

Working with Advokit

A Guide for Voter-Contact Activists

Advokit is a powerful web application that will assist you and your organization to have a real impact in our political lives. Like any powerful piece of software Advokit takes a little time to get used to. Some of the terminology will be new and there are many powerful features. We tried to provide at least some information about all the features you may need to use as a voter-contact activist in your campaign. And we tried to include lots of screenshots. As a result, this guide is perhaps a bit long, but we hope that it will be able to answer any questions you may have.

We assume the following:

- You have the internet address to an Advokit-powered website.
- You are reasonably familiar with Internet Web browsers.
- You have a person to call if you run into trouble.
- You have been provided with a user account for a job with voter contact responsibilities.

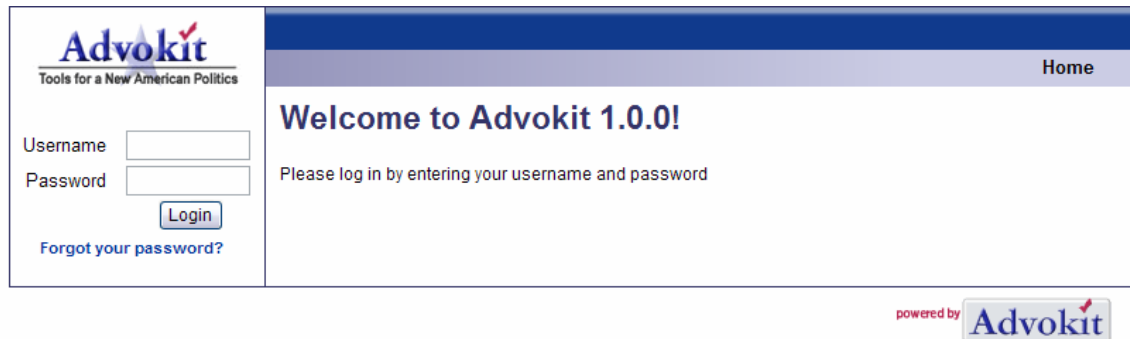
Some basic principles

Advokit is a web application that runs in an internet browser, so things work a little differently than if you were working with an application that runs directly on your computer.

1. There is no keyboard shortcut to save what you are doing (control/command-S does not work). When you work on a page and want to save the changes you have made, you must click on the appropriate on-screen button to commit your changes. If you navigate away from that page without saving your changes, most of the time your changes will be gone.
2. Where possible, use the buttons and links in Advokit to move around. The backward and forward buttons built into your browser can occasionally cause Advokit to become confused about where you are and what you're doing.
3. Most links in Advokit are indicated by blue text, and all links will underline when you hover your mouse over them.
4. Advokit occasionally displays information in separate popup windows. You may need to enable popups for this site if you have popup-blocking turned on in your browser.

Logging In

- 1) Open your browser and type in the URL (internet address) where your Advokit lives. This information should have been provided to you along with a username and password. *If you do not have this information, or are not at your computer, you will still be able to learn much about using Advokit by reading this guide. But we will proceed on the assumption that you can log into Advokit.*
- 2) Once you have successfully connected to Advokit you will see a screen that looks something like this:



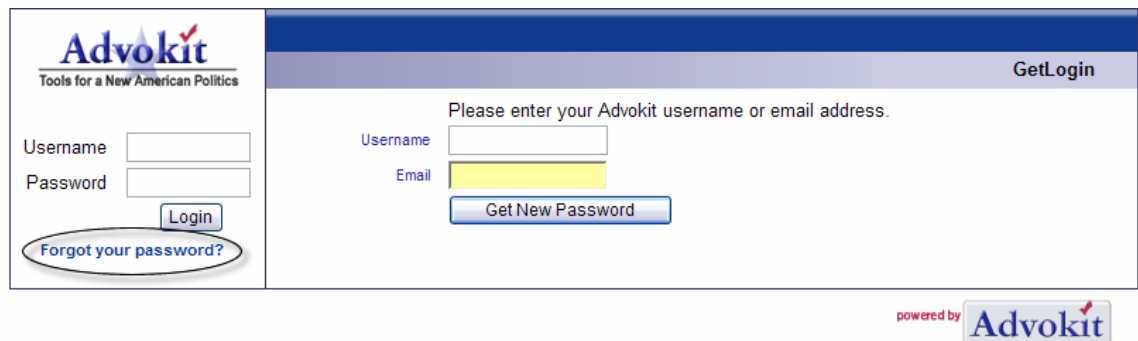
To login, type your login and password and click the Login button. The login is “case-sensitive”. This means that if your username was “DaNieL”, then “Daniel”, “DanieL” etc. would not work. Passwords are also case-sensitive.

Retrieving a Lost Password

It is possible that you have forgotten the password. You can “retrieve” a password from Advokit – Assuming that your user account has an email associated with it. If you need to retrieve a password follow these steps. If not then skip to the next sections.

To retrieve a password, follow these steps –

- 1) Click on the “Forgot Your Password” link below the Login Button.



- 2) Type in your username and/or the email address you are registered with (it’s possible to have two different users registered with the same email address, in which case you will need to provide your username).
- 3) A new password will be e-mailed to you.

- 4) Once you have received the new password and returned to Advokit and logged in, you should click the “change password” link at the bottom of the toolbar on the left to change your password to something you can remember.

If you don't know your Advokit username, and if no email is entered in your user account, then you will need to have a system administrator reset your password and send it to you. Once you do get in, it is a very good idea to add your email address to your profile so that you can recover your login yourself in the future. To do so, click on the “Edit Profile” link at the lower-left of the screen (which can be seen on the next illustration).

Getting into Advokit

When you are logged in you will see a screen that looks something like this -

Advokit
Tools for a New American Politics

Welcome, Ruth Davies

MY JOBS

▶ Voter Contact (AD 217)

CONTACT LISTS

Add 10 voters to new list

SEARCH VOTERS

advanced search

MY ACCOUNT

Edit Profile
Set Password
Logout

My Campaign Home

Welcome to My Campaign, Ruth Davies!
If this is the first time you are seeing this then congratulations for taking on a vital role in My Campaign.

There are links at the left for you to..

