



Here's a step-by-step guide for creating a Virtual Phone Bank for your NAV to Dem outreach.

You can watch a webinar covering these steps at [www.dpo.org/nav-to-dem-resources](http://www.dpo.org/nav-to-dem-resources)

## Creating a Virtual Phone Bank:

To create your virtual phone bank you will need to begin by pressing "Create a list" on the main menu. Scroll down to the "Targets" section and select the DPO NAV2DEM Phone Universes for Tier 1 (you may also include Tier 2) as it appears in the screenshot below.

The screenshot shows a web interface for creating a list. On the left, there are several filter categories: "Self-Reported Demographics", "Sex (Source File)", "Tags", "Targets", and "Voter Status and Voter Registration". The "Targets" section is expanded, showing a list of target groups with checkboxes. The "Include people in" dropdown is set to "ANY". The target list includes:

- DPO NAV2DEM Walk Universes : 2020NAV2DEM - Walk Universe Tier 1
- DPO NAV2DEM Walk Universes : 2020NAV2DEM - Walk Universe Tier 2
- DPO NAV2DEM Walk Universes : 2020NAV2DEM - Walk Universe Tier 3
- Automatic Registrants : Oct 2019 OMY
- DPO NAV2DEM Phone Universes : 2020NAV2DEM - Phone Universe Tier 1
- DPO NAV2DEM Phone Universes : 2020NAV2DEM - Phone Universe Tier 2
- DPO NAV2DEM Phone Universes : 2020NAV2DEM - Phone Universe Tier 3

On the right side of the interface, there are options to "Preview My Results", a plus sign to add more steps, and a "Run Search" button. Below the "Run Search" button, a message states: "Running this search will clear your current list of 2,798 people." Above the "Run Search" button, it says "12,772 People".

Click "Run Search" and then once the search loads, click the "Calls" button and then select "Set up Virtual Phone Bank List".

The screenshot shows the "CONTACTS My List" interface. At the top, there are statistics: 12,772 People, 11,895 Home Phones, 11,238 Doors, and 11,274 Mailboxes. Below these are several action buttons: Print, Letters, Labels, Calls, Export, MiniVAN, Counts, Reports, Cut Turf, Split, Grid, and Script. The "Calls" button is highlighted, and a dropdown menu is open, showing the following options:

- Set up Virtual Phone Bank List
- Set up RoboCall using CallFire
- Set up RoboSurvey using CallFire
- Set up Predictive Dialer Campaign

A "Next" button is visible at the bottom right of the dropdown menu.



On the next screen, select “Save and use my search criteria“, “New Search” and create a new folder to save the search in, unless you already have a specific folder in mind. Press “Continue”

### Setup a Virtual Phone Bank ✕

Would you like to use the static list of these people for your virtual phone bank or create a saved search to keep your universe “fresh” with people that match the criteria?

- Use this static list (Fixed set of people)
- Save and use my search criteria
- New Search
- Replace an existing Search
- Folder
- New Folder\*

Name\*

Description

Up to 250 characters

[Continue](#)

It will then take you to the Virtual Phone Bank setup screen. Give your virtual phone bank a recognizable and memorable name and be sure to select “DPO-NAVtoDEM” as the script. Set your end date to 4/28/2020 and under “Sharing” select the option to “Publish to openvpb.com” And then press “Next”

[My Voters](#) [My Campaign](#)

Home / New

VIRTUAL PHONE BANK Restore Defaults [Next](#)

#### Virtual Phone Bank Details

Calling Round 1

Name\*

Description

Script\*

Start Date\*

End Date\*

List Size 12772 People

Saved Search 2020NAVtoDEM Phone Tier 1&2

#### Sharing

Open Virtual Phone Bank  Publish to openvpb.com (openvpb.com)  Not Visible on openvpb.com

#### Display Settings Save & Preview

Customize the layout and information displayed on your Virtual Phone Bank.

- Basic Demographics
- Contact & Location Information
- Editable Contact Details

Enabling the options below will allow the phone banker to update contact information during a call.

[Select All](#) | [Deselect All](#)

- Self-Reported Demographics
- Custom Contact Fields
- Addresses
- Salutation
- Phones
- Email
- Contact History
- Notes
- Tags

#### Additional Contact Details

Enable read-only information shown for each contact on a list.

[Select All](#) | [Deselect All](#)



You will then be able to see the VPB Code (for use inside of VAN) and the OpenVPB link (for use outside of VAN). Press the “Copy” button to copy the link – it can then be pasted into an email or other communication to send to your trained volunteers.

Load To My List   Send to Round 2   Restore Defaults   Save

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**VPB Code**

Use or share this code with your phone bankers to access this Virtual Phone Bank.

**EA3D63O-554107** Copy

**OpenVPB**

[https://www.openvpb.com/vpb\\_bycode/EA3D63O-554107](https://www.openvpb.com/vpb_bycode/EA3D63O-554107) Copy

When the OpenVPB link is opened by the volunteer, it will ask them to sign in using their existing ActionID (if they already have one) or create a new one (if they don't already have one). The process to create an ActionID takes less than 5 minutes and all you need is an email address. After logging in, the volunteer is ready to start making calls immediately using their own phone.

2020NAVtoDEM Phone Tier 1&2

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**About Catherine**  
2018 General  
2018 Primary  
Date of Reg  
3/5/2016 12:00:00 AM  
Party  
N  
Precinct  
Marion-815  
Preferred Phone  
[REDACTED]

Also in Household:

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**Catherine [REDACTED]**  
[REDACTED]  
54-year-old F

I Couldn't Reach Catherine

Hi, is this [VOTER NAME]?

My name is \_\_\_\_\_, I'm a volunteer with the [COUNTY PARTY/CAUCUS].

We're reaching out to our neighbors who were registered to vote under Oregon's Motor Voter law, to invite them to participate in the Democratic Party primary election on May 19th. If you would like to vote in our primary, you have to register as a Democrat by April 28th!



At the end of the call, the volunteer asks for the voter's email address for more information and follow up. The volunteer should enter the email address in the notes field at the bottom. There's also a place to enter the voter's preferred language if it's other than English.

IF VOTER WANTS MORE INFORMATION: Great! May I get your email so we can follow up with more information?

TO ALL: Thanks for talking to me, have a great day!

What is the voter's preferred language?

Choose an option ▼

**Notes**