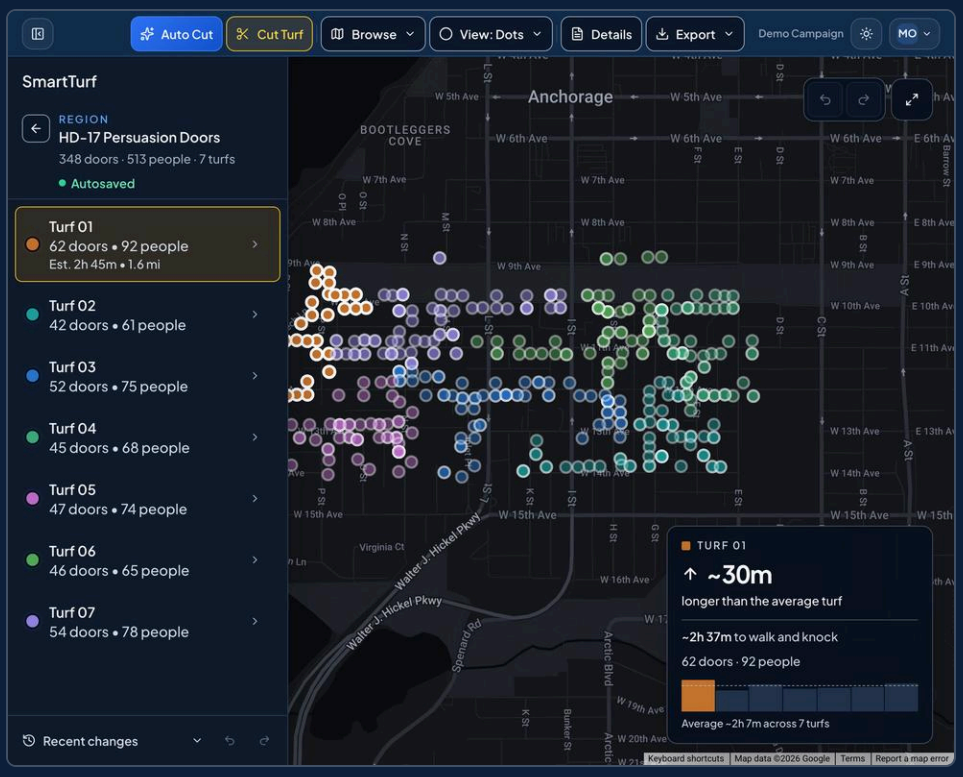
THRESHOLD

OCTOBER 2026 EDITION
WEB APP · IPHONE AND ANDROID 1.4.4

FIELD TRAINING, STEP BY STEP

The Threshold Manual

Lists, turf, doors, calls and texts. Written for the people who set the work up and the people who do it.





THRESHOLDVOTE.COM

ADMINS · ORGANIZERS · CANVASSERS · CALLERS · TEXTERS

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Start here

Threshold is where a campaign builds its lists, cuts its turf, knocks its doors, makes its calls and sends its texts. This manual walks through each job in the order you do it, with the screen you see at every step.

Find your part

Each part of this manual is written for one job. Open the part with your job on it.

YOUR JOB	WHAT YOU DO IN THRESHOLD	OPEN
Admin	Set up the campaign: invite the team, turn on survey questions and write the scripts.	Part 2
Organizer	Build the work: make lists, cut turf, print packets, run phone banks and text campaigns, and read results.	Parts 3, 4, 6, 7 and 8
Canvasser	Knock doors: open an assigned turf in the phone app and record every door.	Part 5
Caller	Make calls: join a phone bank, follow the script and record each call.	Part 6, Making calls
Texter	Send texts: send the first message, answer replies and record outcomes.	Part 7, texter steps

Everyone starts with Part 1, which covers the invitation, signing in and the menu.

How the work fits together

Every program in Threshold follows the same path. A list comes out of the voter file. The list becomes doors, calls or texts. Volunteers record what they hear, and every answer comes back as results.

PROGRAM	THE PATH	WHO DOES WHAT
Doors	List → Cut Turf → the phone app	An organizer cuts a saved list into turfs and assigns each one. The canvasser opens it on the **Canvass** tab of the phone app, or carries a printed walk packet.
Phones	List → Phone bank → Make Calls	An organizer creates a phone bank from a saved list and a script. Callers open it under **Make Calls** in a web browser.
Texts	List → Text campaign → Send texts	An organizer creates a text campaign from a saved list and an initial script. Texters send and reply under **Texting**.

How to read a step

Steps are numbered and each one is a single action. The line with the arrow says what the screen does next.

1 In the sidebar, click **Voters**, then click **ListBuilder**.
→ ListBuilder opens on Step 1.

Bold	The exact words on a button, menu, field or heading.
Click	An action in a web browser.
Tap	An action in the phone app.
Select	Choose an option from a menu or a set of choices.
Enter	Type into a field.

1 **Numbered pin**	Marks a place on a picture. The list under the picture says what each number is.
STATUS	Text shown in a status bar, written exactly as it appears.
ORGANIZER	The job a page is written for, shown at the top of every page.

What you need

To get in	An invitation from your campaign, and the email inbox it was sent to. Threshold emails a 6-digit code each time you sign in.
For the web app	A web browser on a computer, a tablet or a phone.
For knocking doors	The Threshold app on an iPhone or an Android phone.
For a predictive phone bank	A computer with a web browser and a headset, or a microphone and speakers. Calls come through the browser.
For a manual phone bank	A web browser for the script, and your own phone to dial.

The campaign in the pictures

The pictures in this manual follow one demonstration campaign, **Demo Campaign**, through a fall program in Anchorage. Its voters, addresses and phone numbers are invented.

PERSON	ROLE	IN THE PICTURES
Maya Okafor	Admin	Invites the team, turns on survey questions and writes the scripts.
Sam Whitaker	Organizer	Builds lists, cuts turf, and runs the phone bank and the text campaign.
Priya Shah	Volunteer	Knocks Turf 01 in the phone app and makes calls.
Nora Kim	Texter	Sends the first texts and answers the replies.

LIST IN THE FOLDER FALL 2026 FIELD	USED FOR	BECOMES
HD-17 Persuasion Doors	Doors	Seven turfs, knocked in the phone app
HD-18 GOTV Calls	Phones	Fall GOTV Phone Bank
HD-19 Early Vote Texts	Texts	The text campaign Early Vote Reminder

PART 1

Getting in

EVERYONE

Accept your invitation, sign in with your email, your password and a 6–digit code, and learn where everything sits on the screen.

IN THIS PART

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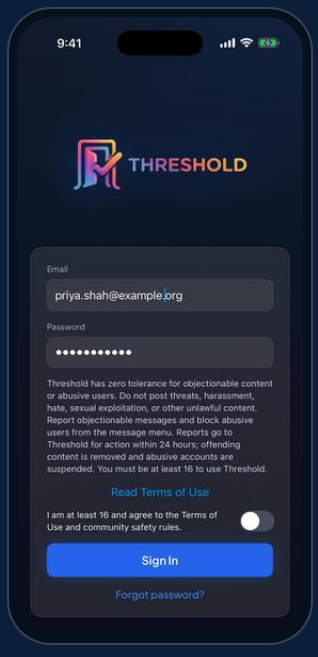
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Accepting your invitation

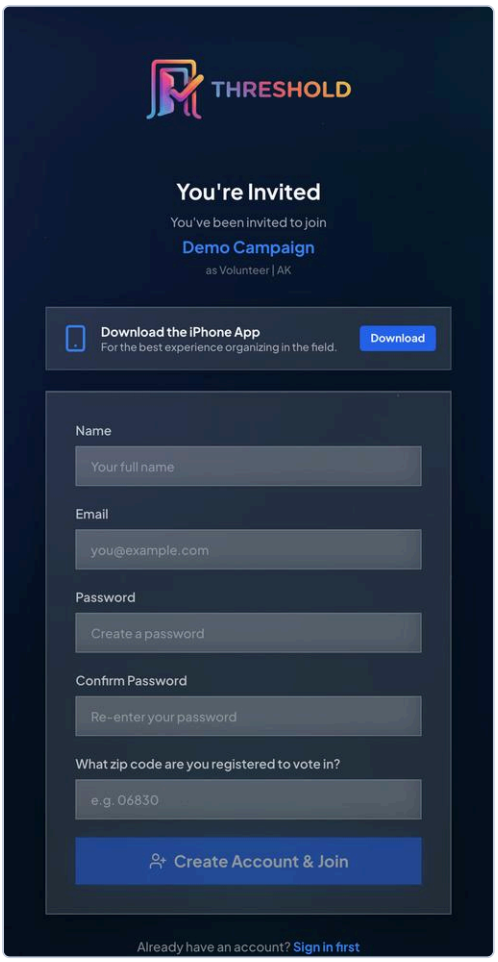
An admin on your campaign sends you an invitation link, by email or as a link to open. The link opens a page titled **You're Invited** that names the campaign and your role.

Create your account and join

1. Open the invitation link.
   → The page reads **You've been invited to join**, then the campaign's name and your role.
2. Enter your **Name** and **Email**.
3. Enter a **Password**, then enter it again in **Confirm Password**.
   → A password has at least 10 characters, with an uppercase letter, a lowercase letter and a number.
4. In **What zip code are you registered to vote in?**, enter your five-digit zip code.
5. Click **Create Account & Join**.
   → The page reads **Check your email**. Threshold emails you a 6-digit code and opens the verification screen.
6. Enter the six digits from the email.
   → You are signed in and the campaign opens.

Join with an account you already have

1. On the invitation page, click **Sign in first** and sign in.
   → The invitation page opens again, with **Signed in as** and your email.
2. Enter your zip code and click **Join Campaign**.
   → The page reads **Welcome aboard!** and names the campaign and your role.



The invitation page for a volunteer joining Demo Campaign.

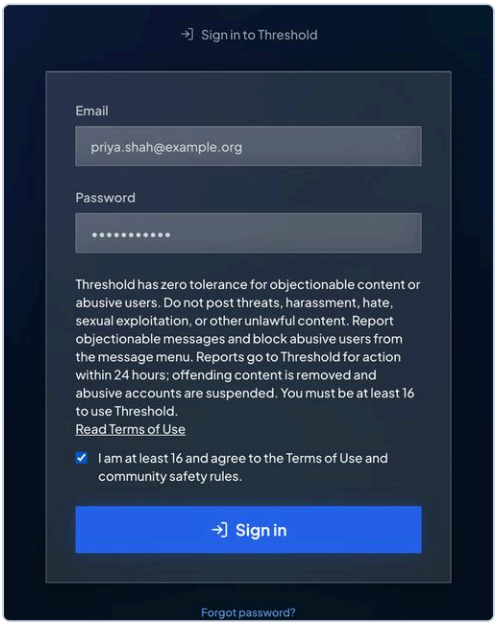
ON THE INVITATION PAGE

The card **Download the iPhone App** has a **Download** button for the phone app. Part 5 covers the app on iPhone and Android.

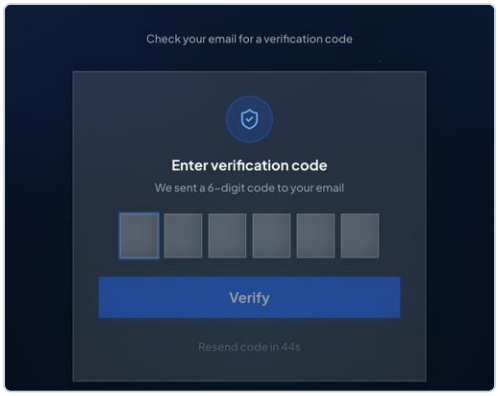
Signing in

Signing in takes your email, your password and a 6-digit code that Threshold emails to you each time.

1. In a web browser, open **thresholdvote.com** and click **Log In**.
   → The sign-in screen opens with the line **Sign in to Threshold**.
2. Enter your **Email** and **Password**.
3. Tick **I am at least 16 and agree to the Terms of Use and community safety rules.**
   → The **Sign in** button turns on.
4. Click **Sign in**.
   → The screen changes to **Enter verification code** with the line **We sent a 6-digit code to your email**.
5. Open the email from Threshold. Its subject is the code followed by **is your Threshold verification code**.
6. Enter the six digits.
   → The code submits on the sixth digit and your home screen opens.



The sign-in screen with the agreement ticked.



The verification screen during the resend countdown.

The code	Six digits, good for 10 minutes. Pasting the code works.
Verify	Submits the code, the same as entering the sixth digit.
Resend code	Sends a new code after a 60-second countdown and confirms with **New code sent!**
Back to sign in	Returns to the email and password screen.
Staying signed in	A browser stays signed in for seven days.

Finding your way around

Every signed-in screen has the same frame: a sidebar on the left with the menu, and a top bar with your campaign and your account.



The frame, shown on Lists & Searches for an admin.

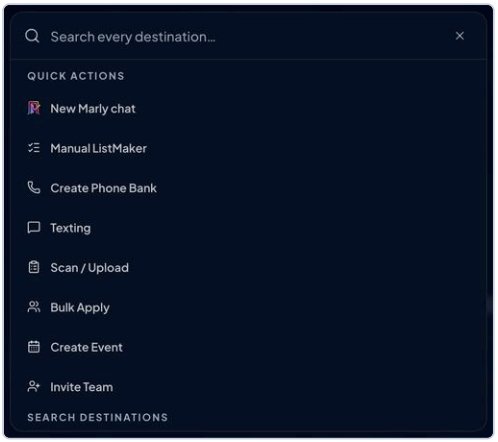
1. **Threshold logo.** Returns to your home screen.
2. **Quick actions.** Opens a search of every destination. ⌘K on a Mac or Ctrl K on Windows opens it from the keyboard.
3. **Menu groups.** Voters, Organizing, Phones, Turfs, Petitioning, Print & Export. Click a name to open the group's first page. Click the arrow to show or hide its pages.
4. **Pages.** The page you are on is highlighted.
5. **Help and first steps.** Opens Help & Support.
6. **Navigation button.** Folds the sidebar down to a narrow strip and opens it again.
7. **Marly.** Opens Marly, the assistant that builds lists and answers questions about your data.
8. **Campaign.** The campaign you are working in. With more than one campaign it is a menu, and choosing a campaign reloads the page in it.
9. **Theme.** Switches between dark mode and light mode. The pictures in this manual use dark mode.
10. **Account.** Your initials. Opens your name and email, the language menu, **Change password** and **Sign out**.

Jumping anywhere with Quick actions

1. In the sidebar, click **Quick actions**.
   → A panel opens with the box **Search every destination…** and a list of shortcuts.
2. Click a shortcut, or enter the name of a page and click it in the results.
   → The page opens.

The shortcuts are **New Marly chat**, **Manual ListMaker**, **Create Phone Bank**, **Texting**, **Scan / Upload**, **Bulk Apply**, **Create Event** and **Invite Team**. Search also reaches pages that sit inside other pages, such as **Settings**, **Team**, **Surveys & Codes**, **Texting Admin** and **Organizing Leaderboard**.

ListBuilder in the sidebar and **Manual ListMaker** in Quick actions are the same page.



Quick actions.

Choosing your language

1. In the top bar, click your initials.
   → The account menu opens with your name and email.
2. Click the globe button. It shows the short code of the current language, such as **EN**.
   → The language list opens: English, Español, Français, 简体中文, 繁體中文, Tagalog and Tiếng Việt.
3. Select a language.
   → Threshold saves the choice to your account and reloads the page in that language.

With a language other than English selected, the account menu adds the checkbox **Show scripts in English too**, which shows call and door scripts in both languages.



The account menu with the language list open. A check marks the current language.

Resetting or changing your password

From the sign-in screen	Click **Forgot password?**, enter your **Email** and click **Send Reset Code**. Enter the code from the email and click **Verify Code**. Enter a **New Password**, enter it again in **Confirm Password**, and click **Reset Password**. The screen reads **Password reset!** and returns to sign-in.
While signed in	In the top bar, click your initials, then click **Change password**. Enter your **Current Password**, a **New Password**, and the new one again in **Confirm New Password**. Click **Change Password**. The screen reads **Password changed successfully!**

What each role sees

The menu shows the pages that go with your role and with the products your campaign uses. An invitation carries one of four roles: **Volunteer**, **Texter**, **Organizer** or **Admin**.

MENU	VOLUNTEER TEXTER	ORGANIZER	ADMIN
VOTERS			
Marly		●	●
ListBuilder		●	●
Threshold Tables		●	●
Voter Lookup			●
Lists & Searches		●	●
Scan / Upload	●	●	●
Bulk Apply		●	●
ORGANIZING			
Organizing Portal		●	●
Reports		●	●
Relational	●	●	●
Friend Banks	●	●	●
AI Coach	●	●	●
Scan / Upload	●	●	●
Events		●	●
Messages	●	●	●

MENU	VOLUNTEER TEXTER	ORGANIZER	ADMIN
PHONES			
Make Calls	●	●	●
Manage	●	●	●
Create		●	●
Scan / Upload		●	●
Texting	●	●	●
TURFS			
Turf Portal	●	●	●
Quick Start		●	●
Organizing Metrics		●	●
PETITIONING			
Petition Hub		●	●
Scan / Upload		●	●
Batch Upload			●
PDF to JPEG			●
PRINT & EXPORT			
Print		●	●
My PDFs		●	●
Print Formats		●	●
Export Data			●
ADMIN			
Admin			●

Where you land after sign-in	Admins and organizers on a campaign with Marly land on **Marly**. Other admins and organizers land on the **Organizing Portal**. Volunteers and texters land on **Relational**.
Products	**Marly**, **Events**, **Messages** and **Texting** appear when the campaign has them turned on.

PART 2

Setting up the campaign

ADMIN

Invite the team, turn on the survey questions volunteers answer, and write the scripts that doors and phones run on. Admins do this once, in the Admin console.

IN THIS PART

The Admin console 13

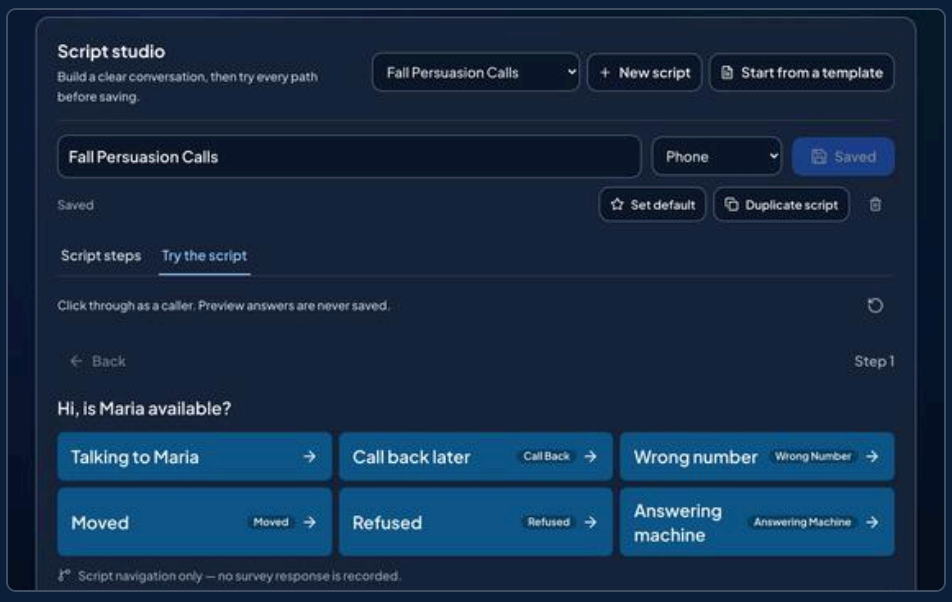
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The Admin console

The Admin console holds the campaign's setup. It opens from **Admin** at the bottom of the sidebar.

1. In the sidebar, click **Admin**.
   → The **Admin Console** opens on **Dashboard**, with the list of sections on the left.
2. In the list on the left, click a section.
   → The section opens on the right and its name becomes the page title.
3. At the top of the console, click **Invite Team**, **Target Lists**, **VAN Sync** or **Export Data** to go straight to that section.



The Admin console on **Dashboard**.

GROUP	SECTION	WHAT IT HOLDS
Command Center	Dashboard	Goal progress, team and contact totals, outcomes and recent activity.
	Activity Log	A timeline of what the team has done.
Team & Access	Team Members	Members, roles and invitations.
Voter File & Data	Polling Places	Polling places by house district and precinct.
	Contact Records	A searchable list of the campaign's contacts.
	VAN Integration	VAN mapping, list import from VAN and sync activity.
	Exports	**Export All Data** and **Download CSV**.
Field Program	Target Lists	Spreadsheet upload with **Map Columns**.
	Turfs & Assignments	The organizing turf directory.
	Survey, Activist Codes and Scripts	Survey questions, activist codes and Script studio.
	AI Coach Setup	AI Coach settings.
Comms & Support	Channels & Push	Message channels and push notifications.
	Support Desk	Support tickets and the knowledge base.
Settings	Campaign Settings	Goals, the phone bank dialer and which voter details show.
	Report Formats	The layouts used for printed lists.

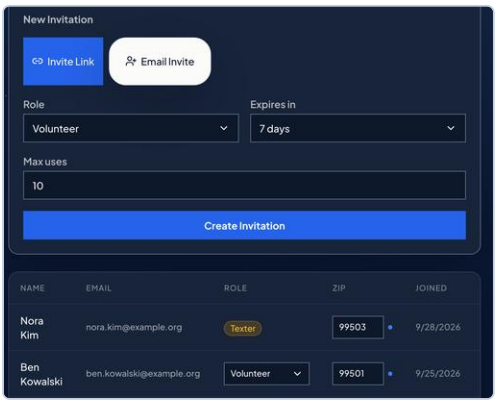
Inviting the team

People join a campaign through an invitation. An invitation is a link you copy and share, or an email Threshold sends for you, and it carries the role the person joins with.

Create an invitation

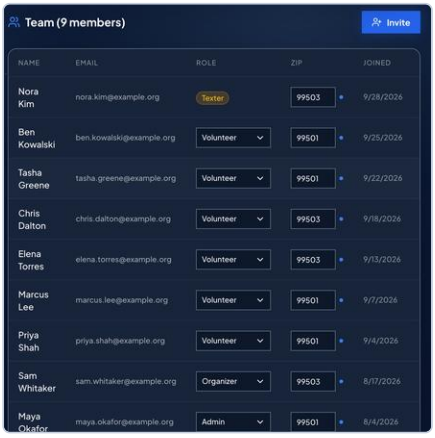
1. In the Admin console, click **Team Members**, then click **Invite**.
   → The **New Invitation** form opens above the team table.
2. Select **Invite Link** or **Email Invite**.
   → **Email Invite** adds an **Email** field for the person's address.
3. In **Role**, select **Volunteer**, **Organizer**, **Admin** or **Texter**.
   → What each role sees lists the pages that come with each role.
4. In **Expires in**, select 1, 3, 7, 14 or 30 days.
5. For a link, enter **Max uses**: the number of people who can join with it.
6. Click **Create Invitation**.
   → A banner reads **Invite link created!** with the link and a **Copy** button. An email invitation also sends the person a message with an **Accept Invitation** button.

The invitation appears under **Active Invitations**, where you copy its link again or revoke it. Used and expired invitations move to **Past Invitations**.



The **New Invitation** form set to a link for volunteers, good for 7 days and 10 uses.

The team table



The team table for Demo Campaign.

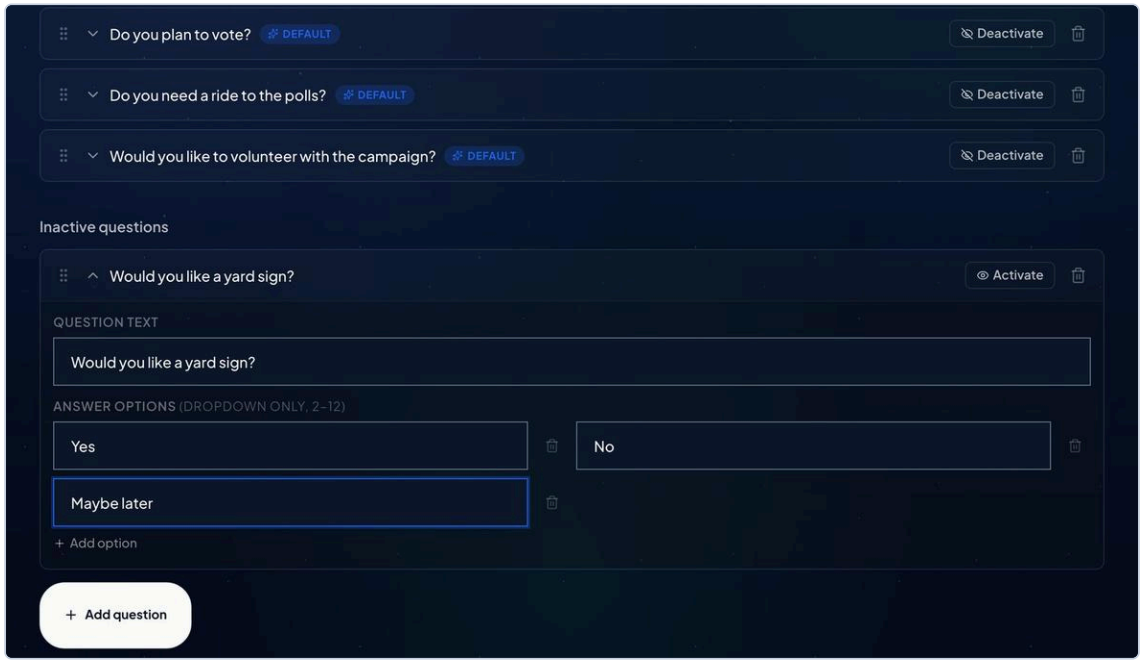
The heading shows the team's size, as in **Team (9 members)**. Each row shows a person's **Name**, **Email**, **Role**, **ZIP** and the date they **Joined**.

Change a role	In the person's row, open the **Role** menu and select **Volunteer**, **Organizer** or **Admin**.
Texter	A texter's role shows as a badge.
Remove a person	Click the trash icon in the person's row and confirm. The person leaves the campaign and keeps their Threshold account.

Turning on survey questions

Survey questions are the questions volunteers answer during a conversation: at the door, on a call and in a text conversation. Each question has a set of answers to pick from.

1. In the Admin console, click **Survey, Activist Codes and Scripts**.
   → The page opens on the tab **Survey questions**, with **Active questions** and **Inactive questions**. A **Back** button returns to the console.
2. Click **Add question**.
   → A new question opens under **Inactive questions**.
3. Enter the **Question text**.
4. Under **Answer options**, enter each answer. Click **Add option** for another. A question takes 2 to 12 answers.
5. Click **Save changes**.
   → The button reads **Saved**.
6. In the question's row, click **Activate**.
   → The question moves to **Active questions** and a message reads **Activated.**



The four default questions under **Active questions**, and a new question, **Would you like a yard sign?**, open under **Inactive questions** with three answers.

Default questions	Four questions come with every campaign and carry a **Default** badge: **What is your top issue?**, **Do you plan to vote?**, **Do you need a ride to the polls?** and **Would you like to volunteer with the campaign?**

Order	Drag a row by its handle to move it within its section.
Edit	Click a row to open it, change the text or answers, and click **Save changes**.
Deactivate	Moves a question to **Inactive questions**. A message reads **Deactivated.**

Adding activist codes

Activist codes are tags a campaign puts on people, such as Volunteer or Yard sign. They sit on the second tab of the same page.

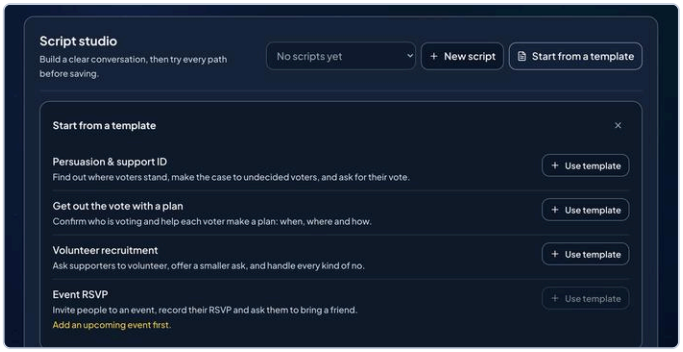
1. Click the tab **Activist codes**, then click **Add activist code**.
2. Enter a **Code name** and, if you like, a **Description (optional)**.
3. Under **VAN mapping**, select the matching code in **MyCampaign** and **MyVoters** for a campaign that syncs with VAN.
4. Click **Create code**.
   → The code joins the list. **Activate** and **Deactivate** in its row turn it on and off, and each change saves at once.

Writing scripts in Script studio

A script is the conversation a volunteer follows, one step at a time. Script studio builds scripts for calls and for doors, and lets you click through every path before a volunteer sees it.

Start a script

1. On **Survey, Activist Codes and Scripts**, click the tab **Scripts & event asks**.
   → **Script studio** opens.
2. Click **Start from a template** and click **Use template** beside a template, or click **New script** for an empty script.
   → The script opens in the editor.
3. Enter the script's name and select its channel: **Phone**, **Phone + Door** or **Door**.

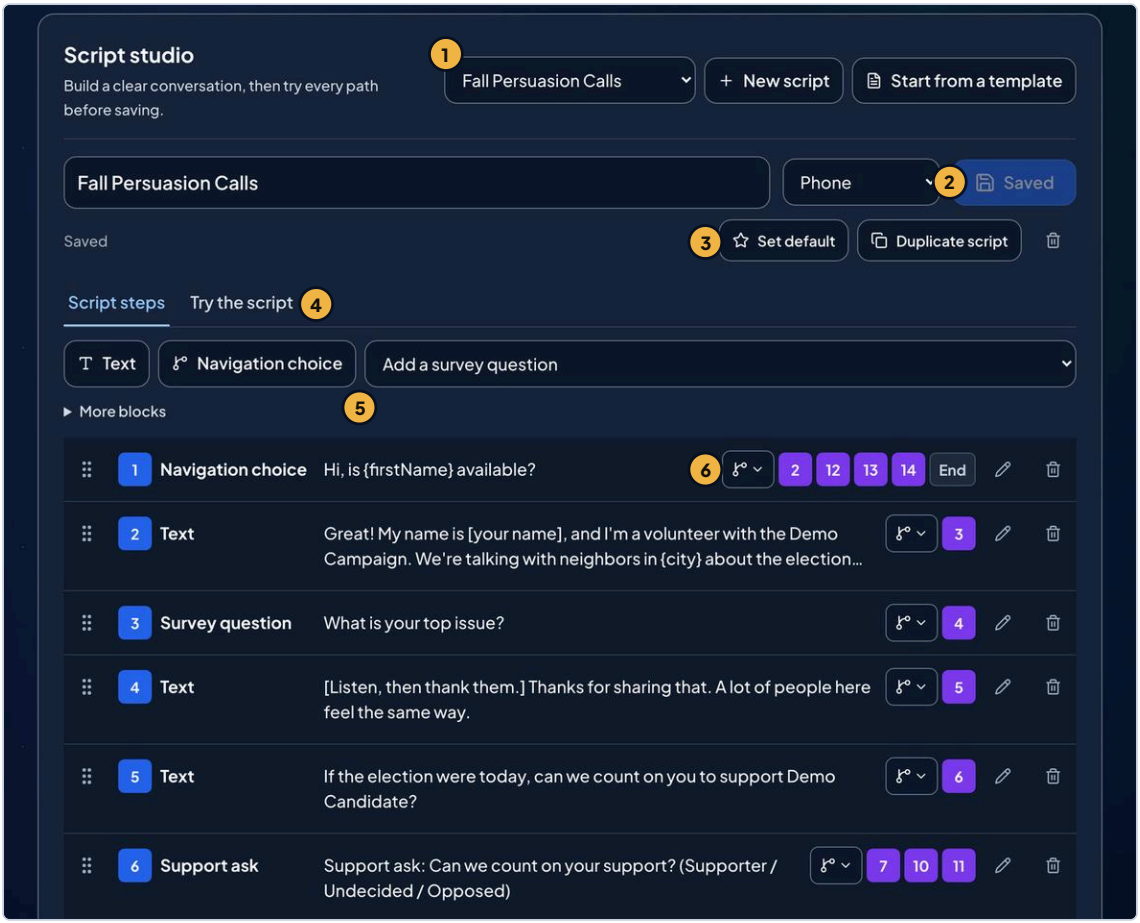


Start from a template. A template turns on when the survey questions or the event it uses are in place, and says which ones it needs.