1. Automatically add 10 voters to a new or existing contact list
2. Search for particular voters to add to a new or existing contact list (simple or advanced search)
3. After you have one or more contact lists, you can click on the contact list name and begin your contacts with voters

When you click on the activist job link under "My Jobs" at the left, you will be taken to a job details page where you will see information about your team leader (or leaders) and who, if anyone, shares this job with you

Look for the [Help] link at the upper-right on many pages for assistance as you work on this site

If you need to get back to this home page just click on the logo on the top left hand corner of the page.
Please direct questions, concerns and inquiries to your team leader

Last result: No information

powered by **Advokit**

Depending on how your user account was configured and how the system is set up you may already be at a different page. That's ok. For the purpose of this guide and to get you onto the same page (so to speak), you should click on the logo in the upper left (your campaign may have a different logo or graphic here). Go ahead and click there now, if you are already in the right place it won't hurt.


Creating a contact list automatically

Contacting voters starts with a contact list. This is a list of voters that have been ‘checked out’ to you. In creating a contact list, you are accepting responsibility to perform whatever outreach that your campaign has in mind for those voters. (Generally, this means calling them and trying to identify them as supporters of your campaign, urging them to vote, or both.) Later, we will discuss creating contact lists by searching in the voter database, but we provide a quick introduction here so that we can get to a discussion of what you do once you have a list of voters to contact.



Select the link – “Add 10 voters to new list”. Depending on the size of your voter database, it may take a short while to return with the next screen.

Your screen should now look something like this:



Tools for a New American Politics

My Campaign

Contact list Contact list #1 ?

Welcome, Ruth Davies

MY JOBS

▶ Voter Contact (AD 217)

CONTACT LISTS

(10 total, 200 max)
Contact list #1

[Add 10 voters to Contact list #1](#)

[Add 10 voters to new list](#)

SEARCH VOTERS

advanced search

MY ACCOUNT

[Edit Profile](#)

[Set Password](#)

[Logout](#)

Show only voters whose names contain

Check this box to group addresses by odd/even

Show voters (any voter)

[Printable Questionnaire](#)

[Printable Call List](#)

[Export Contact List](#)

	Name	adr	cit	Age	Home	AV?	P	Status / Last Date
X	Chase-Toussaint, Tammy - age 47	1442 Main Street # 2	Worcester, MA	01603		N	D	<input type="text"/>
X	Duff, Tracy - age 42	1442 Main Street # 1	Worcester, MA	01603	508-757-8964	N	D	<input type="text"/>
X	Paradise, Stacy - age 36	1442 Main Street # 3	Worcester, MA	01603	508-752-5222	N	D	<input type="text"/>
X	Leboeuf, David - age 59	1502 Main Street # 1	Worcester, MA	01603	508-754-1379	N	D	<input type="text"/>
X	Leboeuf, Barbara - age 47	1502 Main Street # 1	Worcester, MA	01603	508-754-1379	N	D	<input type="text"/>
X	Rodriguez, Conrad - age 53	1524 Main Street # 2L	Worcester, MA	01603	508-757-5819	N	D	<input type="text"/>
X	Soucy, Paulette - age 53	1524 Main Street # 2	Worcester, MA	01603	508-797-3390	N	D	<input type="text"/>
X	Riopel, Leo - age 71	1558 Main Street # 1	Worcester, MA	01603	508-799-5985	N	D	<input type="text"/>
X	Riopel, Lena - age 94	1558 Main Street # 1	Worcester, MA	01603	508-799-5985	N	D	<input type="text"/>
X	Duany, Scott - age 34	2204 Halcyon Drive	Worcester, MA	01606	508-856-9296	N	D	<input type="text"/>

Contact list #1

Last result: 10 records out of 10

Let's take a look at the menu on the left -




The menu assists you in navigating through Advokit and taking advantage of its many features. Here is a detailed listing of this menu (note: in some instances, choices may appear or disappear from the menu – this is normal).

- 1) The Logo – Click here to get back to the “Home” page.
- 2) A listing of your jobs. This screen only shows one job, “Voter Contact” in this example, and the team it is assigned to, “AD217”. Clicking on the job title will bring up information about who occupies this job (there may be more than one of you!), and who leads the team that you are on. There is more information later in this tutorial about Teams and Jobs. For now you should know that it is possible to have multiple jobs in the campaign – you might be a phone banker and you might distribute lawn signs for example. You can choose what job you want to access by clicking on it here.
- 3) Contact List – Activists (that’s you), contact voters listed on their contact lists. Contact Lists “belong” to you. They are how you keep track of the voters you have accepted responsible for. On this screen you have one contact list titled “Contact list #1”. If you had more than one Contact List, they would be listed, one after another in this area of the screen. The Contact List that was current would be presented in black text, while the others would be blue links.
- 4) Add 10 Voters to Contact List #1 – Your Contact List contains “your” voters. It is likely that there are other voters in the pool for your team that you can access and place on one of your Contact Lists. This link, “Add 10 Voters to Contact List #1” is a quick way to put additional voters on your contact list (making you responsible for them). New contacts are always chosen from the voters available to your team – the voter pool.
- 5) Add 10 Voters to a new list – Clicking this will create a new list with 10 voters automatically picked from your team’s pool of voters. It’s up to you to decide whether it makes more sense to have multiple contact lists, or to have one large list.
- 6) Search Voters – this is a “quick” search option so that you can find particular voters in your pool such as when you’re adding friends and acquaintances to your contact list. You can type a value into this field and push the “go!” button. This will initiate a search through your pool of voters and return a list of voters that match the search criteria. If you type “Smith” in the box it will find voters with the last name of “Smith”, “Smithson” etc. It will also apply the search to first names, and addresses. So if there were any voters with a first name of Smith or who lived on Smith Street it would find them as well. We will discuss what to do with the results of a voter search in the “Search for Voters” section of this tutorial.
- 7) Advanced Search – This will present a new screen where you can specify a more precise search (e.g. full address).
- 8) Edit Profile, Set Password, Logout

- 8) Edit Profile, Set Password, Logout – clicking these links will allow you to change your personal account info – address, e-mail etc., change your password, or Logout of the system.

