



Lexington County Democratic Party



Phone Bank Training 2024

Agenda

1. Develop your script
2. Create survey questions
3. Create Script
4. Create your list
5. Create your virtual Phone Bank
6. Make calls

Develop your Script

Develop your script

Write out your script

1. Introduction
2. Purpose
3. What is your “ask”
4. Thank you and closing

Develop your script

Example:

Hello, my name is _____ and I am volunteer with the Lexington County Democratic Party. Could I speak with _____?

We have a lot of energy and excitement around our Presidential candidate and we want to use that energy to elect some local candidates.

Did you know that you have candidate _____ for position x running in your district?

Yes/No

Are you planning on voting for _____

Yes/No

Would you like some more information about your local Democratic Party?

Yes/No

If Yes, go to www.lexcodems.org

Thank you for your time

Create your survey questions

Create your survey questions

1. Login to VoteBuilder (VAN)
2. Go to “Administrative Menu”
3. Go to “Codes/Questions/Scripts”
4. Select “Survey Questions”

Create your survey questions

Select “Survey Questions”

The screenshot displays a web application interface for campaign management. At the top, a blue navigation bar contains a hamburger menu icon, two tabs labeled "My Voters" and "My Campaign", a notification bell icon, and a user profile for "Joe Madge" with the affiliation "County Party: Lexington".

Below the navigation bar, the interface is divided into several sections:

- Left Sidebar:** A list of administrative and campaign tasks. The "Administrative Menu" section is expanded, showing options like "Polling Locations", "Reports • Forms • Labels", "MiniVAN", "Exports", "Letters", "Phone Services", "Users", "Codes • Questions • Scripts" (which is highlighted), "Activist Codes", "Survey Questions" (highlighted), "Scripts", and "Integrations".
- Main Content Area:** Divided into three columns.
 - Left Column:** A table with four rows: "Counts/Crosstabs Outputs" (0), "Follow Ups" (0), "Support Requests" (0), and "Contact the Admin". Below this is a link "Request a User Account".
 - Middle Column:** Contains three sections: "Lists" with links "Create A New List", "Go to My List (1 People)", and "View My Folders"; "Canvassing" with links "Canvass Results", "Turfs", and "MiniVAN"; and "Get Out The Vote" with a link "Get Out The Vote".
 - Right Column:** Contains two sections: "Grid View" and "Form View" (both with icons and arrows), and "Quick Tasks" with links "Manage Relationships" and "Virtual Phone Bank".

Create your survey questions

Select “New Survey Question”

 DNC VOTE BUILDER South Carolina

 Joe Madge
County Party: Lex



My Voters

My Campaign

Home / Survey Questions

ADMIN SETTINGS

Survey Questions

Export To Excel

New Survey Question

View

Cycle

Type

Status

Committee

Standard

Active Only

Lexington County

Name

Question

Database

Remember Filters

Refresh Results

Database	Cycle	Type	Long Name	Question	Active
My Voter File	2024	Action	attend convention	Will you attend the County Convention?	

Create your survey questions

Fill in Cycle, Type, Long Name, Medium Name, Short Name, and your Question

Click “Save”

The screenshot shows the 'New Survey Question' form in the Lexington County Democratic Party system. The form is titled 'New Survey Question' and is located in the 'My Campaign' section. The 'Save' button is highlighted with a yellow circle. The form fields are as follows:

- Cycle***: 2024
- Type***: Candidate
- Long Name***: Voting? (Español)
- Medium Name***: Voting (Español)
- Short Name***: Vote (Español)
- Question***: Are you planning on voting for Kamala Harris?

Create your survey questions

Fill in Response. Resp Medium and Response Short will auto populate

Click “Add”

Continue until you have all of your responses (can be Yes/No, Yes/No/Undecided, 100%/Leaning/undecided, etc.

Response English [Español]	Resp Medium Eng [Esp]	Resp Short Eng [Esp]	Copy to My Campaign			
100% Kamala [100% Kamala]	100 [100]	1 [1]	☐	☒	Edit	Delete
Undecided [Undecided]	Und [Und]	U [U]	☐	☒	Edit	Delete
0% Kamala	0%	0	☐	☐	Add	

Create your survey questions

Click “Save” when complete

The screenshot shows the 'Edit Survey Question' page in the DNC VOTEBuilder interface. The header is blue with the 'DNC VOTEBuilder South Carolina' logo on the left and a user profile 'Joe Madge County Party: Lexington' on the right. Below the header, there are tabs for 'My Voters' and 'My Campaign'. The main content area is titled 'Edit Survey Question' and contains a form with the following fields:

- Cycle***: A dropdown menu showing '2024'.
- Type***: A dropdown menu showing 'Candidate'.
- Long Name***: Two text input fields, both containing 'Voting?'. The second field has '(Español)' next to it.
- Medium Name***: Two text input fields, both containing 'Voting'. The second field has '(Español)' next to it.
- Short Name***: Two text input fields, both containing 'Vote'. The second field has '(Español)' next to it.

At the top right of the form area, there are two buttons: 'Save As' and 'Save'. The 'Save' button is highlighted with a yellow circle. Above the 'Save' button, there are two small buttons labeled 'ES' and 'EN'.