TEMPLATE	THE CONVERSATION IT STARTS
Persuasion & support ID	Find out where voters stand, make the case to undecided voters, and ask for their vote.
Get out the vote with a plan	Confirm who is voting and help each voter make a plan: when, where and how.
Volunteer recruitment	Ask supporters to volunteer, offer a smaller ask, and handle every kind of no.
Event RSVP	Invite people to an event, record their RSVP and ask them to bring a friend.

Build the steps

The row of buttons above the steps adds a step to the end of the script. Drag a step by its handle to move it, click the pencil to edit it, and click the trash icon to remove it.



The Phone script **Fall Persuasion Calls** on **Script steps**.

1. **Script menu.** Opens another saved script. The default script is marked · **Default**.
2. **Name, channel and Save.** The button reads **Saved** when the script is saved and **Unsaved changes** shows while it is being edited.
3. **Set default**, **Duplicate script** and remove.
4. **Script steps** and **Try the script.** The editor, and a click-through preview.
5. **Add a step. Text**, **Navigation choice**, **Add a survey question** and **More blocks**.
6. **Routes.** On a Phone script, the purple numbers show which step each answer goes to next. **End** finishes the script.

What a script is made of

A script is a list of steps. Each step is one of these.

STEP	WHAT THE VOLUNTEER SEES
Text	Words to read. **Merge fields** drop in the voter's details: **First name**, **Last name**, **Full name**, **City**, **Polling place**, **Polling address** and **Registration status**. In a call, **{firstName}** shows as the voter's first name.
Navigation choice	On Phone scripts: a prompt and a set of choices, each with a **Next step**. A choice with **Also records call result** saves the result of the call, such as **Wrong Number** or **Refused**.
Survey question	One of the campaign's active survey questions, picked from **Add a survey question**. The answer saves to that question.
Support ask	**Can we count on your support?** with **Supporter**, **Undecided** and **Opposed**. Under **More blocks**.
Polling place, Polling address	The voter's polling place or its address. Under **More blocks**.
Event ask	An invitation to one of the campaign's events, with the event, shift, role and the responses to offer. Under **More blocks**.

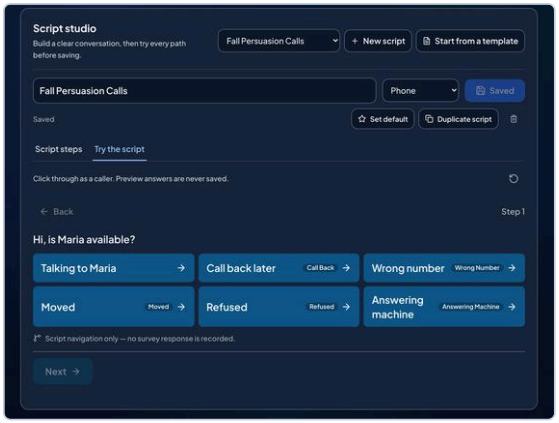
Send answers down different paths

On a Phone script, each step has a route: where the script goes next. Steps run top to bottom until you set a route.

After this step	The next step for a text step.
Next step	The next step for each answer to a survey question, a support ask or a navigation choice, with **For any other response** for the rest.
Where a route goes	**Next step in order**, a numbered step, or **End**.

Try the script

1. Click **Try the script**.
   → The first step opens the way a caller sees it, with the line **Click through as a caller. Preview answers are never saved.**
2. Click an answer or **Next**, and follow the script to its end.
3. Click **Restart preview**, the circular arrow, to begin again and follow another path.
4. Click **Script steps** to return to the editor, then click **Save**.
   → The button reads **Saved**.

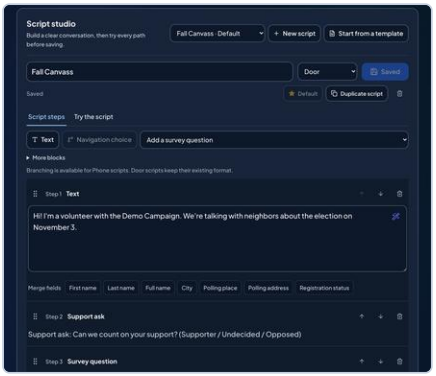


Try the script on step 1 of **Fall Persuasion Calls**. The small label on a choice is the call result it records.

Door scripts

A **Door** script runs top to bottom. It opens for the canvasser on the **Canvass Script** page of the phone app and prints with walk packets.

Set default	Makes this the campaign's default script. Canvassers get the default when it is a Door or Phone + Door script.
Assign canvasser	On a Door or Phone + Door script other than the default: gives the script to a person or a group. The menu lists **New group**, the campaign's groups and its people.
Which script a canvasser gets	The script assigned to the person, then the script assigned to their group, then the default.



The Door script **Fall Canvass**, the campaign's default, with a text step, a support ask and a survey question.

Where each script is used

PROGRAM	WHERE THE SCRIPT IS CHOSEN
Phone banks	Step 2, **Script**, when creating a phone bank, and **Change script** afterward. The menu lists Phone and Phone + Door scripts. See Part 6.
Doors in the app	The default Door script, or the script assigned to the canvasser or their group. See Part 5.
Printed walk packets	The **Script** menu on the **Format** step of the Print wizard. See Part 4.
Text campaigns	Each text campaign has its own **Initial script** and response templates. See Part 7.

Campaign settings

Campaign Settings in the Admin console holds the campaign-wide choices. One **Save Settings** button at the bottom saves the page and confirms with **Settings saved successfully!**

Goal Progress Targets	Targets for **Contacts Added**, **Contacted** and **Supporters Identified**. Each target draws a progress bar on the Admin console's Dashboard.
Phone Bank Dialer	**Enable predictive dialing** turns on Predictive mode for the campaign's phone banks. **Calling hours start** and **Calling hours end** set the daily calling window in each contact's local time. Caller IDs are added with **Add Caller ID**, with **Make default** and **Assigned callers** on each number. The section also holds the **Abandoned-call message** and **Transfer destinations**.
Target List Access	**Lock selected users to assigned target lists**, by role (**Organizers**, **Volunteers**) or by member.
Visible and hidden details	A switch each for **Zip Code**, **Voting History**, **Contact History**, **Region & Turf**, **Activist Codes** and **Survey Responses**.
Contact History Access	**Role rules** and **Individual rules**, each set to inherit, **Visible** or **Hidden**.

PART 3

Building lists

ORGANIZER

Build a list of voters from filters in ListBuilder or by asking Marly, save it to a folder, count it in Threshold Tables, and look up a single voter.

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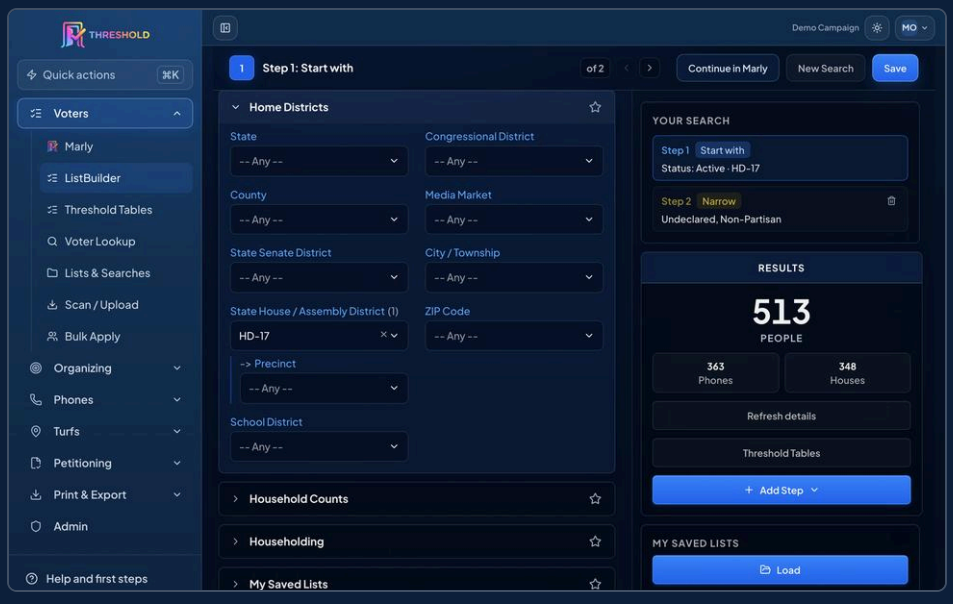
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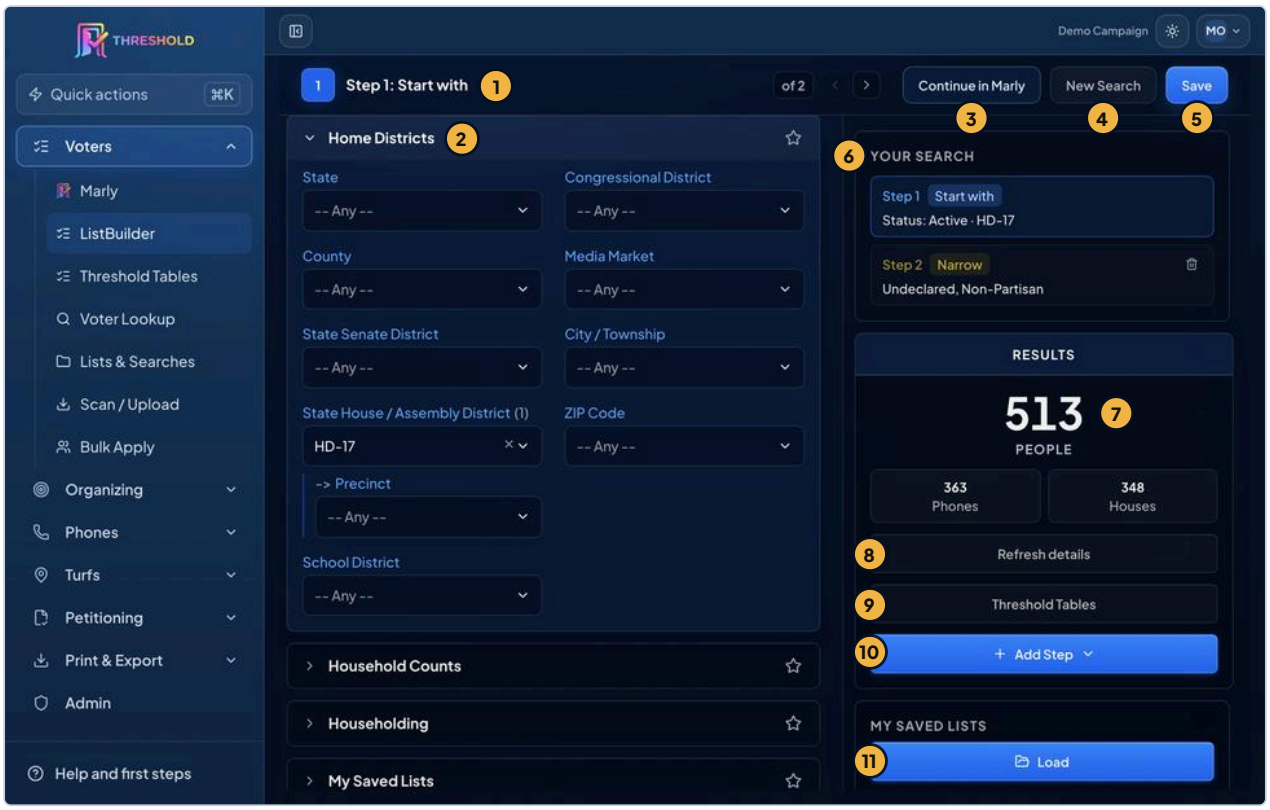
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The ListBuilder screen

ListBuilder builds a list of voters from filters, one step at a time. In the sidebar, under **Voters**, click **ListBuilder**. Quick actions and some buttons call the same page **Manual ListMaker** or **Listmaker**.



ListBuilder with a list of two steps: active voters in HD-17, narrowed to Undeclared and Non-Partisan.

1. **Step header.** The step whose filters show below. With more than one step, arrows open the previous or next step.
2. **Filter sections.** Click a section's name to open or close it. The star pins it to the top of the column.
3. **Continue in Marly.** Opens Marly with these filters loaded.
4. **New Search.** Clears the filters and leaves one empty step.
5. **Save.** Saves the steps to a folder as a list or a search.
6. **Your Search.** One card for each step. Click a card to work on that step.
7. **Results.** The number of **People** the steps match, with **Phones** and **Houses**.
8. **Refresh details.** Reads **Load details** at first. Fills in **Phones** and **Houses** and opens the detail cards.
9. **Threshold Tables.** Opens a table of counts for the list as filtered.
10. **Add Step.** Adds a step of type **Add**, **Remove** or **Narrow**.
11. **Load.** Opens a saved list or search from your folders.

Marly, **ListBuilder** and **Threshold Tables** show in the sidebar on campaigns that have Marly turned on.

The filter sections

The filters column lists its sections in alphabetical order. **Home Districts** and **Party** start open. A starred section moves to **Starred Filters** at the top, and your stars are kept for you on the campaign.

- **Home Districts.** State, Congressional District, County, Media Market, State Senate District, City / Township, State House / Assembly District, Precinct, ZIP Code, School District.
- **Voter Status.** Active, Inactive, Dropped, Other, Unregistered, Applicant.
- **Party.** The parties in the campaign's voter file.
- **Voting History.** Elections and how people voted: Absentee, Early In-Person, Election Day, Prov/Unk.
- **Age & Registration Date.** Age, birth and registration dates.
- **Gender.** Male, Female, Unknown.
- **Phones.** Cell or landline, source, type, scores, a number.
- **Address: Voting, Address: Mailing, Address: TargetSmart.** Full address, city, ZIP codes, ZIP radius, PO boxes, USPS verified, geocoded.
- **Householding.** Full households, or one person in each.
- **Canvass Status.** Method (Phone, Walk, Text, Relational), canvass results, dates, pass, who canvassed.
- **Survey Responses.** Survey question, response options, any response or the most recent, dates.
- **Activist Codes.** ANY, ALL or NONE of the chosen codes.
- **Dialer Attempts.** Call results, dates, minimum attempts.
- **Absentee / Early Voting.** Election, ballot stage (Requested, Sent, Returned, Accepted, Rejected, Cured, Voted Early), ballot type, stage date.
- **Suppressions.** Deceased, Do Not Walk, Do Not Call, Do Not Email, Do Not Text, Do Not Mail, movers, undeliverable addresses.
- **My Saved Lists.** In ANY, ALL or NONE of the chosen lists.
- **My Turfs.** In ANY or NONE of the turfs you choose.
- **Sample.** A random sample of the size you enter.

The column also holds **Events**, **Household Counts**, **Name**, **Notes**, **Organizer Turfs & Regions**, **Petition Status**, **Race & Marital Status**, **Race or Ethnicity**, **Race or Ethnicity Scores**, **Recruitment Record**, **Relationships**, **Religion Scores**, **TargetSmart Scores** and **Voter File IDs**.

Step types

STEP TYPE	WHAT IT DOES TO THE LIST
Start with	Step 1. The people who match its filters begin the list.
Add	Also includes the people who match this step's filters.
Remove	Takes out the people who match this step's filters.
Narrow	Keeps the people who also match this step's filters.

To change the type of a later step, click the type in the step header, such as **Narrow**, and select another. The trash button on a step's card deletes it. With three or more steps, arrows on the later cards move a step up or down.

How the count works

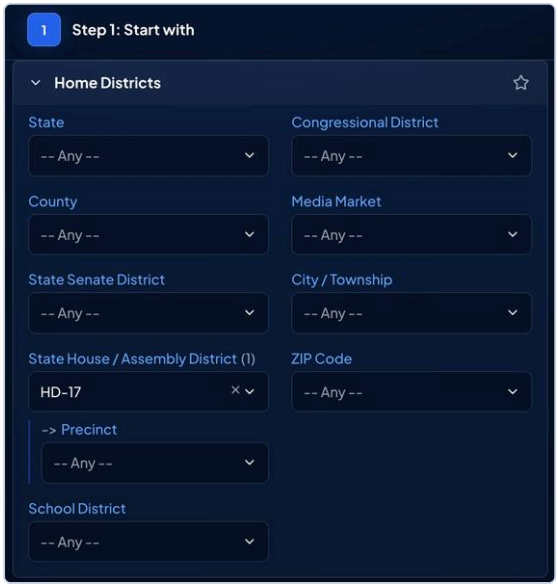
People	Counts on its own a moment after each filter change. The panel reads **Updating count…** while it works.
Phones and Houses	Fill in when you click **Load details**. A number with **~** in front is an estimate from a sample.
Your work in progress	ListBuilder keeps your steps for three days after your last change and brings them back the next time you open the page.

Building a list

A list starts with Step 1, **Start with**. Each step after it adds people, removes people or narrows the list. These steps build the list in the pictures.

Choose the filters for Step 1

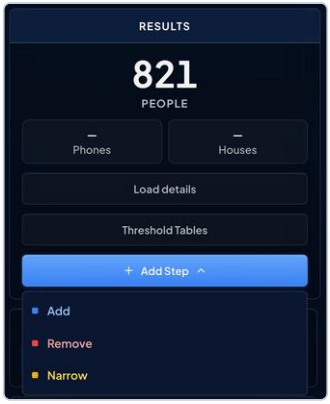
1. In the sidebar, under **Voters**, click **ListBuilder**.
   → A new search starts on **Step 1: Start with**.
2. In **Home Districts**, open the **State House / Assembly District** menu and select **HD-17**.
   → The Step 1 card under **Your Search** reads **HD-17**.
3. Further down the filters, click **Voter Status** to open the section.
4. Tick **Active**.
   → The card reads **Status: Active · HD-17** and **Results** shows **821 People**.



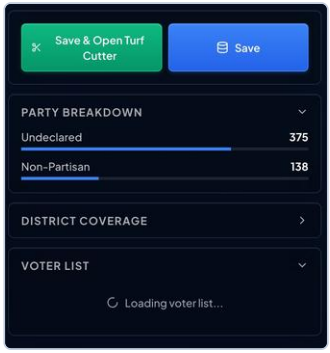
Home Districts with **HD-17** selected. Click a field's name, such as **County**, to tick several values at once.

Add a step

5. In the right panel, click **Add Step**, then select **Narrow**.
   → The header reads **Step 2: Narrow** and a Step 2 card appears under **Your Search**.
6. In **Party**, tick **Undeclared** and **Non-Partisan**.
   → The Step 2 card reads **Undeclared, Non-Partisan** and **Results** shows **513 People**.



The **Add Step** menu after Step 1.



The save buttons and the detail cards, further down the right panel.

Load the details

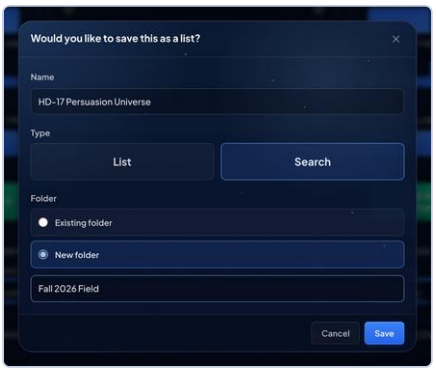
7. Under **Results**, click **Load details**.
   → **Phones** shows **363** and **Houses** shows **348**. The button now reads **Refresh details**.

The cards **Party Breakdown**, **District Coverage** and **Voter List** open further down the panel. **Voter List** shows the people in the list, 100 to a page.

Saving a list or a search

Saving puts the steps in a folder as a **List** or a **Search**. A list keeps the people who match at the moment you save. A search keeps the steps and runs them again each time it is used.

1. In ListBuilder, click **Save**, at the top right or in the right panel.
   → The dialog **Would you like to save this as a list?** opens.
2. Enter a **Name**.
3. Under **Type**, select **List** or **Search**.
4. Under **Folder**, select **Existing folder** and choose one from **Select a folder**, or select **New folder** and enter its name.
5. Click **Save**.
   → The page for the saved list or search opens.



Saving a search named HD-17 Persuasion Universe in a new folder, Fall 2026 Field.

Save & Open Turf Cutter	Opens the same dialog, titled **Save this universe before opening Turf Cutter**, saves, then opens the list in the Turf Cutter. See Part 4.
Load	Under **My Saved Lists**, opens **Load from My Folders**. Click an item to replace the steps on screen. A list loads as one step that reads **From saved list**.

Building a list with Marly

Marly builds a list from a request in plain words. In the sidebar, under **Voters**, click **Marly**.

1. In the message box, enter the people you are looking for.
2. Press Enter or click the send button.
   → Marly reads **Thinking…** while it works, then answers.
3. Under an answer that holds a list, click **Save**, **Open in List Builder** or **Cut turf**.

Manual, in the message box, switches to ListBuilder. From ListBuilder, **Continue in Marly** opens Marly with your filters, and Marly posts **Loaded your Manual ListMaker filters.**

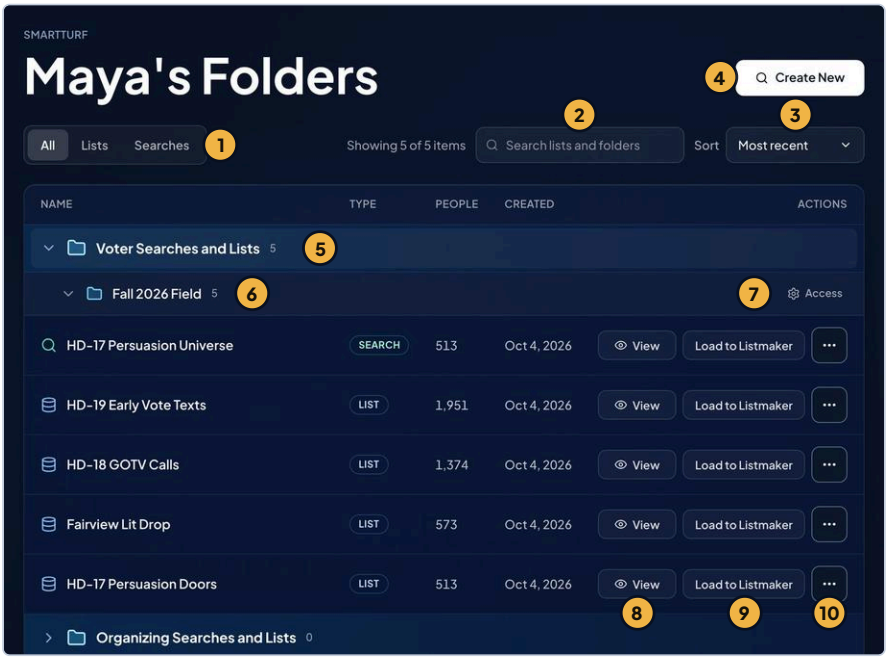


Marly's opening screen for Maya Okafor.

Save	Opens the save dialog. Marly then reads **Saved as** and the name.
Open in List Builder	Opens ListBuilder with Marly's steps loaded and counted.
Cut turf	Names and saves the list, then opens it in the Turf Cutter.

Lists & Searches

Lists & Searches, under **Voters** in the sidebar, holds every saved list and search in folders.



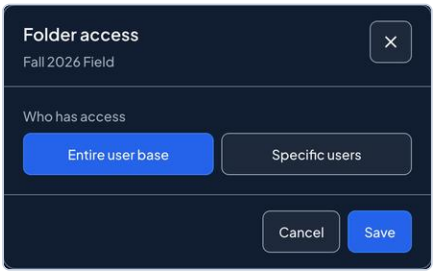
The page carries your first name in its title. Here the folder Fall 2026 Field is open.

1. **All, Lists, Searches.** Shows every item, the saved lists or the saved searches.
2. **Search lists and folders.** Finds an item or a folder by name.
3. **Sort. Most recent** or **Name A–Z**.
4. **Create New.** Opens ListBuilder.
5. **Collections. Voter Searches and Lists** and **Organizing Searches and Lists**. Click one to show its folders.
6. **Folder.** Click it to show or hide its items. The number counts them.
7. **Access.** Opens **Folder access**, which sets who sees the folder.
8. **View.** Opens the page for the saved list or search.
9. **Load to Listmaker.** Opens the item in ListBuilder.
10. **More.** Opens a menu for the item. An admin sees **Split list**, **Rename** and **Print…**

Set who sees a folder

1. On the folder's row, click **Access**.
   → The dialog **Folder access** opens with the folder's name.
2. Under **Who has access**, select **Entire user base** or **Specific users**. With **Specific users**, choose the people under **Assigned users**.
3. Click **Save**.

Admins see every folder. Organizers see the folders open to the entire user base and the folders that name them.



Folder access for Fall 2026 Field.

Working with a saved list

A saved list or search has its own page, with its counts, the people in it and a bar of actions. In Lists & Searches, click **View** on its row.



The saved list HD-17 Persuasion Doors, as an admin sees it.

1. **Folders.** Returns to Lists & Searches.
2. **Name and badge.** The pencil renames the item. The badge reads **Saved List** or **Saved Search**.
3. **Counts. People**, **Phones** and **Houses**.
4. **Edit Search.** Opens the item in ListBuilder.
5. **Cut Turf.** Opens the list in the Turf Cutter. See Part 4.
6. **Map View.** Shows the list on a map above the table.
7. **Bulk Apply.** Applies one code or one survey answer to the people in the list.
8. **Prepare CSV.** Builds a CSV file of the list to download.
9. **Custom Export.** Builds a CSV file with the columns you choose.
10. **Split list.** Splits the list into lists by state and county.
11. **First Name, Last Name, Refresh.** The name boxes filter the table as you type. **Refresh** counts the list again.

The table shows 100 people to a page with **Name**, **Address**, **City**, **Phone**, **Party**, **CD**, **SD** and **HD**. On a list of up to 5,000 people, the button that reads **Load all** with the number of people brings in the whole list. **Bulk Apply**, **Prepare CSV**, **Custom Export** and **Split list** appear for admins.

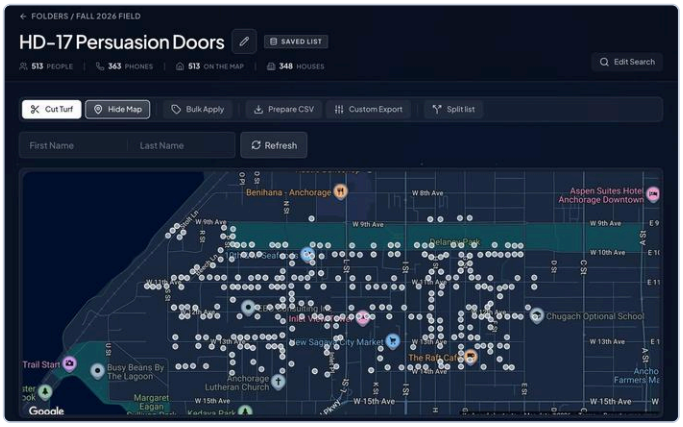
From this page, **Cut Turf** turns the list into turf for the doors (Part 4). A phone bank (Part 6) and a text campaign (Part 7) each take a saved list when you set them up.

See the list on a map

1. Click **Map View**.
   → A map opens above the table with the list as dots. The counts add **On the map**, and the button reads **Hide Map**.

Download the list as a CSV file

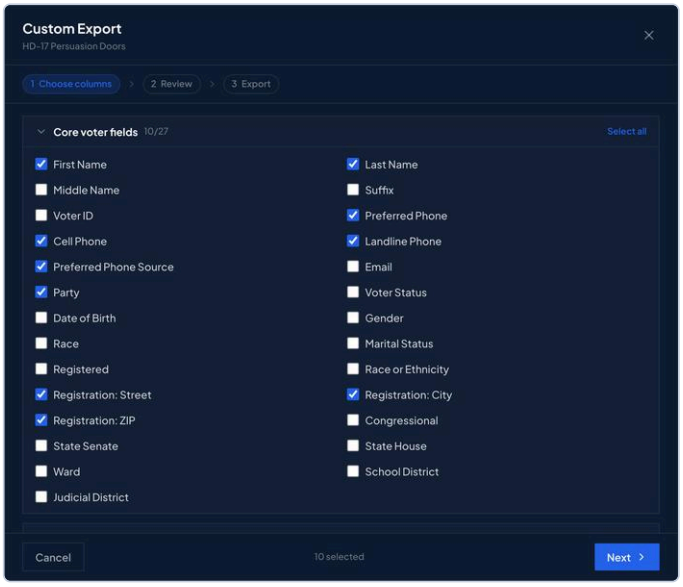
1. Click **Prepare CSV**.
   → The button reads **Preparing CSV** while Threshold builds the file.
2. When the page reads **Ready:** with the number of rows, click **Download CSV**.
   → The file stays ready for 24 hours.



Map View open on HD-17 Persuasion Doors, with 513 people on the map.

Choose the columns with Custom Export

1. Click **Custom Export**.
   → The dialog opens on step 1, **Choose columns**.
2. Tick the columns to include. **Select all** ticks a whole group.
   → The bottom of the dialog counts them, such as **10 selected**.
3. Click **Next**.
   → Step 2, **Review**, previews the first 5 voters with the columns you chose.
4. Click **Next**, then click **Download CSV**.
   → The file downloads, named for the list and the date.