Working with your Contact List

The heart of Advokit is its support for contacting voters, and central to this is the Contact List. Below is a typical contact list.

Contact list Contact list #1 

Show only voters whose names contain

Check this box to group addresses by odd/even

Show voters (any voter)

Printable Questionnaire
Printable Call List
Export Contact List

	Name	adr	cit	Age	Home	AV?	P	Status / Last Date
X	Chase-Toussaint, Tammy - age 47	1442 Main Street # 2	Worcester, MA	01603	1		N	D
X	Duff, Tracy - age 42	1442 Main Street # 1	Worcester, MA	01603	2	508-757-8964	N	D
X	Paradise, Stacy - age 36	1442 Main Street # 3	Worcester, MA	01603		508-752-5222	N	D
X	Leboeuf, David - age 59	1502 Main Street # 1	Worcester, MA	01603		508-754-1379	N	D
X	Leboeuf, Barbara - age 47	1502 Main Street # 1	Worcester, MA	01603		508-754-1379	N	D
X	Rodriguez, Conrad - age 53	1524 Main Street # 2L	Worcester, MA	01603		508-757-5819	N	D
X	Soucy, Paulette - age 53	1524 Main Street # 2	Worcester, MA	01603		508-797-3390	N	D
X	Riopel, Leo - age 71	1558 Main Street # 1	Worcester, MA	01603		508-799-5985	N	D
X	Riopel, Lena - age 94	1558 Main Street # 1	Worcester, MA	01603		508-799-5985	N	D
X	Duany, Scott - age 34	2204 Halcyon Drive	Worcester, MA	01606		508-856-9296	N	D

Clicking on the voter’s name (blue link) will bring up a Contact Sheet for that voter. Read the next section for more information about using Contact Sheets.

The Contact List shows up to twenty voters on a single page. Use the paging controls near the bottom of the page to navigate through a larger contact list.






1
2
Next 10 >
Last >>

The Voter’s name, age (if available), and address are all displayed. Also, near the right side of the screen you will see two columns labeled “AV?” and “P”. “AV?” stands for “Absentee

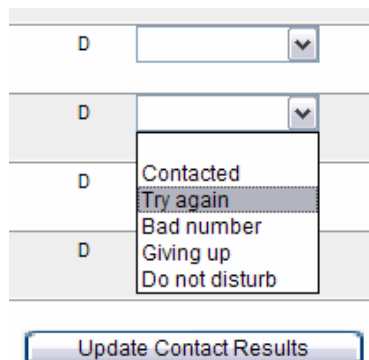
Voter?” and is used to denote whether or not this voter is voting absentee. “P” stands for “Party” and denotes the Party registration. *But note that these columns may be different in your version of Advokit.*

The row of small buttons (small images that are circled and numbered in this illustration) allow you to perform some useful functions. *(Depending on your campaign’s configuration, some of these may not be present.)*

At the upper-right there is a row of up to five buttons:

-  Edit Voter ~ Basic – If basic voter editing is enabled, you will be able to click this to bring up a screen where you can edit the name, phone numbers, email and gender of this voter. You may or may not be able to edit the voter’s address from this screen, depending on configuration.
-  Edit Voter ~ Advanced – If advanced voter editing is enabled, you will be able to edit all the information in the system about this voter. As with basic voter editing, address editing may or may not be enabled.
-  Recruit Activist – Advokit facilitates a “viral” model of organizing. Clicking on the key button allows you to create an account in Advokit for this. So when you ask someone if they would like to volunteer – you can give them an account in Advokit right away. When you do, Advokit will send an email to your team leader(s) with details about the newly recruited activist so that they can create a job and assign that person to it. However you should also contact your team leader directly to tell them about the recruited activist to ensure that action is taken promptly to activate your new recruit. *Note that giving someone an account is not the same as giving them a job. The new recruit will not be able to do any work in Advokit until a team leader assigns him or her to a job.*
-  Map this address - Clicking on this button will bring you to a MapQuest map page with the voter’s address mapped on it. *(Note: when you click on this link the browser will be directed to the MapQuest site. Use your browsers “back” button to return to Advokit.)*
-  Remove Voter - Clicking this button will remove the voter from this contact list. *(The voter data will not be lost – the voter will simply be returned to the team’s voter pool. You should check with your team leader about campaign policy for removing voters from contact lists.)*

Each Voter has a “Contact Status”.



D	<input type="text"/>
D	<input type="text"/>
D	<input type="text" value="Contacted"/>
D	<input type="text" value="Try again"/>
D	<input type="text" value="Bad number"/>
D	<input type="text" value="Giving up"/>
D	<input type="text" value="Do not disturb"/>

If you are collecting information from your voters or creating follow-up tasks for them, you should use the Contact Sheet to record voter contact results. But if you are simply contacting voters to communicate some information to them (e.g. “Today is the election- Please Vote!”) you only need to record whether or not you have completed the contact. In that case, you can use the contact status drop-down menus on the Contact List as shown here.

Once you have set one or more “Contact Status” drop-downs on this page, you must click the “Update Contact Results” button at the bottom of the page to save the changes. *If you do not save your work in this manner it will be lost when you reload this page, or move to another page!*

Other contact list features

The Contact List page has many options and features. Starting at the top, you will see a number of controls.