Create your Script

Create your script

Go back to “Administrative Menu”,
“Codes/Questions/Scripts”, and Select “Scripts”

The screenshot shows a web application interface for the Lexington County Democratic Party. The top navigation bar is blue and contains a hamburger menu icon, the text "My Voters" and "My Campaign", a notification bell icon, and the user's name "Joe Madge" with a dropdown arrow. Below the navigation bar, the interface is divided into several sections. On the left, there is a sidebar with a search bar and a list of links under the heading "Administrative Menu". The "Codes • Questions • Scripts" link is highlighted in yellow. The main content area is divided into three columns. The first column contains a search bar and a list of links: "Create A New List", "Go to My List (1 People)", and "View My Folders". The second column contains a section titled "Canvassing" with links for "Canvass Results", "Turfs", and "MiniVAN". The third column contains a section titled "Get Out The Vote" with a link for "Get Out The Vote". At the bottom of the main content area, there is a section titled "Reporting & Data Analysis" with a link for "Analytics Dashboards". On the right side of the interface, there is a "Quick Tasks" section with links for "Manage Relationships" and "Virtual Phone Bank".

Support Requests 0

Contact the Admin

Request a User Account

Administrative Menu

- Polling Locations
- Reports • Forms • Labels
- MiniVAN
- Exports
- Letters
- Phone Services
- Users
- Codes • Questions • Scripts**
 - Activist Codes
 - Survey Questions
 - Scripts**
- Integrations
- Advanced

Create A New List

Go to My List (1 People)

View My Folders

Form View

Quick Tasks

- Manage Relationships
- Virtual Phone Bank

Canvassing

- Canvass Results
- Turfs
- MiniVAN

Get Out The Vote

- Get Out The Vote

Reporting & Data Analysis

- Analytics Dashboards

Create your script

Select “Add New Script”

DNC VOTEBUILDER South Carolina

Joe Madge
County Party: Lexington

My Voters My Campaign

Home / Scripts

ADMIN SETTINGS

Scripts



Script Name Status Committee Database

Active County Party: Lexington My Voter File

Remember Filters Refresh Results

Name	Description	Created By	Date	Active
2024 County Convention (young)	Script to invite young people to county convention	Joe Madge	2/19/24	■
2024 Precinct Leader Training		Joe Madge	7/19/24	■

Create your script

Name your Script and select “Next”

DNC VOTEBUILDER South Carolina

Joe Madge
County Party: Lexing

My Voters My Campaign

Home / Scripts / New

ADMIN SETTINGS

New Script

Name* Phone Bank Training

Description training

Status ☒ Active ☐ Archived ☐ Inactive

Database* ☒ My Voter File ☐ My Campaign

Owner Committee County Party: Lexington

Next

Create your script

You have the option to create Linear scripts or Branched Scripts (different scripts depending on how questions are answered)
We will focus on Linear Scripts

My Voters

My Campaign

Joe Madge
County Party: Lexington

Script Details

Name

Phone Bank Training

Description

training

Status

☒ Active ☐ Archived ☐ Inactive

Database

My Voter File

Owner Committee

County Party: Lexington

Created By

Joe Madge, County Party: Lexington (8/18/24)

Script Type

Script Type

☒ **Linear**
Linear scripts offer the format of stacked elements with no conditional statements.

☐ **Branched**
Branched scripts are reserved for Open Virtual Phone Bank and MiniVAN use only. Create multiple script paths for your canvassers.

Canvass Result Options

If a person could not be contacted with this survey, you may support other canvass results options (e.g. Not Home). Select the options you'd like to support for each of the following canvass types:

> Community Canvass Results

> Distributed Call Results

> Distributed Canvass Results

> Distributed Text Results

> Event Results

> Letter Results

> Lit Drop Results

> Meeting Results

> No Actual Contact Results

> Paid Call Results

Create your script

Scroll Down to “Add Script” Element and put in your text and Survey questions

My Voters

My Campaign

Joe Madge
County Party: Lexington

Add script elements from the available options below. Your script preview will be shown here.

Add Script Element

English (United States):

Text

Add

Español:

Survey Question

Add

Activist Code

Add

Committee Access

Committees with Access

County Party: Lexington

Committees without Access

Phone Results

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

☒ Busy

☒ Call Back

☐ Cultivation

☒ Deceased

☒ Disconnected

☐ Do Not Text

☐ Gift

☐ Hostile

☐ Inaccessible

☐ Landline

☒ Left Message

☒ Moved

☒ Not Home

☐ Not Interested

☐ Other

☐ Other Language

☐ Out of Order

☒ Refused

☐ Refused Contact

☐ Spanish

☐ Texted

☐ Threatened

Lexington County Democratic Party – Aug. 2024

Create your script

You will see your script in the “Linear Script Preview”

The screenshot shows a web application interface for managing a campaign script. The top navigation bar is blue with a hamburger menu icon, 'My Voters', 'My Campaign', a notification bell, and the user 'Joe Madge, County Party: Lexington'. The main content area is titled 'Linear Script Preview' and displays a list of script items. Item 1 is a 'Text' block with a blue '1' icon, containing a script for a volunteer introduction. Item 2 is a 'Survey Question: Voting?' block with a purple '2' icon, asking about voting for Kamala Harris, with three response buttons: '100% Kamala', 'Undecided', and '0% Kamala'. Item 3 is a 'Text' block with a blue '3' icon, saying 'Thank you for your time!'. Each item has 'Delete' and 'Edit' links. A 'Save Order' link is at the bottom of the list. On the right, a sidebar shows a list of results categories: 'Paid ID Results', 'Paid Walk Results', 'Personal Email Results', and 'Phone Results'. The 'Phone Results' section is expanded, showing a list of checkboxes for various outcomes, with 'Select All' and 'Deselect All' links at the top.

