Instruction Manual

Field operations, campaign management, and safe data handling

A role-based guide for volunteers, Core Leadership, and Admins using WardWalk on phone, tablet, or computer.

EDITION	Version 2.0 | August 2026
USE	Website-ready and shareable PDF
SCOPE	Features vary by role, package, and enabled modules

Screenshots use sanitized demo data. Follow your campaign's current instructions when they differ from an example in this manual.

Contents

1. Start Here

WardWalk brings field operations, campaign information, schedules, reports, and selected campaign-management tools into one role-based workspace.

Use this manual in three ways:

- **New volunteer:** read sections 1 through 8, then use the Volunteer Quick Start in section 22.
- **Core Leadership:** also read sections 9 through 15 for scheduling, reports, inventory, and campaign materials.
- **Admin:** read the full manual, especially sections 16 through 21 for setup, users, optional modules, and data handling.

Before field work begins, confirm that you have your own authorized account, the correct role, an assigned walk list or campaign task, and your campaign's instructions for collecting and handling information.

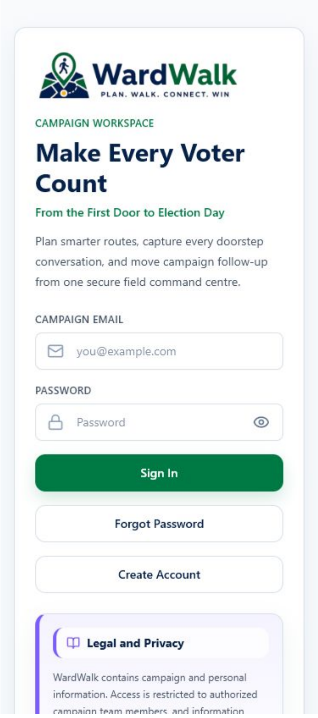
> ***Important:*** *Never share an account or password. Only collect information needed for authorized campaign work, and only record phone or email consent when the resident clearly agrees.*

2. Get Access And Sign In

An Admin must authorize your email address before you create an account.

1. Open the WardWalk link supplied by your campaign.
2. Select **Create Account** if this is your first visit.
3. Use the same email address the Admin authorized for you.
4. Enter your display name and create a strong password.
5. Read the compliance statement and check the agreement box.
6. Complete email confirmation if it is enabled for your campaign.
7. Return to WardWalk and select **Sign In**.

If you already have an account, sign in directly. Use **Forgot Password** if you cannot remember your password.



WardWalk sign-in on a phone. Illustrative screen with sanitized demo data.

> ***Account safety:*** *Each person must use their own account. If your email is not recognized or the wrong campaign opens, stop and contact your campaign Admin.*

3. Install WardWalk On A Phone

WardWalk is a Progressive Web App. You can add it to your home screen without an app-store download.

iPhone Or iPad

1. Open WardWalk in **Safari**.
2. Tap the **Share** button.
3. Scroll down and tap **Add to Home Screen**.
4. Tap **Add**.
5. Open WardWalk from the new home-screen icon.

Android

1. Open WardWalk in **Chrome**.
2. Tap the browser menu.
3. Tap **Install app** or **Add to Home screen**.
4. Confirm the installation.
5. Open WardWalk from the new home-screen icon.

After an app update or role change, refresh WardWalk or close and reopen the installed app. Keep your device locked when it is not in use.

4. Understand Roles And Modules

Your role controls what you can view and change. Your campaign package, enabled modules, and any specific capabilities can limit access further.

Workflow	Volunteer	Core Leadership	Admin
Field Command Centre and visit logging	Use assigned and permitted field tools	Use field tools and manage permitted field work	Full campaign field access
Calendar, assignments, and resources	View permitted items and respond where enabled	Create and manage non-Admin items	Manage all visibility levels
Reports and exports	Limited role-appropriate access	Leadership reports and exports	Full authorized reporting access
Campaign setup, users, imports, and off-boarding	No	No	Admin only
Materials & Social	No	Yes, when enabled	Yes, when enabled
Communications Centre	No	No	Admin only, when enabled

Volunteer

Use this role for canvassers and team members who need field workflows without campaign-administration authority. Volunteers can use permitted maps, visits, walk lists, assignments, documents, resources, and action tools.