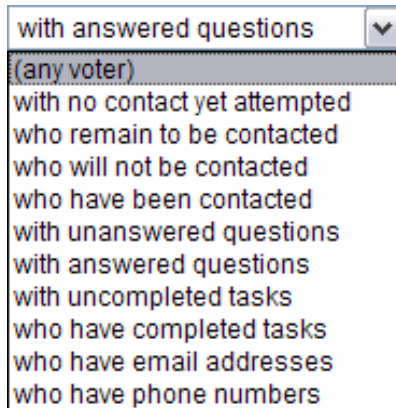
[Printable Questionnaire](#)
[Printable Call List](#)
[Export Contact List](#)

Show only voters whose names contain

Check this box to group addresses by odd/even

Show voters

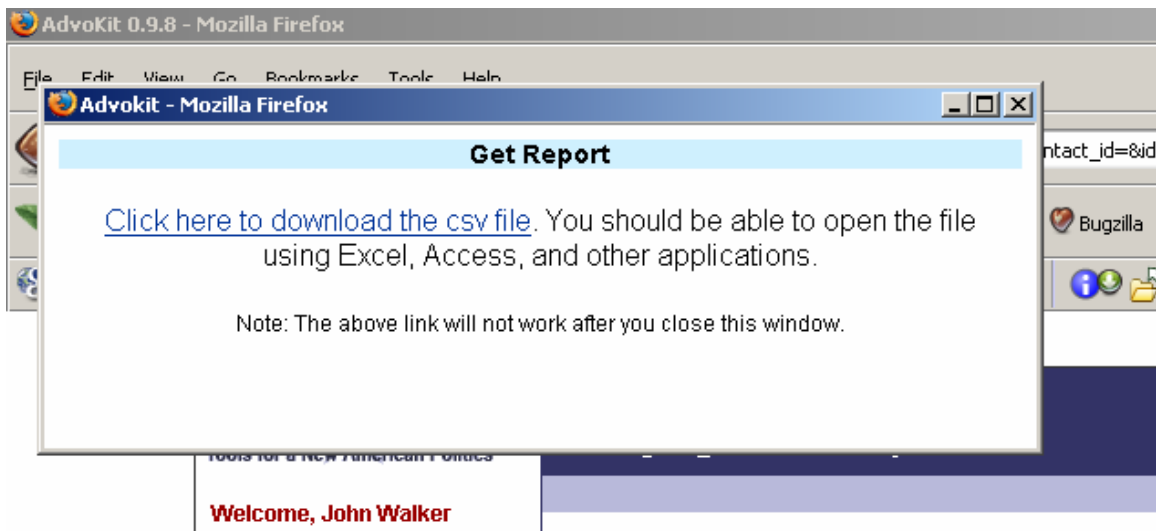
1. “Show only voters whose names contain...” – typing a name or a part of a name in this box and selecting “go!” will cause the contact list to only show voters who’s names match the value that you have entered. To again view all of the voters on your Contact List click the “clear” button.
2. “Check this box to group addresses by odd/even” - When walking in a neighborhood you will often want to walk up one side of the street and then down the other. By sorting the list with by odd and even addresses you will make your life easier when doing this work.
3. “Show voters...”



The image shows a drop-down menu with the following options: with answered questions, (any voter), with no contact yet attempted who remain to be contacted, who will not be contacted, who have been contacted, with unanswered questions, with answered questions, with uncompleted tasks, who have completed tasks, who have email addresses, and who have phone numbers.

This drop-down list provides a number of useful options for restricting which voters on this contact list will be displayed.

4. “Printable Questionnaire” – Clicking this link will cause a separate window to pop up that has the questionnaire in a form that is meant to be printed out.
5. “Printable Call List” – Selecting this option will cause a separate window to pop up with a printable version of the contacts that are currently visible on the Contact List. This list can then be used to record the results of a neighborhood canvas, or to use when not working online. You can later recall this Contact List in Advokit and transcribe the results of your efforts. This printed list will reflect the sorting and display restrictions of the on-screen contact list. So if you want your printed list to be sorted odd/even by address, for example, be sure to select that option in the contact list display first.
6. “Export Call List” – Selecting this option will cause a CSV file (Comma Separated Value – a common computer data exchange format that can be opened in a database or spreadsheet program) to be created for download to your computer. You can open this file in a spreadsheet or other data management program on your computer.



After clicking on this option you will see a “pop-up” window as pictured above. You can use this link to download the data.

Finally, beneath the Contact list are a series of buttons which allow you to control the Contact List itself.

Set ALL Contact Results to	<input type="text"/>
Rename this contact list to	<input type="text" value="Contact list #1"/>
<input type="button" value="Delete this contact list"/>	

- Set ALL Contact Results to – use this option to change the Contact Status of all the voters on the entire contact list at one pass. Simply open the pull down, select the desired result and click on the “Set All Contact...” button. **Use this with caution** – as with almost all actions in Advokit, it is not undoable, and any previous contact status information will be overwritten.
- Rename this contact list – You can name your contact list any way that you would like to. Some examples: “My Friends”, “Saturday Walk List”, “Weekend Phone Calls” etc.
- Delete this contact list – This is just like it sounds – the entire contact list will disappear. *This is not undoable, so use with caution! Of course the voters will not be deleted from the system, they will simply be returned to the team’s voter pool. You should check with your team leader before deleting a contact list. Remember – your campaign needs these voters to be contacted!*

Using a Contact Sheet to record your contacts with voters

In a voter contact, you may be asking the voter one or more questions being put to them by the campaign and recording the results, or simply conveying some communication, such as “Today is election day – Please Vote!” You may also want to initiate some action by the campaign as a result of this contact, such as to have the campaign office send voter registration forms to the voter, or to schedule a ride to the polls. These functions are all provided by the Contact Sheet. However if you are only recording whether or not you contacted a voter, you can do this more quickly on the contact list (see previous section).

Every voter on your Contact List has a contact sheet. **You get to the Contact sheet by clicking on the voter’s name (blue link) on the Contact List.**

Advokit
Tools for a New American Politics

Welcome, Ruth Davies

MY JOBS
Voter Contact (AD 217)

CONTACT LISTS
(32 total, 200 max)
Contact list #1
Add 10 voters to new list

SEARCH VOTERS
advanced search

MY ACCOUNT
Edit Profile
Set Password
Logout

My Campaign Volunteer Now

Contact sheet for George Fontaine

Back to contact list < Prev Voter Next Voter >

GEORGE FONTAINE

Home phone: Office phone: Email:
1387 Main Street, Worcester, MA 01603 Gender: M Age: 24 Party: D

If contact was attempted but not completed, what happened? Record Attempt
 Try again Bad number Giving up Do not disturb

If contact was successful, enter responses below and click "Record Answers" at the bottom

Worcester Votes 2004 Field Operation Questionnaire

Supporter Identification script

1. Do you plan to vote on November 2nd?
 Yes No

Record Answers Clear Answers

Add a followup comment Add a Task

Add Comment
(No previous followup comments)

Category: undefined
Title:
Description:
Priority: 1 - Must complete
Need by:

Add Task

No tasks defined for this voter

Last result: No information

powered by **Advokit**

Let's take a closer look at this screen, starting from the top. First you will find controls for quickly navigating from one voter to the next, or back to the contact sheet.