Linear Script Preview

1 **Text** Hello, my name is ____ and I am volunteer with the Lexington County Democratic Party. Could I speak with ____? We have a lot of energy and excitement around our Presidential candidate and we want to use that energy to elect some local candidates. [Delete](#) [Edit](#)

2 **Survey Question: Voting?** Are you planning on voting for Kamala Harris? [Delete](#)

100% Kamala

Undecided

0% Kamala

3 **Text** Thank you for your time! [Delete](#) [Edit](#)

[Save Order](#)

Phone Results

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

- ☒ Busy
- ☒ Call Back
- ☐ Cultivation
- ☒ Deceased
- ☒ Disconnected
- ☐ Do Not Text
- ☐ Gift
- ☐ Hostile
- ☐ Inaccessible
- ☐ Landline
- ☒ Left Message
- ☒ Moved
- ☒ Not Home
- ☐ Not Interested
- ☐ Other

Create your script

Click on “Save” when complete

DNC VOTEBUILDER

South Carolina

My Voters

My Campaign

Home / Scripts / Edit

ADMIN SETTINGS

ES EN

Save As

Save

Script Details

Name * Phone Bank Training

Description training

Status ☒ Active ☐ Archived ☐ Inactive

Database My Voter File

Owner Committee County Party: Lexington

Created By Joe Madge, County Party: Lexington (8/18/24)

Script Type

Canvass Result Options

If a person could not be contacted with this survey, you may support other canvass results options (e.g. Not Home). Select the options you'd like to support for each of the following canvass types:

> Community Canvass Results

> Distributed Call Results

> Distributed Canvass Results

> Distributed Text Results

> Event Results

> Letter Results

Lexington County Democratic Party – Aug. 2024

Create your List

Create your list

Return to “Home” and select “Create a New List”

 DNC VOTEBUILDER

South Carolina



Joe Madge
County Party: Lexington



My Voters

My Campaign

What's New? ES EN

MAIN MENU

Welcome Joe

My Requests

1 New

My Export Files

0

My PDF Files

0

Counts/Crosstabs Outputs

0

Follow Ups

0

Support Requests

0

Contact the Admin

Request a User Account

Administrative Menu

Polling Locations

➤ Reports • Forms • Labels

Quick Look Up

 Quick Look Up

Lists

 Create A New List

 Go to My List

(1 People)

 View My Folders

Canvassing

 Canvass Results

Load Data

 Quick Mark

 Script View

 Grid View

 Form View

➤

Quick Tasks

 Manage Relationships

 Virtual Phone Bank

Create your list

Determine your Target group

We recommend start with “Home Districts” and select your County, and then precinct, or a specific district

☰

My Voters

My Campaign

Joe Madge
County Party: Lexington

➤ Canvass Status

➤ Custom Contact Fields

➤ Early Voting

➤ Email

▼ Home Districts

Search for Districts that have been applied to a person's physical Voting Address.

Media Market

County

Precinct

Congressional

2011-2021 Congressional

State Senate

2011-2021 State Senate

◀ Step 1: New Search

Voter Status

Registration Status = Registered Active or Registered Inactive

Suppressions

exclude Deceased
and include Current Voter

Refresh Step

and include Current Mailing Address only
and include Do Not Email
and include Do Not Mail

...less

Preview My Results

+

-- People

+ Add Step

▶ Run Search

Running this search will clear your current list of 1 person.

Create your list

To select multiple Precincts, click on the word “Precinct” and you will get the full list of precincts to select

The screenshot displays the 'VoteBuilder South Carolina' web application interface. The main navigation bar includes 'My Voters' and 'My Campaign' tabs. The user is logged in as 'Joe Madge, County Party: Lexington'. The page title is 'Create A List'. The search bar indicates 'Search for Districts that have been applied to a person's physical Voting Address.' The search criteria are set to 'Media Market', 'County: Lexington', 'Precinct', 'Congressional', '2011-2021 Congressional', 'State Senate', '2011-2021 State Senate', 'State House', '2011-2021 State House', 'Municipality', 'County Council', and 'School District'. A modal window titled 'Precinct' is open, showing a list of precincts with checkboxes. The list includes Amicks Ferry, Barr Road 1, Barr Road 2, Batesburg, Beulah Church, Boiling Springs, Boiling Springs South, Bush River, Carolina Springs, Cayce 2a, Cayce Ward No.1, Cayce Ward No.2, Cayce Ward No.3, Cedarcrest, Chalk Hill, Challedon, and Chapin. The modal also shows a 'Check All' link and a 'Run Search' button. The bottom of the screen shows a Windows taskbar with the date and time '11:23 AM 8/18/2024'.

VoteBuilder South Carolina - Create A List

https://www.votebuilder.com/CreateAList.aspx

Joe Madge
County Party: Lexington

Search for Districts that have been applied to a person's physical Voting Address.

Media Market

County: Lexington

Precinct

Congressional

2011-2021 Congressional

State Senate

2011-2021 State Senate

State House

2011-2021 State House

Municipality

County Council

School District

DNC VOTEBUILDER South Carolina

My Voters My Campaign

Home / Create A List / Precinct

Precinct

Check All

- ☐ Amicks Ferry
- ☐ Barr Road 1
- ☐ Barr Road 2
- ☐ Batesburg
- ☐ Beulah Church
- ☐ Boiling Springs
- ☐ Boiling Springs South
- ☐ Bush River
- ☐ Carolina Springs
- ☐ Cayce 2a
- ☐ Cayce Ward No.1
- ☐ Cayce Ward No.2
- ☐ Cayce Ward No.3
- ☐ Cedarcrest
- ☐ Chalk Hill
- ☐ Challedon
- ☐ Chapin

Run Search

Review My Results

People

your current list of 1 person.

