

# Votebuilder 201 Quick Reference Guide

**DRAFT**

## Topics:

1. View My Folders
2. Access a Virtual Phone Bank
3. Create a Virtual Phone Bank
4. Print a Phone Bank List
5. Schedule a Volunteer
6. Record Results In Grid View
7. Review Canvass Results
8. Look Up Your Volunteers
9. View My Calendar
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## 1. View My Folders

Folders can contain a preset of search criteria, you can use to create a new list or it can contain actual lists. Consult your organizer about where to start. From the Votebuilder Main Menu, do the following:

1. Click **View My Folders**
2. Open the Shared list
3. Narrow to Phones only
4. Remove from "Canvass Status" **Include Only** Deceased, Wrong Number, Disconnected, Refused, and Moved.
5. Remove from "Canvass Status" Canvassed;in the past 7 Days
6. Narrow by Tiers from "Volunteer recruitment: Volunteer Leaders needing attention" TO "Volunteer Recruitment: Prospecting Teir 5"
7. Gradually REMOVE from the lowest teir to the highest until just under desired number of calls
8. IF the number of contacts is too low click "Restore"
9. Print or create VPB

To cut a list of "I'm In's" and "2012 Vols" first follow steps 1-5 above:

6. Open "Survey Questions" Click on Questions
7. Check the following survey question boxes  
2012 Action: I'm In - **Yes**  
2012 Action: OFA 2012\_Vol - **Yes**

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## 2. Access a Virtual Phone Bank

A virtual phone bank (VPB) lets you call voters or volunteers from home. You can input the results as you go and there is no need for data entry. A VPB can save travel time and data entry time but may reduce the number of calls compared to a typical phone bank, using paper sheets. Contact your OFA field organizer for access to a VPB. From the Votebuilder Main Menu, do the following:

1. Click on Virtual Phone Bank
2. Select the VPB list you would like to call
3. The information for your call will appear with the survey question responses below.

4. When you complete their survey response click SAVE/NEXT

Repeat until you have reached your goal.

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### 3. Create a Virtual Phone Bank (VPB)

Create a virtual phone bank and share it with a group of people so each person can make calls from their own location. From the Votebuilder Main Menu, do the following:

Follow the steps for cutting a list or select the list from MY Folders that you want to call.

1. Click on "Calls"
2. Select "Set up Virtual Phone Bank List"
3. Name your list
4. Select a Script
5. Select your viewable Display  
Sample:  
Age, Party, Sex  
Precinct, Home Phone, Cell Phone  
Email, Events, Notes
6. Contact History
7. Choose date and time VPB is available
8. Select # of Attempts (goal for a VPB session)
9. Select Progress ("show individual progress", "show entire phone bank progress")
10. Show only people in household also in phone bank list"
11. Share with yourself, and anyone else who will be making calls in this VPB
12. Start making calls

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### 4. Print a Phone Bank List

From your list:

1. Click **Print**
2. Select Report Format
3. Select Script
4. Select Phone
5. Name your list
6. Click Next
7. Find your list in MY PDF Download a print

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### 5. Schedule a Volunteer

In My Campaign, under a potential volunteer's profile (in Quick Look Up) you can schedule that person for an event. From the person's profile, do the following:

1. Click > **Events** to expand
2. Click **Schedule for Events**
3. Select date
4. (Skip Type)

5. Select your District Level
  6. Select your Custom Region
  7. Select your Custom CO
  8. Select your Custom Team
  9. Events: (select event)
  10. (skip Activities)
  11. (select shift)
  12. (select Volunteer Status)
  13. Click Remember Me to preset the above selections
  14. Click Schedule (button)
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## **6. Record Results In Grid View**

From the Votebuilder Main Menu, do the following:

1. Click Grid View
2. Enter your 12 digit list number (bottom of paper sheet)
3. Click Next
4. Click OK
5. Select Script (Fairfax Volunteer Recruitment)
6. Enter canvassers name (Last, First)
7. Select the name
8. Select or change other items as needed
9. Click Next
10. Enter the 9 digit VAN ID in upper left of first page
11. Click Go
12. Enter relevant data
13. Click the calendar icon to schedule a volunteer
14. Click Mark Remaining Not Home (lower right)
15. Click Save/Next icon (upper right)
16. Change canvasser as needed under Contacted By
17. Continue until complete.

**NOTE:** Remember to click Save!

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## **7. Review Canvass Results**

From the Votebuilder Main Menu, do the following:

1. View Canvass Results
  2. Canvassing Summary
  3. Select Date
  4. Find yourself
- or- follow 1-3 and view your team's results by
5. Group By "Custom Team"
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## **8. Look Up Your Volunteers**

You can use the calendar to look up volunteers invited or scheduled to an event so you can make confirmation calls. From the Votebuilder Main Menu, do the following:

1. Click **View My Calendar**
  2. Click the date of the event
  3. Select District Level
  4. Select Available Within
  5. Select Custom Region
  6. Select Custom CO
  7. Click **Refresh**
  8. Click the event
  9. Click **View Volunteers**
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## 9. View My Calendar

From the Votebuilder Main Menu, do the following:

1. Select date
  2. Click Name to sort alphabetically
  3. Select item (i.e. \*Statewide Phone Bank\*)
  4. Click View Volunteers
  5. Select your Custom Region > Custom CO > Custom Team
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## 10. Using Quick Mark

Use Quick Mark to look up people and add data or schedule someone on one screen. From the Votebuilder Main Menu, do the following:

1. From Main Menu select Quick Mark
  2. Select the desired action
  3. Look up individuals to record their response
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## 11. More Resources

- [Votebuilder 101 Quick Reference Guide](#)
- **VAN Support Center** - documentation, videos  
<https://van.support.ngpvan.com/#documentation>
- **Virginia Votebuilder Site** - training guides, videos and data  
<http://votebuilder.vademocrats.org/>
- **Votebuilder Manual** - Vermont Democratic Party 2015  
<http://www.vtdemocrats.org/sites/vtdems/files/pictures/VANual%20v15.1.pdf>