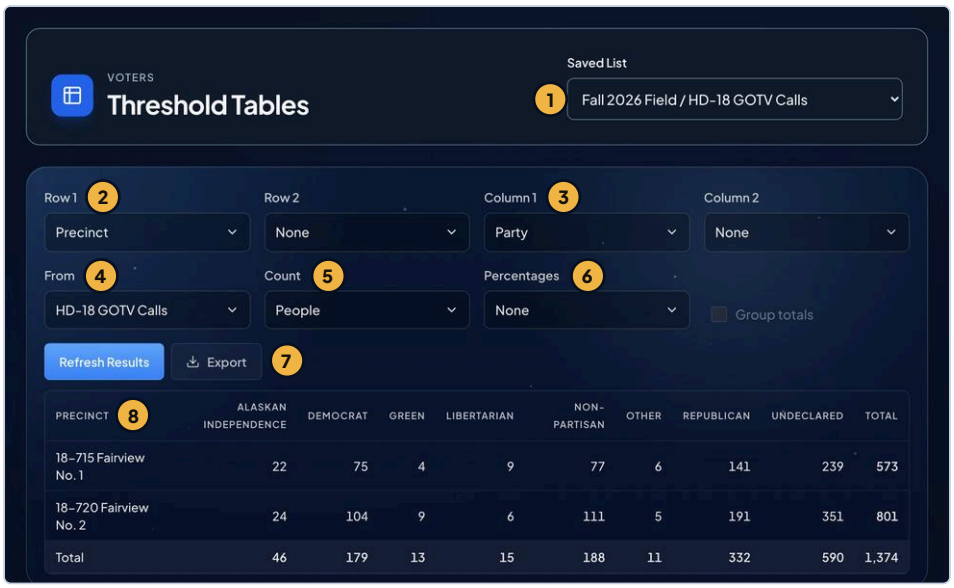
Custom Export, step 1, with 10 of the 27 core voter fields ticked.

Split a list

1. Click **Split list**.
   → A dialog opens, titled **Split** and the list's name.
2. To leave out people with no phone, tick **Exclude people without a phone number**.
3. In the dialog, click **Split list**.
   → Threshold creates fixed lists grouped by state and county, with at most 10,000 people in each, and links each one with a **Print** button beside it. The original stays in its folder.
4. Click **Done**.

Threshold Tables

Threshold Tables counts a saved list by the fields you choose and lays the counts out in rows and columns. In the sidebar, under **Voters**, click **Threshold Tables**.



HD-18 GOTV Calls counted by precinct and party: 1,374 people in two precincts.

1. **Saved List.** The list to count. Saved lists appear here as folder / name.
2. **Row 1, Row 2.** The fields down the side. With two row fields, **Group totals** turns on.
3. **Column 1, Column 2.** The fields across the top.
4. **From.** The saved list, or **All voters**.
5. **Count. People**, **Houses** or **Phones**.
6. **Percentages. None**, **% of row**, **% of column** or **% of total**.
7. **Refresh Results, Export. Refresh Results** runs the count. **Export** downloads the table as a CSV file.
8. **The table.** A row for each value and a **Total** row, with a **Total** column when column fields are chosen.

Count a saved list

1. In **Saved List**, choose a list.
2. In **Row 1**, choose a field, such as **Precinct**.
3. In **Column 1**, choose a field, such as **Party**.
4. Click **Refresh Results**.
   → The table appears.

In ListBuilder, **Threshold Tables** under **Results** opens the same controls on the list as filtered, with **From** set to **My List**.

Fields to count by

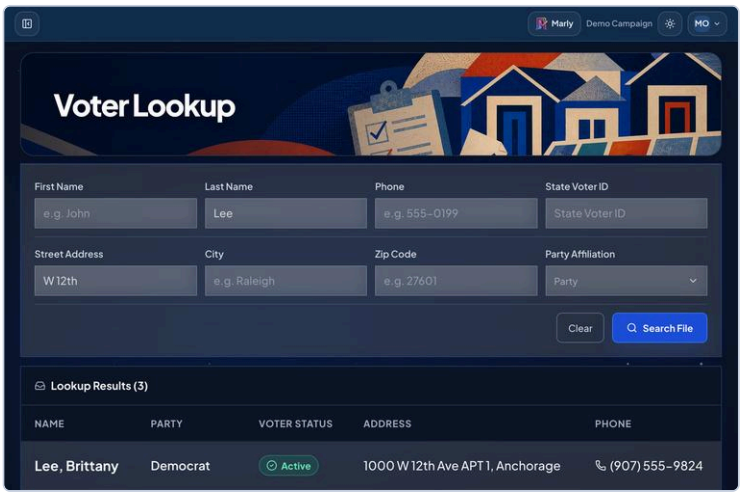
- **Geography.** County, City, ZIP, Precinct, Congressional district, State senate district, State house district.
- **Demographics.** Party, Gender, Age, Voter status.
- **Survey responses.** Support level, and each survey question.
- **Phones.** Has phone.
- **Vote history.** Each election.
- **Activist codes** and **Scores.**

Voter Lookup and the voter profile

ADMIN Voter Lookup finds one voter in the voter file and opens that voter's profile. The sidebar shows **Voter Lookup** to admins.

Look up a voter

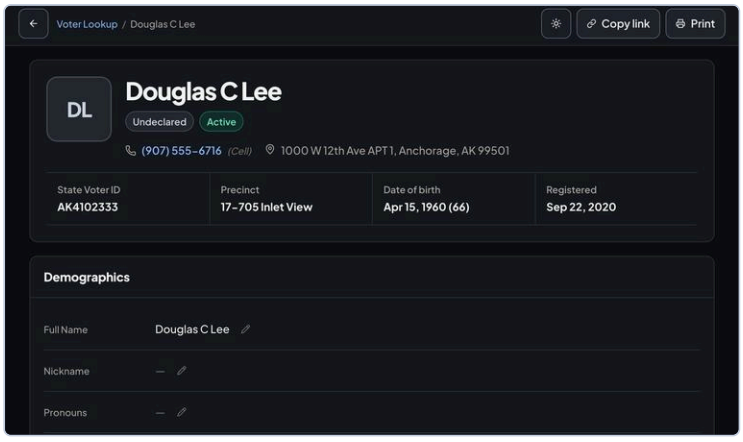
1. In the sidebar, under **Voters**, click **Voter Lookup**.
2. Enter what you know in one or more boxes.
3. Click **Search File**.
   → **Lookup Results** lists up to 100 voters by last name, then first name.
4. Click a row.
   → The voter's profile opens.



A search for the last name Lee on W 12th returns three voters. **Clear** empties the form.

First Name, **Last Name** and **City** match from the start of the word. **Street Address** and **Phone** match any part. **Zip Code** matches the first five digits. With a **State Voter ID** entered, the search uses the ID and **Party Affiliation**.

The voter profile



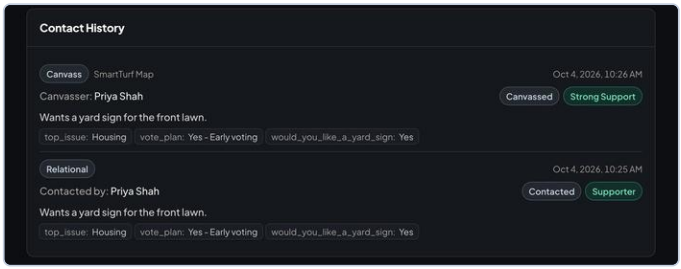
The top of the profile for Douglas C Lee.

The top card shows the voter's name, party and voter status, phone, address, **State Voter ID**, **Precinct**, **Date of birth** and **Registered**. **Copy link** copies a link to the profile. **Print** prints it.

The sections follow in this order: **Demographics**, **Contact**, **Location & Districts**, **Also At Voting Address**, **Custom Fields**, **Identifiers**, **Scores**, **Voting History**, **Listmaker Details**, **Ballot Status**, **Activist Codes**, **Notes**, **Campaign Surveys**, **Event Participation** and **Contact History**.

Changing a profile

Pencil	Edits **Full Name**, **Nickname**, **Pronouns**, **Preferred Phone**, **Email** and **Voting Address**. A changed value shows **Edited**, and **Revert to voter file** restores it.
Activist Codes	Click a code to apply or remove it.
Notes	**Add Note** saves text of up to 5,000 characters.
Campaign Surveys	Set **Canvasser**, **Day** and **Method**, then click the pencil on a question and pick an answer.

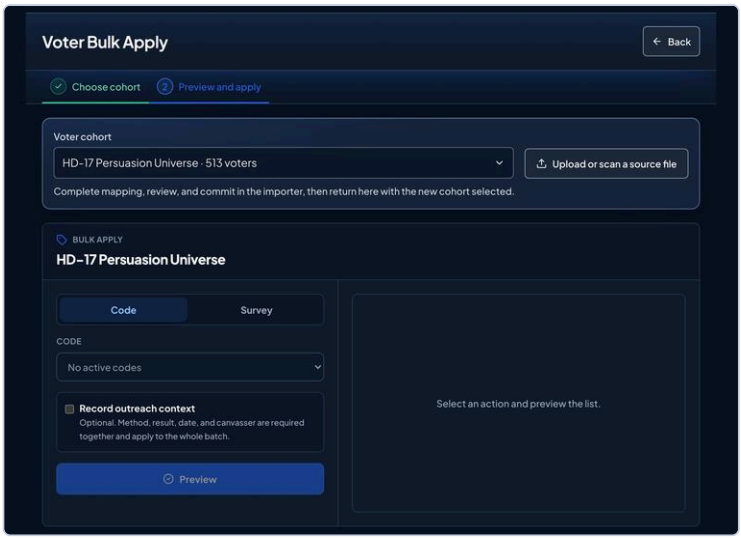


Contact History for Douglas C Lee: a canvass and a relational contact, each with its result and survey answers.

Bulk Apply

Bulk Apply puts one activist code or one survey answer on the people in a saved list or search. In the sidebar, under **Voters**, click **Bulk Apply**.

1. In **Voter cohort**, choose a saved list or search.
   → The **Bulk Apply** panel shows its name.
2. Select **Code** and choose a code, or select **Survey** and choose a **Question** and an **Answer**.
3. Click **Preview**.
   → The right side shows the counts **People**, **Apply** and **Skip**, the first rows and report files.
4. Click **Apply to list**.
   → The button becomes **Undo this apply**.



Voter Bulk Apply with the saved search HD-17 Persuasion Universe chosen as the cohort.

Record outreach context also records a contact for the whole batch, with **Method**, **Result**, **Outreach date** and **Canvasser**. On a saved list's page, **Bulk Apply** opens the same panel for that list.

PART 4

Cutting and running turf

ORGANIZER

Cut a saved list into turfs, assign each turf to a canvasser, print walk packets and read the door results.

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Assigning a turf 36

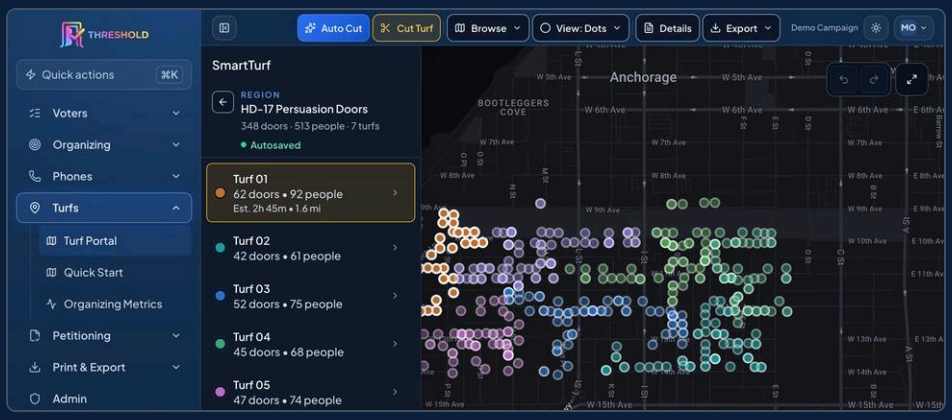
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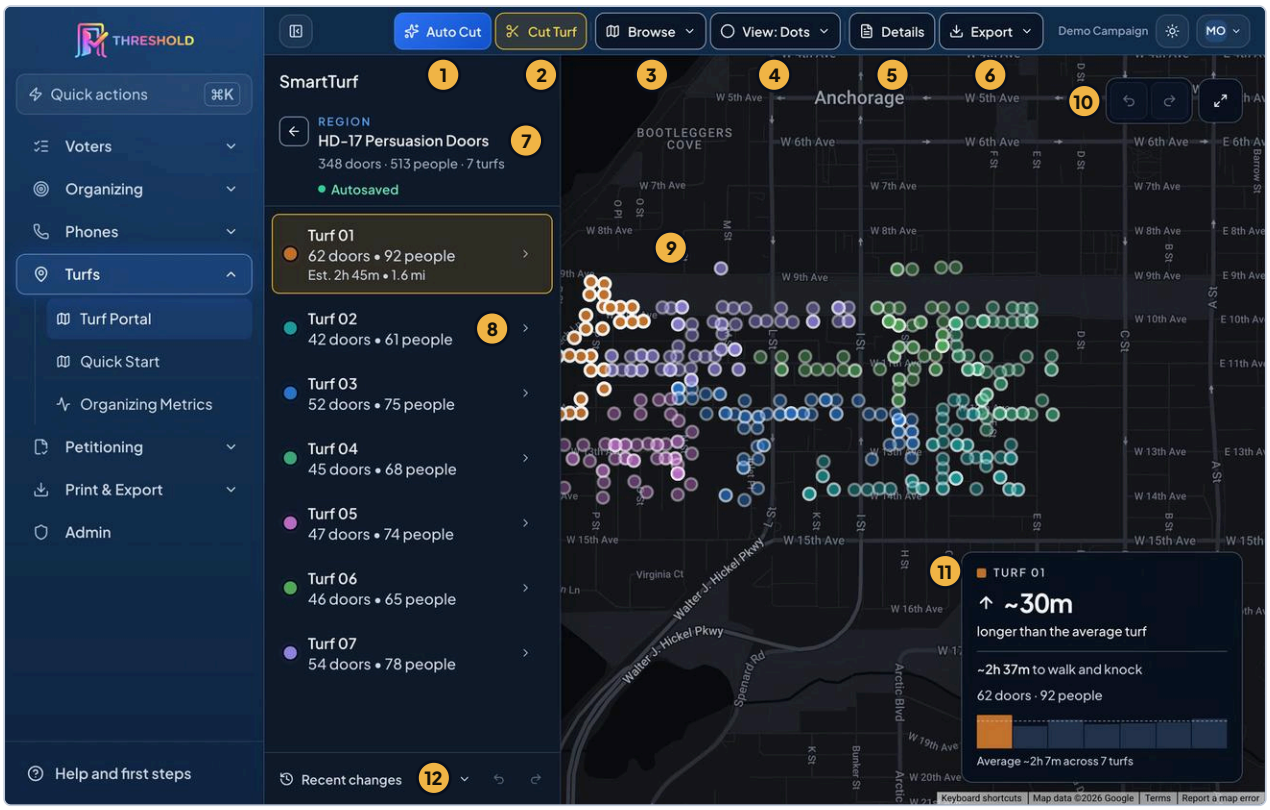
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The Cut Turf screen

Cut Turf is the map where a saved list is divided into turfs. The list being cut is called a region, and each turf is one walkable piece of it. Part 3 covers building the list.



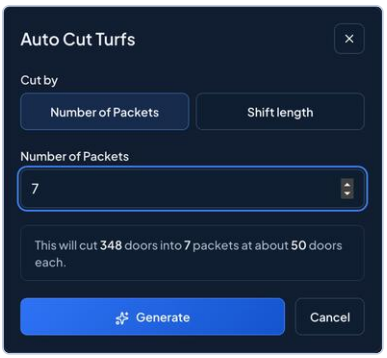
Cut Turf for HD-17 Persuasion Doors after an Auto Cut, with Turf 01 selected.

1. **Auto Cut.** Cuts every door on the list into turfs.
2. **Cut Turf.** Draws one turf by hand.
3. **Mode menu.** The current mode, **Browse** here. The other modes move doors and reshape boundaries.
4. **View. Dots** or **Solo**, and when turf outlines show.
5. **Details.** Opens **List Build Details**: the list's counts, party breakdown and build steps.
6. **Export. Print Packets**, **Export CSV** and **View Sample**.
7. **Region.** The list's name, doors, people and turfs. The arrow returns to My Turfs.
8. **Turf list.** A row for each turf. The selected turf adds its estimated time and distance. The arrow on a row opens the turf's detail panel.
9. **Map.** Each door is a dot in its turf's color. Doors outside a turf are gray.
10. **Undo, Redo, Fit to region.** Take back a change, put it back, or fit the map to the region.
11. **Turf readout.** The selected turf's time to walk and knock, its doors and people, and the average across turfs.
12. **Recent changes.** Your changes, with undo and redo.

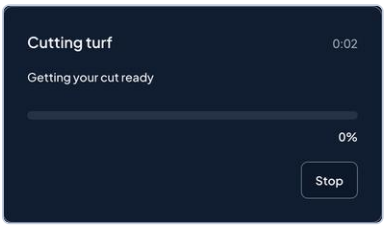
Cutting turf automatically

Auto Cut divides every door on the list into turfs in one pass. You size the cut by a number of packets or by the length of a shift.

1. On the saved list's page, click **Cut Turf**.
   → Cut Turf opens with the list as its region. A list that is new to Cut Turf shows **No turfs yet.** in the rail.
2. In the toolbar, click **Auto Cut**.
   → The dialog **Auto Cut Turfs** opens.
3. Under **Cut by**, select **Number of Packets** or **Shift length**.
4. Enter the number of packets, or the shift length in hours.
   → The line under the box states the cut, such as **This will cut 348 doors into 7 packets at about 50 doors each.**
5. Click **Generate**.
   → The box **Cutting turf** opens with a clock, a percent bar and a line for the current stage. When the cut is done the box reads **Turf cut**, and the turfs fill the rail and the map.



Auto Cut Turfs, set to cut 348 doors into 7 packets.



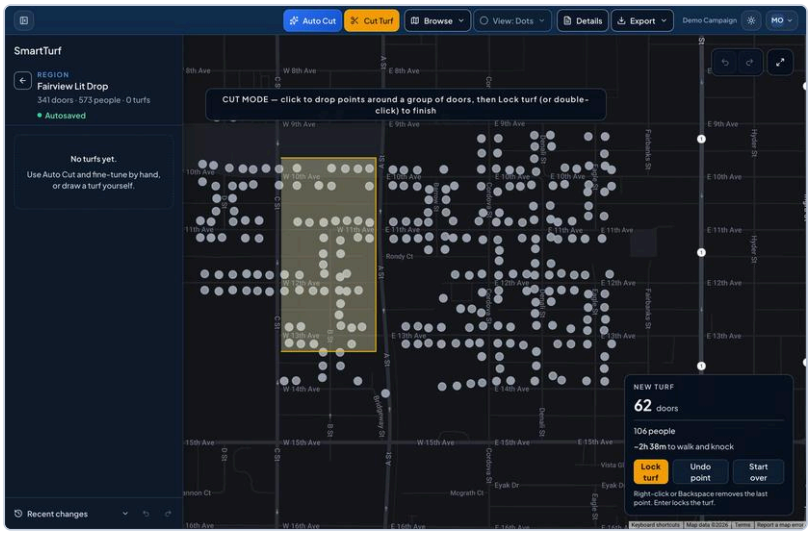
The box **Cutting turf** at the start of a cut.

Number of Packets	The number of turfs to cut. The box opens with a number worked out from the list's door count.
Shift length	**Shift length (hours)** takes 0.5 to 8 in half-hour steps and opens at 2. The dialog reads **Each turf targets this walking + knocking time. Decimals work — 2.5 is two and a half hours.**
Stop	Ends the cut, and the box reads **Cut stopped**. A cut that ends early reads **Cut did not finish**, with **Try again** and **Close**.
A region with turfs	**Auto Cut** shows **Replace turfs with a new cut** and lists the turfs, tagged **hand-edited** or **assigned to** a person. Ticked turfs are kept and their doors stay out of the new cut. Hand-edited turfs and turfs past **In Creation** start ticked. **Keep edited and assigned** and **Keep none** set the ticks in one click. Click **Cut the rest**.
Outliers	Doors that Auto Cut sets aside go into a gray turf named **Outliers**. Its detail panel adds **Why these were set aside**, with a door count for each reason.
Other ways in	ListBuilder's **Save & Open Turf Cutter** saves the list and opens it in Cut Turf. In My Turfs, **Manage** in a region's menu opens the region.

Drawing a turf by hand

Cut Turf draws one turf at a time. You click points around a group of doors, then lock the shape.

1. In the toolbar, click **Cut Turf**.
   → A banner reads **CUT MODE — click to drop points around a group of doors, then Lock turf (or double-click) to finish**.
2. Click the map to drop a point at each corner of the area.
   → The shape fills in as you go. The card **NEW TURF** counts the doors and people inside it and estimates the time to walk and knock. With other turfs on the map, the card also compares the new turf with the average turf.
3. To take back the last point, click **Undo point**, right-click, or press `Backspace`. To begin the shape again, click **Start over**.
4. Click **Lock turf**, double-click, or press `Enter`.
   → The turf joins the rail under the next name in order, such as **Turf 01**, and its doors take its color.



Drawing a turf on Fairview Lit Drop. The shape holds 62 doors and 106 people.



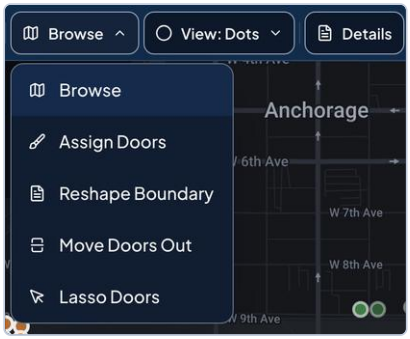
After **Lock turf**: Turf 01 is in the rail and its doors are in its color.

A SHAPE THAT CROSSES ANOTHER TURF

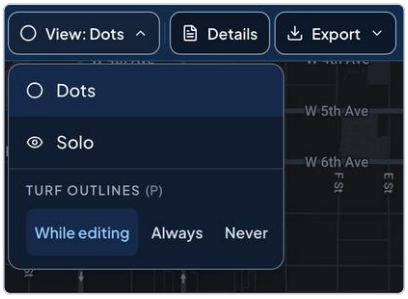
When the shape covers doors that belong to another turf, Threshold asks **Those doors belong to other turfs**. Click **Take them**, **Leave them — cut N unclaimed doors** or **Cancel**. A line then reads **New turf has N doors.**

Adjusting turfs

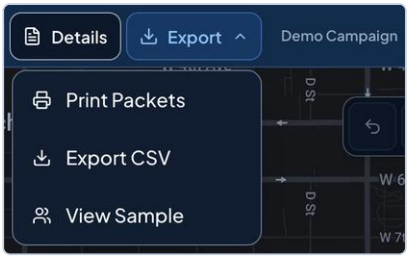
After a cut, the mode menu moves doors between turfs and reshapes boundaries, and the rail merges, renames and deletes turfs. The rail reads **Autosaved**: each change is saved as you make it.



The mode menu.



The **View** menu. P is the keyboard shortcut for turf outlines.



The **Export** menu. **View Sample** opens **Sample**, with each person's name, address, party, voting history and phone.

MODE	WHAT IT DOES
Browse	The mode the screen opens in, for looking over the map and selecting turfs.
Assign Doors	A banner reads **ASSIGN MODE — doors you click or sweep join** and the selected turf's name. Doors you click or sweep across join that turf. The mode has a **Brush** slider.
Reshape Boundary	Opens the panel **Boundary editing**, which reads **Drag the larger handles. The map stays fixed and invalid shapes are rejected.**
Move Doors Out	Draw around doors in the selected turf and click **Lock selection**. **Reassign Specific Doors** then offers **Create New Turf**, or **Move Doors** on another turf.
Lasso Doors	A banner begins **ADJUST MODE — drag a loop around the doors you want to move**. After the loop, **Move N doors to:** lists the turfs. **Cancel selection** clears the loop.

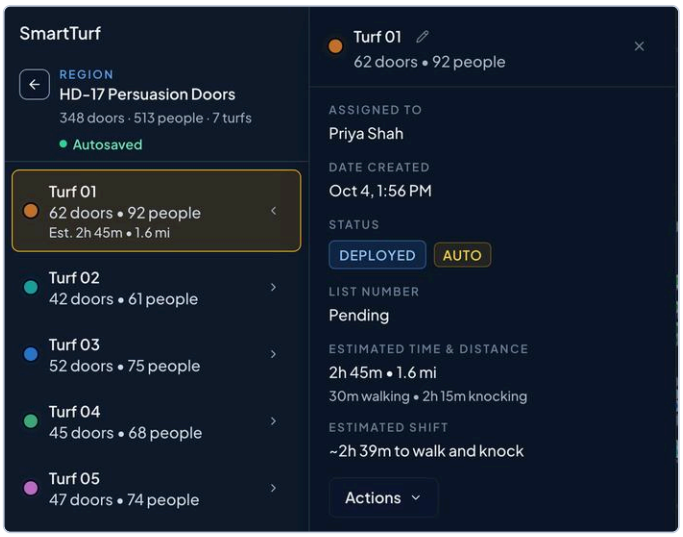
Assign Doors, **Reshape Boundary** and **Move Doors Out** act on the turf selected in the rail.

Select turfs	Click a turf's row to select it, and click it again to clear it. ⌘-click on a Mac or Ctrl-click on Windows adds or removes a turf. Shift-click selects a range.
Merge turfs	Select two or more turfs. A bar reads **2 turfs selected**, with **Merge**, **Assign**, **Delete** and **Clear**. Click **Merge**. In **Merge Turfs**, select a name under **Keep this turf's name** and click the button that begins **Merge into**. Threshold confirms with a line such as **Merged 1 turf into Turf 02 — 84 doors.**
Rename a turf	In the turf's detail panel, click the pencil beside the name, enter a name and press Enter. Esc cancels. An empty name restores the default name.
Delete a turf	In the detail panel, click **Delete turf**, then click it again while it reads **Click again to confirm**.
Take back a change	Click undo on the map or beside **Recent changes**. Threshold confirms with **Change taken back.** Redo confirms with **Change put back.** Press ? for the card of keyboard shortcuts.

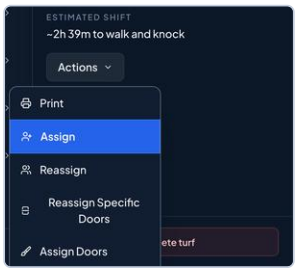
Assigning a turf

Assigning a turf gives it to one member of your team. That person then knocks the turf in the phone app, covered in Part 5.

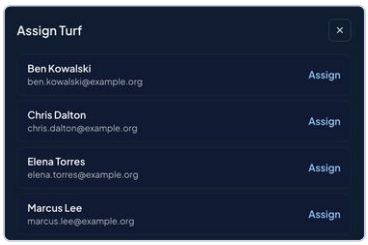
1. In the rail, click the arrow on the turf's row.
   → The turf's detail panel opens beside the rail.
2. Click **Actions**, then click **Assign**.
   → The dialog **Assign Turf** lists your team.
3. Click **Assign** beside a name.
   → The panel shows the name under **ASSIGNED TO**, and the status changes from **IN CREATION** to **DEPLOYED**.



The detail panel for Turf 01, assigned to Priya Shah.



The **Actions** menu in the detail panel.



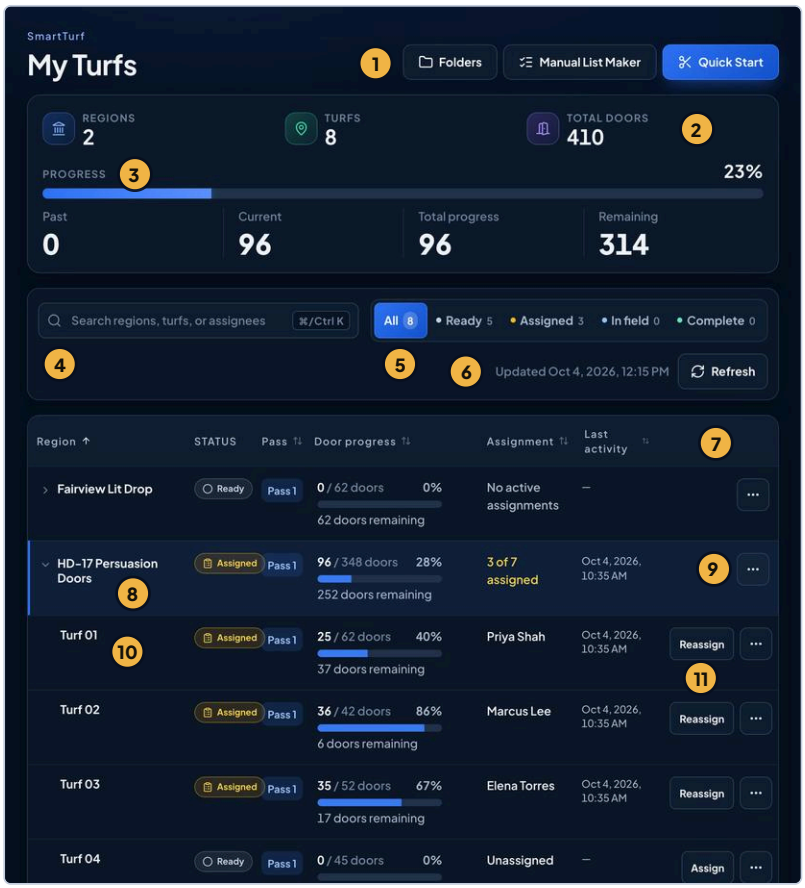
The top of the dialog **Assign Turf**.

STATUS	WHAT IT MEANS
IN CREATION	The turf is unassigned.
DEPLOYED	The turf is assigned or scheduled.
IN PROGRESS	A canvasser has a live canvass session on the turf.
DOORS KNOCKED	Every person on the turf has a final result.

The detail panel	**AUTO** marks a turf made by Auto Cut. **LIST NUMBER** is the turf's list number, or **Pending**. While an assignment saves, the status reads **Deploying**.
Actions	**Print**, **Assign**, **Reassign**, **Reassign Specific Doors**, **Assign Doors** and **Rename Turf**. **Reassign** opens **Reassign Turf** with the same list of names.
Several turfs at once	Select the turfs in the rail and click **Assign** in the bar. The dialog is titled **Assign N Turfs**, and a line confirms **Sent N turfs.** One person can hold several turfs.
The door script	The script belongs to the canvasser. Each canvasser gets the campaign's default door script, or the script given to that person or their group with **Assign canvasser** in Script studio, covered in Part 2.

Tracking turf in My Turfs

My Turfs lists every region with its turfs, who holds each turf and how many doors are attempted. In the sidebar, click **Turfs**, then click **Turf Portal**.



My Turfs with the region HD-17 Persuasion Doors open.

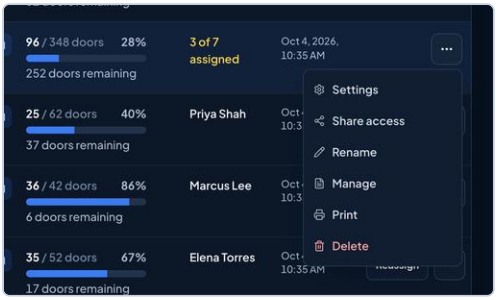
1. **Folders, Manual List Maker, Quick Start.** Shortcuts to your folders, ListBuilder and Quick Start.
2. **Summary. REGIONS**, **TURFS** and **TOTAL DOORS**.
3. **Progress.** The share of doors attempted. **Total progress** is **Past** plus **Current**.
4. **Search.** Finds regions, turfs or assignees.
5. **Status filters. All**, **Ready**, **Assigned**, **In field** and **Complete**, each with its count of turfs.
6. **Refresh.** Reloads the figures. The time of the last update is beside it.
7. **Column headings. Region**, **Pass**, **Door progress**, **Assignment** and **Last activity** sort the table.
8. **Region row.** The arrow opens its turfs. The row gives the status, pass, door progress and assignment.
9. **Region menu. Settings**, **Share access**, **Rename**, **Manage**, **Print** and **Delete**.
10. **Turf row.** One turf's status, pass, door progress, assignee and last activity.
11. **Assign and Reassign. Assign** on an unassigned turf, **Reassign** on an assigned one.