82°F Mostly sunny

Search

Lexington County Democratic Party – Aug. 2024

11:23 AM 8/18/2024

Create your list

We recommend using “Voting History” and select people who voted in Democratic Primaries (ex. 3 out of the last 7, etc.)

VoteBuilder South Carolina - Create List

https://www.votebuilder.com/CreateAList.aspx

My Voters | **My Campaign**

Voter Status and Voter Registration

Voting History

Include anyone who did of the following

Year	Include anyone who did	of the following
2022 General	☐	☐ Voted ☐ Didn't Vote
2020 General	☐	☐ Voted ☐ Didn't Vote
2018 General	☐	☐ Voted ☐ Didn't Vote ☐ Absentee
2016 General	☐	☐ Voted ☐ Didn't Vote
2014 General	☐	☐ Voted ☐ Didn't Vote
2012 General	☐	☐ Voted ☐ Didn't Vote ☐ Absentee
2010 General	☐	☐ Voted ☐ Didn't Vote ☐ Absentee
2009 General	☐	☐ Voted ☐ Didn't Vote
2008 General	☐	☐ Voted ☐ Didn't Vote ☐ Absentee
2006 General	☐	☐ Voted ☐ Didn't Vote
2004 General	☐	☐ Voted ☐ Didn't Vote
2002 General	☐	☐ Voted ☐ Didn't Vote
2000 General	☐	☐ Voted ☐ Didn't Vote

Step 1: New Search

Voter Status
Registration Status = Registered Active or Registered Inactive

Suppressions
exclude Deceased
and include Current V
and include Current Mailing Address only
and include Do Not Email
and include Do Not Mail

-- People

Running this search will clear your current list of 1 person.

Create your list

Important: When Selecting Primary voting results, Presidential Primaries are listed separately towards the bottom of the list:

My Voters

My Campaign

Joe Madge
County Party: Lexington

	☐ Democrat ☐ Republican
☐ 2021 Muni Runoff	☐ Voted ☐ Didn't Vote
☒ 2024 Pres Primary	☒ Voted ☐ Didn't Vote
	☒ Democrat ☐ Republican
☐ 2020 Pres Primary	☐ Voted ☐ Didn't Vote
	☐ Democrat
☐ 2016 Pres Primary	☐ Voted ☐ Didn't Vote ☐ Absentee
	☐ Democrat ☐ Republican
☐ 2012 Pres Primary	☐ Voted ☐ Didn't Vote
	☐ Republican
☐ 2008 Pres Primary	☐ Voted ☐ Didn't Vote ☐ Absentee
	☐ Democrat ☐ Republican
☐ 2004 Pres Primary	☐ Voted ☐ Didn't Vote
☐ 2012 Primary Runoff	☐ Voted ☐ Didn't Vote
☐ 2004 Runoff	☐ Voted ☐ Didn't Vote ☐ Democrat ☐ Republican
☐ 2017 Special	☐ Voted ☐ Didn't Vote
☐ 2013 Special	☐ Voted ☐ Didn't Vote

◀ Step 1: New Search

Voter Status

Registration Status = Registered Active or Registered Inactive

Suppressions

exclude Deceased
and include Current Voting Address
and include Current Mailing Address only
and include Do Not Mail
and include Do Not Mail

Refresh Step

...less

Preview My Results

+

-- People

+ Add Step

▶ Run Search

Running this search will clear your current list of 1 person.

Create your list

When ready, click on “Preview my Results” to see how many people will be in your list
Select “Run Search” when done

The screenshot shows the 'DNC VOTE BUILDER' interface for South Carolina. The user is logged in as 'Joe Madge' from the 'Lexington County Party'. The main navigation bar includes 'My Voters' and 'My Campaign' tabs. The current view is 'Create A New Search'. On the left, under 'CONTACTS', there's a section for 'FAVORITES' with a note to click stars to move criteria to the top. Below that, 'OTHER SEARCH CRITERIA' lists several categories: 'Activist Codes', 'Addresses', 'Age • Registration Date', 'API Saved Lists', and 'Applicant Status', each with a star icon. The main content area is titled 'Step 1: (Start with anyone who meets the selected criteria)'. On the right, a sidebar shows search filters: 'Voting History' (2024 Pres Primary = Voted Democrat), 'Districts' (Precinct = West Columbia No. 3, County = Lexington), 'Voter Status' (Registration Status = Registered Active or Registered Inactive), and 'Suppressions' (exclude Deceased, include Current Voting Address only, Current Mailing Address only, Do Not Email, Do Not Mail). At the bottom of the sidebar, a blue button 'Preview My Results' is circled in yellow. Below this, a green button 'Run Search' is also circled in yellow, with a yellow box highlighting '47 People' above it. A '+ Add Step' button is also visible. At the very bottom, a note states: 'Running this search will clear your current list of 1 person.'

DNC VOTE BUILDER South Carolina

Joe Madge
County Party: Lexington

My Voters My Campaign

Home / Create A New Search

CONTACTS

Create A New Search

Step 1: (Start with anyone who meets the selected criteria)

FAVORITES

Click the stars below to move search criteria to the top.

OTHER SEARCH CRITERIA

- Activist Codes
- Addresses
- Age • Registration Date
- API Saved Lists
- Applicant Status

Step 1: New Search

Voting History — Exactly 1 of the following:
2024 Pres Primary = Voted Democrat

Districts
Precinct = West Columbia No. 3
and County = Lexington

Voter Status
Registration Status = Registered Active or Registered Inactive

Suppressions
exclude Deceased
and include Current Voting Address only
and include Current Mailing Address only
and include Do Not Email
and include Do Not Mail

Preview My Results

47 People

+ Add Step

Run Search

Running this search will clear your current list of 1 person.

