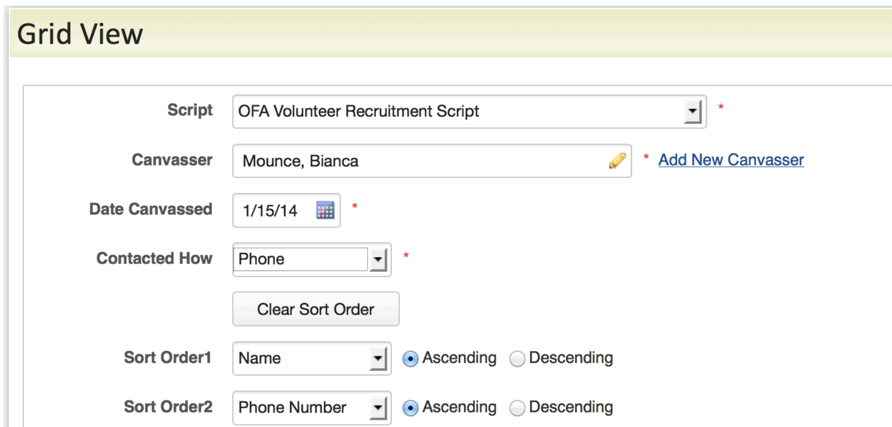
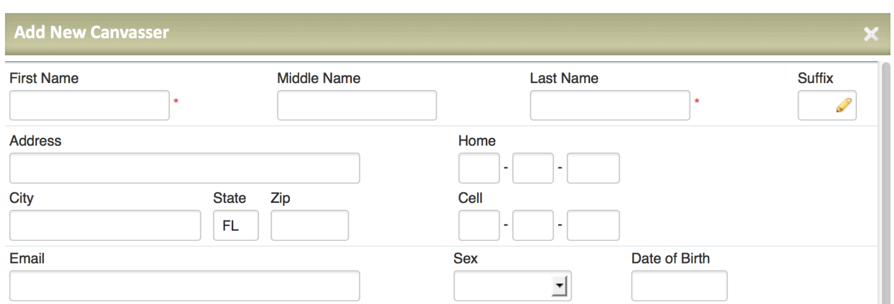
ORGANIZING FOR ACTION

# Grid View Data Entry

Once the calls are made and you are ready to do the data entry (ideally the same night), from the Main Menu, click Grid View. Press the button next to **Let Me Enter a List Number**, find the list number at the bottom of one of your call list pages, and enter it in the two fields provided. Click Next, and the fields below should fill in with the same selections you had when printing:




Canvasser is one field you will have to enter – that is the person who made the calls, entered as **[Last Name], [First Name]** (may take a few seconds, but must click a name from the list) – when the names appear in the section below the field, click the one with the correct information. If the person's name does not appear at all, click Add New Canvasser to add them manually.



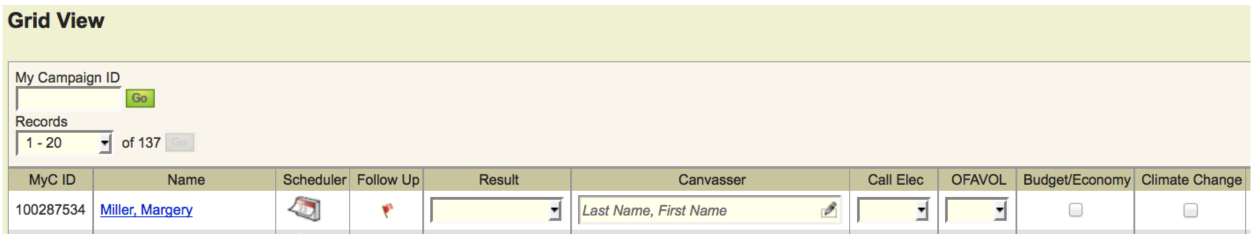

Other than that, be sure to mark Include Event Scheduler below to let you schedule people into events directly from Grid View, and include Notes and Follow Ups if you'd like.

## Entering the data:

When you arrive on the Grid View page, you will see the first person of the call sheet listed at the top and the list should be in the same order as the printed call list. From

ORGANIZING FOR ACTION

here on, all you need to do is enter the information on the paper in the corresponding fields of Grid View. One key point: information selected in the drop-down menus is not automatically saved – **DO NOT LEAVE GRID VIEW BEFORE CLICKING SAVE** (disk icon in upper right), or selections will be lost.