STATUS	WHAT IT MEANS
Ready	The turf is waiting to be assigned.
Assigned	The turf is assigned or scheduled.
In field	A canvasser has a live canvass session on the turf. The assignee is marked **Active**.
Complete	Every door on the turf is attempted in the current pass.

Door progress is the doors with any logged attempt, out of the turf's doors.

Assign or reassign a turf

1. Click the arrow beside a region.
   → The region's turfs open under it.
2. On a turf's row, click **Assign**.
   → A dialog titled **Assign** and the turf's name lists your team.
3. Select a person.
   → The row shows the person's name and the status **Assigned**.



The region menu. **Manage** opens the region in Cut Turf.

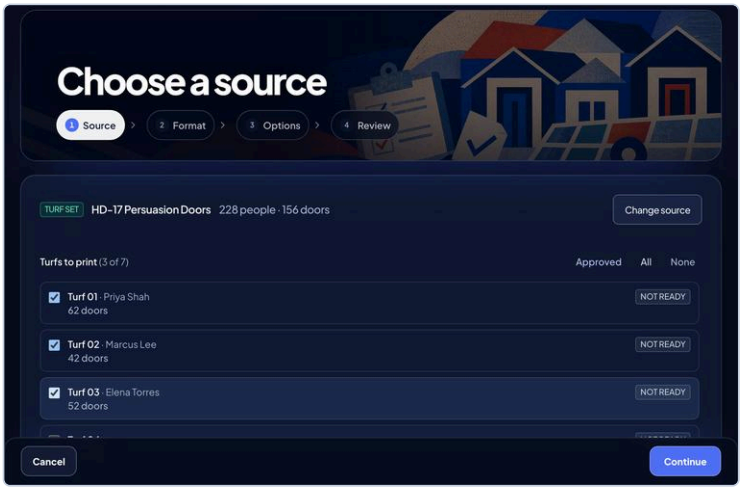
Reassign	On an assigned turf, click **Reassign**. A change of person opens the question **Reassign** with the turf's name, where you enter **Reassign turf** to confirm. **Unassign** clears the assignment.
Settings	**Progress totals** sets **Calculate total from** to **Current turfs**, **Enter a total**, **List or dynamic search** or **Region**. **Passes** sets the percent of doors knocked that completes a pass. **Checkout** sets when a checkout expires. **Alerts** warns before an attempted turf is assigned.
Share access	Under **Who has access**, select **Entire user base** or **Specific users**. Volunteers and texters see the regions shared with them on Turf Portal.
The next pass	A pass is one round through a region, and a region has up to three. When a region is eligible, its menu adds **Create next pass**. On a turf's row, the **…** button holds **Send to next pass**.

Printing walk packets

The Print wizard turns a region's turfs into PDF walk packets, one for each turf, in four steps.

Step 1: Source

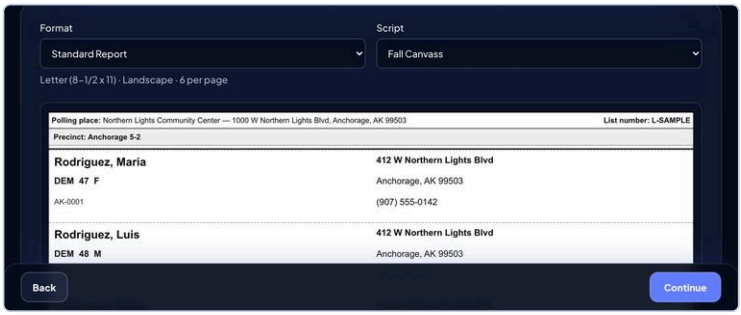
1. In My Turfs, open the region's **…** menu and click **Print**.
   → The wizard opens on **Choose a source** with the region as the **TURF SET**.
2. Under **Turfs to print**, tick the turfs, or click **Approved**, **All** or **None**.
   → The people and doors beside the region's name follow the ticks.
3. Click **Continue**.



Step 1 with three of the seven turfs ticked.

Step 2: Format

4. In **Format**, select a format. **Standard Report** is the starter format, listed with your campaign's own formats.
   → The line under the menu gives the page setup, and a sample page shows the layout.
5. In **Script**, select a door script, or leave **No script**. Click **Continue**.

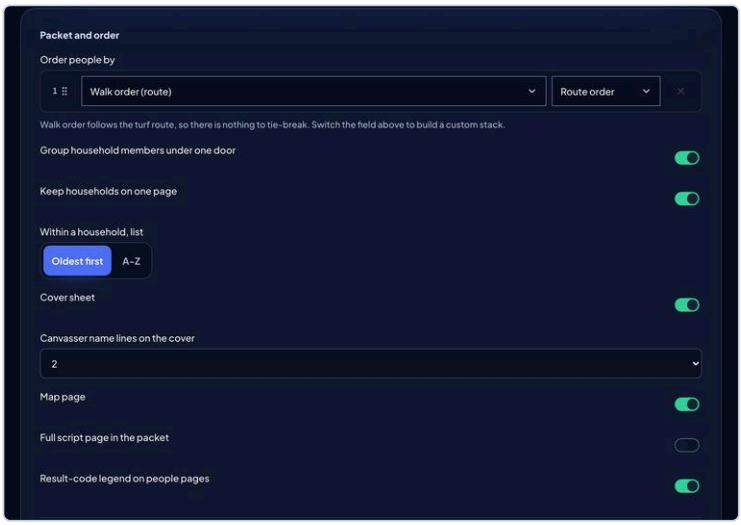


Step 2 with the format **Standard Report** and the script **Fall Canvass**.

Step 3: Options

6. Set the options, then click **Continue**.

- **Order people by. Walk order (route)** follows the turf's route. The menu also holds **Street**, **House number**, **Odd / even side**, **Unit / Apt**, **Name (Last, First)**, **Phone** and **ZIP**.
- **Group household members under one door**, **Keep households on one page** and **Within a household, list** set the householding.
- **Cover sheet**, **Map page** and **Full script page in the packet** add those pages to each packet.

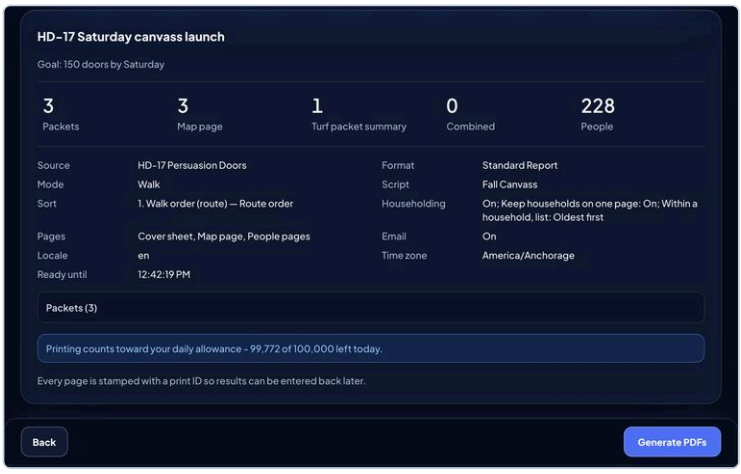


Step 3, the section **Packet and order**.

Below it, **Print name** holds **Name this print** and **Cover goal**, a line for the cover sheet. **Output** holds the switches **People pages**, **Email me when it's ready** and **Also build one combined PDF**.

Step 4: Review

7. Check the counts and the settings.
   → The tiles count **Packets**, **Map page**, **Turf packet summary**, **Combined** and **People**.
8. Click **Generate PDFs**.
   → **My PDFs** opens with the new print.



Step 4 for three packets and 228 people.

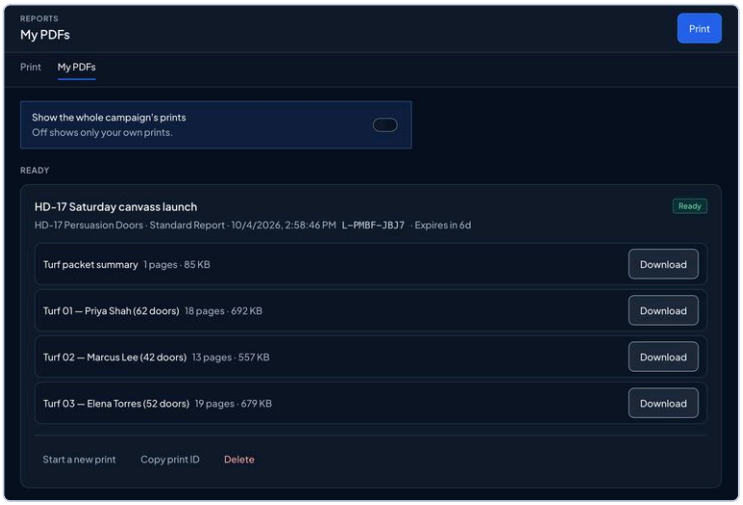
My PDFs

A print moves through **Preparing**, **Queued** and **Rendering** to **Ready**. It then lists one file for the turf packet summary and one for each turf.

9 Click **Download** beside each file.

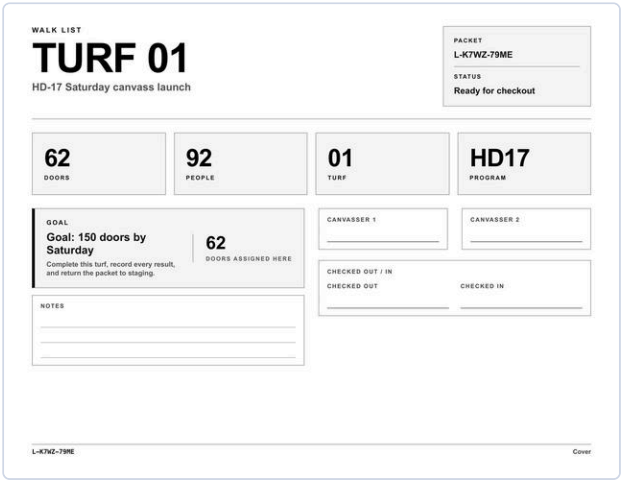
Start a new print opens the wizard. **Copy print ID** copies the ID in the line under the print's name. A print is kept for seven days, and its line counts down, as in **Expires in 6d**.

Print and **My PDFs** are also in the sidebar, under **Print & Export**.

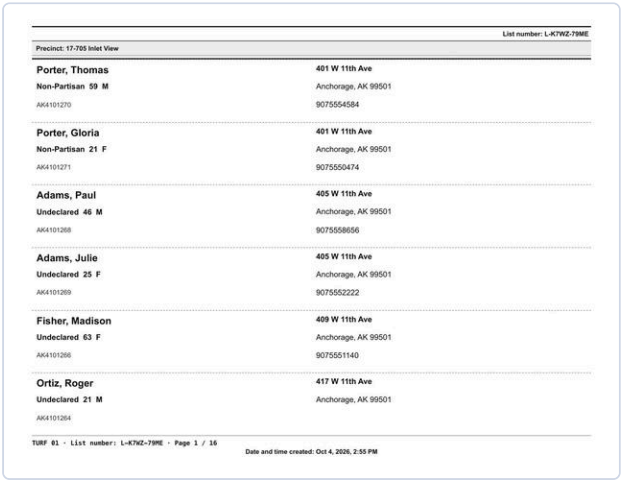


My PDFs with the print HD-17 Saturday canvass launch ready to download.

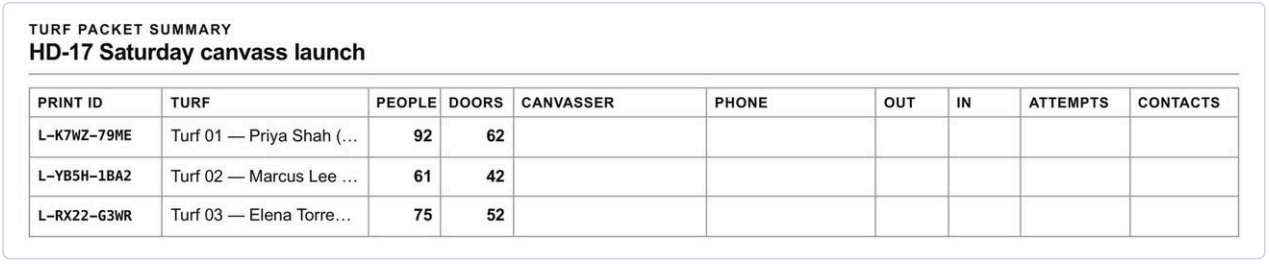
What is in a packet



The cover sheet: the turf, the print's name, the **PACKET** number, the counts of **DOORS** and **PEOPLE**, the **GOAL** line, lines for canvasser names, **CHECKED OUT / IN** and **NOTES**.



A people page: people under their **Precinct**, each with name, party, age, sex, ID, address and phone. The footer carries the turf, the **List number** and the page number.



TURF PACKET SUMMARY

HD-17 Saturday canvass launch

PRINT ID	TURF	PEOPLE	DOORS	CANVASSER	PHONE	OUT	IN	ATTEMPTS	CONTACTS
L-K7WZ-79ME	Turf 01 — Priya Shah (…	92	62						
L-YB5H-1BA2	Turf 02 — Marcus Lee …	61	42						
L-RX22-G3WR	Turf 03 — Elena Torre…	75	52						

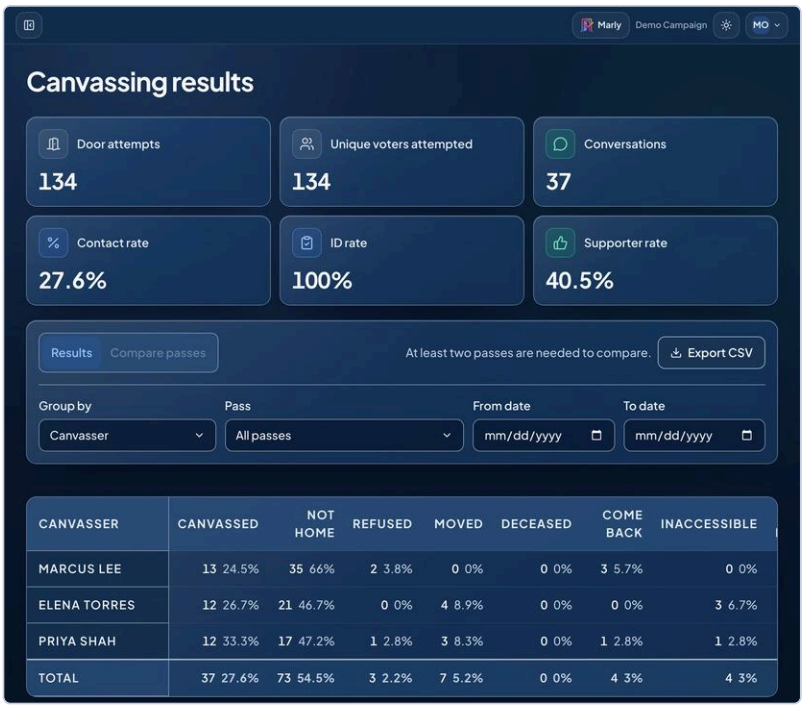
The top of the turf packet summary, a separate PDF with one row for each packet. The **PRINT ID** of Turf 01 matches the **PACKET** number on its cover and the **List number** on its people pages. With **Map page** on, each packet also has a map page.

Reading door results

Canvassing results totals the door attempts your canvassers log. In the sidebar, click **Turfs**, then click **Organizing Metrics**.

- **Door attempts.** Attempts logged at doors.
- **Unique voters attempted.** Voters with at least one attempt.
- **Conversations.** Attempts with the result **Canvassed**.
- **Contact rate.** Conversations divided by door attempts.
- **ID rate.** Support answers divided by conversations.
- **Supporter rate.** 1s and 2s divided by support answers.

The table has one row for each group and a **TOTAL** row. Each cell is a count and its share of the row.



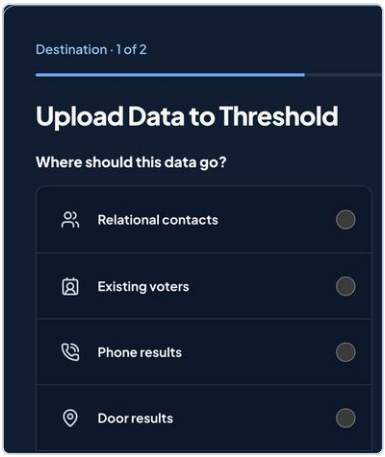
Canvassing results grouped by canvasser.

Columns	One column for each result: canvassed, not home, refused, moved, deceased, come back, inaccessible, lit dropped and other response. Then the total, the count of each support score from 1 to 5, and the supporter rate.
Group by	**Canvasser**, **Organizer**, **Turf**, **Region**, **List or turf**, **City**, **Precinct**, **Congressional district**, **State Senate district** or **State House district**. **List or turf** groups by the walk list or door turf where a result was recorded. **Organizer**, **Turf** and **Region** follow the canvasser's place in the campaign's organizing structure.
Pass and dates	**Pass**, **From date** and **To date** narrow the results. **Clear filters** resets them.
Compare passes	The second view, beside **Results**. Until a second pass has results, the line reads **At least two passes are needed to compare.**
Export CSV	Downloads the table.

Entering door results from paper

Results written on printed packets go in through **Scan / Upload**, as a photo, a scan or a spreadsheet.

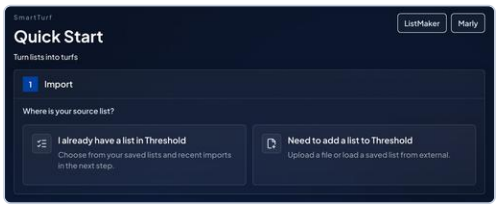
1. In the sidebar, click **Voters**, then click **Scan / Upload**.
   → **Upload Data to Threshold** opens on **Destination · 1 of 2**.
2. Under **Where should this data go?**, select **Door results**, then click **Continue**.
3. Under **How are you adding it?**, select **Photo or scan** or **CSV or Excel**.
   → The panel **Door results** opens.
4. Under **Choose the existing Door source**, select **Canvass list**, **Turf** or **Printed walk list**, then set the **Canvasser attribution**.
5. Under **Choose a Door result file**, choose the file.
6. Review the door results Threshold reads from the file, then click the **Import** button, which carries the number of door results.
   → **Canvassing results** opens.



The top of **Upload Data to Threshold**, on the first of its two steps.

Quick Start

Quick Start turns a list into turfs in five steps. In the sidebar, click **Turfs**, then **Quick Start**.



Quick Start on its first step, **Import**.

Need to add a list to Threshold opens **Add a new list**, with the tabs **Upload file** and **Load from external**.

Send to turf cutter opens the new list in Cut Turf. **Send list to** a person asks **Send N doors to** that person, and **OK** creates one turf assigned to them.

1. **Import.** Select **I already have a list in Threshold** or **Need to add a list to Threshold**.
2. **List & destination.** Select the list in **List**. Under **Send to**, select **Turf cutter**, or **One person** and an **Assignee**. Click **Continue**.
3. **Remove–if.** Four removals, all on to start: doors attempted in the last 365 days, doors canvassed in the last 365 days, **Remove all statuses except Not Home and Canvassed**, and **Remove if opponent (via doors)**. **Preview counts** shows **Before**, **Removed** and **After**.
4. **Householding.** The step reads **Removals apply to the whole household.** Tick **Confirmed**.
5. **Send.** Click **Send to turf cutter**, or **Send list to** and the person's name.

PART 5

Knocking doors with the app

CANVASSER

Get the Threshold app on your iPhone or Android phone, sign in, open the turf assigned to you, and record each door as you walk.

IN THIS PART

Getting the app 44

Signing in 45

Opening your turf 46

The map and the walk list 47

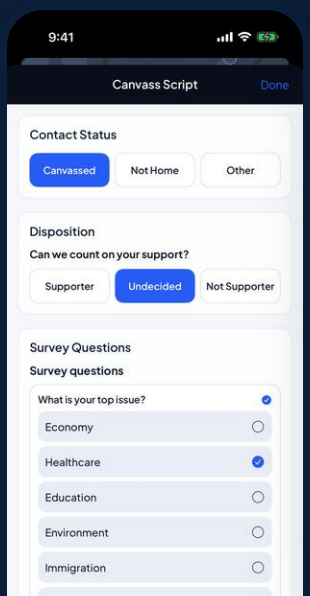
Recording a door 48

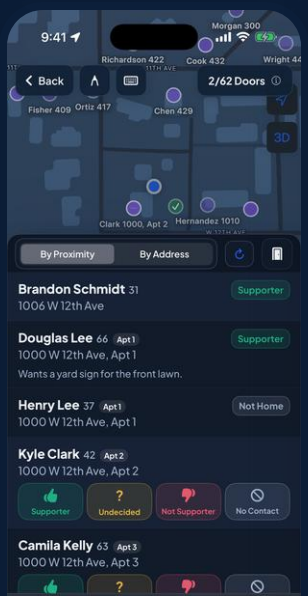
The full script 49

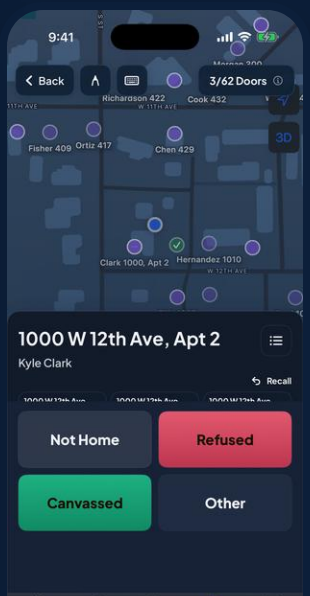
One door at a time 50

Syncing your results 51

iPhone and Android 52







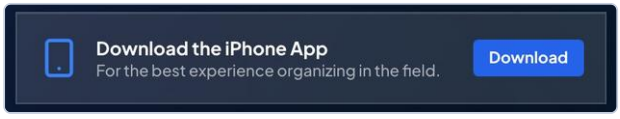
SET-UP

Getting the app

The app runs on iPhone and on Android. Its name on the phone is **Threshold**.

IPHONE From the App Store

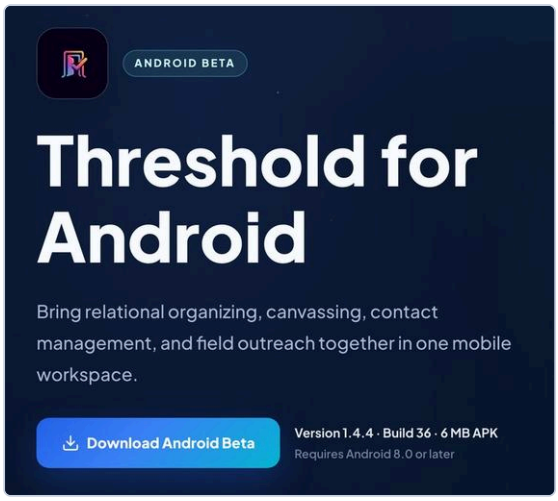
1. On your iPhone, open your invitation link (Part 1).
   → The invitation page shows the card **Download the iPhone App**.
2. Tap **Download**.
   → The App Store opens on the Threshold app.
3. Install the app, then open **Threshold**.
   → The sign-in screen opens.



The card on the invitation page.

ANDROID From the download page

1. On your Android phone, open a web browser and go to **thresholdvote.com/android**.
   → The page **Threshold for Android** opens with the badge **Android Beta**.
2. Tap **Download Android Beta**.
   → The browser downloads the app as an APK file.
3. When Android asks for permission, allow your browser to install the app.
4. Open **Threshold**.
   → The sign-in screen opens.



The page **Threshold for Android**. The lines beside the button read **Version 1.4.4 · Build 36 · 6 MB APK** and **Requires Android 8.0 or later**.

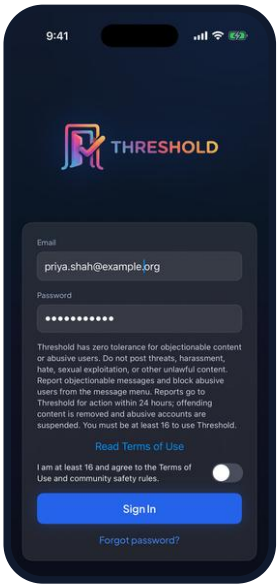
Version	The pictures in this part show the iPhone app, version 1.4.4.
App Store link	On the page **Threshold for Android**, under **Using an iPhone?**, the link **View Threshold on the App Store** opens the same App Store page.
Google Play	Threshold for Android is also published on Google Play.
Your account	The app signs in with the same Threshold account as the web (Part 1).

SET-UP

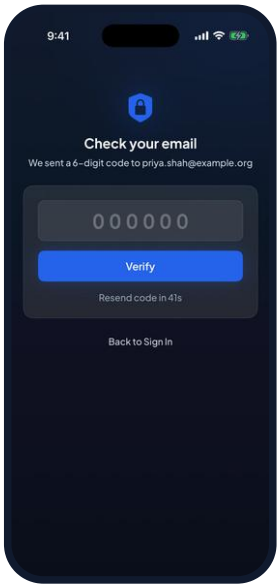
Signing in

Signing in takes your email, your password and a 6-digit code that Threshold emails to you.

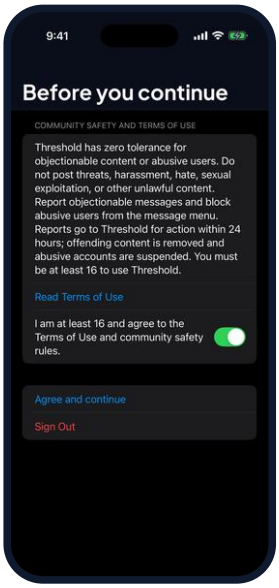
1. Open **Threshold** and enter your **Email** and **Password**.
2. **iPhone:** turn on the switch **I am at least 16 and agree to the Terms of Use and community safety rules.**
   → **Sign In** turns on.
3. Tap **Sign In**.
   → The screen reads **Check your email**.
4. Enter the six digits from the email Threshold sends you.
   → The app submits the code at the sixth digit.
5. **iPhone:** when **Before you continue** appears, turn on the switch and tap **Agree and continue**.
   → **Home** opens. On Android, **Home** opens right after the code.



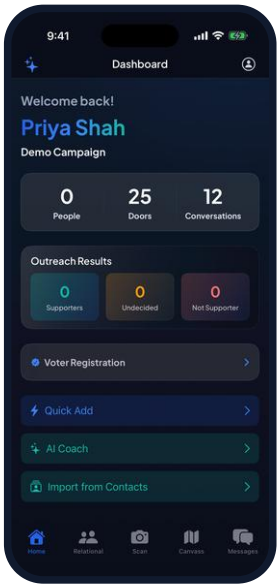
1 The sign-in screen on iPhone, with the switch off.



4 **Check your email**: the code field, **Verify** and the resend countdown.



5 **Before you continue** on iPhone, with the switch on.



The **Home** tab, titled **Dashboard**.

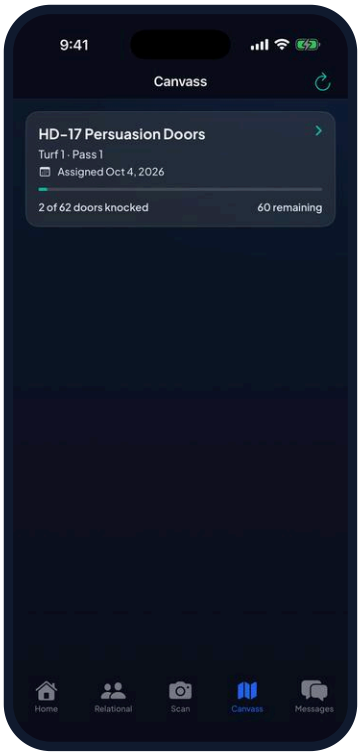
The five tabs	**Home** shows your counts of **People**, **Doors** and **Conversations**. **Relational** (on Android, **People**) holds your own contacts and **Nearby**, a lookup of voters by address or zip code. **Scan** photographs a paper sheet. **Canvass** holds your turfs. **Messages** is team messaging.
Forgot password?	Enter your email and tap **Send Reset Code**. Enter the code from the email and tap **Verify Code**. Enter a new password and tap **Set Password**.

CANVASSING

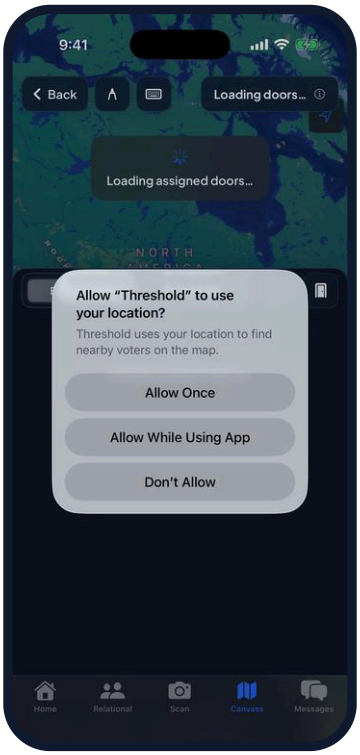
Opening your turf

The turfs an organizer assigns to you (Part 4) appear on the **Canvass** tab, one card for each turf.

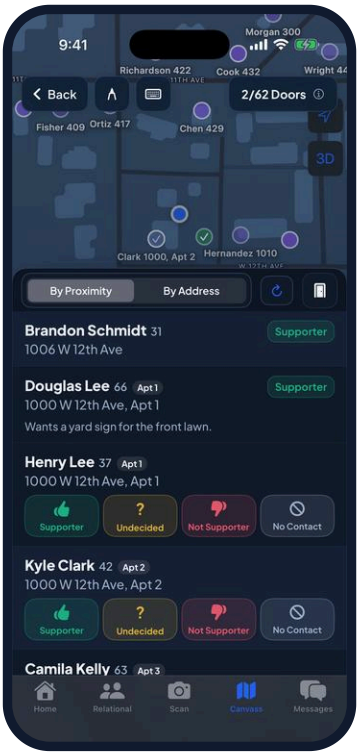
1. In the tab bar, tap **Canvass**.
   → The tab lists your turfs. In the picture the card reads **HD–17 Persuasion Doors**, **Turf 1 · Pass 1**.
2. Tap the card.
   → The turf opens. The first time, the phone asks to use your location.
3. **iPhone:** tap **Allow While Using App** or **Allow Once**. **Android:** allow location in the prompt Android shows.
   → The map appears with the walk list under it, and the map follows you as you walk.



