

Setting Up a Virtual Phone Bank

You must first have your script including a survey question.

In My Voters, run your list, select “Calls”, select “Set Up Virtual Phone Bank List”

You will now be in the New Virtual Phone Bank page

1. Assign a name – either P539 VBM Drop for example or Master VBM Drop
2. Choose a script
3. Select your start and end date
4. Daily availability 9:30AM to 8:00PM
5. Set to openvpb.com
6. Householding: select middle option
7. Alternate Numbers: attempt for precincts, won't appear in openvpb.com
8. Skipping: allow
9. Status: active
10. Display Settings: Basic Demographics: select all three
11. Contact & Location Info. : above the script, preferred email & preferred phone, voting address
12. Editable Content: preferred email & preferred phone, contact history, notes
13. For Progress Bar check “Show Entire Phone Bank Progress”

You can return to edit the Virtual Phone Bank at any time including the date, users with access, etc.