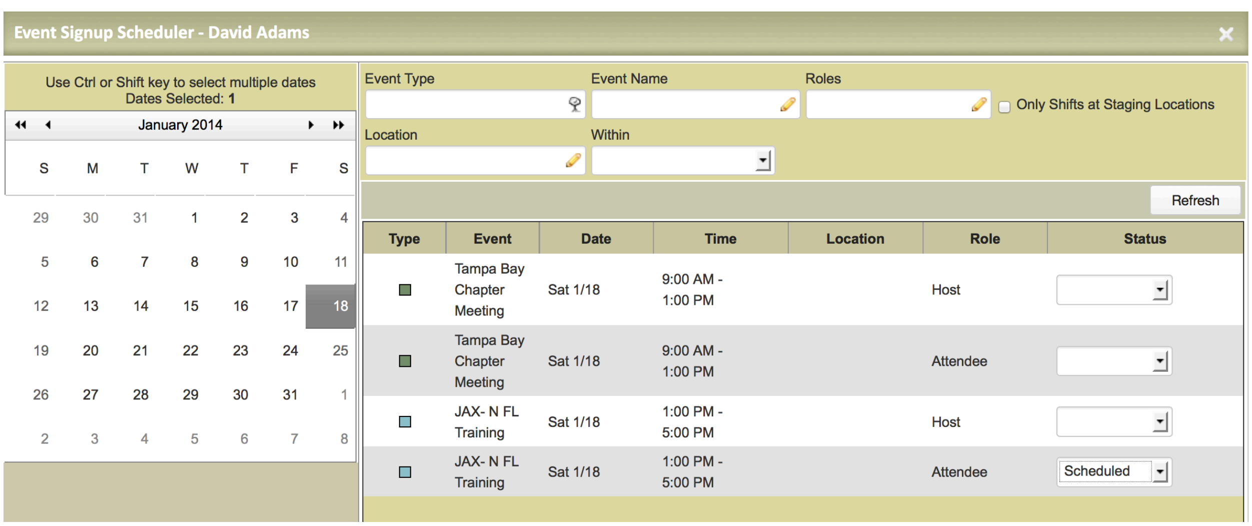



**Call Result Menu**: Not Home (NH), Busy (BZ), Call Back (CB), Refused (RF), Moved (MV), Wrong Number (WN), Spanish (SP), Deceased (DEC) – if both a call result and another response are marked, mark the others rather than the call result – you cannot enter both.

**Volunteer, Call Elect**: Select the appropriate response (Yes/No/Later or Yes/No/Maybe)

**Issues**: Mark all that appear on the call sheet (don't unmark anything if already checked)

**Attend Event → entered via Event Scheduler**: Click the calendar icon in the correct row, which will bring up a new window to schedule the person into an event. The events scheduler includes a calendar where you can select one or multiple days. This then populates the right-side of the scheduler with every event occuring on those dates, as well as the shifts, locations, and roles associated with them. You can select multiple dates by using the shift key on your keyboard.



You may restrict the events shown in the list to those matching a specified name, or within a specified radius of a ZIP code. Once you have located the appropriate shift, use the dropdown and mark the person Scheduled if they are coming to the event (or Declined if they said no).

*(Entering the data continued on next page)*

**Follow-up Call** (optional, small flag icon): Gives you the option to schedule another call with the person if they said the wanted to be called back on a specific day - click the flag icon in the correct row, specify date, who will make the call, type: call, and click Schedule. This appears as a red number on the main menu in the upper left, on the day the follow up is scheduled.

**Notes** (optional): You may enter notes here, but **do not enter Address, Phone, or Email here.**

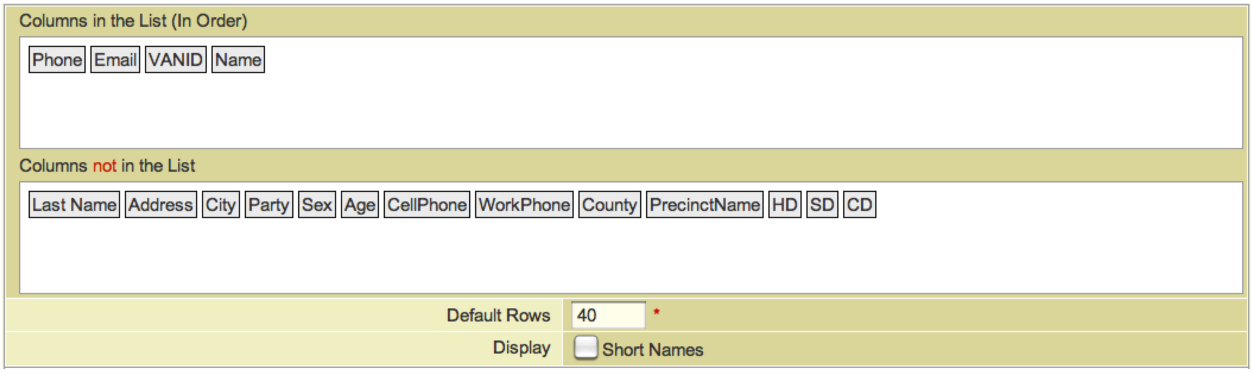
**New Email/Phone/Address**: You cannot enter these directly in Grid View but have easy access to do so – before leaving Grid View, click Save to save what is currently on the page, then click the name of the person you are adding the information for. On their profile, open the section you need to update, enter the new information, save it, and at the top of their profile, click Grid View to return to Grid View rather than going back to the main menu.

Again, when finished with a page, make sure to click the **Save** or **Save/Next** button to save the data on a page! They appear as disk icons in the upper right. Do not click the arrow that reads "Next (Don't Save)" by accident – your data will not be saved!

In case you are starting with a sheet other than the first, to navigate to a specific printed page or name, enter the My Campaign ID of the top person on the sheet (shown on the left of the call sheet above the bar code) into Grid View, where it says My Campaign ID, has a box below it, and a button labeled "Go". Click Go, and that person will be placed at the top of the list.

Another useful option is to adjust how many people appear on each page or customize what information appears on the left about the people on the list. To make those adjustments, click the **Cog** (settings tool) at the far upper right of the screen and drag-and-drop fields:

ORGANIZING FOR **ACTION**




Changing the Grid View settings can ease the entry of data, or allow you to quickly check the existing information, such as email address. You can also configure the number of rows to be displayed, which is particularly useful with call lists as a visual aid. For example, if your list has 14 names per page, configuring the row count to 28 would allow a visual check to ensure that 28 entries were made after two physical pages; a blank at the bottom, or reaching the bottom prior to the last name on the list would indicate a row was missed.

Last but not least, remember:
Always, always, always save!