1 The **Canvass** tab with one turf assigned.



3 The location prompt on iPhone, over **Loading assigned doors…**



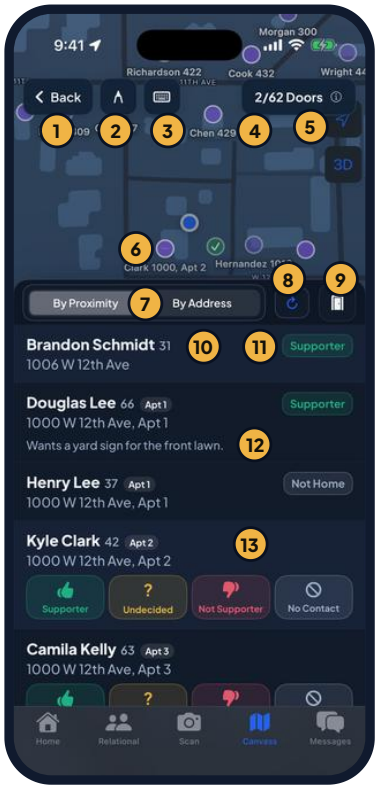
The open turf: the map, the counter **2/62 Doors** and the walk list.

2 of 62 doors knocked	A door counts as knocked once you record a result for a person there. **60 remaining** counts the doors left.
Refresh	The arrow at the top right reloads the tab. Pulling the list down does the same.
No canvass lists assigned	Shows while you have no turf, above the line **When an organizer assigns you a list, it will appear here.**

CANVASSING

The map and the walk list

The walk list has one row for each person. People at the same address and unit make up one door.



An open turf on iPhone, sorted **By Proximity**.

1. **Back.** Returns to the **Canvass** tab.
2. **Pencil.** Draw mode: write on the screen and Threshold reads the handwriting.
3. **Keyboard.** Opens **Typed entry** (Android: **Type canvass entry**) to type a name and a result. A name on the walk list gets the result. A new name becomes a new contact.
4. **Doors counter.** Doors you have knocked out of the doors in the turf. Tap it to open **List Info** (Syncing your results).
5. **Location button.** The map follows you until you drag it. This button returns it to following you.
6. **Pins.** One for each person, with the last name and house number. The color shows the person's latest result from anyone on the campaign. Tap a pin and the walk list scrolls to that person.
7. **By Proximity, By Address.** The order of the walk list.
8. **Refresh.** Reloads the walk list.
9. **Door button.** Switches to one door at a time (One door at a time).
10. **Person.** Name, age and unit, then the address. Tap the name or address to open the full script (The full script).
11. **Badge.** The result you recorded, such as **Supporter** or **Not Home**.
12. **Your text.** What you entered in **Optional note**.
13. **Result buttons.** On each person with no result yet: **Supporter**, **Undecided**, **Not Supporter** and **No Contact**.

The order of the walk list

By Proximity	Doors within 40 meters of you come first, nearest first. The rest follow by distance, weighted toward the direction you are walking. People with a result keep their place.
By Address	Street name, house number, then unit.
At the door	Within 15 meters of a person's point on the map, the list scrolls to that row and highlights it.

Pin colors

LATEST RESULT	IPHONE	ANDROID
No result yet	Purple	Gray
Canvassed	Purple, person and check	Blue
Supporter	Green, check	Green, check
Undecided	Dark yellow, ?	Amber, ?
Not Supporter	Red, x	Red, x
No contact	Slate, minus	Blue, dash

CANVASSING

Recording a door

Each person has four buttons until they have a result: three for a conversation, one for no contact.

CANVASSING Record a conversation

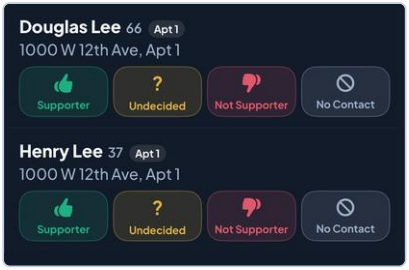
1. On the person's row, tap **Supporter**, **Undecided** or **Not Supporter** (on Android, **Opposed**).
   → The badge appears on the row and the first survey question opens.
2. Tap the voter's answer. **iPhone:** then tap **Next**, and **Continue** on the last question. **Android:** each tap saves the answer and opens the next question.
   → On iPhone, **Optional note** opens after the last question.
3. In **Optional note**, enter what the voter said.
4. Tap **Done** (Android: **Complete**).
   → The visit ends. The row closes and shows the badge and your text.

CANVASSING Record no contact

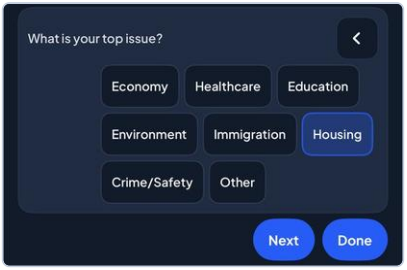
1. On the person's row, tap **No Contact**.
   → The reasons open.
2. Tap the reason, such as **Not Home**.
3. In **Optional note**, enter why there was no contact, then tap **Done** (Android: **Complete**).
   → The row closes with the reason as its badge.

AT EVERY STEP

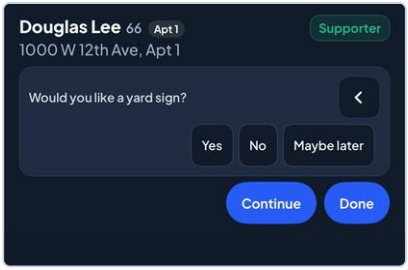
The back arrow returns one step and undoes it. Each tap is saved on the phone as you go. On iPhone, **Done** on a question ends the visit there.



1 The four buttons on each person with no result yet.



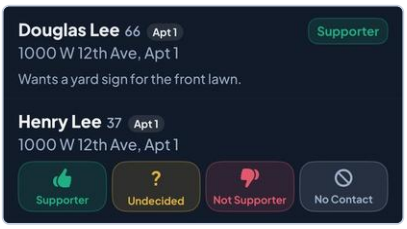
2 A survey question on iPhone with **Housing** selected.



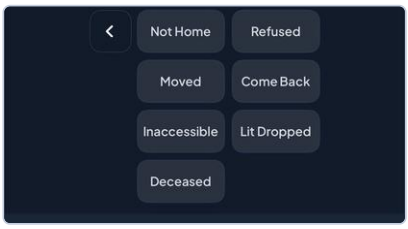
2 The last question, with **Continue**. The row carries the badge **Supporter**.



3 **Optional note** and **Done**.



4 The finished row, and the next person with the four buttons.



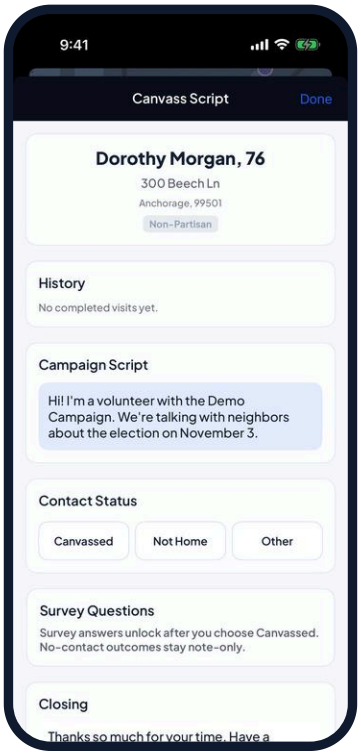
The reasons after **No Contact** on iPhone.

CANVASSING

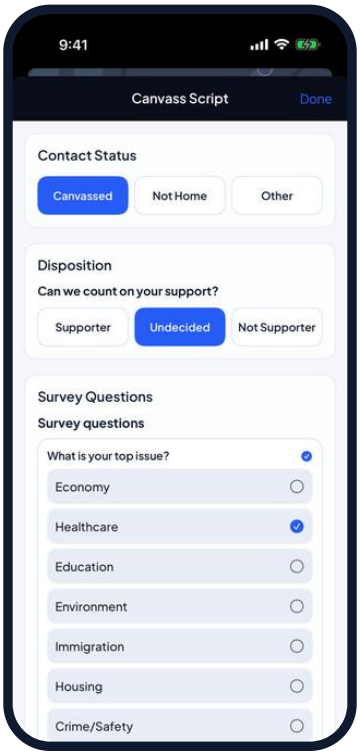
The full script

The page **Canvass Script** holds one person's script, contact status, survey and notes.

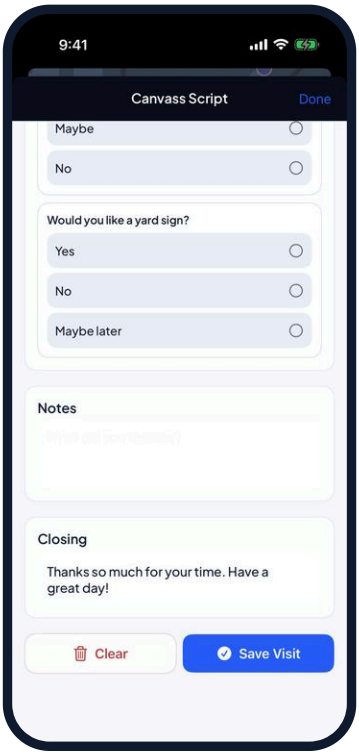
1. In the walk list, tap the person's name or address (Android: the row or **Script**).
   → **Canvass Script** opens on that person.
2. Read the opening under **Campaign Script**.
3. Under **Contact Status**, tap **Canvassed**, **Not Home** or **Other**.
   → **Canvassed** opens **Disposition**. **Other** opens **Reason**.
4. Under **Disposition**, tap the support level. Under **Survey Questions**, tap an answer to each question. Tapping an answer again clears it.
5. Under **Notes**, enter what you discussed.
6. Read the **Closing** and tap **Save Visit**.
   → The visit ends. **Done**, at the top right, closes the page and keeps the visit open.



1 The voter, **History**, **Campaign Script** and **Contact Status**.



4 **Canvassed** and **Undecided** selected, and **Healthcare** checked.



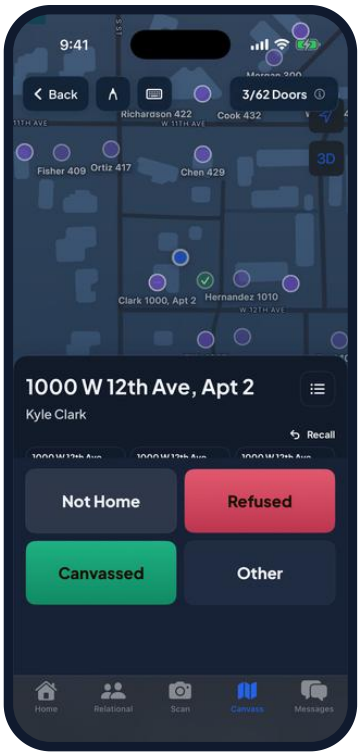
6 **Notes**, **Closing**, **Clear** and **Save Visit**.

History	Earlier visits to this person. With none it reads **No completed visits yet.**
Clear	Asks **Clear Current Attempt?** and clears the visit in progress.

CANVASSING

One door at a time

The door button in the walk list header swaps the list for a single door: its address, the people there and large result buttons. The app moves you from door to door.



One door on iPhone: **1000 W 12th Ave, Apt 2**, Kyle Clark.

1. In the walk list header, tap the door button (Android: the map button).
   → The panel shows one door: the address, the people there and, on iPhone, **Not Home**, **Refused**, **Canvassed** and **Other**.
2. With no conversation, tap **Not Home** or **Refused**, or tap **Other** and then **Moved**, **Come Back**, **Inaccessible** or **Lit Dropped**.
   → One tap records the result for every person at the door with no result yet. **Deceased**, under **Other** on iPhone, is recorded for one person.
3. **iPhone:** after a conversation, tap **Canvassed**.
   → The panel shows the script, a chip for each person, **Full record**, and **Supporter**, **Undecided** and **Not Supporter**.
4. Tap the person's support level.
   → The panel moves to the next person at the door, then to the next suggested door.

ON ANDROID

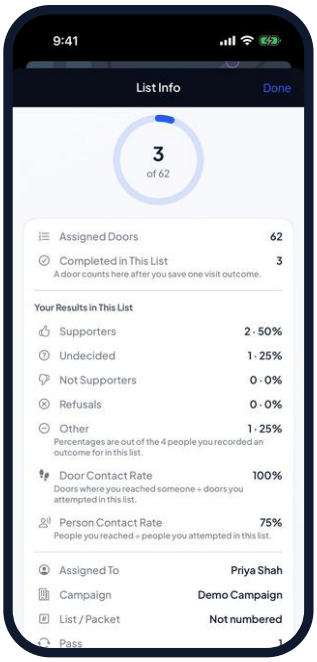
The panel lists each person with **Supporter**, **Undecided**, **Opposed**, **Deceased** and **Full script**. **Not Home**, **Refused** and **Other** sit at the bottom.

The next door	One door at a time moves to the next door by itself. In the walk list you pick the next person: scroll to the row or tap the pin on the map.
Recall	Returns to the last door you completed.
Suggested doors	Up to three buttons under the names lead to the next doors.
Back to the walk list	**iPhone:** tap the list button at the top right of the panel. **Android:** tap **List**.
Undo	For 5 seconds after a result, a banner reads **Marked**, the name, **as** and the result, with an **Undo** button. The result uploads after those 5 seconds.
Changing a saved result	Open **Canvass Script** for the person and save a new visit. The earlier visit stays under **History**, struck through and tagged **Corrected** or **Voided**.

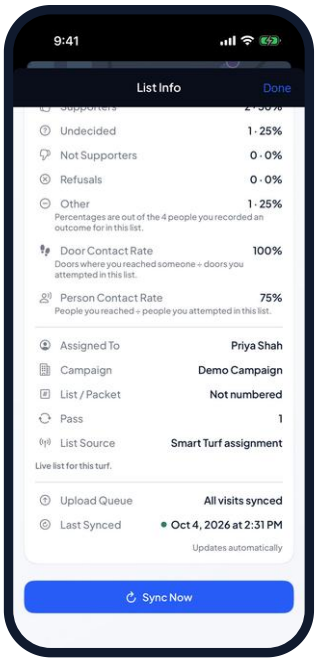
SYNCING

Syncing your results

A result shows on its row as soon as it is written to the phone, with or without signal, and the app uploads it by itself.



1 The top of **List Info**: doors completed, **Your Results in This List** and the two contact rates.

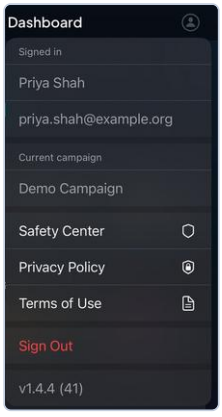


2 The end of **List Info**: **Upload Queue**, **Last Synced** and **Sync Now**.

1. In an open turf, tap the doors counter.
   → **List Info** opens.
2. Scroll to **Upload Queue**.
   → **All visits synced** means every result has uploaded.
3. Tap **Sync Now**.
   → The walk list reloads.
4. Tap **Done**.

iPhone	Uploads after each save, when the network returns, and when you come back to the app.
Android	Uploads while a turf is open: after each edit and after each refresh of the walk list, every 30 seconds.
Organizers	See door results on the web under **Organizing Metrics** (Part 4).

The account menu



The menu on iPhone.

On **Home**, tap the person icon at the top right. The menu shows who is signed in, the campaign, **Safety Center**, **Privacy Policy**, **Terms of Use**, **Sign Out** and the version and build, here **v1.4.4 (41)**. On Android the icon opens **Profile**, with **Sign Out**, **Terms of Use**, **Privacy Policy** and the version.

Current campaign	The campaign the app is working in. With more than one campaign it offers **Switch Campaign**.
Safety Center	The community rules and **Blocked users**.
Sign Out	**iPhone:** signs you out at once. **Android:** first counts results waiting to upload. With some waiting, **Unsynced field work** offers **Sign out anyway** and **Keep working**.

REFERENCE

iPhone and Android

The pictures come from an iPhone. This table pairs what reads differently on Android.

WHERE	IPHONE	ANDROID
SET-UP		
Sign-in screen	**Email**, **Password**, the agreement switch, **Sign In**	**Email**, **Password**, **Sign In**
Second tab	**Relational**	**People**
Home, counts	**People**, **Doors**, **Conversations**	**People Rolodexed**, **Doors Knocked**, **Conversations**
Account	The person icon opens a menu	The person icon opens **Profile**
Colors	Dark	Light or dark, following the phone's setting
CANVASSING		
Leave the turf	**Back**	A back arrow
Map	Apple Maps	Google Maps
One door at a time	The door button	The map button
Result buttons	Icons with words	Icons: thumb up, question mark, thumb down, crossed circle
Third support level	**Not Supporter**	**Opposed** on **Home**, the walk list and one door
No Contact reasons	**Not Home**, **Refused**, **Moved**, **Come Back**, **Inaccessible**, **Lit Dropped**, **Deceased**	**Not Home**, **Refused**, **Inaccessible**, **Moved**, **Deceased**
Survey on the row	Tap an answer, then **Next**, and **Continue** on the last question	A tap saves the answer and opens the next question. Also **Skip** and **Add note**
End the visit	**Done**	**Complete**
Survey on Canvass Script	Unlocks at **Canvassed**	Unlocks at **Canvassed** and a support level
Open the full script	Tap the name or address	Tap the row or **Script**
One door, buttons	**Not Home**, **Refused**, **Canvassed**, **Other**	For each person **Supporter**, **Undecided**, **Opposed**, **Deceased**. Below, **Not Home**, **Refused**, **Other**
One door, to the script	**Full record**	**Full script**
SYNCING		
Upload Queue, waiting	A count of visits and **syncing** or **will sync automatically**	A count and **waiting** or **need retry**
Sign Out	Signs out at once	First counts results waiting to upload

PART 6

Phone banks

ORGANIZER CALLER

An organizer creates a phone bank from a saved list and a script, brings callers in and reads the results. A caller joins and makes the calls.

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Managing phone banks 59

Getting callers in 60

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Watching the Live monitor 61

Reading results 62

Contact review and the next pass 63

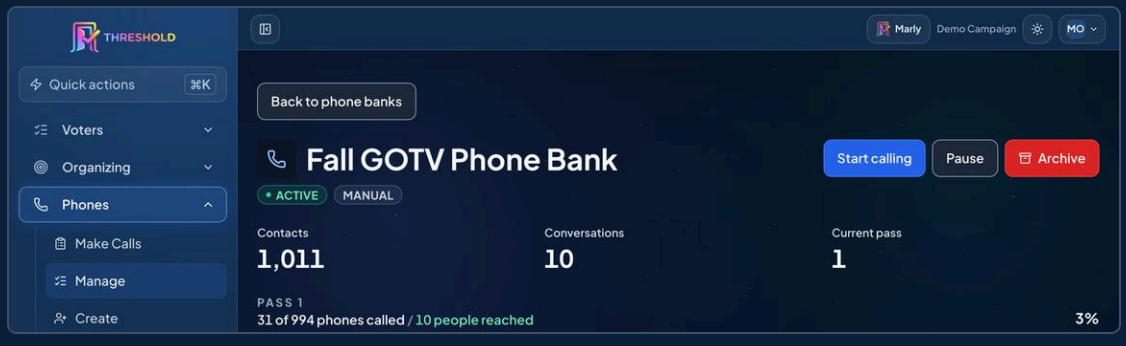
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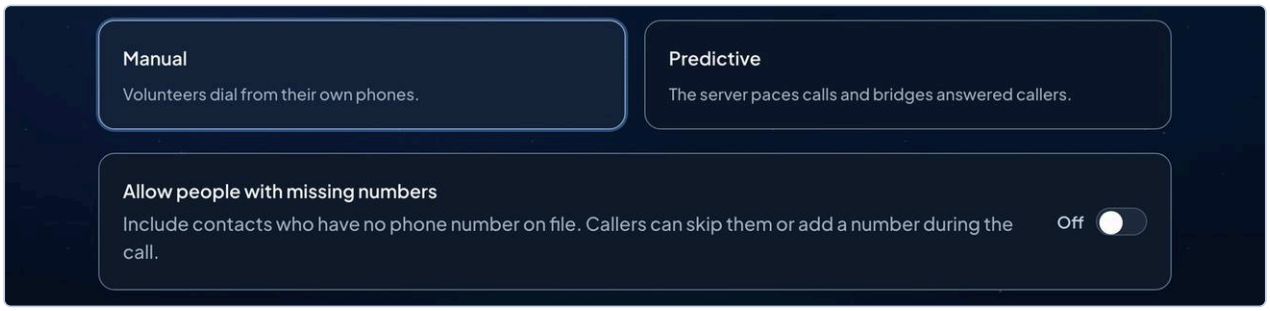
Step 3: Making calls 66

Step 4: Calling on your own phone 71



Manual and Predictive

A phone bank puts a call list and a script in front of callers. Every phone bank calls in one of two modes, **Manual** or **Predictive**. You select the mode on step 4 of the wizard, and the phone bank's page shows it as a badge beside the status.



The two mode cards on step 4 of the wizard, with **Manual** selected.

	MANUAL	PREDICTIVE
On the card	Volunteers dial from their own phones.	The server paces calls and bridges answered callers.
Who dials	The caller. The call console shows the number and the button **Call on this phone**.	Threshold. It dials once the phone bank is active and callers are ready in the call console.
What a caller uses	A web browser for the script, and their own phone.	A web browser with a headset, or a microphone and speakers. Calls come through the browser.
Between calls	The caller clicks **Save & next call** and the next contact loads.	The caller waits in the call queue. A chime sounds when a voter answers.
Unanswered calls	The caller selects the result under **Call disposition**.	Threshold records the result: **No Answer**, **Busy**, **Disconnected**, **Answering Machine**, or **Left Voicemail** on a phone bank with a voicemail message.
Step 4 adds	**Allow people with missing numbers**	**Caller ID coverage**, **Voicemail message** and **Require click approval**
Total passes allowed	Optional	Required
Screens for you	Contact review, Results, Settings and Live monitor	The same four, plus the click console and the cards **Launch readiness** and **Live dialer**

Predictive is turned on by an admin

Predictive is switched on campaign by campaign. In the Admin console, an admin opens **Campaign Settings** and, under **Phone Bank Dialer**, ticks **Enable predictive dialing**. The same section holds the campaign's caller ID numbers. Part 2 covers Campaign Settings.

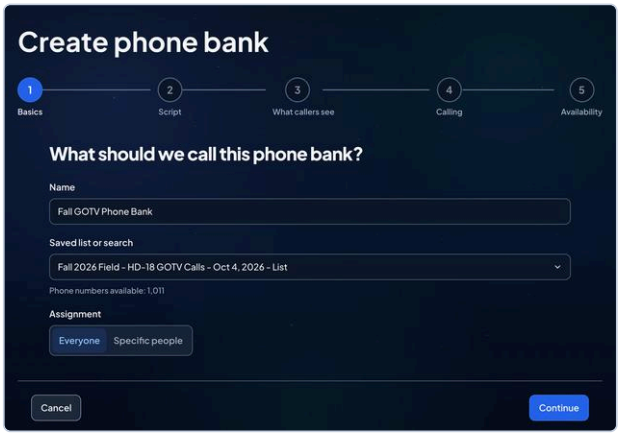
Creating a phone bank

The wizard **Create phone bank** has five steps: **Basics**, **Script**, **What callers see**, **Calling** and **Availability**. **Continue** moves to the next step and **Back** returns to the one before.

A phone bank takes a call list and a script. The call list is a saved list or a saved search, covered in Part 3. The script is a Phone or Phone + Door script. Admins write scripts in Script studio, covered in Part 2.

STEP 1 Basics

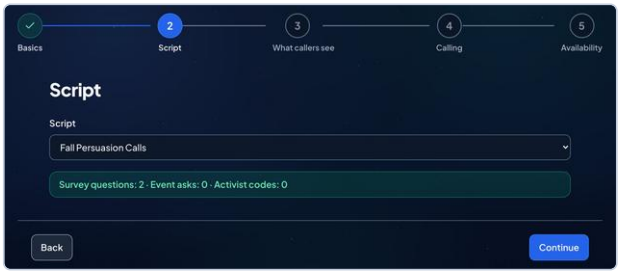
1. In the sidebar, click **Phones**, then click **Create**.
   → The page **Create phone bank** opens on step 1, **Basics**.
2. Enter a **Name**.
3. In **Saved list or search**, select the call list.
   → Each choice reads folder, name, date, then **List** or **Search**. **Phone numbers available** shows the count for the choice.
4. Under **Assignment**, select **Everyone** or **Specific people**.
   → **Specific people** opens **Members**. Tick each caller. Your own name is ticked and marked **(you)**.
5. Click **Continue**.



Step 1, **Basics**, filled in for Fall GOTV Phone Bank.

STEP 2 Script

1. In **Script**, select a script.
   → The menu lists **(default script)** and the saved Phone and Phone + Door scripts.
2. Read the line under the menu: **Survey questions**, **Event asks** and **Activist codes**, each with a count.
   → Publishing takes a count of one or more: a survey question or an event ask in the script, or an active activist code.
3. Click **Continue**.



Step 2, **Script**, with the script Fall Persuasion Calls selected.

STEP 3 What callers see

1. Click a tab: **Identity**, **Household**, **Contact**, **Address**, **Voting**, **Campaign**, **Custom**, **Contact history** or **Notes**.
2. Click a field to turn it on.
   → The field shows a check and joins the list under the fields. **Notes** and **Contact history** start turned on.
3. In the list, click the arrows to set the order of the fields.
4. Turn **Caller editing** on or off.
   → On, it lets callers adjust which fields are visible while calling.
5. Click **Continue**.

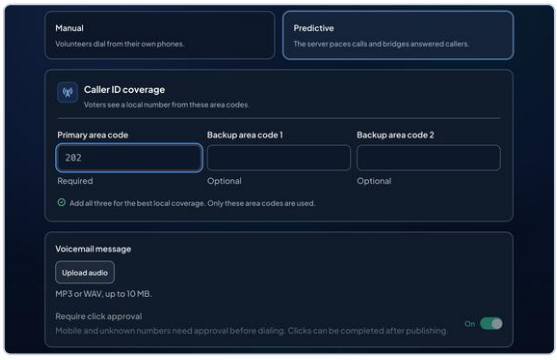


Step 3 on the **Identity** tab, with four fields turned on.

STEP 4 Calling

1. Click **Manual** or **Predictive**.
   → The options for that mode appear under the cards.
2. Set the options, then click **Continue**.

Manual	The switch **Allow people with missing numbers**. On screen: **Include contacts who have no phone number on file. Callers can skip them or add a number during the call.**
Predictive	**Caller ID coverage**, **Voicemail message** and **Require click approval**, described below.

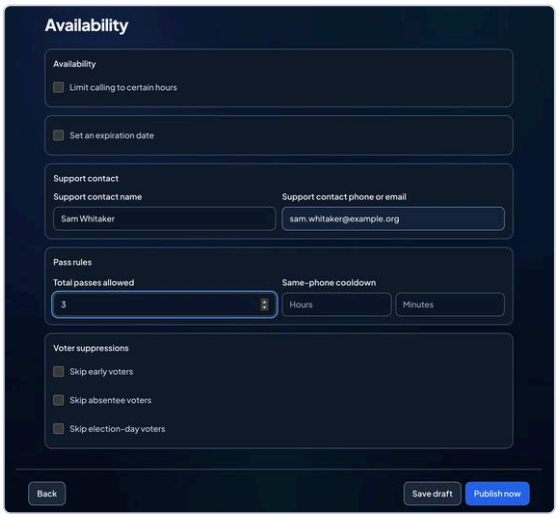


Step 4 with **Predictive** selected, before the area codes are entered.

Caller ID coverage	Enter the **Primary area code**, marked **Required**, and the optional **Backup area code 1** and **Backup area code 2**. The card then lists **Callable contacts**, **Numbers required**, **Available**, **To buy** and **Estimated cost**, with a status: **Checking**, **Allocating**, **Ordering**, **Ready**, **Unavailable** or **Failed**. **Numbers required** is one caller ID number for every 40,000 callable contacts, rounded up, for each pass allowed.
Voicemail message	**Upload audio** takes an MP3 or WAV file up to 10 MB. Threshold plays it to an answering machine after the greeting and records **Left Voicemail**.
Require click approval	**On** for every predictive phone bank: mobile and unknown numbers need approval before dialing, and clicks can be completed after publishing. See Approving numbers in the click console.

STEP 5 Availability

Limit calling to certain hours	Tick it, then enter a **Start time** and an **End time**. The times use your browser's time zone.
Set an expiration date	Tick it, then enter the **Expiration date**.
Support contact	Enter a **Support contact name** and a **Support contact phone or email**. Callers see **Technical issue? Contact** followed by the contact.
Pass rules	**Total passes allowed** is the number of passes the phone bank can run. **Same-phone cooldown** takes **Hours** and **Minutes**: the time before the same phone number comes up again.
Voter suppressions	Tick **Skip early voters**, **Skip absentee voters** or **Skip election-day voters** to leave those voters out of the calls.



Step 5, **Availability**, with a support contact and three passes allowed.

1. Click **Save draft** or **Publish now**.
   → The page **Preparing phone bank** opens and counts the source records processed. Then the phone bank's page opens, as a **Draft** or as **Active**.

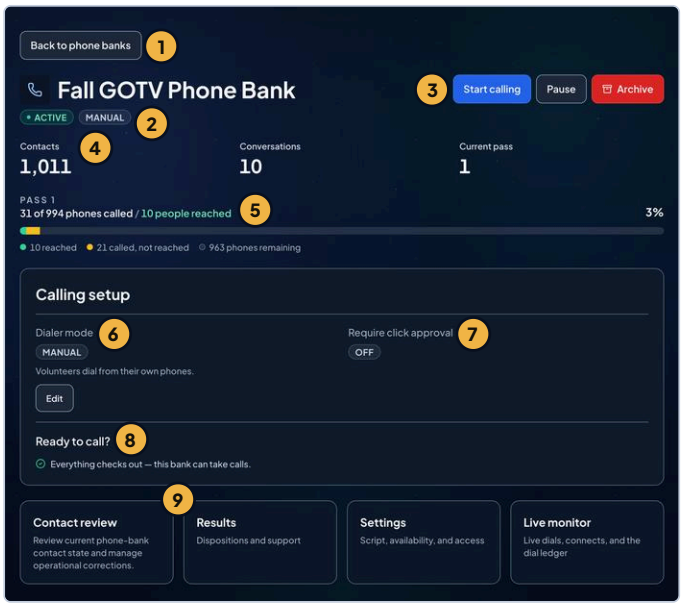
A phone bank's status

STATUS	WHAT IT MEANS	BUTTONS ON THE PHONE BANK'S PAGE
Draft	Saved and waiting to be published. The page reads **Publish to open calling.** A predictive draft set to publish reads **Publishing when caller IDs are ready. Editing the bank cancels this.**	**Publish now**, **Edit settings**. A predictive draft set to publish has **Cancel automatic publication**.
Active	Open for calling.	**Start calling**, **Pause**, **Archive**. While a readiness check is open, the first button reads **Review phone bank** or **Review schedule**.
Paused	Calling is on hold.	**Resume**, **Archive**
Completed	Calling is complete.	**View results**, **Archive**
Archived	Calling has stopped. Contacts and results are kept.	**View results**

Start calling opens the call console, covered under Making calls. **Archive** asks **Archive this phone bank?** with the line **Archiving stops calling while keeping contacts and results.** An archived phone bank comes back through **Restore** in its row menu on the Manage page: **Moves the phone bank back to Paused**.