Core Leadership

Use this role for campaign leaders who coordinate field work, schedules, resources, reporting, inventory, events, and campaign materials without Admin-only user or data-import authority.

Admin

Admins manage campaign setup, territory, authorized imports, users, permissions, full exports, and Admin-only modules. Admin access still depends on the modules enabled for the campaign.

> *Use the least access a person needs. A person who only canvasses should normally be a Volunteer, not an Admin.*

5. Navigate The Workspace

WardWalk is organized into page groups. Select a page from the workspace navigation; on a phone, open the navigation menu first.

- **Campaign Operations:** Field Command Centre, Calendar & Assignments, Resources.
- **Campaign Insight:** Dashboard, Data & Reports.

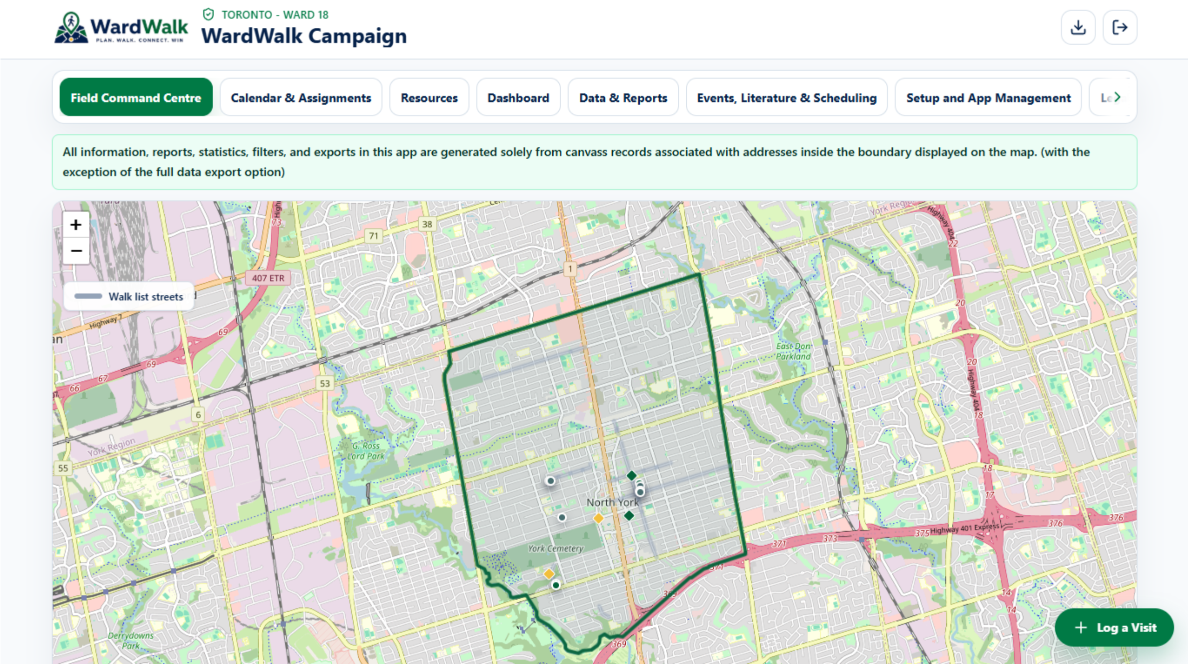
- **Campaign Management:** Literature & Signage Inventory, Events & Scheduling, Campaign Launch Readiness, Operations & User Setup.
- **Campaign Website:** Website Setup, when the module is enabled.
- **Campaign Communications:** Communications Centre, when enabled and available to an Admin.
- **Campaign Studio:** Materials & Social, when enabled for Admin or Core Leadership.
- **Campaign Legal:** Legal & Privacy.

Every workspace page includes a **Help with this page** panel. Open it for recommended steps, role notes, safety boundaries, frequently asked questions, and the WardWalk Assistant.

If a page is missing, first check whether your role and campaign package include it. Contact an Admin if you believe your access is incorrect.

6. Use The Field Command Centre

The Field Command Centre combines the campaign map, walk lists, volunteer support, signage, and saved visits.



Field Command Centre with sanitized demo data. Illustrative screen.