Create your list

You will see a summary of your list

DNC VOTEBUILDER

South Carolina

Joe Madge

County Party: Lexington

My Voters

My Campaign

Home / My List

ES

EN

CONTACTS

My List

Edit Search

Load List

Save List As

New Search

47

People

42

Home Phones

42

Preferred Phones

37

Doors

37

Mailboxes

Print

Letters

Labels

Calls

Export

MiniVAN

Counts

Reports

Cut Turf

Split

Grid

Script

Form

Copy

Map

Advertising

Messages

Description

Last Name

First Name

Remember Filters

Refresh Results

Name	Address	City	Phone	Age	Precinct	Work Phone
------	---------	------	-------	-----	----------	------------

Lexington County Democratic Party – Aug. 2024

Create your virtual phone bank

Create your Virtual Phone Bank

From your List Summary, select “Calls”

 DNC VOTE BUILDER

South Carolina



Joe Madge
County Party: Lexington



My Voters

My Campaign

Home / My List

 ES EN

CONTACTS

My List

Edit Search Load List Save List As New Search

47
People

42
Home Phones

42
Preferred Phones

37
Doors

37
Mailboxes

 Print

 Letters

 Labels

 Calls

 Export

 MiniVAN

 Counts

 Reports

 Cut Turf

 Split

 Grid

 Script

 Form

 Copy

 Map

 Advertising

 Messages

Description

Last NameFirst Name

Remember Filters Refresh Results

NameAddressCityPhoneAgePrecinctWork Phone

Create your Virtual Phone Bank

Select “Set Up Virtual Phone Bank List” and then click “Next”

The screenshot shows the DNC VOTEBUILDER South Carolina interface. The user is logged in as Joe Madge, County Party: Lexington. The main navigation bar includes 'My Voters' and 'My Campaign'. The 'My List' section is active, showing a list of contacts with filters for Person, Home Phones, Preferred Phones, Doors, and Mailboxes. A modal window is open for selecting a virtual phone bank setup method.

CONTACTS
My List

1 Person 1 Home Phones 1 Preferred Phones 1 Doors 1 Mailboxes

Print Letters Labels Calls Export MiniVAN Counts Reports Cut Turf Split Grid Script Form Copy Map Advertising Messages

Description

Last Name

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

Next

Remember Filters Refresh Results

Name	Address	City	Phone	Age	Precinct	Work Phone
Madge, Joseph	1101 D Ave	West Columbia	(803) 315-7245	57	West Columbia No. 3	

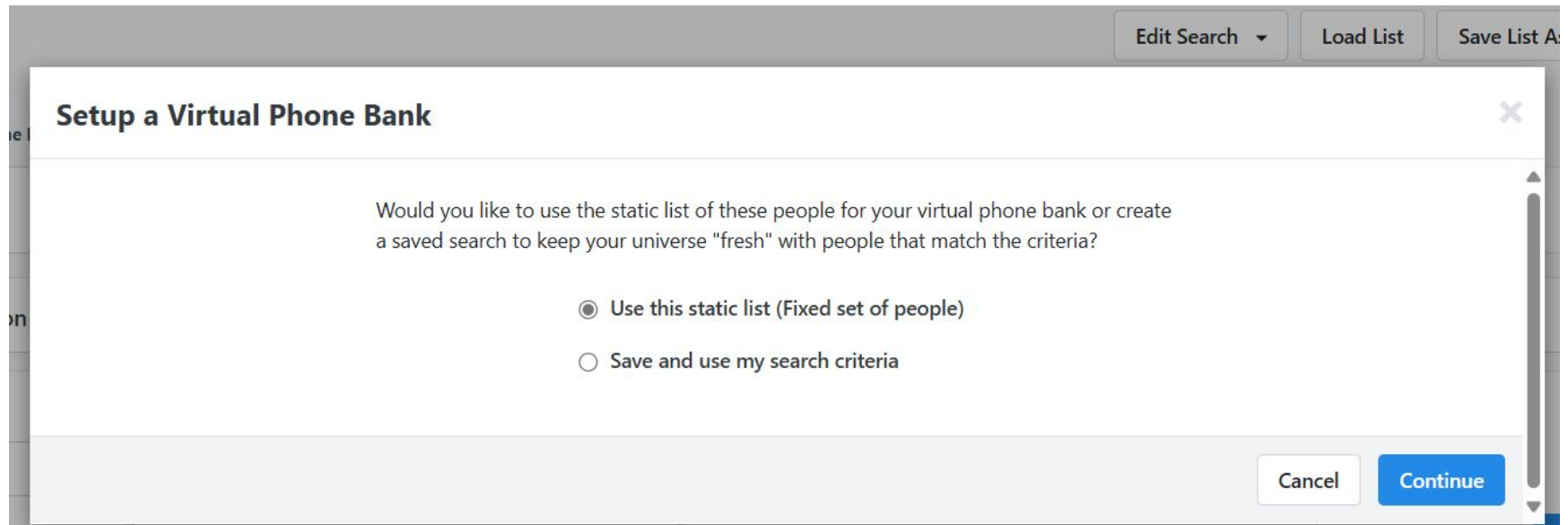
1 People · 1 Page

Create your Virtual Phone Bank

In the Pop Up window, select “Use Static List” or “Use search Criteria

Use a static list if your list will not change

Use Search Criteria if your list may change (if the phone bank will stay open for a long time, for example)

A screenshot of a web application interface showing a dialog box titled "Setup a Virtual Phone Bank". The dialog box has a close button (X) in the top right corner. Inside the dialog, there is a question: "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?". Below the question are two radio button options: "Use this static list (Fixed set of people)" which is selected, and "Save and use my search criteria". At the bottom right of the dialog are two buttons: "Cancel" and "Continue". Above the dialog, in the background, are three buttons: "Edit Search" with a dropdown arrow, "Load List", and "Save List As".

