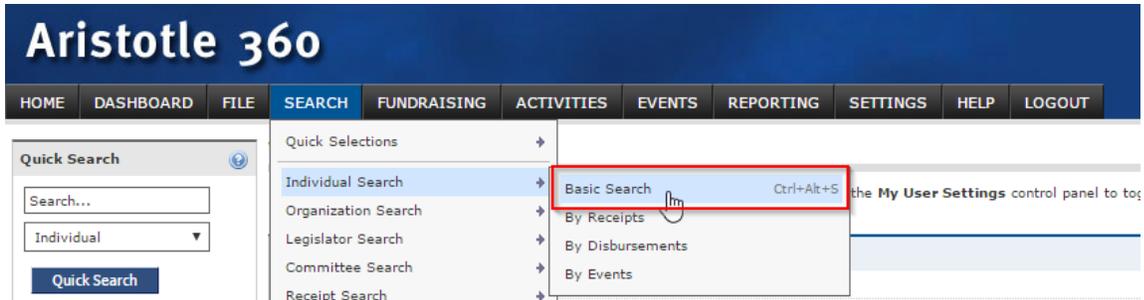


# Adding Additional Volunteers to Your Phone Bank

1. Log into Aristotle and go to Search>Individual Search>Basic Search



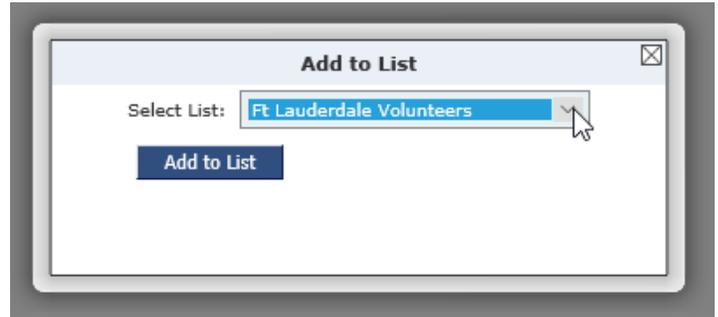
2. On the criteria page, enter the member's NRDS ID into the Source ID field. Include all 9-digits, even if the NRDS ID begins with a zero (0). Then click the SEARCH button.

The screenshot displays the 'Individual Basic Search' form. The form is titled 'INDIVIDUAL SEARCH FIELDS' and contains several input fields and dropdown menus. The 'Source ID' field is highlighted with a red box and contains the text '00000100'. Other fields include First Name, Middle Name, Last name, Voter ID, Occupation, Address Type (set to Default), Address Line 1, City, State (set to ALL), Country (set to ALL), Zipcode (First 5), County, Record Status (set to Active), SMS Status (set to ALL), and Web Form (set to ALL). A 'Search' button is located at the bottom of the form.

3. Click the button on the right to Add Results to Existing List. (This is the same place where you will enable the new volunteer as an advocate. That is step 5 & 6, after you add the volunteer to your volunteer list).

The screenshot shows the search results page. On the left, there is a 'Current Selection' section with a 'Selection Results' table. The table has columns for Name, Address, City, and State. One result is shown: Greacen, Jack, 7025 Augusta National Dr., Orlando, FL. Below the table are navigation buttons and a page indicator 'Page 1 of 1 (1 items)'. On the right, there is a 'List Functions' panel with a list of actions. The 'Add Results to Existing List' option is highlighted with a red box. At the bottom of the List Functions panel, the 'Enable as Advocate(s)' option is also highlighted with a red box and an arrow.

- A pop-up will appear, and you can select your list using the drop down menu. When you have selected your list, click the blue button Add to List. Lists display in alphabetical order.



- Your volunteer has been added to the volunteer list and will be matched with targets in the phone bank. To enable advocate privileges, click the button on the right Enable as Advocate(s).

Current Selection:

Use the **Current Selection** window to open records, save to lists, and export sets of records.