[Back to contact list](#)





[< Prev Voter](#) [Next Voter >](#)



- Back to Contact List – this will return you to the contact list that this voter is listed on.
- Prev / Next Voter – This will take you to the previous or next voter on the contact list that this voter is on. The order will be the same as the Contact List.

Next we have some essential information about this voter: name address, gender, age (if available), etc.






GEORGE FONTAINE    		
Home phone: <input type="text"/>	Office phone: <input type="text"/>	Email: <input type="text"/>
1387 Main Street, Worcester, MA 01603		Gender: M Age: 24 Party: D

If we have home or office phone numbers, or an email address they will be displayed. These fields are editable, so you can enter new phone numbers or an email address, or modify them. When you change the information in any of these fields, a pair of buttons will appear enabling you to save or cancel your changes.

GEORGE FONTAINE    		
Home phone: <input type="text" value="513-111-222"/>	Office phone: <input type="text"/>	Email: <input type="text"/>  
1387 Main Street, Worcester, MA 01603		Gender: M Age: 24 Party: D

Click the  button to save; or click the  button to cancel.

At the upper-right there is a row of up to five buttons:

-  Edit Voter ~ Basic – If basic voter editing is enabled for your campaign, you will be able to click this to bring up a screen where you can edit the name, phone numbers, email and gender of this voter. You may or may not be able to edit the voter's address from this screen, depending on configuration.
-  Edit Voter ~ Advanced – If advanced voter editing is enabled for your campaign, you will be able to edit all the information in the system about this voter. As with basic voter editing, address editing may or may not be enabled.
-  Recruit Activist – Advokit facilitates a “viral” model of organizing. Clicking on the key button allows you to create an account in Advokit for this. So when you ask someone if they would like to volunteer – you can give them an account in Advokit right away. When you do, Advokit will send an email to your team leader(s) with details about the newly recruited activist so that they can create a job and assign that person to it.. However you should also contact your team leader directly to tell them about the recruited activist to ensure that action is taken promptly to activate your new recruit. *Note that giving someone an account is not the same as giving them a job. The new recruit will not be able to do any work in Advokit until a team leader assigns him or her to a job.*
-  Map this address - Clicking on this button will bring you to a MapQuest map page with the voter's address mapped on it. *(Note: when you click on this link the browser will be directed to the MapQuest site. Use your browsers “back” button to return to Advokit.)*
-  Remove Voter - Clicking this button will remove the voter from this contact list. *(The voter data will not be lost – the voter will simply be returned to the team's voter pool. You should check with your team leader about campaign policy for removing voters from contact lists.)*

The next two sections of the contact sheet are probably the ones that you will be paying the most attention to. This is where you will record the results of your contact with the voter. When you attempt to contact a voter, there are essentially three kinds of results you can have:

- Contact incomplete – need to try again. This may be because you need to call back at another time, or perhaps because you had a bad phone number and you need to look up the correct phone number and try calling again.
- Contact failed – do not try again. Perhaps you tried multiple times to contact this voter and have not been able to get an interview, so you have decided to give up. Or if the voter asked not to be interviewed, you should record that this person does not want to be disturbed..
- Contact complete – you’re done with this voter, at least for now. You have been able to interview this voter and record answers to the questions that you were instructed to ask.

The next two sections of the contact sheet are designed to record these contact results.

If contact was attempted but not completed, what happened? Record Attempt

Try again Bad number Giving up Do not disturb

If contact was successful, enter responses below and click "Record Answers" at the bottom

Worcester Votes 2004 Field Operation Questionnaire

Supporter Identification script

1. Do you plan to vote on November 2nd?

Yes No

Record Answers Clear Answers

The first section (top) is where you record contact attempts that did not result in a completed interview with the voter. *If you have successfully interviewed the voter, skip to the next section.* Select the contact status description that best matches how you want to proceed with this contact: ‘Try Again’, ‘Bad number’, ‘Giving Up’ or ‘Do not disturb’. After making your choice, click on ‘Record Attempt’ to save it.

After saving, a box will appear with some information about that contact result:

Earlier contact attempt, on Wednesday, June 07 at 15:21, was recorded as "Try again"

If new contact was attempted but not completed, what happened? Record Attempt

Try again Bad number Giving up Do not disturb

The second section (bottom) is used to record responses to a voter questionnaire from a successful interview, and it will appear different for each campaign, perhaps for different voter contact jobs within the campaign, and even possibly for different voters. In this example, we show just one question, expecting a simple yes or no answer.

Record the voter’s responses for each question, and then click on the ‘Record Answers’ button to save them to the system.

Once you have filled out and recorded a questionnaire, it will be replaced by something like this:

1 previous instances of questionnaire **Worcester Votes 2004 Field Operation Questionnaire**
Questionnaire results from 06/07/2006 15:32 [MODIFY RESULTS](#)

If you need to revisit this questionnaire to change any responses, you can click on ‘modify results’. You can also simply review the recorded responses by clicking on ‘Questionnaire results from...’

Once you have filled out a Questionnaire the voter’s status will automatically change to “Contacted” on the contact list.

Other contact sheet functions

At the bottom of the contact sheet are two additional forms: ‘Add task’ and ‘Add followup comment’.