Edit Search ▾ Load List Save List As

Setup a Virtual Phone Bank X

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

Cancel Continue

Create your Virtual Phone Bank

Give your Phone Bank a Name, select your script and give a start and end date

My VotersMy Campaign

Joe Madge
County Party: Lexington

Virtual Phone Bank Details

Calling Round 1

Name

Phone Bank training

Description

Script Options

☒ Choose a script for everyone in the list

☐ Choose a default script and up to 4 alternate scripts

☐ Choose a default script and alternate scripts based on a target's subgroups

Default Script

Phone Bank Training

View Script

Start Date

8/18/2024

End Date

8/20/2024

List Size

1 Person

Status

☒ Active☐ Inactive

Owner Committee

County Party: Lexington

Display Settings

Save & Preview

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

Designated Contact

Decide who virtual phone bank volunteers should reach out to if they need help.

Name

Phone

(201) 555-0123

Email

example@email.com

Basic Demographics

Select All | Deselect All

☒ Age

☐ Party

☒ Source File Sex

Contact & Location Information

Enable read-only information shown for each contact on the

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Create your Virtual Phone Bank

Under “Open VPB” select “Publish to openvpb.com”

My Campaign

Joe Madge
County Party: Lexington

☐ Choose a default script and alternate scripts based on a target's subgroups

Default Script* Phone Bank Training [View Script](#)

Start Date* 8/18/2024

End Date* 8/20/2024

List Size 1 Person

Status ☒ Active ☐ Inactive

Owner Committee County Party: Lexington

OpenVPB

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

VPB Connect ☐ Enable VPB Connect

Teams and Divisions ☐ Require canvassers to set a Team and Division

Basic Demographics

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

☒ Age

☐ Party

☒ Source File Sex

Contact & Location Information

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

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

☐ Applicant Address

☐ Ballot Application Requested

☐ Ballot Mailed

☐ Ballot Reissued

☐ Ballot Rejected

☐ Ballot Requested

☐ Ballot Returned

☐ Canceled a Ballot

☐ Congressional

Create your Virtual Phone Bank

Under “Additional Settings” select “Attempt all alternate numbers”

My Voters **My Campaign** Joe Madge
County Party, Lexington

▼ **Additional Settings**

Daily Availability to Eastern
Standard Time

Time Limit Minutes

Contact Limit Successful Contacts

Repeat ☐ Allow users to repeat session

Distribute Contacts ☐ Distribute voters by zip code

Householding ☒ Do not display Also in Household
☐ Show only people in Household from Virtual Phone Bank list
☐ Show all Also in Household

Alternate Numbers ☐ Don't attempt alternate numbers
☒ **Attempt all alternate numbers**
☐ Attempt only alternates with:

Skipping ☐ Allow users to skip contacts and households

- ☐ Early Voting Hours
- ☐ Early Voting Location
- ☐ Early Voting Phone
- ☐ Early Voting Zip
- ☐ Personal Email
- ☐ Polling Address
- ☐ Polling City
- ☐ Polling Location
- ☐ Precinct
- ☒ Preferred Email
- ☒ Preferred Phone
- ☐ Registration Status
- ☐ State House
- ☐ State Senate
- ☐ Voted on Election Day
- ☐ Voted Status
- ☐ Voter File VANID
- ☐ Voting Address
- ☐ Voting City
- ☐ Voting City and Zip
- ☐ Voting City, State, Zip
- ☐ Work Email

▼ Editable Contact Details

Create your Virtual Phone Bank

Select “Next”

DNC VOTEBUILDER

South Carolina

My Voters

My Campaign

Home / New

VIRTUAL PHONE BANK

New Virtual Phone Bank

ES

EN

Restore Defaults

Next

Virtual Phone Bank Details

Calling Round 1

Name*

Phone Bank training

Description

Script Options*

☒ Choose a script for everyone in the list

☐ Choose a default script and up to 4 alternate scripts

☐ Choose a default script and alternate scripts based on a target's subgroups

Default Script*

Phone Bank Training

View Script

Start Date*

8/18/2024

Display Settings

Save & Preview

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

Designated Contact

Decide who virtual phone bank volunteers should reach out to if they need help.

Name

Phone

(201) 555-0123

Email

example@email.com

Basic Demographics

Lexington County Democratic Party – Aug. 2024

Create your Virtual Phone Bank

You will see your Virtual Phone Bank Code and the link.