Begin Field Work

1. Open **Field Command Centre**.
2. Open your assigned walk list, or focus the map on the area your campaign assigned.
3. Review the map-display options and visible address information.
4. Select an address or house row to open **Log a Visit** with the address prefilled.
5. Save the outcome and confirm the map or visit list reflects the update.

Use **Search Address** to find a saved visit by street number, street name, or resident information available to your role. Filters can narrow results by status or canvasser.

Map And Location Safety

- Device location is optional and helps orient the map; it is not proof that a residence was visited.
- Individual addresses may appear only at a closer zoom or inside a selected map area.
- Map, list, walk-list, and report counts should describe the same campaign-scoped records.
- Do not take screenshots that expose resident names, addresses, notes, or campaign documents.

Leadership Map Actions

Core Leadership and Admins may be able to select houses in a map area, create a walk list, assign team members, or apply permitted bulk actions. Always review the selected count and action summary before confirming.

7. Use Walk Lists And Offline Field Mode

Walk lists divide campaign territory into manageable routes and keep assignments separate from visit outcomes.

Open And Work A Walk List

1. Open **Walk Lists** from the Field Command Centre.
2. Select the list assigned to you.
3. Review its houses or streets and any event or assignment instructions.
4. Open one address at a time and log the result.
5. Return to the list and confirm progress updated.

A house can be assigned, reserved, released, visited, no-answer, follow-up, or still-to-knock. Assignment status and visit status are separate and should not overwrite each other.

Prepare For Unreliable Service

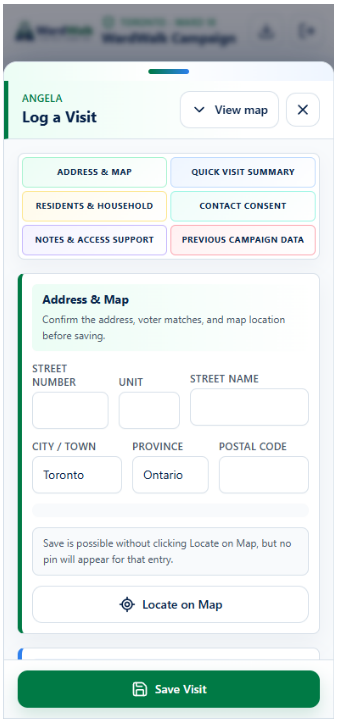
If **Offline Field Mode** is enabled:

1. While online, open the assigned walk list and select **Prepare**.
2. Wait for WardWalk to confirm that the permitted field package is ready.
3. Lock or unlock the package only as directed by the campaign.
4. Work through the prepared addresses during poor connectivity.
5. Reconnect and select **Sync** before removing the offline package.

Do not sign out, switch campaigns, or remove an offline package while unsynced work remains. If sync reports an error, keep the package and contact your Admin.

8. Log A Visit

Use **Log a Visit** for doorstep activity and household follow-up. Selecting an address from the map or a walk list is preferred because the address is filled in consistently.



Log a Visit on a phone with sanitized demo data. Illustrative screen.

Record The Visit

1. Confirm the street number, street name, and unit when applicable.
2. Confirm or locate the address on the map if the workflow asks you to do so.
3. Record the visit outcome.
4. Enter only information the resident willingly provides and the campaign is authorized to collect.
5. Record literature, signage, volunteer interest, transportation, or other follow-up only when applicable.
6. Review the form and select **Save Visit** once.
7. Wait for the success confirmation before moving to the next address.

Common Outcomes

- **No one home:** Mark the no-answer option, add only useful operational notes, and save.
- **Follow-up needed:** Select the follow-up option, choose a reason when available, and add a short action-focused note.
- **Do not contact:** Record this only when requested or required by campaign policy. It must be respected in future outreach.
- **Visited:** Leave no-answer off and record only the details the resident shared.

Phone And Email Consent

Only check phone or email consent after the resident clearly agrees. Use the **IMPORTANT** link beside the consent fields to open the campaign-approved wording.

Suggested wording:

> *Can we use your phone number and/or email address to contact you about this election, this candidate, campaign updates, events, volunteer opportunities, voting information, and reminders? You can unsubscribe or ask us to stop contacting you at any time.*

If consent is unclear, do not check the box. A phone number or email address by itself is not proof of consent.