The phone bank page

Every phone bank has a page of its own, with its status, its progress and the way into its other screens. To open it, click **Phones**, then **Manage** in the sidebar, then click the phone bank's row.



The page for Fall GOTV Phone Bank, a manual phone bank, during pass 1.

1. **Back to phone banks.** Returns to the Manage page.
2. **Status and mode.** Here **Active** and **Manual**.
3. **Start calling, Pause, Archive.** The buttons for an active phone bank.
4. **Contacts, Conversations, Current pass.** The contacts, the people reached, and the pass under way.
5. **Pass bar.** Phones called out of the phones in the pass, and people reached.
6. **Dialer mode.** The mode. **Edit** opens the **Calling** section of Settings.
7. **Require click approval. On** for Predictive, **Off** for Manual.
8. **Ready to call?** The readiness checklist. Here every check is ready.
9. **Contact review, Results, Settings, Live monitor.** The phone bank's other pages.

What Ready to call? checks

A draft lists every check, and so does a published phone bank with a check still open. Each check carries a pill, **Ready**, **Needs attention**, **Blocked** or **Ended**, and where there is a fix, a button: **Review schedule**, **Review script**, **Open click console** or **Review calling setup**. A ready check reads:

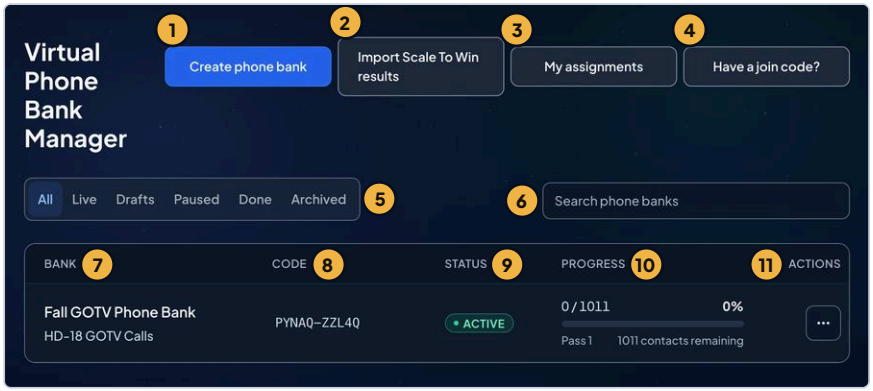
- **Phone bank is open**
- **Structured asks ready**
- A count and **pending contacts**
- **Voter dataset ready**
- A count and **callable now**
- Predictive: **Click approval up to date**
- Predictive: a count and **caller ID numbers ready**
- Predictive: a count and **agents online**, with the number free

More on a predictive phone bank's page

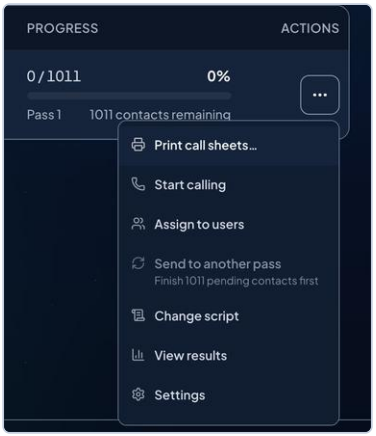
Launch readiness	A card with three lines. **Click approval** shows the numbers approved out of the numbers required, with **Open click console**. **Caller IDs** shows the numbers ready out of the numbers required, with **Retry**. **Next pass** shows **Preparing**, **Ready**, **Complete** or **Not planned**.
Live dialer	A card with the **Right now** numbers of the Live monitor, a pill with the count **awaiting approval**, the pill **Live**, and the button **Open live monitor**.

Managing phone banks

The page **Virtual Phone Bank Manager** lists the campaign's phone banks, one row each. To open it, click **Phones** in the sidebar, then click **Manage**.



The Manage page with one phone bank, before any calls.



The … menu on the same row.

1. **Create phone bank.** Opens the wizard.
2. **Import Scale To Win results.** Opens the import of call results from Scale To Win.
3. **My assignments.** Opens **My Phone Assignments**.
4. **Have a join code?** Opens a box for a join code.
5. **Tabs.** Filter the rows by status. Archived phone banks are listed under **Archived**.
6. **Search phone banks.** Narrows the rows to the matches.
7. **Bank.** The name and the call list. Click the row to open the phone bank's page.
8. **Code.** The join code. Click it to copy the join link.
9. **Status.** **Draft**, **Active**, **Paused**, **Completed**, **Archived** or **Expired**, plus **Predictive** on a predictive phone bank.
10. **Progress.** Contacts done out of the total, the pass, and the contacts remaining.
11. **Actions.** The … menu, and a button for the next action: **Publish**, **Resume** or **View results**.

The row menu

Print call sheets…	Opens printing for the phone bank's call sheets.
Start calling	Opens the call console.
Assign to users	Opens Settings at **Basics**, where **Assignment** sets who calls.
Send to another pass	Starts the next pass. It is greyed while contacts are pending.
Change script	Opens a dialog with the **Script** menu and **Save**.
View results	Opens **Voter phone results**.
Settings	Opens the wizard's fields in four sections: **Basics**, **Script**, **What callers see** and **Calling**. **Save changes** keeps an edit.

Getting callers in

Assignment	**Everyone** lets every active member of the campaign call, and puts the phone bank on each member's **Make Calls** page. **Specific people** lets the members ticked under **Members** call.
Join code	Two groups of five characters, such as PYNAQ-ZZL4Q, shown in the **Code** column. A signed-in member of the campaign with the code or the join link can call.
Not assigned	The pill on a phone bank you manage from outside its assignment. To call in it, add yourself with **Assign to users**.

Change who is assigned

1. On the Manage page, click the row's **…** menu, then click **Assign to users**.
2. Under **Assignment**, select **Everyone**, or select **Specific people** and tick each caller under **Members**.
3. Click **Save changes**.

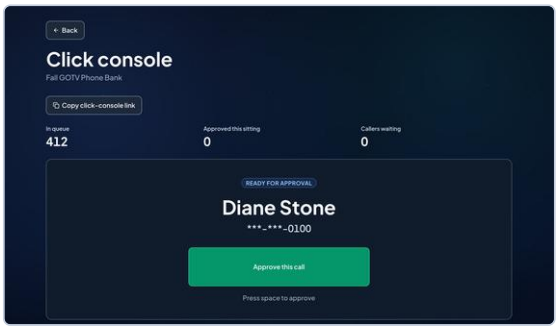
Share the join link

1. On the Manage page, click the code in the **Code** column.
   → The join link is copied. The link ends with the code.
2. Paste the link into a message to your callers.
   → A phone bank joined by code is listed on that caller's **Manage** page.

Approving numbers in the click console

On a predictive phone bank, a person approves each mobile number and each number of unknown type before Threshold dials it. The approvals are made in the click console.

1. On the phone bank's page, click **Click console**.
   → The click console opens.
2. Click **Approve this call**, or press the space bar.
   → The card moves to the next number in the queue.
3. Repeat until the card reads **Queue clear**.
   → Under it: **New calls will appear here automatically.**

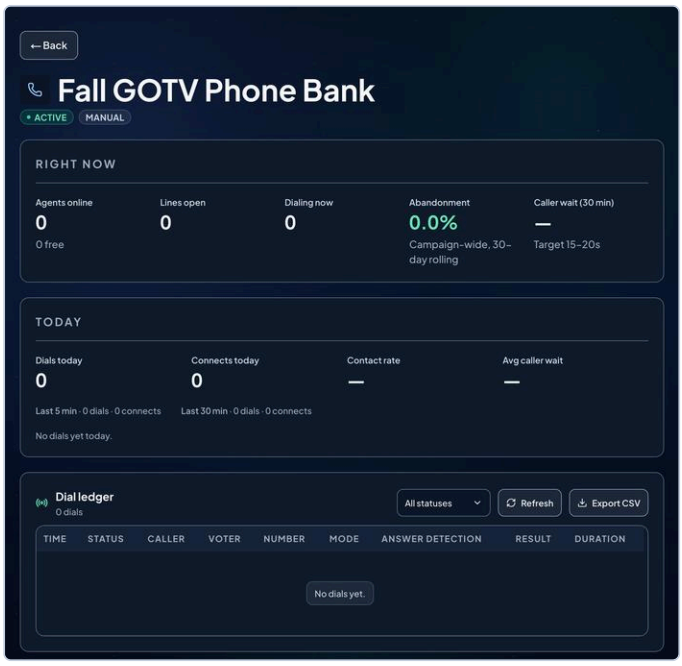


The click console with a number ready for approval.

What takes a click	Mobile and unknown-type numbers, once each. Landlines go to the dialer as they are.
Who approves	Admins, organizers and the callers assigned to the phone bank. Those assigned see the card **Click console** on the phone bank's page and a **Click console** button under **Make Calls**.
On the console	**In queue** counts the numbers waiting, **Approved this sitting** your own approvals, and **Callers waiting** the callers waiting for a call. The card shows the voter's name and the number with its first six digits hidden. **Up next** lists the next five.

Watching the Live monitor

The **Live monitor** shows a phone bank's dialing as it happens, for admins and organizers. To open it, click **Live monitor** on the phone bank's page.



The Live monitor for Fall GOTV Phone Bank before any dials.

Stalled	A line at the top that reads **Stalled**, then the count of **dials waiting on click approval**, with **Open click console**.
Refresh	Reloads the dial ledger.

Right now

Agents online	Callers in the call console, and the number free.
Lines open	Calls in progress.
Dialing now	Dials ringing or waiting for a caller.
Abandonment	Answered calls that ended while waiting for a caller, as a share of answered calls. **Campaign-wide, 30-day rolling**.
Caller wait (30 min)	The average wait for a call. Under it: **Target 15–20s**.

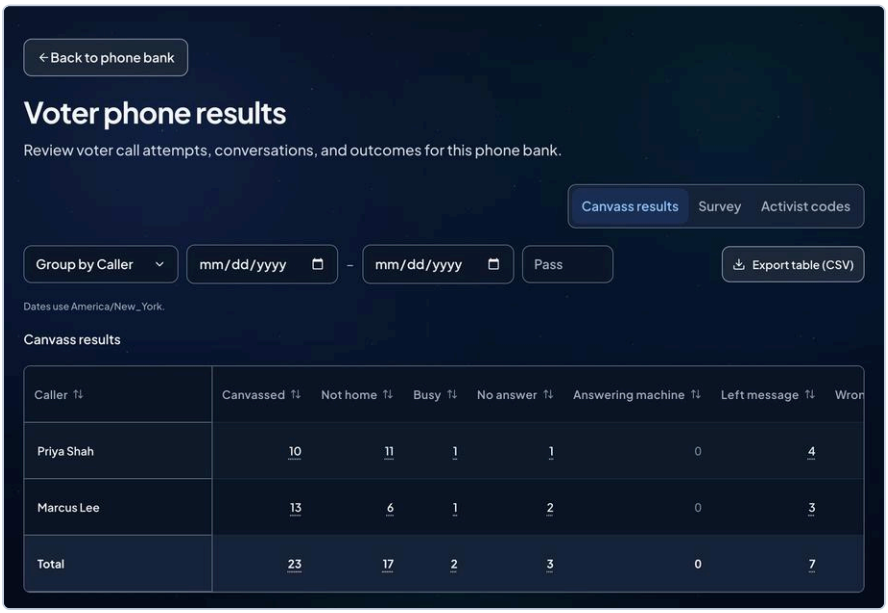
Today

Dials today	Dials placed today.
Connects today	Dials connected to a caller.
Contact rate	Connects as a share of dials.
Avg caller wait	Today's average wait.
Last 5 min, Last 30 min	Dials and connects in each window.
Today's dials by status	A bar of today's dials, split by status.

Dial ledger	One row for each dial, with the count of dials under the title. Columns: **Time**, **Status**, **Caller**, **Voter**, **Number** with digits hidden, **Mode**, **Answer detection**, **Result** and **Duration**.
All statuses	Filters the ledger to one status: **Initiated**, **Ringing**, **Answered**, **Machine**, **Bridged**, **Completed**, **Failed** or **No answer**.
Export CSV	Downloads the dials, up to 300,000 rows. Columns: Dial ID, Created At, Status, Dialer Mode, Caller, Voter ID, Voter Name, From Number, To Number, AMD Result, Hangup Cause, Duration Seconds, Attempt Result, Support Level, Attempt Created At, Phone Contact ID.

Reading results

Voter phone results counts a phone bank's call attempts by result. It is open to admins, organizers and the callers assigned to the phone bank. To open it, click **Results** on the phone bank's page, or **View results** in the row menu.

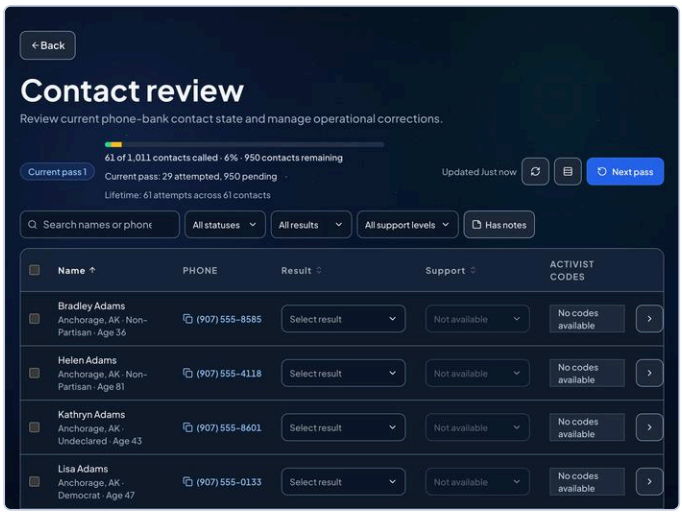


Canvass results grouped by caller, with a **Total** row.

Report tabs	**Canvass results** counts attempts by call result. **Survey** counts the answers to a survey question. **Activist codes** counts the activist codes applied.
Group by	Sets the rows: **Caller**, **Region** or **Turf**.
Date fields	A first date and a last date for the attempts counted.
Pass	Enter a pass number to count that pass.
Export table (CSV)	Downloads the table.
A count	Click a count to list the attempts behind it.
Columns	**Canvassed**, **Not home**, **Busy**, **No answer**, **Answering machine**, **Left message**, **Wrong number**, **Disconnected**, **Left voicemail**, **Other response** and **Total**.
Canvassed	The result a caller records as **Reached this person**. Contact review, the reports and the CSV call it **Canvassed**.
Call status	A block above the table on a phone bank that has placed dials. It reads **Dials** with the count, then **Completed**, **Answering machine / voicemail**, **No answer**, **Busy**, **Failed / invalid**, **Abandoned** and **Awaiting outcome**.

Contact review and the next pass

Contact review lists every contact in a phone bank with its current result. It is where you correct a result and start the next pass. To open it, click **Contact review** on the phone bank's page.



Contact review during pass 1.

Result	Open **Select result** in a row and select a result to set or correct it.
Next pass	Starts the next pass from this page.

Top lines	The current pass, contacts called out of the total, the percentage and the contacts remaining. Then **Current pass** with the attempted and pending counts, and **Lifetime** with attempts and contacts.
Search and filters	The search box takes a name or a phone number. The filters are **All statuses**, **All results**, **All support levels** and **Has notes**.
Columns	**Name**, **Phone**, **Result**, **Support**, **Activist codes**, **Current pass**, **Lifetime attempts**, **Notes**, **Caller** and **Updated**.

Start the next pass

A pass is one round through the call list. **Total passes allowed** on step 5 sets how many passes a phone bank can run. The next pass opens when the current pass has zero contacts pending.

1. In the sidebar, click **Phones**, then click **Manage**.
2. Click the row's **…** menu, then click **Send to another pass**.
   → The dialog **Start another pass?** opens.
3. Select **Retry all** or **Retry Not Home contacts**.
4. Click **Confirm**.
   → The contacts return to the queue and **Current pass** goes up by one.

Retry all	On screen: **Everyone who was called goes back into the queue.**
Retry Not Home contacts	On screen: **Contacts with any other result stay complete.**

Making calls

A caller works through a phone bank one voter at a time in the call console: talk with the voter, follow the script, record the answers and save the result. Calling happens in the web app.

The whole job

1. **Getting started.** Sign in, open **Make Calls** and click **Start calling** on your phone bank.
2. **Getting connected.** On a predictive phone bank, set up your audio and tell the console you are ready.
3. **Making calls.** Threshold connects you when a voter answers. Follow the script, record the answers and save the result.
4. **Calling on your own phone.** On a manual phone bank, dial each voter yourself and record the result.

Two kinds of phone bank

Predictive. Threshold dials the voters and connects you when someone answers. The call runs through your browser, with your device's microphone and speaker. Follow Steps 1, 2 and 3.

Manual. You dial each voter on your own phone and record the result in the console. Follow Steps 1 and 4.

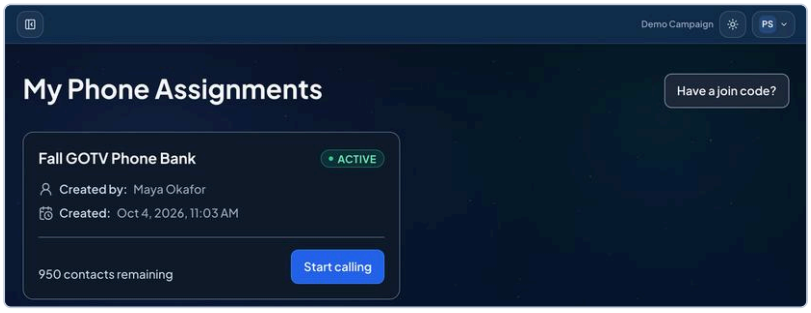
STEP 1 **Getting started**

Open your phone bank

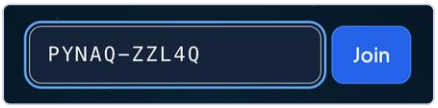
1. Sign in to Threshold. Part 1 covers signing in.
2. In the sidebar, click **Phones**, then click **Make Calls**.
   → The page **My Phone Assignments** opens, with one card for each of your phone banks.
3. On the card for your phone bank, click **Start calling**.
   → The call console opens with the phone bank's name in the top row.

Join with a code

1. On **My Phone Assignments**, click **Have a join code?**
   → A box for the code and the button **Join** take its place.
2. Enter the join code from your organizer and click **Join**.
   → The page reads **Joining virtual phone bank** and the code, then the call console opens.



My Phone Assignments with the card for Fall GOTV Phone Bank.



The code box and **Join**, with the code PYNAQ-ZZL4Q entered.

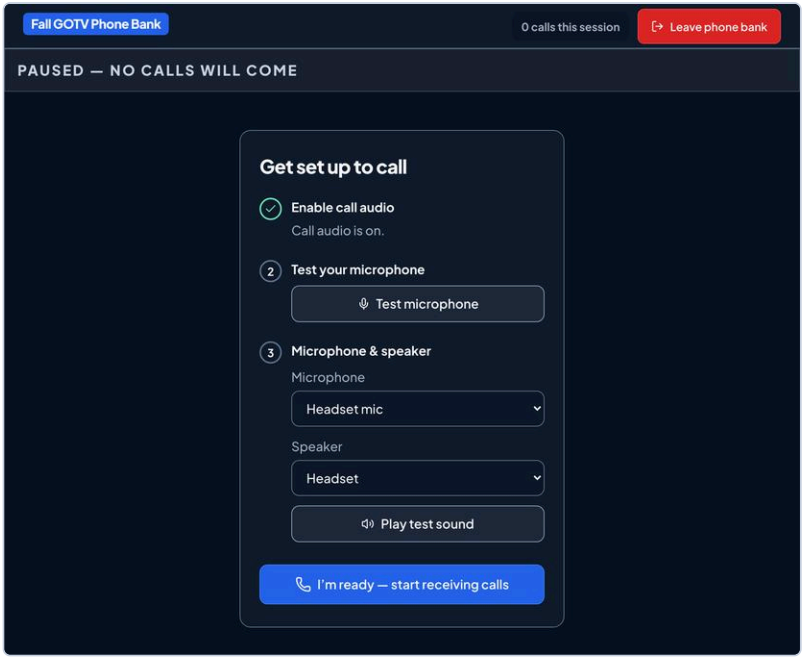
950 contacts remaining	The contacts still to call. On a phone bank that is closed to calling, this line gives the reason, such as **This phone bank is paused.**, and the button reads **View results** or **View details**.
Start calling	Opens the call console: the card **Get set up to call** on a predictive phone bank, the first voter on a manual phone bank.
Click console	A second button on the card of a predictive phone bank. It opens the click console, where mobile and unknown numbers are approved for dialing.
Join link	A join link from your organizer opens the phone bank the same way as a code. Open it while signed in. A phone bank joined by code or link is then listed under **Phones**, **Manage**.

NEXT Predictive phone bank: Step 2. Manual phone bank: Step 4. Step 2 · Step 4

STEP 2 Getting connected

On a predictive phone bank the call runs through your browser. While the console starts, the status bar reads CONNECTING… and the screen reads **Starting phone bank…** Then the status bar reads PAUSED — NO CALLS WILL COME and the card **Get set up to call** appears.

1. Under **Enable call audio**, click **Enable audio**.
   → The step reads **Call audio is on.**
2. Click **Test microphone** and speak.
   → The bar **Mic level — say something** moves with your voice.
3. Select your **Microphone** and your **Speaker**, then click **Play test sound**.
   → The sound plays through the speaker you selected.
4. Click **I'm ready — start receiving calls**.
   → The status bar reads IN THE CALL QUEUE.



A predictive phone bank: **Get set up to call**, with call audio on and a headset selected.

Stop mic test ends the microphone test. The button **I'm ready — start receiving calls** turns on once call audio is on. Until then the line **Enable call audio first.** shows under it.

NEXT Step 3: Making calls Go

STEP 3

Making calls

Once you are ready, Threshold dials voters and connects you when someone answers. The status bar across the top of the console names each state in capitals.

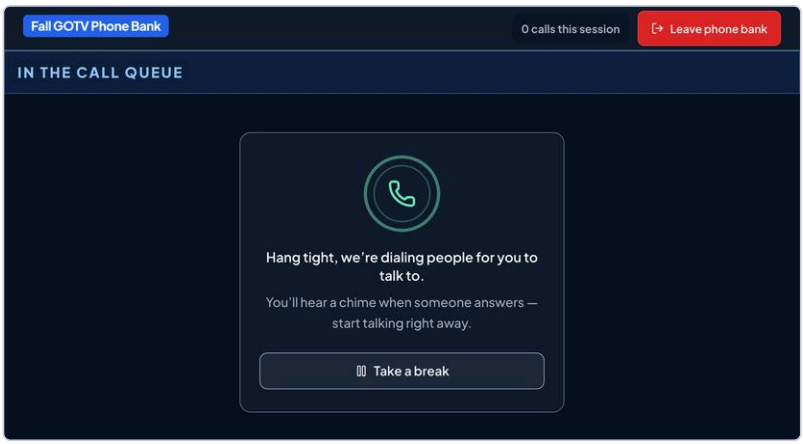
IN THE CALL QUEUE Waiting in the call queue

The queue follows **I'm ready — start receiving calls**, **I'm ready** and **Continue calling**.

The card reads **Hang tight, we're dialing people for you to talk to.** and **You'll hear a chime when someone answers — start talking right away.**

After your first call the card adds **You completed** and your number of calls this session.

Take a break pauses calls.

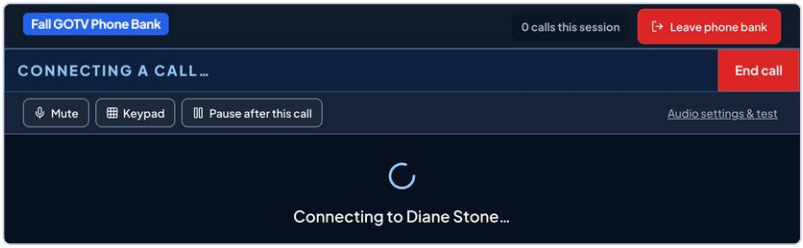


A predictive phone bank: waiting in the call queue.

CONNECTING A CALL… A call is connecting

The screen reads **Connecting to** and the voter's name.

The call controls appear under the status bar, and **End call** appears at the right end of the status bar.



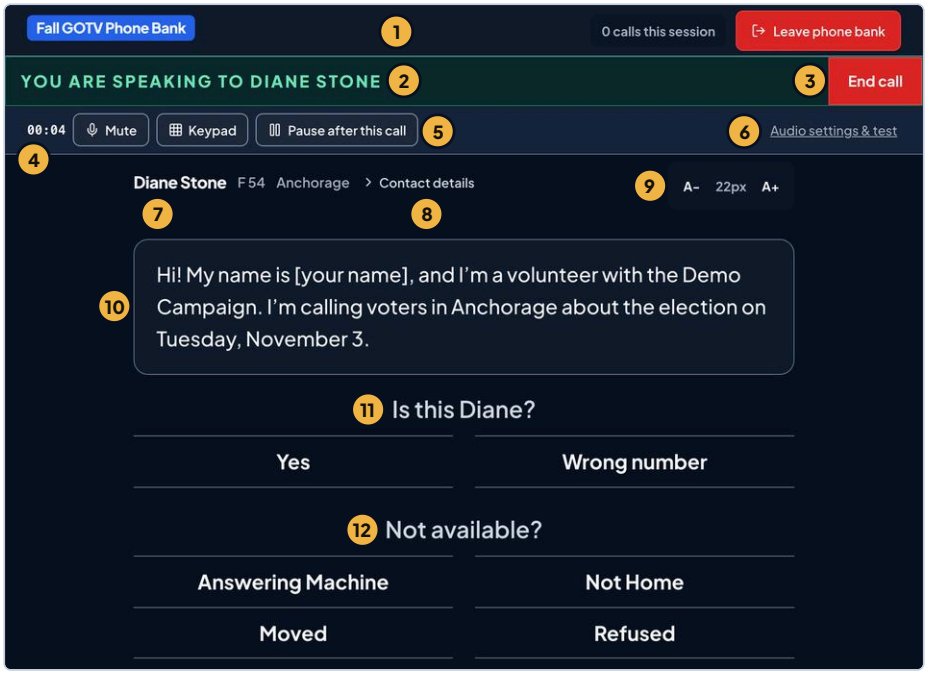
A call to Diane Stone connecting.

YOU ARE SPEAKING TO DIANE STONE You are speaking

Three things happen at once when the voter is on the line:

1. The status bar turns green and reads **YOU ARE SPEAKING TO** and the voter's name. A call without a voter name reads YOU ARE ON A LIVE CALL.
2. A chime plays through your speaker.
3. The call timer appears, with the voter's name, the script and the first question. While the voter's details load, the screen reads **Say hello to** and the name.

The console during a call



A predictive phone bank: the first page of a get-out-the-vote script on a call with Diane Stone.

1. **Top row.** The phone bank's name, your calls this session and **Leave phone bank**.
2. **Status bar.** The state of the call.
3. **End call.** Hangs up.
4. **Call timer.** The length of the call so far.
5. **Call controls. Mute** turns your microphone off, then reads **Unmute**. **Keypad** opens touch-tone keys. **Pause after this call** starts a break once the call is saved.
6. **Audio settings & test.** Device menus, both tests and the checkbox **Chime when a call connects**.
7. **Voter.** Name, sex and age, and city.
8. **Contact details.** Expands the fields your organizer chose for callers.
9. **A– and A+.** Script text size.
10. **Script text.** The words for this page of the script.
11. **Question.** One button for each answer.
12. **Not available?** Results for a call with no conversation.

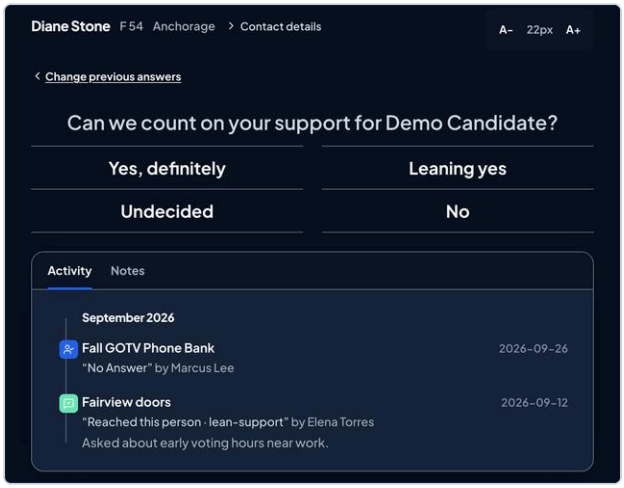
Recording a result when the voter is unavailable

1. On the first page of the script, under **Not available?**, click the result.
   → The review opens with that result under **Call result**.
2. Click **End call** if the call is still live, then click **Continue calling**.
   → Threshold saves the call and returns you to the call queue.

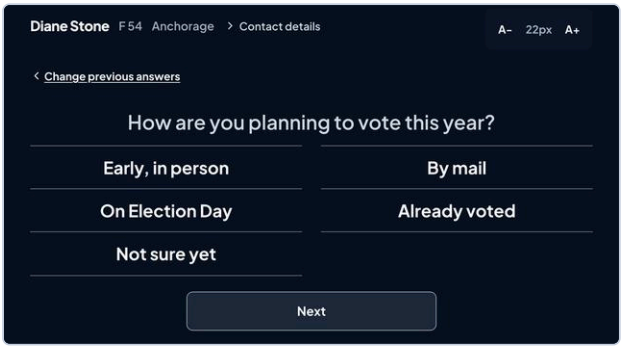
The results are **Answering Machine**, **Not Home**, **Wrong Number**, **Moved**, **Refused**, **Deceased**, **Busy**, **No Answer**, **Left Message**, **Disconnected**, **Left Voicemail** and **Call Back**. A result that the script's own first-page choices name is left out of the group. In the picture above, the script's choice **Wrong number** stands in for **Wrong Number**.

Following the script and recording answers

1. The script runs one page at a time. On a page with a question, click the button for the voter's answer.
   → Threshold records the answer and opens the next page. On a script with routes, the answer decides which page comes next.
2. On a page with a **Next** button, click **Next** to move on. A question with the box **Type your response…** takes a typed answer before **Next**.
   → Your first answer, or your first **Next**, sets the call result to **Reached this person**.
3. To go back a page, click **Change previous answers**, at the top left from the second page on. **Clear answer** removes an answer.



The second page: a question, with **Change previous answers** above it. Below the script, the tabs **Activity** and **Notes** show earlier contacts with this voter.

