

FAQs

The phone bank module is **NOT** compatible with Microsoft Edge (the newest version of Internet Explorer). Please use a different version of Internet Explorer, Firefox or Chrome.

Make sure all pop-up blockers are disabled.

Q: I cannot get my target list to appear, what should I do?

A: Clear your browsing history (clear your cache). To do this, go to the Tools or Settings feature in your browser and follow the prompts to clear your browsing history. Sometimes this is found in Settings>Advanced Settings. Log in to the phone bank again.

Q: I don't want to clear my browsing history, what else can I do?

A: Close your current browser and open in another internet browser that you use less frequently.

Q: I'm using an iPad, and I get a warning that says something about "Flash not able to be installed." What does this mean? Can I still do the phone bank?

A: Yes. The phone bank does not use Flash. Clear the warning message and launch your phone bank (click the phone bank tab, and then click the blue button to open your phone bank). Flash is a feature on the Fundraising page, but not necessary for the phone bank.

Q: I forgot my advocate password.

A: Click the "Reset Password" link on the Advocate Login Screen. You will need to have access to the email where you received your Advocate Link and ID. If you do not have access to this email, please ask your Association staff to look up your Advocate Password in Aristotle.

Q: How come I cannot get to all the records in the "search for a target" look-up?

A: "Search for a target" only returns member (target) records for targets who have not been contacted or are in Call Back" or "No Answer" status. If a member is in status "Contributed" "Emailed" or "Declined" the record cannot be retrieved.



Q: How come my “Completed Calls” is not as high as I think it should be? I’m calling a lot of people, but the number doesn’t always rise.

A: A call counts as completed once the volunteer has processed a credit card payment, sent an email, scheduled check delivery, or noted a decline. If you have put a member (target) as “Call Back” or “No Answer” the target still needs to be contacted/educated, so it are not counted as completed calls in your personal advocate panel. All calls, regardless of status are counted in phone bank final results..

Common Scenarios

1. The member just said he’s closing a sale at the end of the month and can’t pay until then.”

Answer: Send the member an email and personalize it, reminding him to pay at the end of the month.

2. The member says, “I need to come by the Association office, can I stop by and pay by credit card then?”

Answer: Yes. Put the member in “call back status” and put a note in. Then Association staff will be able to recall the target at a later date/time to collect the credit card information.

3. “The person I’m supposed to call has already been contacted by another volunteer. What do I do?”

Answer: Collaborate! Ask your fellow volunteer if he would like to call the member back or if you should.

4. “I do not want to call the target (member) that is on my screen. What do I do?”

Answer: Collaborate! Ask one of your fellow volunteers if he/she would like to call the target instead. If yes, the original volunteer should put the target in “Call Back” status. The second volunteer can then use the “search for a target feature” to get the target’s record.

5. “I want to call a specific person. How do I do that?”

Answer: Use the “search for a target” feature. If the member has not been contacted by another volunteer, you can access the record.