

Setting up a Virtual Phone Bank and Advanced List Creation

California VoterConnect VAN Tutorial Series #4

1st Draft, June 2008

In this tutorial, we are going to go through how to set up a Virtual Phone Bank, one of the most powerful tools in the VAN's arsenal.

Here are the steps:

Step 1, Create a new VPB-ready list from a few precincts

Step 2, Send that list to the Virtual Phone Bank

Step 3, Add users to the VPB

Step 1: Making a good VPB list

To start, we're going to create a somewhat complex list. Let's look for Decline to State (DTS) voters that live with Democrats, and live in big buildings that are inaccessible to walking. To create this list, first go to the Create a List page and set the following options in the following boxes (you can do some variant of this if you don't have access to San Francisco, or don't want to look up big buildings, so long as your list comes up with less than 10k voters):

1. In Location, set County to San Francisco (or wherever)
2. In Phones-Emails, check "Phones Only"
3. In Party, pick "Declined"
4. In Household Party Counts, type in "1" to "10" Dems
5. In Address Types, check "Buildings w/ Approx" and put in "4" to "200" units

The page should look more or less like this:

The screenshot shows a web form for creating a voter list. The 'Location' section includes dropdowns for County (San Francisco), Precinct, Municipality, and Supervisor Dist, along with text input fields for Street Name, City, and Zip. The 'Age • Registration Date' section has fields for Age From/To, Birthday From/To, Zodiac Sign, and Reg Date From/To. The 'Party' section has radio buttons for Democrat, Republican, Declined (checked), Other Left, Other Right, and Other Unknown. The 'Address Types' section has radio buttons for Walkable Houses, Buildings w/ Approx (checked), PO Boxes, USPS Verified, and Geocoded, with input fields for 4 and 200 units. The 'Household Party Counts' section has input fields for 1 and 10 for Democrats and Republicans.

Hitting Search brings up a list with 5,386 voters. One helpful tip when you're doing complex queries is to click on the "Description" box from the My List page. This

feature was recently added to make the process that went into pulling a list easier to remember. It looks like this:

My List
 5,386 Voters
 4,979 Doors
 5,283 Mailboxes

+ Add Voters **- Remove Voters** **<> Narrow Voters**

Reports Emails Letters Labels Export Counts Sample Cut Turf Save More...

Description
Step 1 Create a New List

Search Criteria
 Party = Declined
 and Household Democrats is between 1 and 10 (inclusive)

Location
 USPS Address Code = Multi-Unit Building
 and Building Unit Count is between 4 and 200 (inclusive)

Districts
 County = San Francisco

Suppressions
 exclude Deceased
 and exclude Bad Address
 and include Phones only

Last Name First Name

Below is a sample because your list is too large to display. Refresh

Name	Address	City	Age	Phone	CD	SD	HD
Aceves, Josue Angel	1130 LARKIN ST APT 37	SAN FRANCISCO	26	(917) 270-8062	008	003	013
Alaniz, Matthew Raymond	1817 CALIFORNIA ST APT 208	SAN FRANCISCO	30	(415) 385-5213	008	003	013
Arellano, Manny	1 CRESTLINE DR APT 2	SAN FRANCISCO	30	(415) 577-0184	008	008	013
Badertscher, Carolyn Elise Moore	2201 CALIFORNIA ST APT 33	SAN FRANCISCO	28	(704) 516-3287	008	003	013

Done #645,870

Step 2: Send the List to the Virtual Phone Bank

Next, you're going to take this list and create a Virtual Phone Bank from it. To do this, pick the "More >>" icon from the My List page, and then pick "Create a Virtual Phone Bank List," like this:

My List
 5,386 Voters
 4,979 Doors
 5,283 Mailboxes

+ Add Voters **- Remove Voters** **<> Narrow Voters**

Reports Emails Letters Labels Export Counts Sample Cut Turf Save More...

Description
Step 1 Create a New List

Search Criteria
 Party = Declined
 and Household Democrats is between 1 and 10 (inclusive)

Location
 USPS Address Code = Multi-Unit Building
 and Building Unit Count is between 4 and 200 (inclusive)

Districts
 County = San Francisco

Suppressions
 exclude Deceased
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Last Name First Name

Below is a sample because your list is too large to display. Refresh

Name	Address	City	Age	Phone	CD	SD	HD
Alaniz, Matthew Raymond	1817 CALIFORNIA ST APT 208	SAN FRANCISCO	30	(415) 385-5213	008	003	013

More...