Add a followup comment

Doesn't want to be called - says we can count on his support

(No previous followup comments)

Add a Task

Category

Title

Description

Priority

Need by

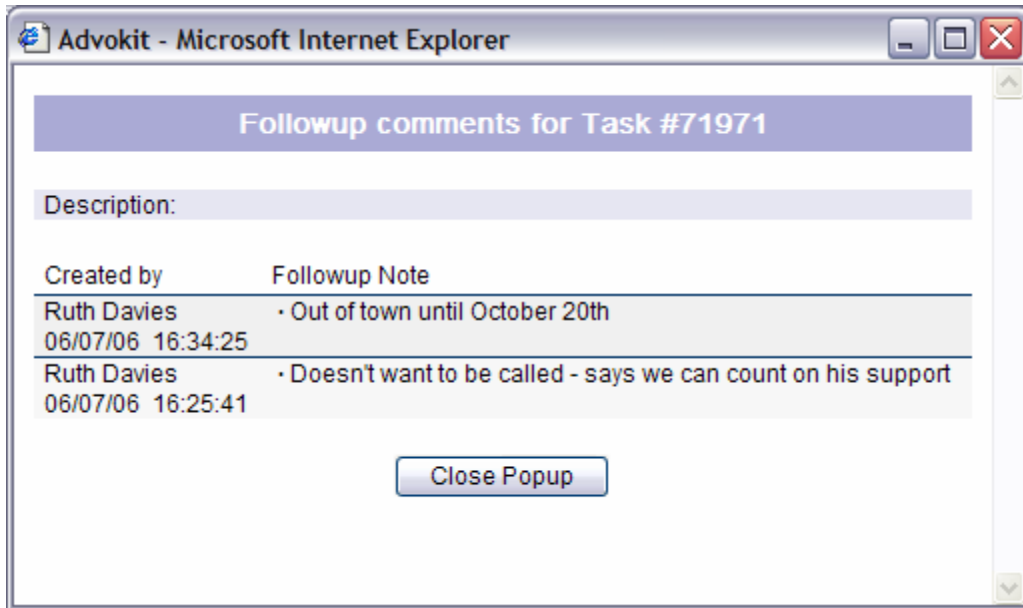
No tasks defined for this voter

Use the **Add task** form to create a request for some kind of action from the campaign. A typical example would be, as shown here, to have some literature sent to the voter. Your campaign will instruct you as to the kinds of task you can create and how they should be used in the campaign. After creating a task, a summary of that task will appear at the bottom of the page as shown below. You can modify the task by clicking on the task’s title, or remove it by clicking on the **X** button.

1 tasks defined for this voter

Title	Category	Priority	Need By	Completed?	
Voter Reg Forms	Literature Mailing	1 - Must complete	08/12/2006	No	X
Please send 2-dozen voter registration forms					

Use the **Add followup comment** form to take notes that you can later review. Clicking on 'Show previous followup comments' will bring up a popup window with the comments listed, as in this example.



Appendix A: Adding voters to contact lists by searching the voter database

Why would we want to search for voters, when we can just create contact lists automatically? We can lump various approaches and philosophies for voter outreach into two categories. We'll call these "voter targeting" and "friend to friend" (or "neighbor to neighbor").

- "Voter targeting" has campaign activists contacting voters within selected segments of the voter population by phone, door-knocking, etc. Because the voters are chosen for you, you probably will not know most or even any the people that you are contacting. In voter targeting, there is no reason to search the voter file for particular voters. Rather, the campaign will have defined a target voter population for you, and when you click on the 'Add 10 voters to new list' or 'Add 10 voters to [a contact list name]', you will receive a batch of those voters to work with.
- "Friend to friend", on the other hand relies upon social affinity within the voter population. You will create your contact lists by searching for people that you know, or who live near you.

Both approaches are useful, and can and often should be used simultaneously. We have previously discussed how to create a contact list automatically.

There is a little more involved in searching for particular people and adding them to a contact list. Advokit provides 'simple' and 'advanced' voter search options. The results will look the same. For a simple search, try typing "smith" into the text box in the 'Search Voters' section of the sidebar, and the click 'Go'.



To perform a more precise search, click on the 'advanced search' link. You will now see a screen where you can enter specific criteria for name, address, etc.

Advanced Voter Search

Fill in the desired values, then click the button below. Partial matching is performed. For example, "John" will match "Johnny" or "Johnson".

Last name <input type="text"/>	First name <input type="text"/> More choices
Street number <input type="text"/>	Street name <input type="text"/>
City <input type="text"/>	State <input type="text" value="(any state)"/>
Zip <input type="text"/>	Phone <input type="text"/>
Has email <input type="checkbox"/>	Has phone <input type="checkbox"/>

Click on the 'More choices' link to see additional fields that can be searched.

Either way, assuming you have some Smith's in your voter pool, you will now see a screen that looks something like this. Remember that the Quick Search will look for matching values in the first name, last name, city, and street. And if you don't put anything in the box it will return *all* voters in your voter pool.

Browse Voters

Group by household? yes no

☐	Address ▲	City	State	Zip	Name	Age	
<input type="checkbox"/>	62 Drexel Street	Worcester, MA	01602		Smith, Marc	72	
<input type="checkbox"/>	62 Drexel Street	Worcester, MA	01602		Smith, Susan	67	
<input type="checkbox"/>	2 Edgewood Street	Worcester, MA	01602		Smith, John	39	
<input type="checkbox"/>	24 Edgewood Street # 3	Worcester, MA	01602		Smith, Andrew	40	
<input type="checkbox"/>	39 First Street # A708	Worcester, MA	01602		Smith, Arline	70	
<input checked="" type="checkbox"/>	38 Flagg Street	Worcester, MA	01602		Smith, Jeralyn	50	
<input checked="" type="checkbox"/>	38 Flagg Street	Worcester, MA	01602		Smith, Michael	49	
<input type="checkbox"/>	19 Hartshorn Avenue # 1	Worcester, MA	01602		Smith, Jeffrey	50	
<input type="checkbox"/>	258 Highland Street	Worcester, MA	01602		Smith-Bussey, Brent	32	
<input type="checkbox"/>	291 June Street	Worcester, MA	01602		Smith, Olive	83	
<input type="checkbox"/>	291 June Street	Worcester, MA	01602		Smith, Robert	83	
<input type="checkbox"/>	156 May Street # 1	Worcester, MA	01602		Smith, Adria	74	
<input checked="" type="checkbox"/>	496 Mill Street	Worcester, MA	01602		Smith, Julie	30	
<input checked="" type="checkbox"/>	496 Mill Street	Worcester, MA	01602		Smith, Matthew	35	
<input checked="" type="checkbox"/>	569 Mill Street	Worcester, MA	01602		Smith, Joseph	46	
<input checked="" type="checkbox"/>	569 Mill Street	Worcester, MA	01602		Smith, Mary	52	
<input checked="" type="checkbox"/>	77 Moore Avenue	Worcester, MA	01602		Smith, Carolyn	53	
<input checked="" type="checkbox"/>	77 Moore Avenue	Worcester, MA	01602		Smith, Christopher	21	
<input checked="" type="checkbox"/>	77 Moore Avenue	Worcester, MA	01602		Smith, Jeffrey	54	
<input checked="" type="checkbox"/>	77 Moore Avenue	Worcester, MA	01602		Smith, Jennifer	25	

to

-- OR --

Name the new list

(advanced)