Avoid Duplicate Or Conflicting Saves

WardWalk checks for existing records at the same normalized address. If a warning appears, open the existing record or follow the on-screen resolution steps instead of creating a second household record.

9. Edit Or Delete A Visit

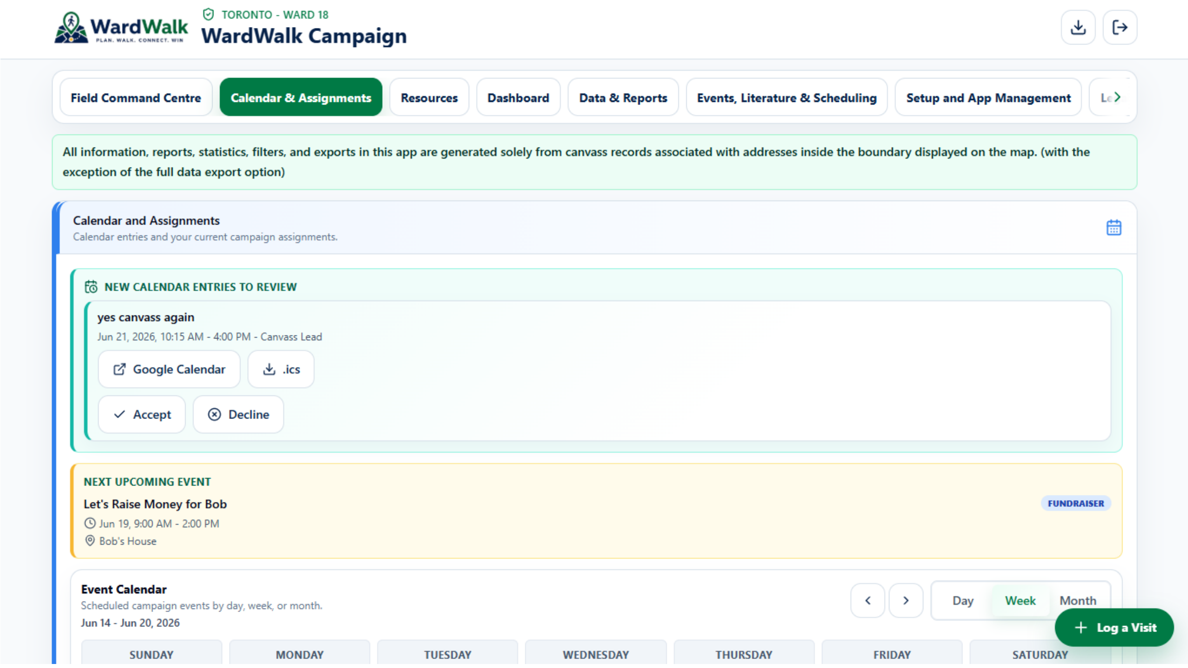
1. Find the visit from the map, walk list, or **Visits** listing.
2. Open the saved record.
3. Make the smallest necessary correction.
4. Save and confirm the updated outcome.

Admins can delete campaign visits. Other users can delete only visits they recorded when that action is available. Deleting is not a routine correction method: use edit when the visit is valid but needs an update.

Never delete a visit to change an assignment status. Assignment and visit records have different purposes.

10. Calendar And Assignments

Use **Calendar & Assignments** to review events and the work available to you.



Calendar and assignments with sanitized demo data. Illustrative screen.

1. Review the next upcoming event first.
2. Switch between day, week, and month views as needed.
3. Open an event or assignment to review the time, location, role, walk list, and campaign instructions.
4. Respond to an assignment when a response control is available.

Event visibility may be Volunteer, Core Leadership, or Admin. You may be able to view an event without permission to edit it.

11. Resources And The WardWalk Assistant

The **Resources** page keeps campaign-approved information inside the workspace.