Select “Copy” next to the OpenVPB link to share the link with others

Select “Save” when you are done

DNC VOTEBUILDER

South Carolina

My Voters

My Campaign

Joe Madge

County Party: Lexington

Home / Virtual Phone Bank Lists / Edit

VIRTUAL PHONE BANK

Phone Bank training

ES EN

Load To My List Send to Round 2 Restore Defaults Save

Virtual Phone Bank Details

Calling Round 1

Name* Phone Bank training

Description

Script Options*

☒ Choose a script for everyone in the list

☐ Choose a default script and up to 4 alternate scripts

☐ Choose a default script and alternate scripts based on a target's subgroups

Default Script* Phone Bank Training View Script

Start Date* 8/18/2024

VPB Code

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

15AAC5D-391272

Copy

OpenVPB

https://www.openvpb.com/vpb_bycode/15AAC5D-391272

Copy

Display Settings

Save & Preview

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

Lexington County Democratic Party – Aug. 2024

Create your Virtual Phone Bank

In the “Virtual Phone Bank Lists” screen, you will see your list and any progress

DNC VOTEBUILDER

South Carolina

My Voters

My Campaign

Joe Madge

County Party: Lexington

Home / Virtual Phone Bank Lists

ES

EN

PHONE SERVICES

Virtual Phone Bank Lists

Export To Excel

Add New Phone Bank

Status

Committee

Name

Date From

To

☐ Show Expired Virtual Phone Banks

Remember Filters

Refresh Results

Select All 1 Virtual Phone Banks

Refresh & Send to Next Round

☐	Name	Code	Round	List Size	Attempted	%	Completed	%	Canvassed	%	Voted	%	Start Date	End Date	Owner Committee
☐	Phone Bank training	15AAC5D-391272	1	1							N/A		8/18/24	8/21/24	County Party: Lexington

1 Virtual Phone Bank · 1 Page

Create your Virtual Phone Bank

From your Home screen, you can select “Virtual Phone Bank” to start making calls

 **DNC VOTEBuilder** South Carolina

 Joe Mac
County Pa



My Voters

My Campaign

What's New? ES

MAIN MENU

Welcome Joe

My Requests1 New

My Export Files0

My PDF Files0

Counts/Crosstabs Outputs0

Follow Ups0

Support Requests0

Contact the Admin

Request a User Account

Quick Look Up

 Quick Look Up

Lists

 Create A New List

 Go to My List (1 People)

 View My Folders

Canvassing

 Canvass Results

Load Data

 Quick Mark

 Script View

 Grid View

 Form View

Quick Tasks

 Manage Relationships

 Virtual Phone Bank

Make Calls

Make calls

From your Home screen, you can select “Virtual Phone Bank” to start making calls

 **DNC VOTEBuilder** South Carolina

 Joe Mac
County Pa

 **My Voters** My Campaign

What's New? ES

MAIN MENU

Welcome Joe

My Requests 1 New

My Export Files 0

My PDF Files 0

Counts/Crosstabs Outputs 0

Follow Ups 0

Support Requests 0

Contact the Admin

Request a User Account

Quick Look Up

 Quick Look Up

Lists

 Create A New List

 Go to My List (1 People)

 View My Folders

Canvassing

 Canvass Results

Load Data

 Quick Mark

 Script View

 Grid View

 Form View

Quick Tasks

 Manage Relationships

 Virtual Phone Bank

Make calls

Select your Phone Bank or enter a code

DNC VOTEBUILDER South Carolina

My Voters My Campaign

Home / Virtual Phone Bank

PHONE SERVICES

Virtual Phone Bank

Which Virtual Phone Bank do you want to use?

☒ Phone Bank training

☐ Let me select by VPB Code

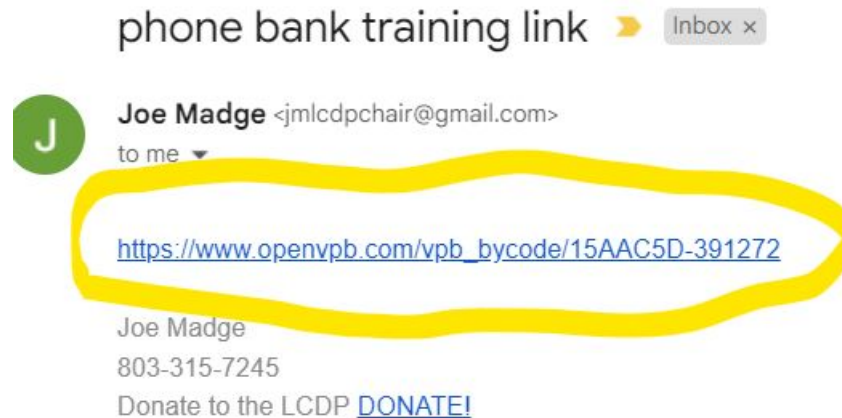
-

Next

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Make calls

Or you can select a link that has been sent to you via email or text



Make calls

You will get a pop-up window
Click “Next”

 **DNC VOTE BUILDER** South Carolina 

My Voters **My Campaign**

[Home](#) / [Virtual Phone Bank](#)

PHONE SERVICES

Virtual Phone Bank

Phone Bank training

Welcome to Virtual Phone Bank. We'll show you names and phone numbers, along with a script to read. Please call each person and fill in their responses on the screen as you go along.

Next

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Make calls

You will be taken to the list to start making calls

You will see the name of the person and the number, script, etc.

DNC VOTEBUILDER

South Carolina

Joe Madge

County Party: Lexington

My Voters

My Campaign

Home / Virtual Phone Bank

ES EN

VIRTUAL PHONE BANK

Phone Bank training

Save & Next Call

Joseph Madge – 57 M

(803) 315-7245

Number 1 of 2

Voter File VANID: 1960305

I Couldn't Reach Joseph

Script

Hello, my name is ____ and I am volunteer with the Lexington County Democratic Party. Could I speak with ____?

We have a lot of energy and excitement around our Presidential candidate and we want to use that energy to elect some local candidates.

Are you planning on voting for Kamala Harris?

Thank you for your time!