◀ First
◀ Prev 20
1
2
3
4
5
6
7
Next 20 ▶
▶ Last ▶▶

Last result: 20 records out of 494

This screen displays up to twenty voters at a time. That’s usually not a problem if you’re being reasonably careful in choosing your search terms. The whole point of a search is to let Advokit find particular voters for you! However if more than twenty voters were found, a navigation bar will appear at the bottom of the page which will allow you to navigate through a longer list of voters. *(Hint: you can see the total number of voters found by this search in the ‘Last result:’ message in the page footer. In this case 494 Smiths were found!)*

Using the results of a search to populate a contact list

Once you have performed a search you will likely want to add one or more of the voters found to a Contact List. *(Remember, if you actually want to record data about a voter, they must be on a contact list.)* The search results page has a number of features to help with this process. Let’s take a look.

<input type="checkbox"/>	39 First Street # A708	Worcester, MA 01602	Smith, Arline	70	
<input type="checkbox"/>	38 Flagg Street	Worcester, MA 01602	Smith, Jeralyn	50	
<input type="checkbox"/>	38 Flagg Street	Worcester, MA 01602	Smith, Michael	49	
<input type="checkbox"/>	19 Hartshorn Avenue # 1	Worcester, MA 01602	Smith, Jeffrey	50	
<input type="checkbox"/>	258 Highland Street	Worcester, MA 01602	Smith-Busseey, Brent	32	
<input type="checkbox"/>	291 June Street	Worcester, MA 01602	Smith, Olive	83	
<input type="checkbox"/>	291 June Street	Worcester, MA 01602	Smith, Robert	83	
<input type="checkbox"/>	156 May Street # 1	Worcester, MA 01602	Smith, Adria	74	

Once a voter is on a contact list they are not accessible to others. However the default search shows all matching voters in your pool – whether or not they are on a contact list. *(That way you can know if the particular voter you are looking for is in the voter database. If they aren’t, then you can add them. We will look at that in detail later.)* Look at the check boxes at the left of each row. These check boxes will let you know if the Voter is already “taken”. Grayed out boxes mean they are already on a Contact List (Note: They could be on a Contact List of yours – but since they cannot be on two Contact Lists at the same time they will still be grayed out).

A simple way to add people to a contact list is to click their check boxes.

<input type="checkbox"/>	39 First Street # A708	Worcester, MA 01602	Smith, Arline	70	
<input type="checkbox"/>	38 Flagg Street	Worcester, MA 01602	Smith, Jeralyn	50	
<input type="checkbox"/>	38 Flagg Street	Worcester, MA 01602	Smith, Michael	49	
<input type="checkbox"/>	19 Hartshorn Avenue # 1	Worcester, MA 01602	Smith, Jeffrey	50	
<input type="checkbox"/>	258 Highland Street	Worcester, MA 01602	Smith-Busseey, Brent	32	
<input checked="" type="checkbox"/>	291 June Street	Worcester, MA 01602	Smith, Olive	83	
<input checked="" type="checkbox"/>	291 June Street	Worcester, MA 01602	Smith, Robert	83	
<input type="checkbox"/>	156 May Street # 1	Worcester, MA 01602	Smith, Adria	74	

Then go to the bottom of the page where you will see something like this –

to

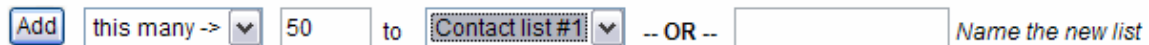
 -- OR --

 Name the new list

3
1
2


- 1) You can select an existing contact list to add these voters to by pulling down a list from the drop-down box.
- 2) You can create a new list by simply typing in a name you would like to use for it in the “Name the new list” box.
- 3) In either case press the “Add” button to add the selected voters to the list that you have specified.

In some cases you will want to add more voters than you can see on the search results screen to a contact list. This is common if you want to contact a batch of voters in a particular geographic area (such as those who live on a particular street, share a zip code etc.). To add more voters than you can see at one time, do the following –



Select “this many ->” from the drop down next to the “Add” button. This will activate the field next to it which will have a number displayed in it. This number will correspond to either the total number of voters returned by the search, or the maximum number of voters you are allowed to add to all of your Contact Lists (this is a setting defined by the campaign you are working for). If you want fewer voters, you can adjust this number. Once you have selected the number you want, either choose an existing contact list to add them to, or type a name for a new contact list, then click on “Add”.

Voters in a household

Something you may have thought of is that by searching on a last name, we may not be finding everyone in a household, and indeed that is frequently true. You could search by address from the advanced search page, but there is a better way. If you look at the search results above, you will see ‘Smith-Bussey, Brent’ at 258 Highland Street. If we click on the  button at the far right of the row, Advokit will show all the voters who share that address. So if you know one person at an address, you can just search for that person, and then find everyone else at that address with one additional click.

View Voters in Household 						
Show all voters visible at this level 						
Cancel view of household						
<input type="checkbox"/>	Address 	City	State	Zip	Name	Age
<input checked="" type="checkbox"/>	258 Highland Street	Worcester, MA	01602		Rodriguez, Marshall	33
<input checked="" type="checkbox"/>	258 Highland Street	Worcester, MA	01602		Smith-Bussey, Brent	32
<input checked="" type="checkbox"/>	258 Highland Street	Worcester, MA	01602		Sweet, Julia	24

You will also notice in this screenshot where it says “Show all voters visible at this level”, that there are several options for restricting which voters are displayed from the search results. For example, if you only want to see voters for whom we have a phone number, you may select that option. Or if you don’t want to see voters who are already on a contact list, that is another option.