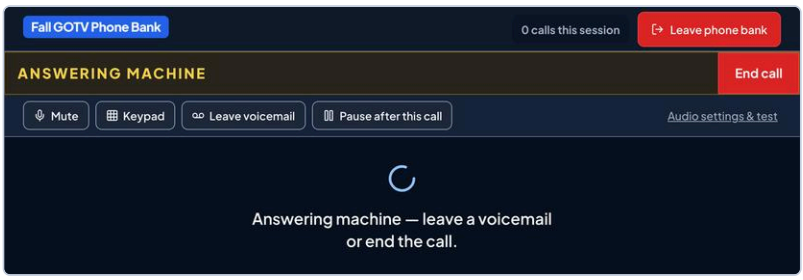


A question with a **Next** button below the answers.

ANSWERING MACHINE An answering machine

The screen reads **Answering machine — leave a voicemail or end the call.** and the controls add **Leave voicemail**.

Leave voicemail plays the phone bank's recorded voicemail message into the call. **End call** hangs up.



A predictive phone bank: a call that reached an answering machine.

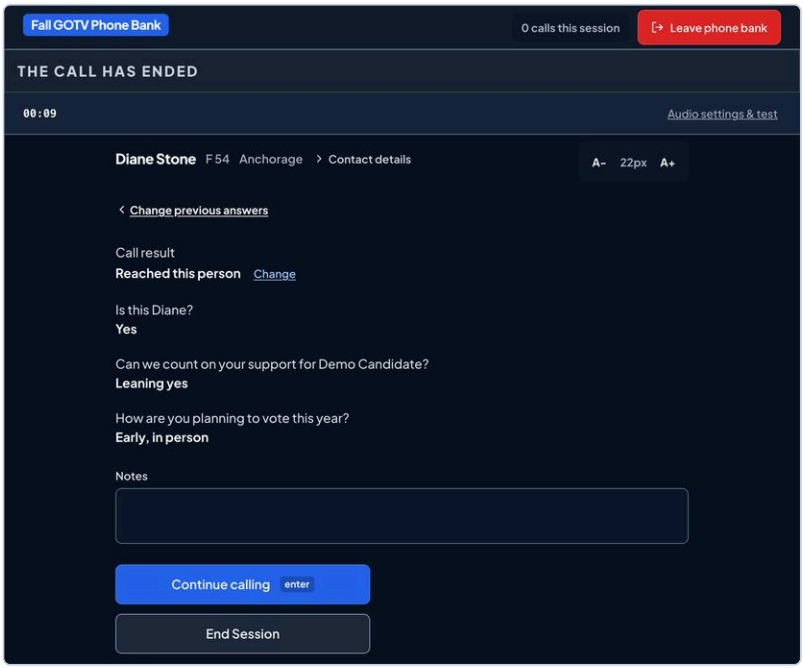
After a call that Threshold closed on its own as a machine, a banner asks **Was the previous call an answering machine?** Click **Mark answering machine** to save that result for the previous call. The banner then reads **Previous call marked Answering Machine.**

Reviewing your answers and ending the call

The review opens after the last page of the script, and after a result under **Not available?** It shows **Call result** with **Change**, each question with its answer or **Not answered**, and **Notes** where the phone bank shows it.

1. In the status bar, click **End call**.
   → The status bar reads THE CALL HAS ENDED. **Continue calling** and **End Session** appear under the review.
2. Click **Continue calling**, or press Enter.
   → Threshold saves the call and returns you to the call queue.

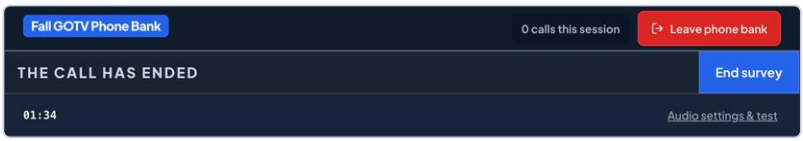
End Session saves the call and pauses you.



The review after **End call**, with **Continue calling** and **End Session**.

THE CALL HAS ENDED When the call ends before the review

When the voter hangs up first, or you click **End call** partway through the script, the button in the status bar changes to **End survey**. The script stays open.



The voter hung up. The status bar holds **End survey**.

1. Record any answers the voter gave, then click **End survey**.
   → The review opens. With no result chosen yet, **Call result** reads **Not selected** and a group named **Call result** lists **Reached this person** and the twelve other results.
2. Under **Call result**, click the result.
3. Click **Continue calling**.

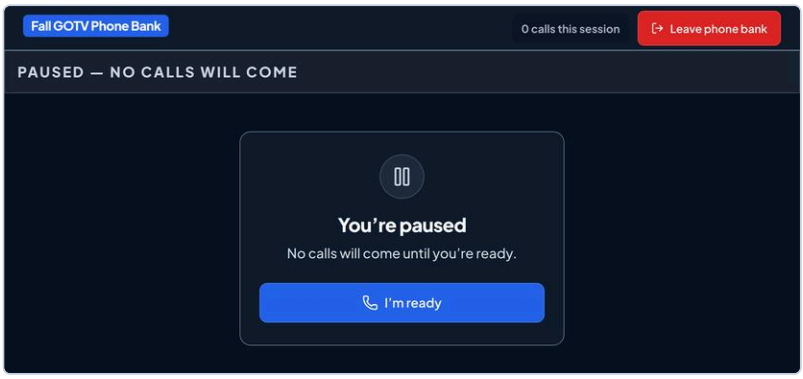


The review after **End survey**, with no result chosen yet.

PAUSED — NO CALLS WILL COME	Taking a break
During a call	Click **Pause after this call**. The button gives way to the line **You'll pause once you save this call's result.** The review then has one button, **End Session**.
After a call	On the review, click **End Session**. Threshold saves the call and pauses you.
In the call queue	Click **Take a break**.

While you are paused, the card reads **You're paused** and **No calls will come until you're ready.**

Click **I'm ready** to return to the call queue.



A predictive phone bank: paused.

Finishing

1. On the review of your last call, click **End Session**.
   → Threshold saves the call. The status bar reads PAUSED — NO CALLS WILL COME.
2. In the top row, click **Leave phone bank**.
   → The console closes and the page **Virtual Phone Bank Manager** opens.

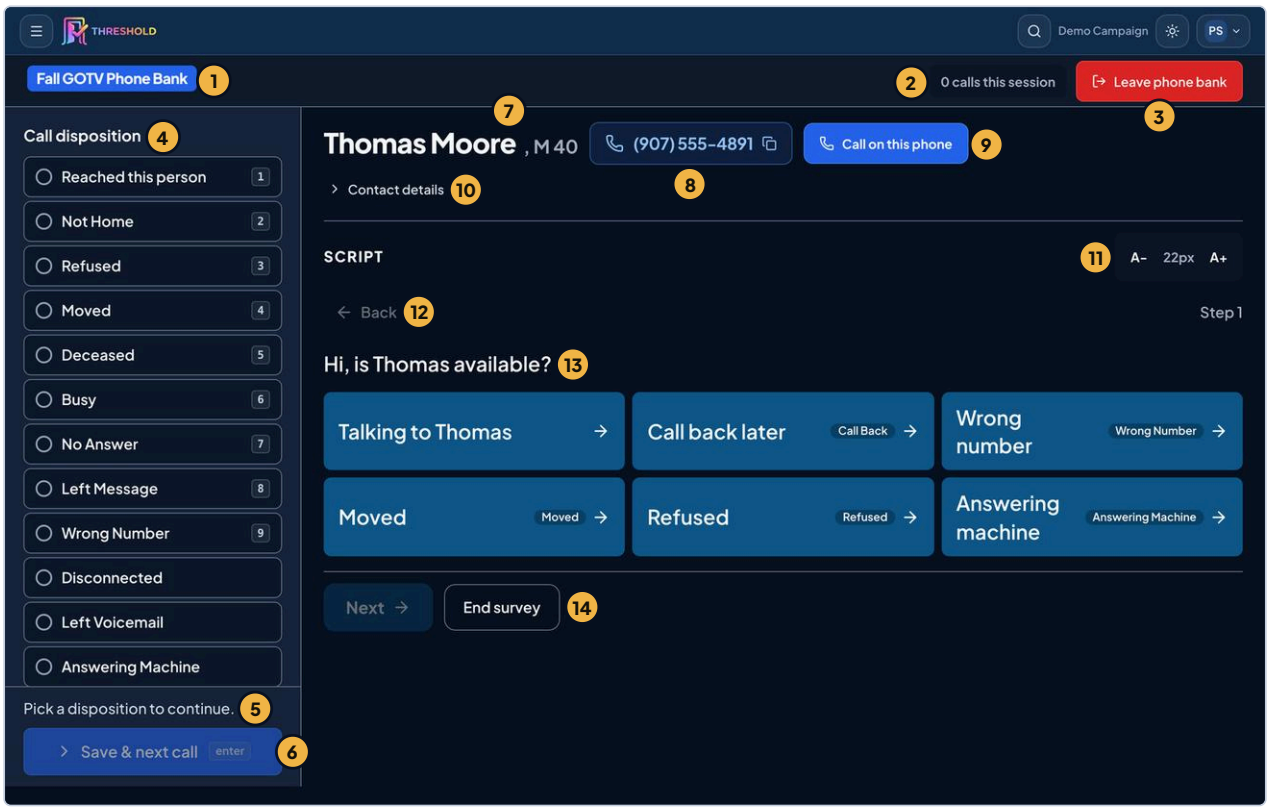
Other screens of the console

Leaving during a call	A box asks **Leave phone bank?** On a live call it reads **You're on a live call. Leaving hangs up and doesn't save a result.** After the call and before the save it reads **This call's result isn't saved yet.** The buttons are **Stay here** and **Leave phone bank**.
When the call list runs out	The screen reads **No contacts are available**, **This phone bank has ended** or **Other callers are using the remaining contacts**, then **You completed** and your number of calls this session. **End phone bank** closes the console.
Saving a reached call	A call saved as **Reached this person** carries a survey, event or activist code response. The screen asks for one with the line **Reached this person requires at least one survey, event, or activist code response.**

NEXT Step 4: Calling on your own phone Go

STEP 4 Calling on your own phone

On a manual phone bank you dial each voter on your own phone and record the result in the console. The left column holds the **Call disposition** list. The right side holds the voter, the phone number and the script.



A manual phone bank: the console on the first step of the script Fall Persuasion Calls, with the voter Thomas Moore.

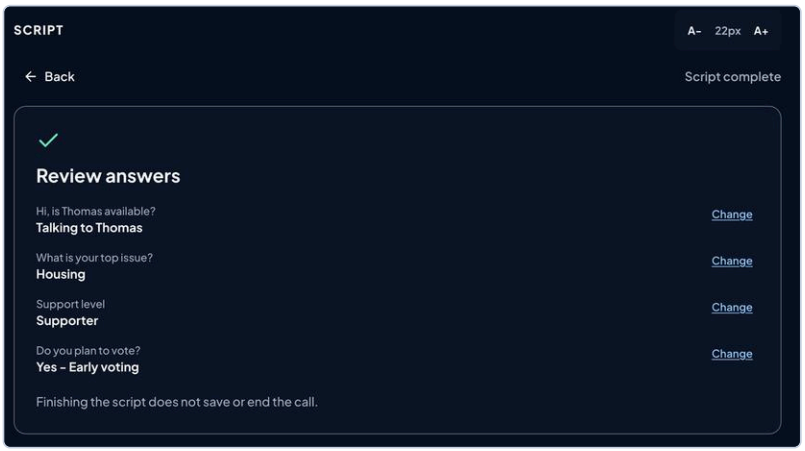
1. **Phone bank.** The name of the phone bank.
2. **0 calls this session.** Your count of completed calls since the console opened.
3. **Leave phone bank.** Closes the console and opens the page **Virtual Phone Bank Manager**.
4. **Call disposition.** The results of a call. The first nine carry the number keys `1` to `9`.
5. **Pick a disposition to continue.** Changes to **Disposition:** and the result once one is selected.
6. **Save & next call.** Saves the call and loads the next voter. `Enter` does the same.
7. **Voter.** Name, sex and age.
8. **Phone number.** The number to dial. Click it to copy the number.
9. **Call on this phone.** On a phone, opens the dialer with the number entered.
10. **Contact details.** Expands the fields your organizer chose for callers.
11. **A– and A+.** Script text size.
12. **Back.** Returns to the step before. **Step 1**, at the right, is your place in the script.
13. **Question.** One button for each choice. A choice with a small label, such as **Wrong Number**, also records that call disposition.
14. **Next** and **End survey. Next** moves to the next step. **End survey** opens **Review answers** with the answers so far.

Call the voter and follow the script

1. Dial the number beside the voter's name. On a phone, tap **Call on this phone**. On a computer, click the number to copy it, then dial it on your phone.
2. On each step of the script, click the voter's answer.
   → Recording an answer selects **Reached this person** in the **Call disposition** list.
3. Click **Next** to move to the next step, or **Back** to return to the step before.
   → The label at the right shows your place, such as **Step 2**.

Review answers and save the call

1. Finish the last step of the script.
   → The label at the right reads **Script complete**. The card **Review answers** lists each question with your answer.
2. To change an answer, click **Change** beside it.
3. Click **Save & next call**, or press Enter.
   → Threshold saves the call and loads the next voter. The count of calls this session goes up.



A manual phone bank: **Review answers** after the last step of the script.

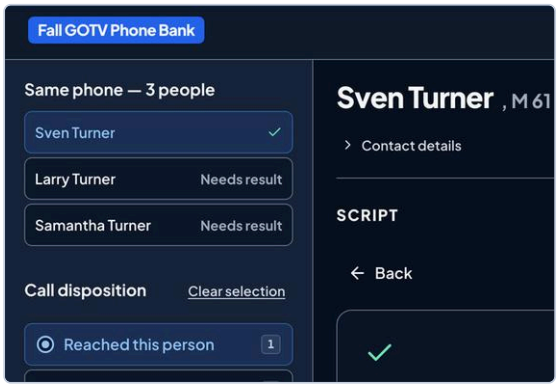
Choose a call disposition

1. For a call with no conversation, click the disposition in the left column, such as **Not Home**, or press its number key.
   → Threshold saves the result at once and loads the next voter.

The list	**Reached this person**, **Not Home**, **Refused**, **Moved**, **Deceased**, **Busy**, **No Answer**, **Left Message** and **Wrong Number** on the keys 1 to 9, then **Disconnected**, **Left Voicemail**, **Answering Machine** and **Call Back**.
Reached this person	Stays on screen while you record the answers. Until the script reaches an end, the left column reads **Follow a valid script path before saving this reached call.**
Clear selection	Removes the selected disposition.
Answers	With a disposition other than **Reached this person** selected, the script reads **Select "Reached this person" to record answers.**
Also on screen	A **Notes** box below the list, on phone banks that show **Notes**. A voter with no number shows **No phone on file**, the button **Skip — no phone number** and the box **Add a number (optional)**.

Several people on one phone

When one number belongs to several people on the call list, the left column opens with a list such as **Same phone — 3 people**, one row for each person.



Three people on one number. Sven Turner has a result.

1. Click a person's row.
   → The right side shows that person's name and script.
2. Select a call disposition for that person, and repeat for each row. **Apply this result to all**, under the list, gives every person on the number the disposition now selected.
   → A check mark replaces **Needs result** on each row that has a disposition.
3. Click **Save & next call**.

Status bar reference

The status bar of a predictive phone bank shows one of these texts.

STATUS BAR	WHAT IT MEANS	BUTTON IN THE BAR
CONNECTING…	The console is starting. The screen reads **Starting phone bank…**	
PAUSED — NO CALLS WILL COME	You are setting up your audio or taking a break. The screen shows **Get set up to call** or **You're paused**.	
IN THE CALL QUEUE	You are ready. Threshold is dialing voters for you.	
CONNECTING A CALL…	A call is on its way to you. The screen reads **Connecting to** and the voter's name.	**End call**
YOU ARE SPEAKING TO DIANE STONE	You are on the line with the voter named in the bar.	**End call**
YOU ARE ON A LIVE CALL	You are on the line, on a call without a voter name.	**End call**
ANSWERING MACHINE	An answering machine picked up. **Leave voicemail** is in the controls.	**End call**
THE CALL HAS ENDED	The call is over and its result is waiting to be saved.	**End survey**, while the script is open
DIALER ERROR	The dialer reports a problem. The screen shows the error text.	

One more card can show on a predictive phone bank.

Already open in another window	The card shown when the console is open in a second tab or window. **Take over on this device** moves the console to the window you are in.

PART 7

Texting

ORGANIZER TEXTER

Set up a text campaign, send it and read the results. Texters send each message, answer the replies and record the outcome.

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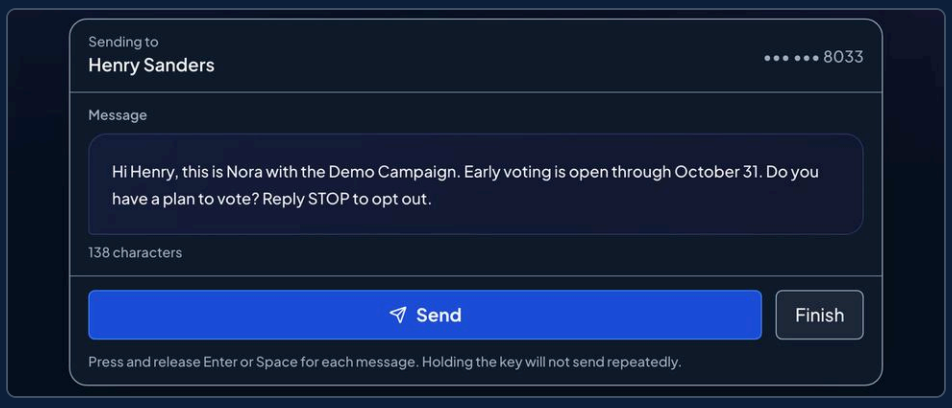
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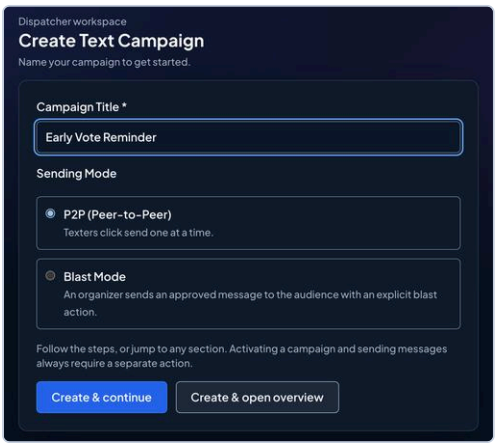
Texter step 4: Recording the outcome 85



Creating a text campaign

A text campaign holds an audience, an initial script and the conversations that follow. An organizer creates it on the **Texting** page and prepares it in four setup steps.

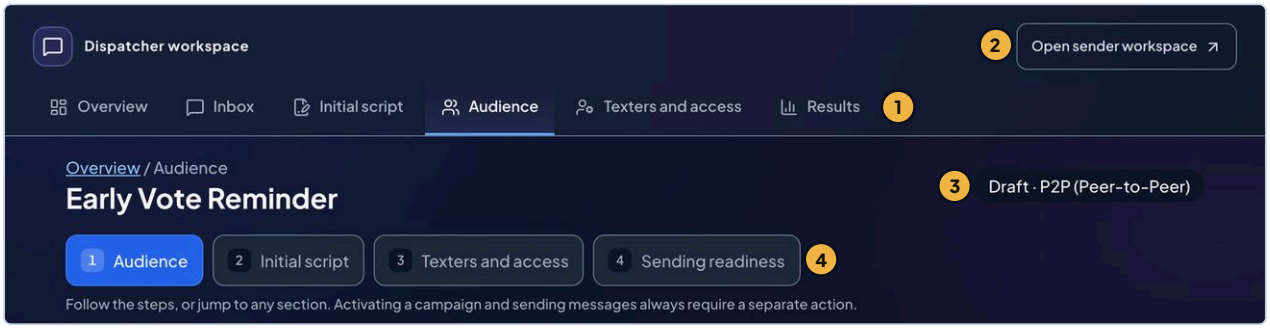
1. In the sidebar, click **Phones**, then click **Texting**.
   → The page **My Texting Campaigns** opens.
2. Click **Quick start**.
   → The page **Create Text Campaign** opens.
3. Enter a **Campaign Title**.
4. Under **Sending Mode**, select a mode.
   → **P2P (Peer-to-Peer)**: texters click send one at a time. **Blast Mode**: an organizer sends an approved message to the audience with an explicit blast action.
5. Click **Create & continue**.
   → The campaign is saved as a draft and setup step 1, **Audience**, opens. **Create & open overview** saves the same draft and opens its **Overview** tab.



Create Text Campaign with the title entered and **P2P (Peer-to-Peer)** selected.

The dispatcher workspace

A text campaign opens in the **Dispatcher workspace**, the organizer's side of the campaign.



The top of the Dispatcher workspace, on the **Audience** step of a new campaign.

1. **Tabs.** Overview, Inbox, Initial script, Audience, Texters and access, and Results.
2. **Open sender workspace.** On a P2P campaign, opens the texter's side, with the tabs **Send texts** and **Inbox**.
3. **Status and mode.** The status is Draft, Active, Paused or Archived. The mode is the sending mode.
4. **Setup steps.** Audience, Initial script, Texters and access, and Sending readiness. Click a step to open it.

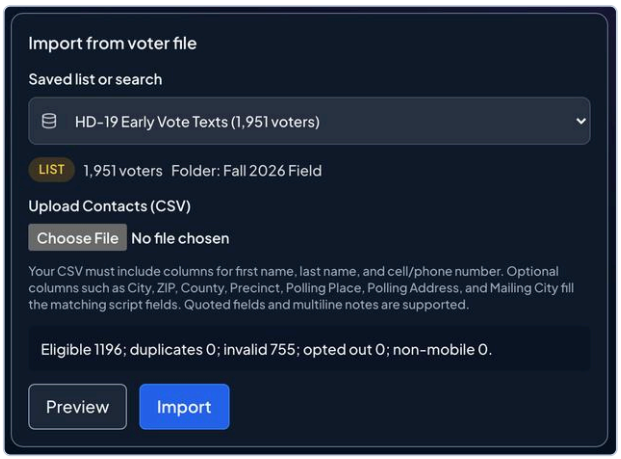
To return to a campaign later, open **Texting**. Under **Campaigns to prepare and manage**, click **Continue setup** on a draft or paused campaign, or **Manage campaign** on an active one. Both open the campaign's **Overview**.

Step 1: Audience

The audience is the set of contacts the campaign texts. It comes from a saved list or search in the voter file, or from a CSV file. Part 3 covers building and saving a list.

Import a saved list or search

1. Under **Import from voter file**, open **Saved list or search** and select a list or search.
   → A tag reads **LIST** or **SEARCH**, with the number of voters and the folder.
2. Click **Preview**.
   → A line reports the result, such as **Eligible 1196; duplicates 0; invalid 755; opted out 0; non-mobile 0. Import** turns on.
3. Click **Import**.
   → The import joins **Audience import history**. Its status reads **Queued**, then **Importing contacts**, then **Import completed**.
4. Click **Continue to script**.
   → Setup step 2, **Initial script**, opens.



Import from voter file after **Preview**, with the saved list HD-19 Early Vote Texts selected.

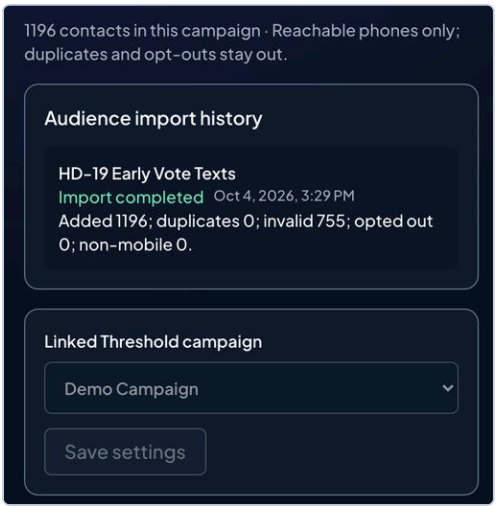
Upload a CSV file

1. Under **Upload Contacts (CSV)**, click **Choose File** and select a file with columns for first name, last name and cell or phone number.
   → The page shows the number of contacts loaded and the first five names, then the contacts accepted and the rows rejected.
2. Click **Preview**, then click **Import**.
   → The contacts join the campaign at once.

Optional columns for City, ZIP, County, Precinct, Polling Place, Polling Address and Mailing City fill the matching merge fields in the script.

Linked Threshold campaign

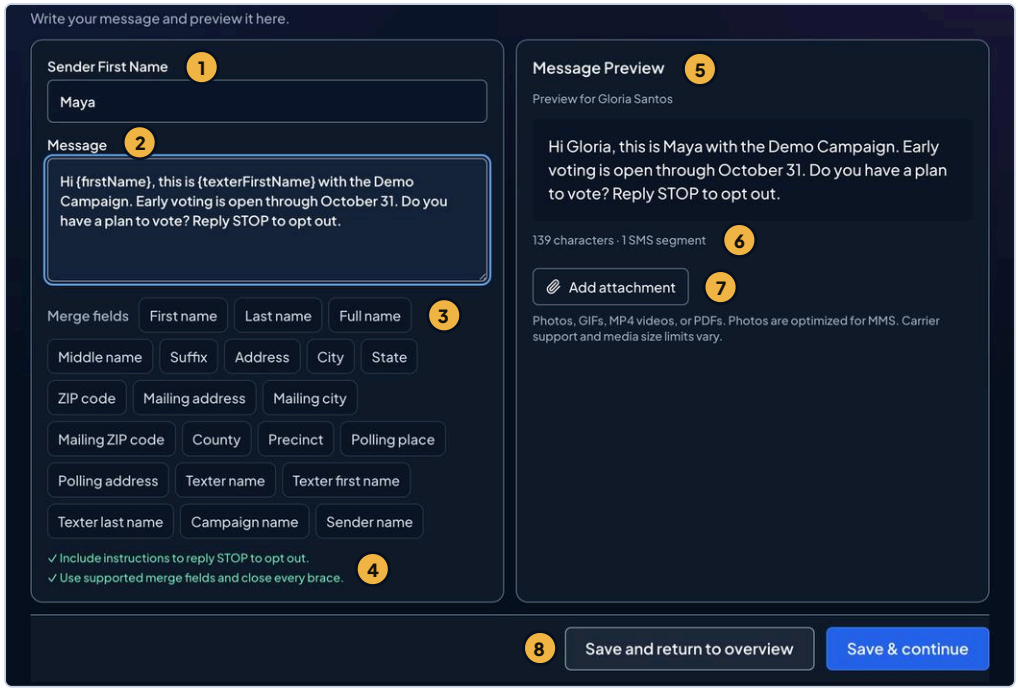
Importing a saved list or search links the text campaign to the list's Threshold campaign, which is Demo Campaign in the picture. The linked campaign supplies the survey questions and the members who can be given access.



The left side of the page after **Import**: the contact count, **Audience import history** and **Linked Threshold campaign**.

Step 2: Initial script

The initial script is the first message each contact receives. The page pairs the editor with a preview of the message for one contact.



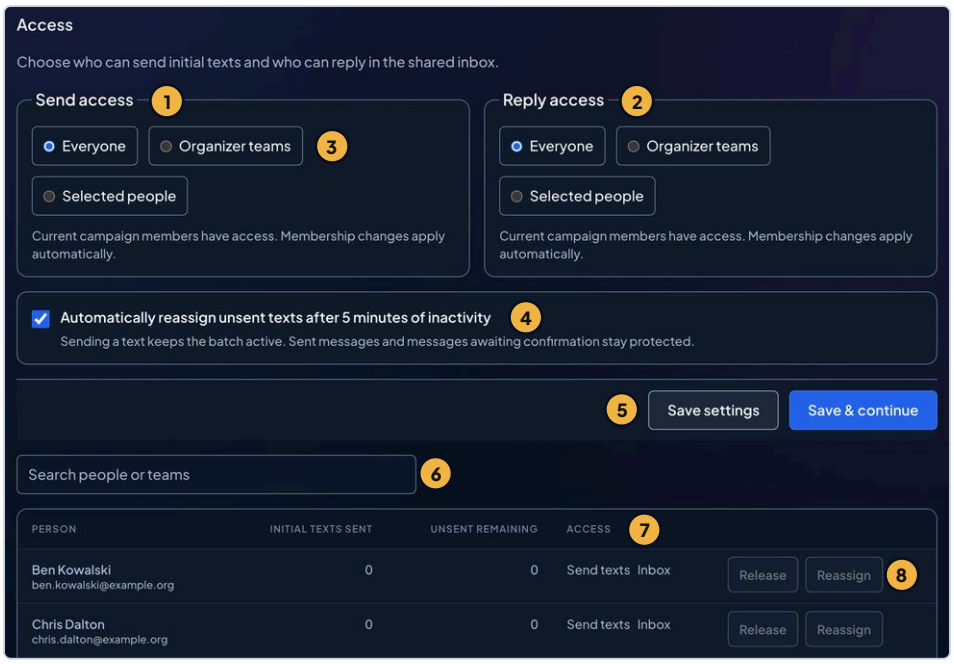
The **Initial script** step with a finished message. Both checks under the merge fields show a check mark.

1. **Sender First Name.** Fills the **Sender name** merge field. Left blank, the field uses the organization's name.
2. **Message.** The text of the first message.
3. **Merge fields.** Click a field to add its token, such as **{firstName}**. Each contact's own value fills it when the text is sent.
4. **The two checks.** Each shows a check mark when it passes: the message contains the word STOP, and every token is a listed field with both braces.
5. **Message Preview.** The message as one contact receives it, here **Preview for Gloria Santos**.
6. **Counter.** The length of the previewed message and its SMS segments.
7. **Add attachment.** Photos, GIFs, MP4 videos or PDFs, up to 10 for a message and 10 MB each. The counter then reads **1 MMS per contact**.
8. **Save and return to overview** opens the Overview. **Save & continue** opens step 3, **Texters and access**.

A contact with an empty field	**First name**, **Last name** and **Full name** fill for every contact. Where a contact's record is empty for another field in the script, the Send screen reads **This contact is missing values for:** with the field, and offers **Skip contact**.
Editing an active campaign	The page reads **Pause this campaign before editing its initial script or sender name.** and shows a **Pause** button.

Step 3: Texters and access

This step sets who sends first messages and who answers replies. A table under the settings lists each member of the campaign with their sent and unsent texts.



Texters and access on a new campaign, with both kinds of access set to **Everyone**.

1. **Send access.** Who sends first messages.
2. **Reply access.** Who replies in the shared Inbox.
3. **Everyone, Organizer teams, Selected people.** **Everyone** covers every current member of the campaign. The other two open a search box for choosing teams or people.
4. **Automatic reassignment.** Ticked on a new campaign. Five minutes after a texter's last send, the unsent texts become available to other texters.
5. **Save settings** saves the choices. **Save & continue** saves them and opens step 4, **Sending readiness**.
6. **Search people or teams.** Finds a person in the table.
7. **The table.** Each member's **Initial texts sent**, **Unsent remaining** and **Access**, which reads Send texts, Inbox or both.
8. **Release** and **Reassign.** Turn on in the row of a person with unsent texts.