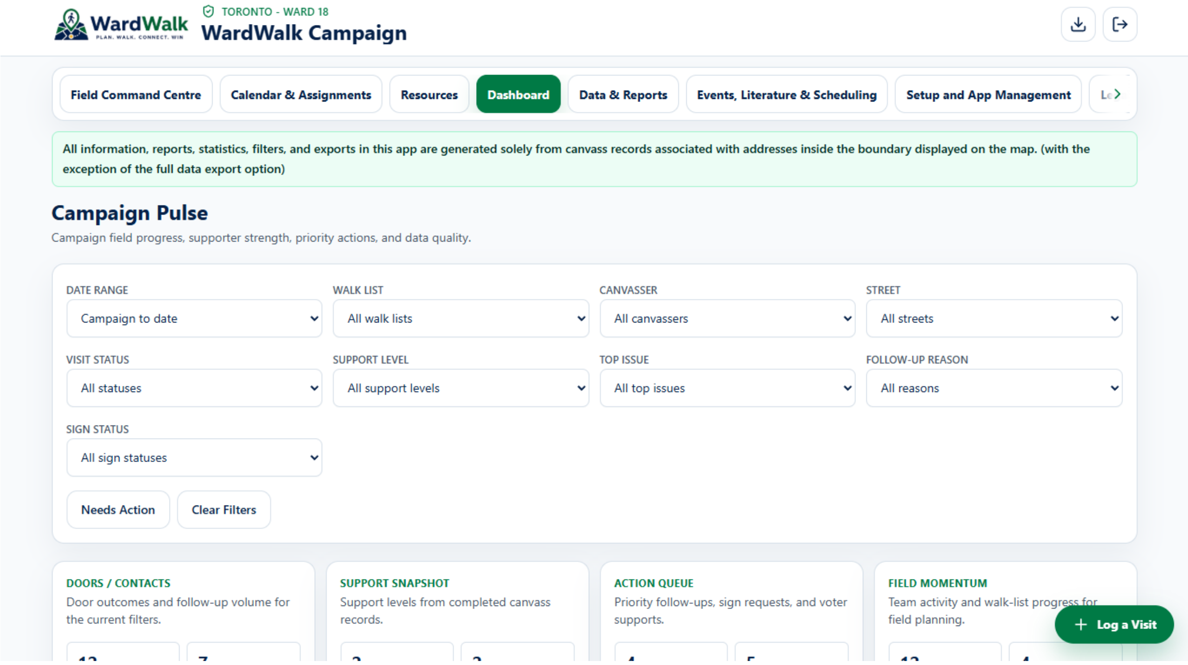
- **Campaign Documents:** scripts, FAQs, policies, messaging, and reference files uploaded for your role.
- **External Campaign Resources:** approved websites, forms, municipal information, and campaign links.
- **WardWalk Assistant:** help with the current page and questions grounded in approved campaign material available to your role.

The Assistant can explain workflows and summarize approved material. It cannot publish, send, delete, import, change users or permissions, establish consent, or complete another consequential action.

Do not put voter lists, recipient lists, resident names, contact details, private notes, passwords, tokens, or unnecessary personal information into an Assistant question.

12. Dashboard

Use the **Dashboard** for a high-level view of campaign progress, field activity, follow-up priorities, and data-quality needs.



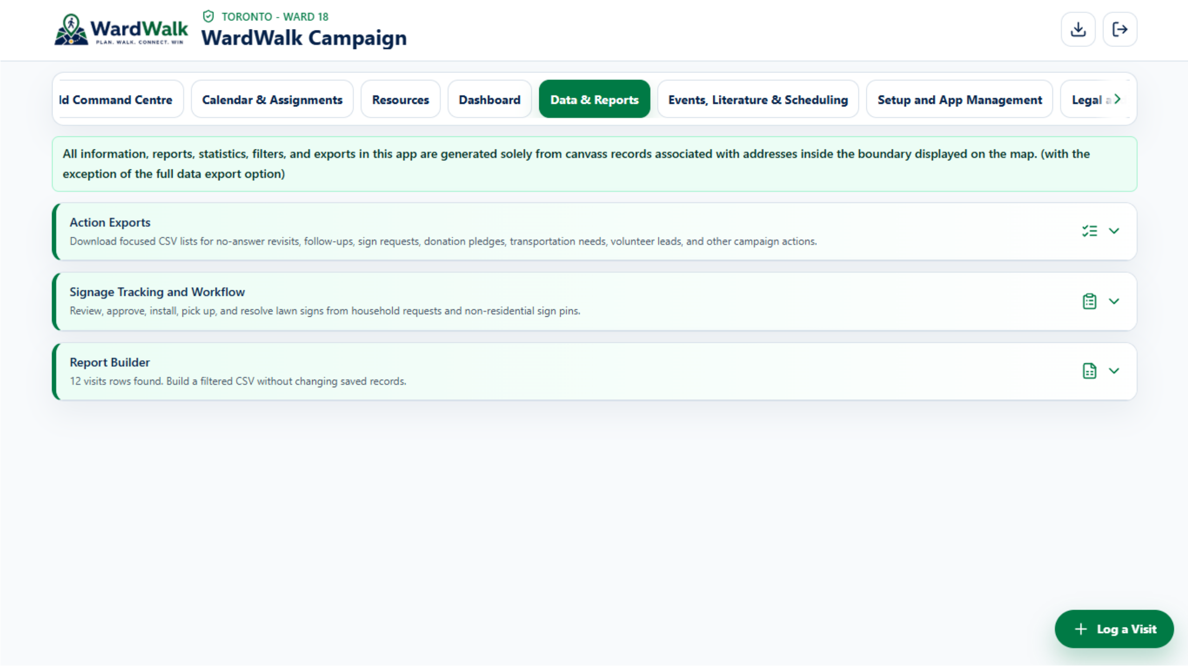
Campaign dashboard with sanitized demo data. Illustrative screen.