- New! Householding Wizard
- Create a Virtual Phone Bank List
- Send to Bulk Upload
- Copy Voters to My Campaign

Next

The page you'll see looks something like this:

New Virtual Phone Bank

Name	<input type="text"/>
Description	<input type="text"/>
List Size	5386 Voters
Script	<input type="text"/>
Upper Display	<input type="checkbox"/> Age <input type="checkbox"/> Sex <input type="checkbox"/> Party
Lower Display	<input type="checkbox"/> VANID <input type="checkbox"/> Precinct <input type="checkbox"/> Work Phone
	<input type="checkbox"/> Voting Address <input type="checkbox"/> State House <input type="checkbox"/> Work Phone Ext
	<input type="checkbox"/> Voting City <input type="checkbox"/> State Senate <input type="checkbox"/> Cell Phone
	<input type="checkbox"/> Voting City and Zip <input type="checkbox"/> Congressional <input type="checkbox"/> Email
	<input type="checkbox"/> Voting City, State, Zip <input type="checkbox"/> Preferred Phone <input type="checkbox"/> Voting History General
	<input type="checkbox"/> Date of Reg <input type="checkbox"/> Home Phone <input type="checkbox"/> Voting History Primary
	<input type="checkbox"/> County
Lower Display Appears	<input type="radio"/> Above the Script <input checked="" type="radio"/> Below the Script
Editable Display	<input type="checkbox"/> Phone Numbers
	<input type="checkbox"/> Emails
	<input type="checkbox"/> Addresses
	<input type="checkbox"/> Notes
Start Date	6/23/08
End Date	<input type="text"/>
Calling Round	1
Time Limit	<input type="text"/>
Contact Limit	<input type="text"/>
	<input type="checkbox"/> Allow users to repeat session
	<input type="checkbox"/> Distribute voters by zip code
Householding	<input checked="" type="radio"/> Do not display Also in Household
	<input type="radio"/> Show only Voters in Household from Virtual Phone Bank list
	<input type="radio"/> Show all Also in Household
Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
<input type="button" value="Next"/>	

There are a lot of options on this page, but they should be mostly self-explanatory. Once you have them set up, click next. Once you've saved your VPB, another box will pop up at the bottom of the page. It looks like this:

	<input checked="" type="checkbox"/> Allow users to repeat session
	<input type="checkbox"/> Distribute voters by zip code
Householding	<input checked="" type="radio"/> Do not display Also in Household <input type="radio"/> Show only Voters in Household from Virtual Phone Bank list <input type="radio"/> Show all Also in Household
Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Created By	Dan Ancona (6/13/08)
<input type="button" value="Load To My List"/> <input type="button" value="Send to Round 2"/> <input type="button" value="Save"/>	

Assign Users (How Optional)

Committee: California VoterConnect

<p>User with access</p> <div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> Ancona, Dan </div> <p style="text-align: right;"><input type="button" value="Remove"/></p>	<p>User without access</p> <div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> Mao, Jonathan Matt, Lockshin McNeighborstein, Nabe Testy, Mctestypants </div> <p style="text-align: right;"><input type="button" value="Add"/></p>
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Add yourself and any other users that show up to the VPB, then go back to the Main Menu.

Step 3: Add New Users to the VPB

In most cases, some users that need access to the VPB don't have accounts yet. The VAN allows you to create unlimited numbers of Virtual Phone Bank only accounts. To create a new user, simply go to the "Users" drop down on the left hand side menu, click Users and then "Add New User" to get to a screen that looks like this:

New User
Step 1 of 2

Last Name	<input type="text"/>	*
First Name	<input type="text"/>	*
Committee	<input type="text"/>	*
User Name	<input type="text"/>	*
My Voter File Profile	<input type="text"/>	
My Campaign Profile	<input type="text"/>	
Password	<input type="text"/>	*
Confirm Password	<input type="text"/>	*
<input type="checkbox"/> This account expires in		
		<input type="button" value="Next"/>

To create a new VPB user, just fill out that form and set "My Voter File Profile" to "Virtual Phone Bank Only." On the screen after this you can pick a turf for this user to have access too. Then, email the new user the username you picked for them and their temporary password and the link to pepvan.com.

Once you've added your new users, from the Main Menu you can edit your existing VPBs under the "Advanced" menu item on the left. Add the new users and they can get started immediately, making calls and building a stronger democracy!