Additional Info

Preferred Email

jmlcdpchair@gmail.com

Preferred Phone

(803) 315-7245

Email

Type	Email	Status	Source	Access	Edi
Personal	jmlcdpchair@gmail.com*	Can Email	User Added	Private	3/3 (J. M)
Other					

Make calls

You will be taken to the list to start making calls

You will see the name of the person and the number, script, etc.

DNC VOTEBUILDER

South Carolina

Joe Madge

County Party: Lexington

My Voters

My Campaign

Home / Virtual Phone Bank

ES EN

VIRTUAL PHONE BANK

Phone Bank training

Save & Next Call

Joseph Madge – 57 M

(803) 315-7245

Number 1 of 2

Voter File VANID: 1960305

I Couldn't Reach Joseph

Script

Hello, my name is ____ and I am volunteer with the Lexington County Democratic Party. Could I speak with ____?

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Are you planning on voting for Kamala Harris?

Thank you for your time!

Additional Info

Preferred Email

jmlcdpchair@gmail.com

Preferred Phone

(803) 315-7245

Email

Type	Email	Status	Source	Access	Edi
Personal	jmlcdpchair@gmail.com*	Can Email	User Added	Private	3/3 (J. M)
Other					

Make calls

Click on the number to start your call

Follow your script and enter the results of any questions

DNC VOTEBUILDER

South Carolina

Joe Madge

County Party: Lexington

My Voters

My Campaign

Home / Virtual Phone Bank

Save & Next Call

VIRTUAL PHONE BANK

Phone Bank training

Joseph Madge – 57 M

(803) 315-7245

Number 1 of 2

Voter File VANID: 1960305

I Couldn't Reach Joseph

Additional Info

Preferred Email jmlcdpchair@gmail.com

Preferred Phone (803) 315-7245

Script

Hello, my name is ____ and I am volunteer with the Lexington County Democratic Party. Could I speak with ____?

We have a lot of energy and excitement around our Presidential candidate and we want to use that energy to elect some local candidates.

Are you planning on voting for Kamala Harris?

Thank you for your time!

Email

Type	Email	Status	Source	Access	Edi
Personal	jmlcdpchair@gmail.com*	Can Email	User Added	Private	3/3 (J. M)
Other					

Make calls

If you cannot connect with the person, select “I couldn’t reach _____”

DNC VOTEBUILDER

South Carolina

Joe Madge

County Party: Lexington

My Voters

My Campaign

Home / Virtual Phone Bank

ES EN

VIRTUAL PHONE BANK

Phone Bank training

Save & Next Call

Joseph Madge – 57 M

(803) 315-7245

Number 1 of 2

Voter File VANID: 1960305

I Couldn't Reach Joseph

Additional Info

Preferred Email

jmlcdpchair@gmail.com

Preferred Phone

(803) 315-7245

Email

Type	Email	Status	Source	Access	Edi
Personal	jmlcdpchair@gmail.com*	Can Email	User Added	Private	3/3 (J. M)
Other					

Script

Hello, my name is ____ and I am volunteer with the Lexington County Democratic Party. Could I speak with ____?

We have a lot of energy and excitement around our Presidential candidate and we want to use that energy to elect some local candidates.

Are you planning on voting for Kamala Harris?

Thank you for your time!

Make calls

Select the reason for not being able to connect:

DNC VOTEBUILDER

South Carolina

My Voters

My Campaign

Home / Virtual Phone Bank

VIRTUAL PHONE BANK

Phone Bank training

Joseph Madge – 57 M

(803) 315-7245

Number 1 of 2

Voter File VANID: 1960305

I Couldn't Reach Joseph

☐ Not Home

☐ Refused ?

☐ Deceased

☐ Moved

☐ Call Back

☐ Busy

☐ Left Message

☐ Wrong Number ?

☐ Disconnected ?

Cancel

Additional Info

Preferred Email

jmlcdpchair@gmail.com

Preferred Phone

(803) 315-7245

Email

Type	Email	Status	Source
Personal	jmlcdpchair@gmail.com*	Can Email	User A
Other			

Make calls

If there are multiple numbers for the person and you could not reach the first number, select the “Try number x of x” button to dial the next number:

DNC VOTEBUILDER

South Carolina

Joe Madge

County Party: Lexington

My Voters

My Campaign

Home / Virtual Phone Bank

VIRTUAL PHONE BANK

Phone Bank training

ES

EN

Try Number 2 of 2

Joseph Madge – 57 M

(803) 315-7245

Number 1 of 2

Voter File VANID: 1960305

I Couldn't Reach Joseph

☒ Not Home

☐ Refused ?

☐ Deceased

☐ Moved

☐ Call Back

☐ Busy

☐ Left Message

☐ Wrong Number ?

☐ Disconnected ?

Cancel

Additional Info

Preferred Email jmlcdpchair@gmail.com

Preferred Phone (803) 315-7245

Email

Type	Email	Status	Source	Access	Edi
Personal	jmlcdpchair@gmail.com*	Can Email	User Added	Private	3/3 (J. N
Other					

Lexington County Democratic Party – Aug. 2024

Make calls

When finished with the person on your list, select “Save and Next Call” to go to the next person in the list

 DNC VOTEBUILDER

South Carolina



My Voters

My Campaign



Joe Madge
County Party: Lexington

Home / Virtual Phone Bank

VIRTUAL PHONE BANK

Phone Bank training

ES

EN

Save & Next Call

Joseph Madge – 57 M

(803) 315-7245

Number 1 of 2

Voter File VANID: 1960305

I Couldn't Reach Joseph

Script

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Email

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Personal	jmlcdpchair@gmail.com*	Can Email	User Added	Private	3/3 (J. M)
Other					

Any Questions?

Thank you for your time!