1. Review the Campaign Pulse summary.
2. Apply a filter only when you need a narrower period, canvasser, or activity view.
3. Open a detail section for context.
4. Move to **Data & Reports** when you need record-level rows or a download.

Dashboard values are campaign-scoped aggregates based on saved records and active filters. A changed filter can change the total without changing the underlying records.

13. Data, Reports, And Exports

Use **Data & Reports** to answer a specific operational question, preview rows, and create the smallest authorized export needed.



Data and Reports with sanitized demo data. Illustrative screen.

1. Choose the report that matches the decision or follow-up task.
2. Apply the smallest useful filters.
3. Review the preview and record count.
4. Download only if a file is necessary.
5. Store, share, and delete the file according to campaign rules.

Common action lists can include no-answer revisits, follow-ups, transportation requests, signage work, and GOTV priorities when that module is enabled.

Except for the clearly labeled full-data export, information, statistics, filters, and exports are based on canvass records associated with addresses inside the boundary displayed on the map.

> *Exported files can contain sensitive campaign information. Do not upload them to personal cloud storage, forward them outside the authorized team, or paste their rows into the Assistant.*

14. Literature, Signage, And Field Requests

Use **Literature & Signage Inventory** to maintain the items that appear in field and scheduling workflows. Editing requires the appropriate campaign-management permission.

Keep item names, available quantities, and status current. Signage records may originate from a visit or from a pin placed directly on the map.

Typical signage work includes approved, planned, installed, damaged, missing, picked up, and removed. The exact status labels can vary by campaign configuration.

Use related workflows in **Data & Reports** to review requests, installations, pickup needs, and exceptions. A sign request should identify a configured sign type when the campaign requires one.

15. Events, Scheduling, And Launch Readiness

Events And Scheduling

Core Leadership and Admins can create or manage events when their permissions allow it.

1. Confirm the event time, location, visibility, and purpose.
2. Add required roles, quantities, walk lists, literature, or signage work.
3. Review open positions and team schedules.
4. Treat the event as staffed only after assignments are confirmed.

An event describes the campaign activity. An assignment describes a specific person's work within that activity.