**Selection Results** Load Quick Selection...

Name	Address	City	State
<input checked="" type="checkbox"/> Greacen, Jack	[REDACTED]	Orlando	FL

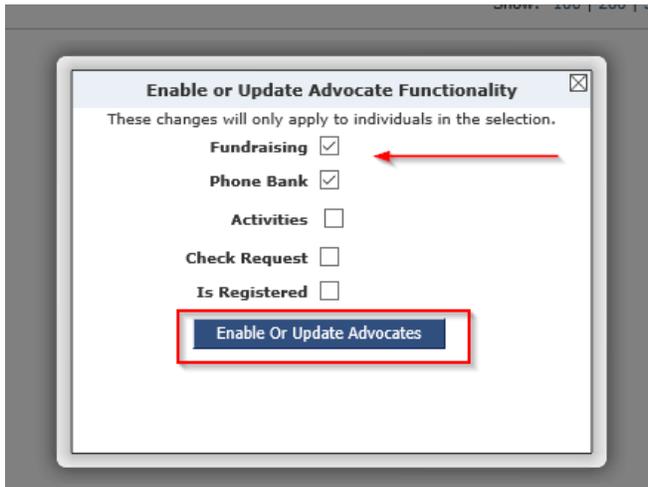
Page 1 of 1 (1 items)  
Show: 100 | 200 | 500 per page

**List Functions**

Perform one of the functions by clicking on the links below:

- Add/Edit Fields and Calculations
- Save Output Preferences
- Save Results as New List
- Add Results to Existing List
- Add Results to Existing Group
- Merge Selected Records
- Export Results
- Generate Thank You Emails
- View Results in Map
- Enable as Advocate(s)**

- In the pop-up, check the boxes for Fundraising and Phone Bank, and click Enable or Update Advocates.



- To give the volunteer his advocate information, click his name. Or search him in Quick Search by name or NRDS ID.

Current Selection:

Use the **Current Selection** window to open records, save to lists, and export sets of records.

**Selection Results** Load Quick Selection...

Name	Address	City	State
<input checked="" type="checkbox"/> Greacen, Jack	[REDACTED]	[REDACTED]	[REDACTED]

Page 1 of 1 (1 items)  
Show: 100 | 200 | 500 per page

**List Functions**

Perform one of the functions by clicking on the links below:

- Add/Edit Fields and Calculations
- Save Output Preferences
- Save Results as New List
- Add Results to Existing List
- Add Results to Existing Group
- Merge Selected Records
- Export Results
- Generate Thank You Emails
- View Results in Map
- Enable as Advocate(s)

8. In the volunteer's record, look on the far right in the box that says Advocate Settings. Give the volunteer the following information:
- Advocate ID
  - Advocate Password
  - Log out from Aristotle if you are on the volunteer's computer**

Active Record | New Individual | Delete | Save and Close | Close/Cancel

### Individual Jack Greacen

**Basic Information**

Prefix: Jack | First Name: | Middle: | Last Name: Greacen | Suffix: |  
Mail Name: | Voter ID: |  
Salutation 1: Jack | Source ID: 081600424  
Employer: FLORIDA REALTORS® | Occupation: Sr. Political Representative

**ADDRESS INFORMATION**

Type	Line 1	Line 2	City	State	Zip
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**Record Functions**

Perform one of the functions by clicking on the links below:

- Add Receipt
- Add Disbursement
- Add Pledge
- Add Note
- Log Phone Call
- Send Text Message
- Send Email
- Log Direct Mail
- Add Appointment
- Add Task
- FatCats® Compliance Check
- Enhance with SuperVoter® Data
- Manage Group Memberships
- Add to Outlook (vCard)

**Household Membership**

**Advocate Functions**

Advocate ID: [REDACTED]

Advocate Password: [REDACTED]

Current Goal: \$ 0.00

Total Raised: \$0.00

# of Child Donors: 0

Fundraising:

Phone Bank:

Activities:

Check Request:

Account Selection: #0

Is Registered:

Advocate Control Panel URL:  
<https://nar.ai360.aristotle.com/public/fundrai>

Send URL to Primary Email  
View URL in New Window