You can continue browsing through the list of voters and selecting and more voters to add to existing or new contact lists. And you can perform new searches and add voters in the same way.

Appendix B: Adding a new voter to the database

It is possible, or depending on the circumstances of your campaign even likely, that a voter you are searching for is not in the database. You may need to add a voter in this case. Advokit provides two procedures for adding voters, accessed by the two links you see at the bottom of the voter search results page.

[add new voter](#) (advanced)

The ‘add new voter’ option is the safer of the two since it requires that you first eliminate the possibility that your voter isn’t “lurking” in a part of the voter database that is outside of the voter pool that you are drawing from and therefore hidden from normal searches. Unless you are instructed by your campaign to use the ‘advanced’ mode of adding voters, you should assume that the safer ‘add new voter’ method is the correct one to use.

After clicking ‘add new voter’ you will see a search form not unlike the advanced voter search form described earlier for finding voters to put on a contact list.

Last Name	<input type="text" value="smith"/>		
Street Address	<input type="text" value="salisbury"/>		
City	<input type="text"/>	State	<input type="text" value="(choose state)"/>
Zip	<input type="text"/>	Home Phone	<input type="text"/>
<input type="button" value="Clear Form"/>		<input type="button" value="Find Voters"/>	

Fill in enough information to narrow down to one or a few voters. A full or partial last name will usually be sufficient unless it is a large database, in which case including the city and/or part of the address would be a good idea. After entering your search text, click “Find Voters”. In the example above we are checking for a voter named John Smith, at 545 Salisbury Street. We can enter “smith” in the ‘Last Name’ field, and “salisbury” in the street address field. After clicking the “Find Voters” button we might see something like this:

9 voters found

Last Name	First Name	Address	City	State	Zip	Phone
Smith	Andrew	500 Salisbury Street	Worcester	MA	01609	
Smith	Christopher	500 Salisbury Street	Worcester	MA	01609	
Smith	Jocelyn	500 Salisbury Street	Worcester	MA	01609	
Smith	Justin	500 Salisbury Street	Worcester	MA	01609	
Smith	Kevin	500 Salisbury Street	Worcester	MA	01609	
Smith	Kimberly	500 Salisbury Street	Worcester	MA	01609	
Smith	Lindsey	500 Salisbury Street	Worcester	MA	01609	
Smith	Vanessa	500 Salisbury Street	Worcester	MA	01609	
Smith	Marsha	545 Salisbury Street # 309	Worcester	MA	01609	

If your voter does not appear in this list, you may

In this example, we have not found “John Smith at 545 Salisbury Street. So we could add him now. To do so, we would click “Enter a new voter record”, after which we will see the “Add voter” page:

(Only a fraction of this screen is shown here) You can now enter information about this new voter: name, phone numbers, address, gender, etc. **Your campaign will need to instruct you as to what information is needed to be entered when adding a voter to the database.**

If you chose to go to the “Advanced” Add Voter screen you would bypass the search process and see this screen immediately.

When finished entering information for the voter, click the “Add Voter” button at the bottom of the page.

Appendix C: Editing a Voter Record

Depending on your campaign’s configuration, you may be able to edit voter information, in either ‘basic’ or ‘advanced’ modes. The only difference is what data you can edit – on the “advanced” screen you can edit all of the voter’s data – on the “basic” screen only a subset. You can access the edit screens from one of two places, on a Contact List or a Contact Sheet. See the section above about these pages where these buttons are described.

2510 BANCROFT WAY BERKELEY, CA 94704	510-883-1426	Y	I	
WEISS, KRISTEN - age 21				
2510 BANCROFT WAY BERKELEY, CA 94704	408-931-7583	Y	D	
DOSHI, LEKHA - age 22				
2510 BANCROFT WAY BERKELEY, CA 94704	510-548-5540	Y	G	
LEE, YUN - age 24				
2510 BANCROFT WAY BERKELEY, CA 94704				

To get to the basic edit screen, click on the edit with the yellow “pencil”. To get to the advanced edit screen, click on the edit icon with the red “pencil”.

The Basic Edit Screen

Edit voter

Salutation	<input type="text"/>	First	<input type="text" value="George"/>	M. Initial	<input type="text" value="P"/>
		Last	<input type="text" value="Fontaine"/>	Suffix	<input type="text" value="IV"/>
Address	<input type="text" value="1387 Main Street"/>				
City	<input type="text" value="Worcester"/>	State	<input type="text" value="Massachusetts"/>		
Zip	<input type="text" value="01603"/>				
County	<input type="text" value="choose..."/>			Zip+4	<input type="text"/>
Home	<input type="text"/>	Office	<input type="text"/>	Mobile	<input type="text"/>
Gender	<input type="text" value="Male"/>	Birthdate	<input type="text" value="12/22/1981"/>		
Email	<input type="text"/>				
Alt Email	<input type="text"/>				

This is a pretty straightforward data entry screen. You should note a couple of things –

- 1) Disabled address editing - Because of data integrity issues, your campaign may decide to block editing of voter's addresses. In this case the address fields would be visible, but not able to be edited.
- 2) County: choose – Used to select a County for this voter. After selecting a state in the “State” menu, click “choose” to the right of the “County” field to bring up a list of Counties. *You cannot simply type in the name of the county!*
- 3) Calendar Icon – Click the Calendar Icon to bring up a calendar from which you can click the appropriate date for their birthday. Alternatively you can simply type in the date.
- 4) Save / Reset Form – Select the Edit Voter button to save your changes. Selecting Reset Form will return the values in the fields to their original values – useful if you have made an error during data entry. *NOTE: If you do not wish to save the information on this form simply click on your browser's back button or select one of the choices from the menu on the left.*

Advanced Edit Screen

The Advanced Edit Screen works the same way as the Basic Edit screen but with much more data available to be edited. In fact, it looks just like the Add Voter Screen shown earlier. You can talk to your Team Leader to find out what all the data fields mean and which you may edit.

The End!

And that is it. There are a few other screens and features we did not look at in this guide, but this should create a strong foundation for your understanding and ability to work with Advokit. You should feel comfortable going back into the system and exploring on your own. Have fun, and do good work!