Campaign Launch Readiness

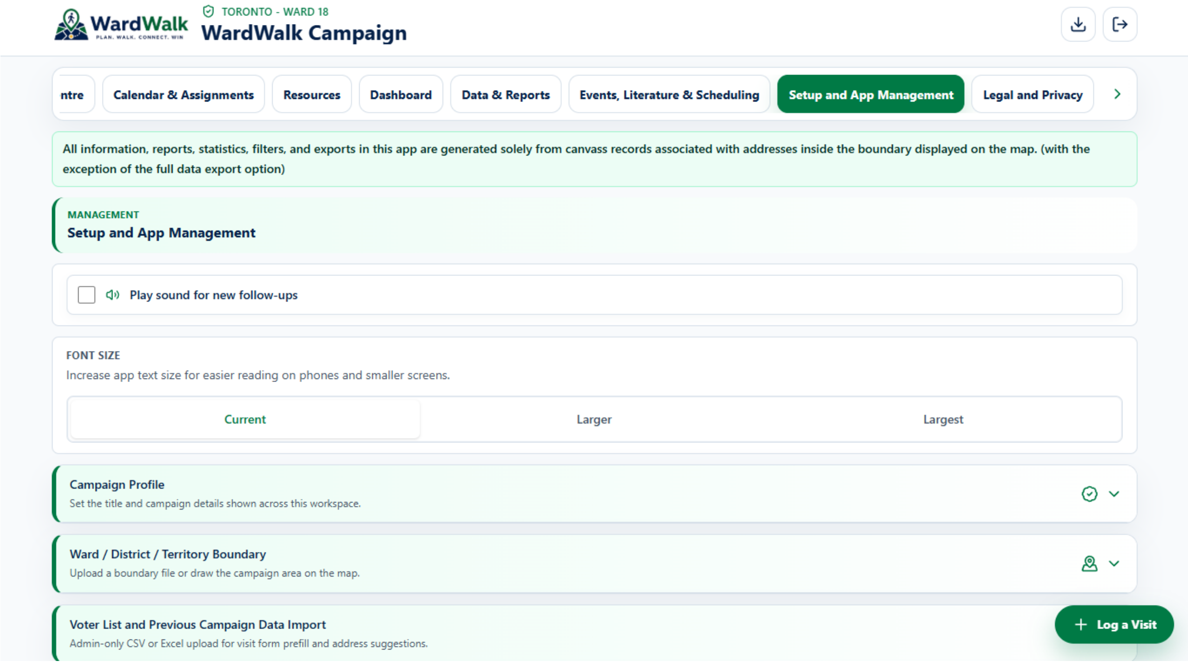
Admins and other permitted users should begin management work at **Campaign Launch Readiness - Start Here**.

1. Review the overall completion summary and mandatory items.
2. Select one incomplete task to see why it matters.
3. Follow the direct link to the correct setup tool.
4. Save the work and return to confirm readiness updated.

Launch Readiness is evidence-based. A task remains incomplete until the required saved information is present.

16. Admin Setup And User Management

Use **Operations & User Setup** to manage the campaign profile, territory, imports, resources, users, permissions, and off-boarding export.



Operations and User Setup with sanitized demo data. Illustrative screen.

Recommended Setup Order

1. Complete the campaign profile, municipality, province, time zone, and election information.
2. Upload or draw the campaign boundary and refresh official map layers when required.
3. Confirm package limits and enabled modules.
4. Import only authorized voter, visit-history, or prior-campaign data after reviewing the preview and mapping.
5. Add campaign documents and approved external resources.
6. Add users with the least access they need.
7. Test one account at each active role.
8. Return to Launch Readiness and resolve remaining blockers.

Manage Users Safely

- Use each person's actual campaign email and display name.
- Prefer resend, refresh, release, or role-correction workflows before removing and re-adding a user.
- Review assignment effects before removing access.
- Keep at least two trusted Admins where campaign policy permits, but never share an Admin login.
- The protected first Admin account may have additional removal or role-change safeguards.

Authorized Imports

Review the source, authorization, row preview, field mapping, duplicate summary, and campaign destination before confirming. Preserve uploaded source values; normalized matches and current campaign visits serve different purposes.

If the GOTV module is enabled, Admins may also see an official voted-update import. Stage and review the batch before approval, and use only an authorized official source.

17. Campaign Website

When **Website Setup** is enabled, WardWalk separates saving, previewing, reviewing, and publishing.

1. Use **Continue setup** to open the next stage needing attention.
2. Save campaign details, messaging, style preferences, logos, content, photos, forms, and attribution information.
3. Review page status and blockers in **Preview & Readiness**.
4. Preview the current material before a separate publish decision.
5. Confirm public forms and inbox responsibilities before launch.

Saving a draft does not publish it. The Assistant can help explain stages or draft copy, but it cannot publish the website.

18. Communications Centre

The **Communications Centre** is an optional Admin-only module. It separates audience eligibility, drafting, readiness, testing, scheduling, and dispatch.

1. Configure and verify the campaign sender and Reply-To mailbox.
2. Review eligible and excluded address counts.
3. Resolve exclusions only when supported by documented campaign evidence.
4. Create and preview a private draft.
5. Send a restricted test only to an explicitly entered active campaign Admin.
6. Complete readiness and safety checks before scheduling or dispatch controls are used.

The Assistant cannot establish consent, select recipients, override exclusions, or send email. Do-not-contact, unsubscribe, invalid-address, and other suppression rules must be respected.

19. Materials And Social

The optional **Materials & Social** page is available to Admin and Core Leadership users when enabled.

Use it to keep approved documents, external resources, messaging, and photos current, then prepare content-only social post sets for human review.

1. Start from verified campaign facts and approved media.
2. Create a base caption and select the intended platforms.
3. Review any platform-specific variants and required authorization wording.

4. Copy or download the final content.
5. Post manually through the campaign's own social account.

WardWalk does not connect to social networks or publish social posts from this workflow.

20. Privacy, Security, And Legal Reminders

WardWalk can contain confidential campaign information and personal information. Use it only for authorized campaign purposes.

Do not share:

- Login details, passwords, or access links.
- Voter lists or resident contact details.
- Private notes, campaign documents, or recipient lists.
- Exported spreadsheets outside the authorized team.
- Screenshots that expose campaign or resident information.

Use campaign-approved devices and storage when required. Lock the screen when unattended. Report mistaken sharing, a lost device, suspicious access, or another security incident immediately through the campaign's escalation process.

The **Legal & Privacy** page provides operational reminders and links. It does not replace campaign-specific legal advice. Use authoritative election sources or qualified counsel when legal interpretation is required.

21. Troubleshooting And Support

I Cannot Sign In

- Confirm the Admin authorized the exact email address you are using.
- Check for spelling differences or an unexpected personal/work email.
- Use **Forgot Password**.
- Check spam for a confirmation or reset email.
- Ask an Admin to resend or refresh your access instead of creating a duplicate account.

A Page Or Button Is Missing

- Confirm your role.
- Confirm the campaign package and module include the feature.
- Refresh or reopen the app after a role or package change.
- Ask an Admin to review your role capabilities.

The Map Or Address Is Not Loading

- Check the internet connection and refresh.

- Confirm the campaign boundary is saved.
- Zoom closer or select a smaller map area.
- Check the street number, street name, unit, and municipality.
- If permitted, place or correct the pin carefully and tell an Admin about a recurring address issue.

A Visit Will Not Save

- Confirm the address and required outcome fields are complete.
- Review any duplicate-address warning.
- Select a configured signage or literature type when required.
- Wait for the current save to finish before trying again.
- If offline, keep the prepared package and sync after reconnecting.

An Import Or Export Looks Wrong

- Stop before approving or sharing the file.
- Confirm the campaign, boundary, source, filters, row count, and field mapping.
- Keep the original source file unchanged.
- Contact an Admin or WardWalk support with a description of the issue, not a copy of sensitive rows unless a secure approved channel is provided.

22. Quick Start For Volunteers

1. Sign in with your own authorized account.
2. Open **Field Command Centre**.
3. Open the walk list or area assigned to you.
4. Select the next address.
5. Confirm the address and visit outcome.
6. Record only information the resident provides and the campaign is authorized to collect.
7. Get clear consent before checking phone or email consent.
8. Save once and wait for confirmation.
9. Confirm the map or list updated.
10. Sync prepared offline work before ending the session.

23. Quick Start For Admins

1. Open **Campaign Launch Readiness - Start Here**.
2. Complete the campaign profile, election details, boundary, and map layers.
3. Confirm package limits and modules.
4. Import only authorized data after preview and mapping review.

5. Add documents, external resources, literature, and signage types.
6. Add users with the least access they need.
7. Create events, assignments, and walk lists.
8. Test Volunteer, Core Leadership, and Admin access on desktop and phone.
9. Review dashboards, reports, follow-ups, exports, and data-quality warnings.
10. Maintain a campaign-approved off-boarding, retention, and deletion process.

24. End-Of-Shift Checklist

- Confirm every attempted visit shows the intended outcome.
- Sync any prepared offline work.
- Report address, map, assignment, or duplicate-record problems.
- Return campaign materials and devices as instructed.
- Close exported files and secure the device.
- Sign out on a shared device.
- Escalate urgent follow-ups or security concerns before leaving.

Thank you for using WardWalk carefully. Clear records, restrained data collection, and timely follow-up help the campaign make every door count.