Release	Hands the person's unsent texts back to the campaign. The page reads **Remaining unsent texts updated. Sent messages stay with their conversations.**
Reassign	Opens the panel **Reassign remaining texts from** with the person's name. Select a person with Send access and click **Reassign**.

Step 4: Sending readiness

Sending readiness reports whether the campaign is clear to send. It opens from setup step 4.

Sending numbers	The numbers the campaign sends from, **Use the organization's approved number pool** or **Use selected numbers**, with the count of assigned numbers.
A problem	A script or audience problem is described with a link to **Initial script** or **Audience**. A sending-number problem reads **Sending numbers need setup. Contact your administrator.**
Ready	Shown in green when the checks pass. **Refresh readiness** runs the checks again, and **Review campaign** opens the Overview.

Survey questions and response templates

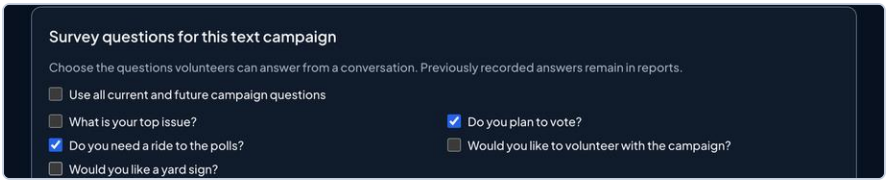
Survey questions record a contact's answers. Response templates are ready-made replies for the texters.

Choose the survey questions

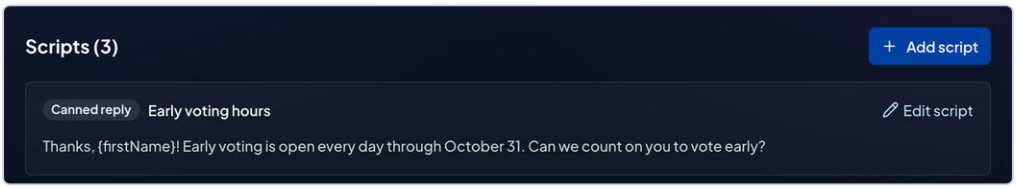
1. On **Sending readiness**, click **Choose survey questions**.
   → The **Results** tab opens at the panel **Survey questions for this text campaign**.
2. Tick **Use all current and future campaign questions**, or tick questions one at a time.
3. Click **Save settings**.
   → The ticked questions appear in the **Answers and conversation outcome** panel of every conversation.

Add response templates

1. Click the **Inbox** tab, then click **Response templates**.
2. Click **Add script**.
   → The form opens with **Script type** set to **Canned reply**.
3. Enter a **Title** and a **Message**, then click **Save script**.
   → The script joins the list. In the Inbox, its title is a button above the reply box.



Two of five questions ticked. The questions belong to the linked campaign, where an admin writes them (Part 2).

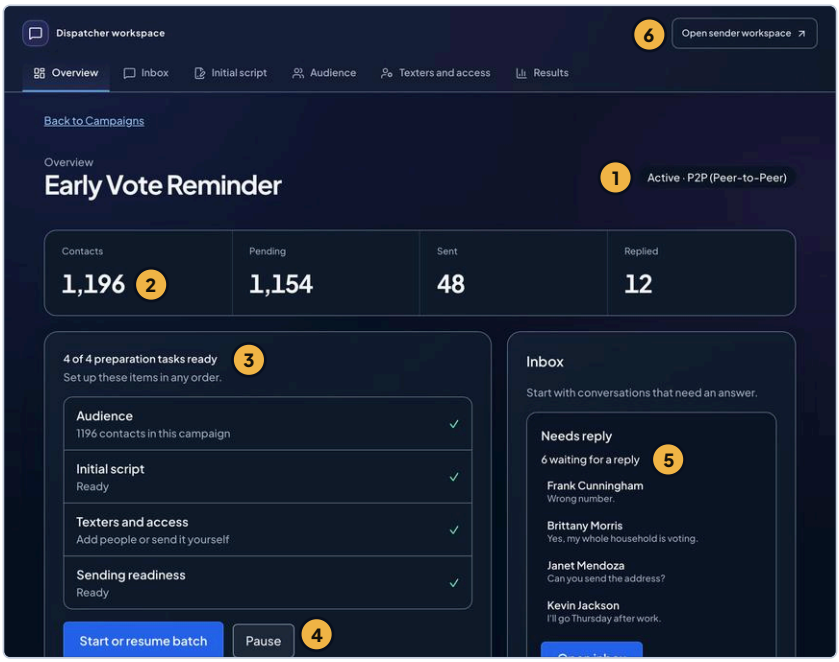


The top of **Response templates**: the first of three canned replies.

Activating and sending

A campaign sends after two separate actions. The organizer activates it, then the texts go out. Both start on the **Overview** tab.

1. Click the **Overview** tab.
   → The task list reads **4 of 4 preparation tasks ready** when every setup step shows a check mark.
2. Click **Activate**.
   → The badge changes from **Draft** to **Active**, and **Pause** appears. **Activate** is on when the campaign has at least one contact, a valid initial script and sending numbers that are ready.
3. Send the texts. On a P2P campaign, texters send in batches on the Send screen, which **Start or resume batch** opens. On a Blast Mode campaign, click **Send blast**.
   → After **Send blast**, the page reads either the number of messages queued with the line **Progress updates automatically.** or the counts of texts sent, failed and skipped.



The **Overview** of an active P2P campaign.

1. **Status and mode.** Active · P2P (Peer-to-Peer).
2. **Counts.** Contacts, Pending, Sent and Replied.
3. **Preparation tasks.** The four setup steps, each with a check mark when it is ready. Click a row to open the step.
4. **Start or resume batch** opens the Send screen. **Pause** sets the status to Paused, and **Resume** then activates the campaign again.
5. **Needs reply.** How many conversations are waiting, with up to four previews. **Open inbox** is under it.
6. **Open sender workspace.** Opens the texter's side of the campaign.

Campaign details, at the bottom of the Overview, opens a **Description** box and the **Archive** link.

Reading results

The **Results** tab counts what the campaign has sent and received, shows each texter's pace, and holds the downloads.

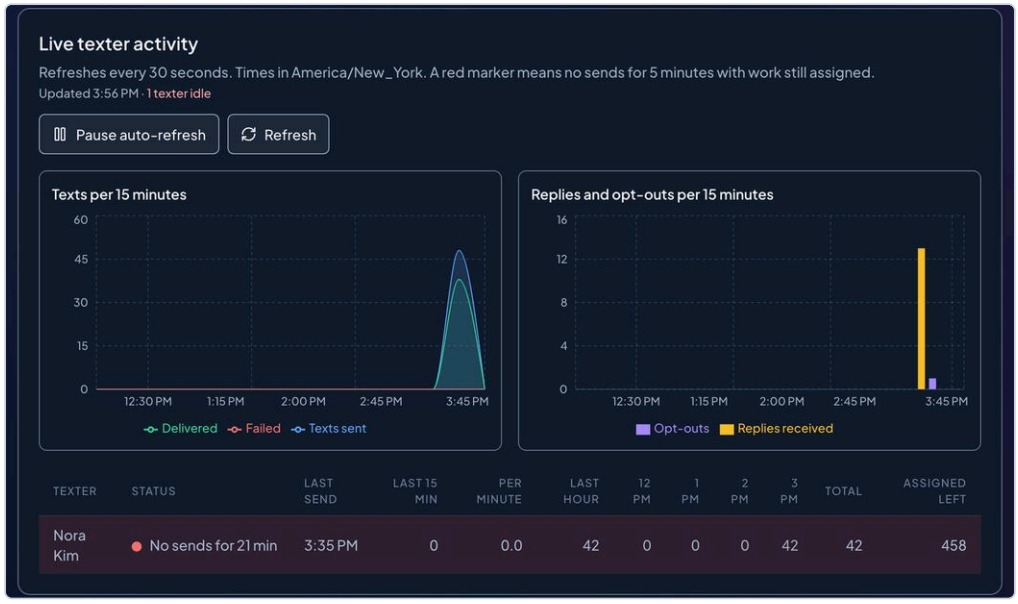


The counts at the top of **Results**. They update every 5 seconds.

Pending counts contacts still to be texted. **Queued** and **Sending** count texts on their way out. **Sent** counts texts accepted for delivery. **Segments** and **Cost** total the SMS segments sent and their cost.

Under the counts, the page reads **Counts overlap on purpose: someone who replied is still counted in Sent and Delivered. Replied and Opt-outs never overlap; anyone who opted out is counted only there.**

Live texter activity



Live texter activity. Nora Kim has sent 42 texts and has 458 still assigned. Her last send was 21 minutes ago.

Refreshing	The panel refreshes every 30 seconds. **Pause auto-refresh** holds it still and **Refresh** updates it at once.
The texter table	One row for each texter, with the sends by period and by hour, the **Total** and the texts **Assigned left**.
Status	**No sends yet**: texts are assigned and the first is still to be sent. **No sends for 21 min**: texts are still assigned and the last send was 5 or more minutes ago, and the row turns red. **Finished**: **Assigned left** and **Last hour** are both 0. Every other texter reads **Sending**.

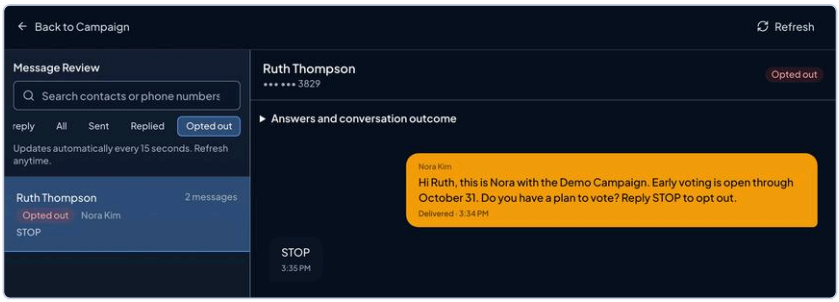
Response metrics and downloads

Response metrics	Under the texter activity: texts sent, delivered and failed, replies, reply rate, opt-outs and saved outcomes for **Last hour**, **Today (campaign time)** and **All time**, then **Survey answers (all time)**.
Texting results report	**Activity window** sets the period. **Download results CSV** gives one row for each contact, with the first reply, the survey answers and the opt-out. **Download toplines CSV** gives the topline numbers.
Create follow-up draft	At the bottom of the page. Creates a new draft campaign with the people sent a message at least 24 hours ago who have yet to reply.

Message Review and opt-outs

Message Review lists every conversation in the campaign with its status and its texter.

1. At the bottom of the **Results** tab, click **Review messages and delivery**.
   → **Message Review** opens, with the filters **Needs reply**, **All**, **Sent**, **Replied**, **Opted out**, **Error** and **Unassigned replies**.
2. Click a filter, then click a conversation.
   → The messages open on the right. Each sent message shows the texter's name, its status and the time.



Message Review filtered to **Opted out**. Ruth Thompson replied STOP to the message Nora Kim sent.

Opt-outs

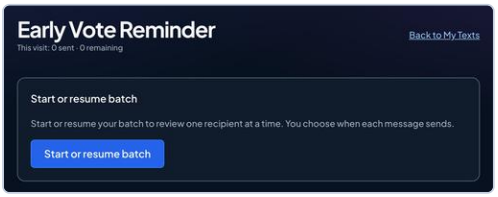
A contact opts out by replying with a stop word. The contact then carries the **Opted out** badge in every text campaign of the organization and counts in **Opt-outs** on the Results tab.

FIRST WORD OF THE REPLY	WHAT HAPPENS
STOP, STOPALL, UNSUBSCRIBE, CANCEL, END, QUIT, OPTOUT, OPT-OUT, REMOVE	The contact is opted out, in capital or small letters. A confirmation text goes back, ending **Reply START to resubscribe.**
START, UNSTOP	Lifts an opt-out that a stop word made.
HELP, INFO	The organization's help message goes back, ending **Reply STOP to unsubscribe. Msg&data rates may apply.**

A texter sends the first message to each contact, answers the replies and records what each person said. The work happens in a web browser, in the **Sender workspace**.

STEP 1 Getting started

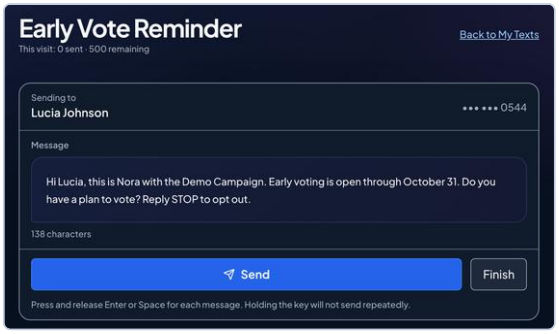
1. Sign in to Threshold in a web browser, as Part 1 describes.
2. In the sidebar, click **Phones**, then click **Texting**.
   → **My Texting Campaigns** lists your campaigns under **Your texting**.
3. On your campaign, click **Start or resume batch**.
   → The **Sender workspace** opens on the **Send texts** tab. A campaign where you answer replies has the button **Inbox**.



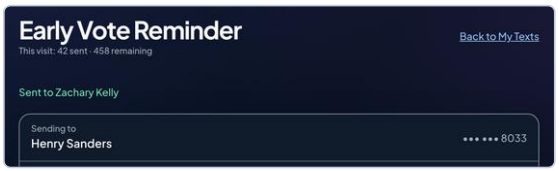
The **Send texts** tab before a batch starts.

STEP 2 Sending texts

1. On the **Send texts** tab, click **Start or resume batch**.
   → Up to 500 contacts are assigned to you and the sending card opens. The line under the campaign's name reads **This visit: 0 sent · 500 remaining**.
2. Read the card.
   → **Sending to** names the contact, with the last four digits of the number. **Message** shows the text filled in for this contact.
3. Click **Send**, or press and release Enter or Space.
   → One text is sent. A green line reads **Sent to** with the contact's name, the counts move by one and the next contact loads.
4. Send to each contact in turn. Each click, or each fresh press of the key, sends one text.
5. Click **Finish** to stop.
   → Your unsent contacts go back to the campaign. After at least one send the card reads **All done!**



The sending card for the first contact in a batch of 500.



After 42 sends: **Sent to Zachary Kelly**, and the next contact on the card.

Resume batch. The button reads **Resume batch** when texts are already assigned to you.

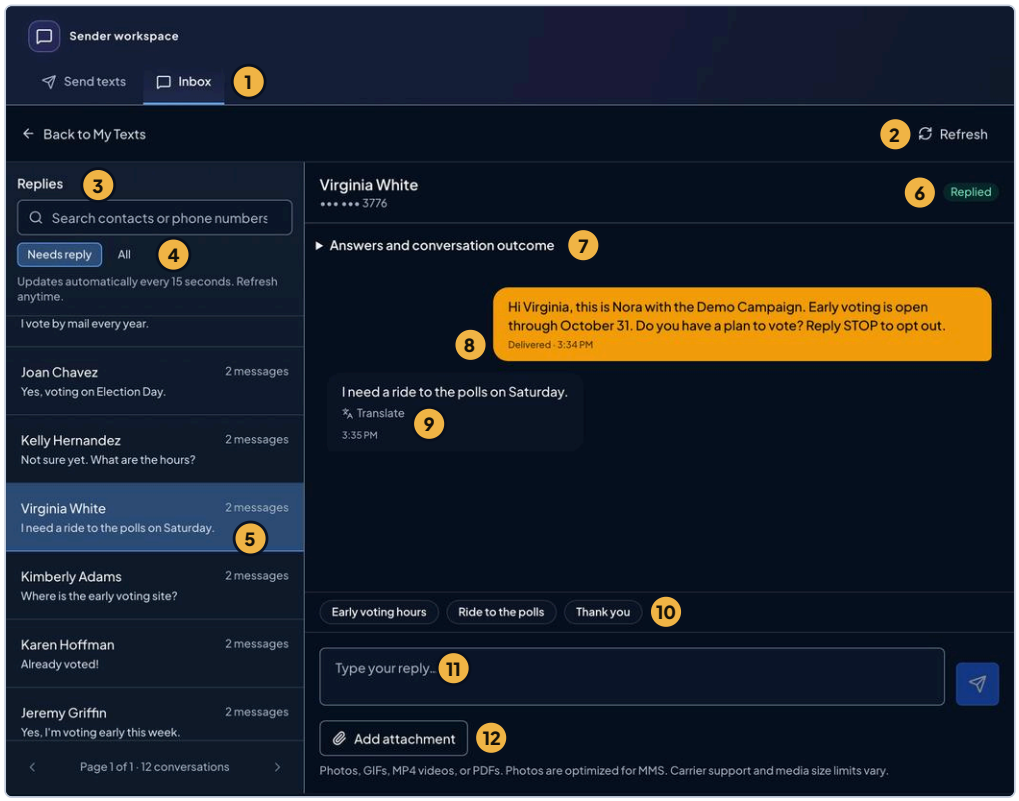
A batch session that expired. With automatic reassignment on, a send more than 5 minutes after your last one reads **Your batch session expired. Resume to continue with this contact.** Click **Resume batch**.

A contact who opted out. The page reads **This contact has opted out of text messages.** and the next contact loads.

Skip contact. Appears with the line **This contact is missing values for:** and a field name. Click it to move to the next contact.

STEP 3 Replying

1. Click the **Inbox** tab.
   → The list **Replies** opens on **Needs reply**, the conversations waiting for an answer. The Inbox is shared: everyone with Reply access works the same list.
2. Click a conversation.
   → The conversation opens on the right, with the sent message and the reply.

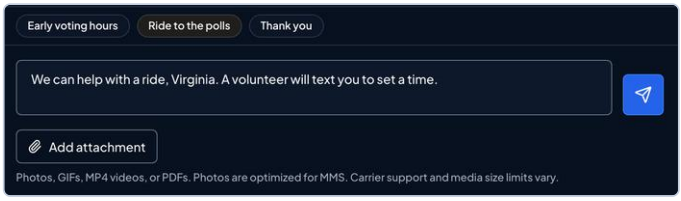


The Inbox with the conversation with Virginia White open.

1. **Send texts** and **Inbox.** The tabs of the Sender workspace.
2. **Refresh.** Updates the list at once. It also updates by itself every 15 seconds.
3. **Replies.** The conversations, with a search box for a name or a phone number.
4. **Needs reply** lists conversations waiting for an answer. **All** lists every conversation.
5. **A conversation.** The contact's name, the number of messages and the latest message.
6. **Status.** The contact's status, such as **Replied** or **Opted out**.
7. **Answers and conversation outcome.** Opens the panel that Step 4 covers.
8. **A sent message.** Ends with its status, Queued, Sent, Delivered or Failed, and the time.
9. **Translate.** Translates the contact's message and marks it **Translated from** with the language.
10. **Response templates.** One button for each ready-made reply.
11. **Type your reply…** The reply box, with the send button at its right.
12. **Add attachment.** Adds photos, GIFs, MP4 videos or PDFs to the reply.

Send a reply

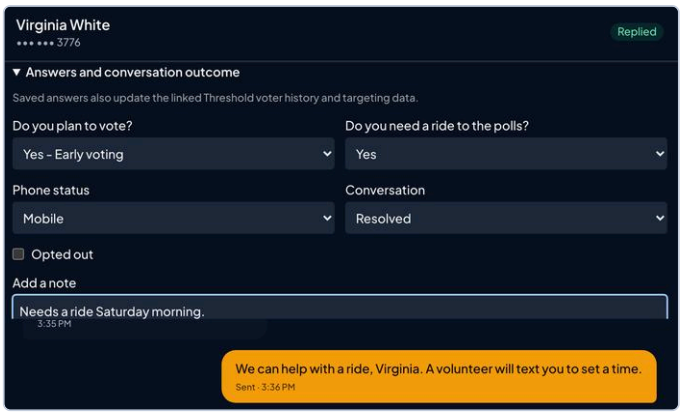
1. Click a template, or type in **Type your reply…**
   → A template fills the reply box with its text and the contact's own details. The text stays open to editing.
2. Press Enter, or click the send button.
   → The reply joins the conversation and the conversation leaves **Needs reply**. Shift with Enter starts a new line.



The reply box after a click on **Ride to the polls**.

STEP 4 Recording the outcome

1. In an open conversation, click **Answers and conversation outcome**.
   → The panel opens above the messages.
2. Select an answer for each survey question.
   → Each menu starts on **Not answered**.
3. Select a **Phone status** and a **Conversation** state.
4. Tick **Opted out** for a contact who asks to stop receiving texts.
5. Enter any detail in **Add a note**.
6. At the bottom of the panel, click **Save outcome**.
   → The panel reads **Outcome saved.**



The panel filled in for Virginia White. Under it, the reply sent from the template is marked **Sent**.

Phone status	**Unverified**, **Mobile**, **Wrong number — suppress future texts** or **Invalid number — suppress future texts**.
Conversation	**Open** or **Resolved**. A resolved conversation leaves **Needs reply**, and a new message from the contact opens it again.
Where answers go	On screen: **Saved answers also update the linked Threshold voter history and targeting data.**
A contact who replied STOP	The conversation carries the **Opted out** badge, **Opted out** is ticked and locked, and the reply box turns off with the line **This person has opted out of texting and can't receive messages.**
Back to My Texts	Returns to **My Texting Campaigns**.

PART 8

Results and help

ORGANIZER EVERYONE

Every door, call and text lands in a results page. This part shows where each one is, how to ask Marly about the numbers, how to take data out, and where to get help.

IN THIS PART

Where results land 87

Taking data out 87

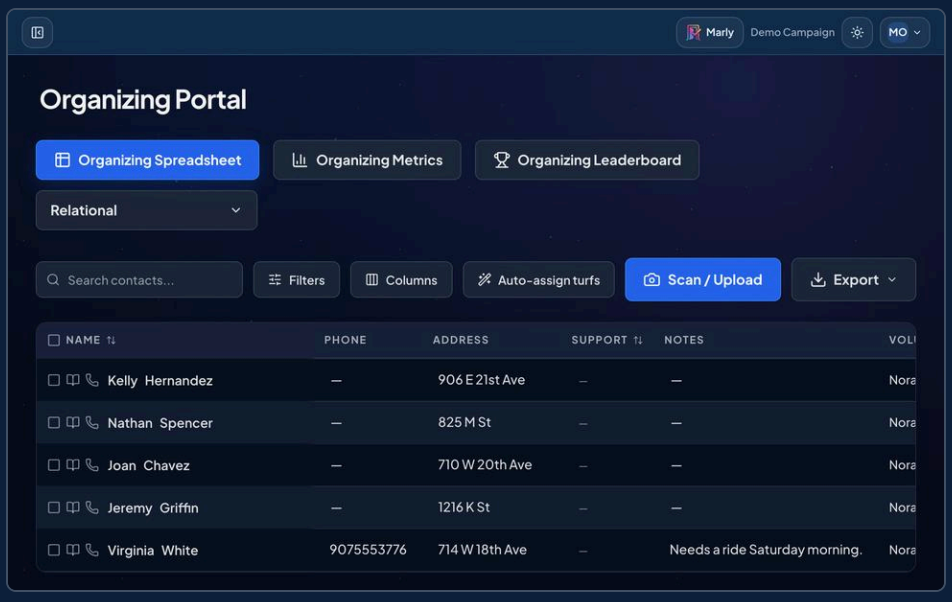
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Where results land

Each program has its own results page. Answers saved in a conversation also go onto the voter's record.

PROGRAM	OPEN	WHAT IT SHOWS	TAKE IT OUT WITH
Doors Part 4	Sidebar **Turfs**, then **Organizing Metrics**. The page is titled **Canvassing results**.	**Door attempts**, **Unique voters attempted**, **Conversations**, **Contact rate**, **ID rate** and **Supporter rate**, with a table grouped by canvasser, turf, region, precinct or district.	**Export CSV**
Phones Part 6	Sidebar **Phones**, then **Manage**. Open the phone bank and click **Results**.	**Canvass results**, **Survey** and **Activist codes**, grouped by caller, region or turf.	**Export table (CSV)**
Texts Part 7	Sidebar **Phones**, then **Texting**. Open the text campaign and click **Results**.	**Contacts**, **Pending**, **Queued**, **Sending**, **Sent**, **Delivered**, **Failed**, **Replied**, **Opt-outs**, **Segments** and **Cost**, with live texter activity and response metrics.	The results download on the page
All contact work	Sidebar **Organizing**, then **Organizing Portal**.	One row per contact, by sheet: **Relational**, **Walk**, **Phones**, **SMS outcomes**, **Hybrid**.	**Export**
Any question	Sidebar **Organizing**, then **Reports**.	Marly answers questions about the campaign's numbers.	

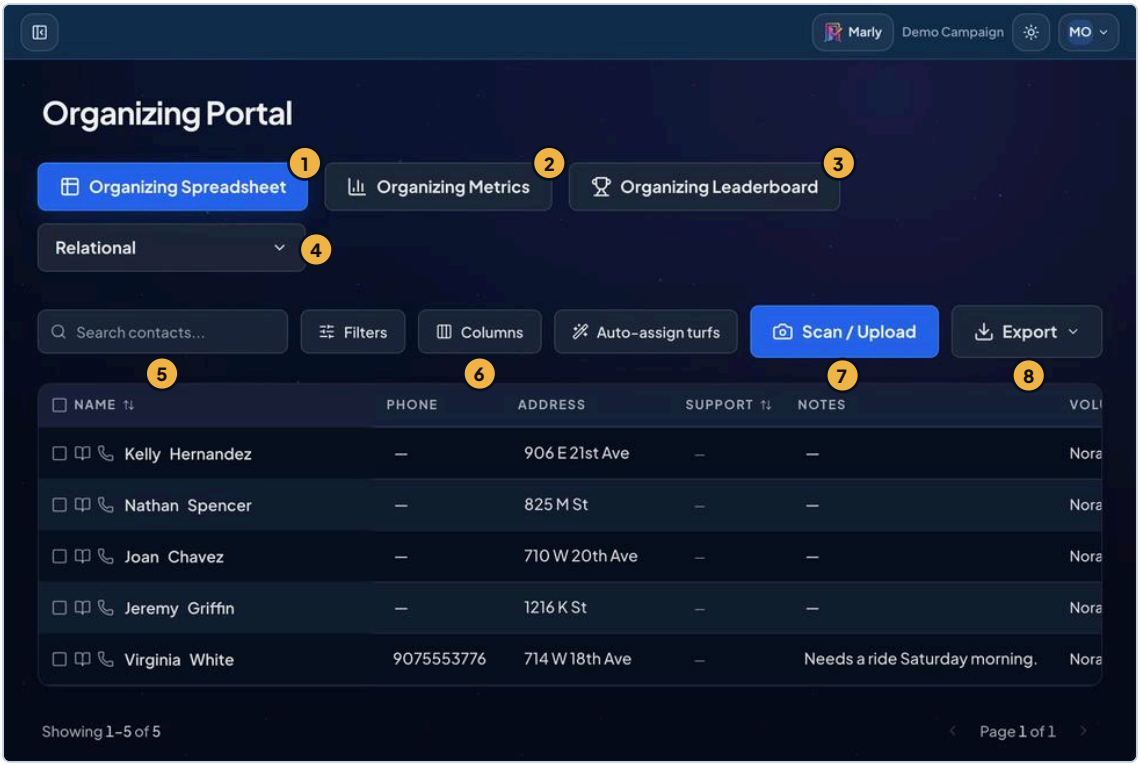
Taking data out

Each page exports what it shows. Admins also have one export for the whole campaign.

WHAT YOU WANT	WHERE	BUTTON
The people on a saved list	The saved list's page, under **Lists & Searches**	**Prepare CSV**, **Custom Export**
A count or crosstab	**Threshold Tables**	**Export**
The doors in a set of turfs	**Cut Turf**, **Export** menu	**Export CSV**
Printed walk or call packets	Sidebar **Print & Export**, then **Print**. Finished files are in **My PDFs**.	**Generate PDFs**, **Download**
Door results	**Canvassing results**	**Export CSV**
Phone bank results	The phone bank's **Results** page	**Export table (CSV)**
Contacts and conversations	**Organizing Portal**	**Export**
Everything, for admins	Sidebar **Print & Export**, then **Export Data**. Choose the fields under **Basic details**, **Contact details**, **Match data**, **Action history** and **Survey data**.	**Download CSV**

The Organizing Portal

The Organizing Portal is the campaign's running record of contacts and conversations. It opens on the **Organizing Spreadsheet** and refreshes itself every minute.



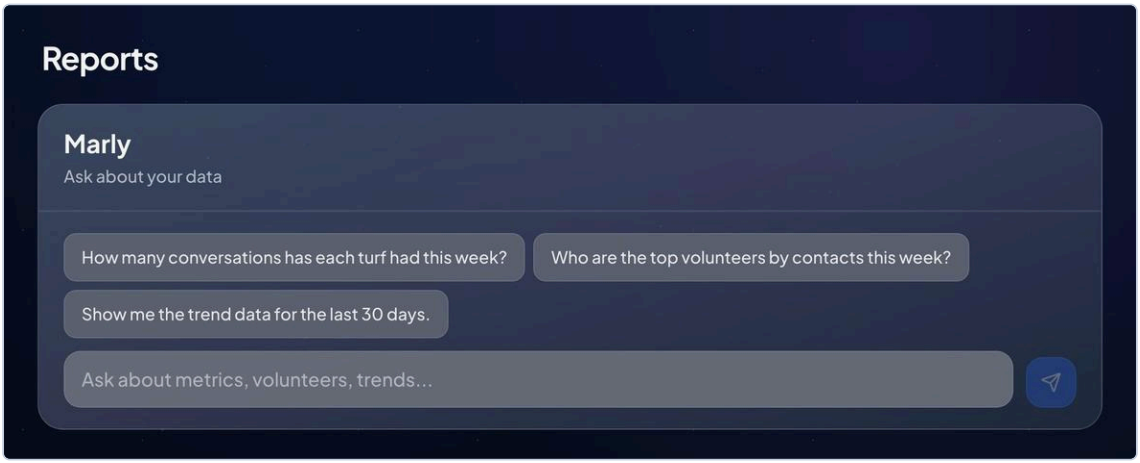
The Organizing Portal on the **Relational** sheet.

1. **Organizing Spreadsheet.** One row per contact, with phone, address, support, notes and the volunteer who recorded it.
2. **Organizing Metrics.** Cards for **Relational Participants**, **Relational Volunteers**, **Active Vols**, **Relational Conversations** and **Contacts Added**, with tables **By region**, **By turf** and **By volunteer** for today, the week and the total.
3. **Organizing Leaderboard.** Volunteers, turfs or regions ranked by **Conversations**, **Added**, **Supporters IDed**, **Vol. Recruits**, **Shifts** and **Recruited**.
4. **Sheet menu. Relational**, **Walk**, **Phones**, **SMS outcomes**, **Hybrid** and **Miscellaneous Sheets**.
5. **Search contacts…** Searches the rows on the sheet.
6. **Filters** and **Columns.** Narrow the rows by region, turf, volunteer, outcome, source, match or date, and choose the columns shown.
7. **Scan / Upload.** Brings in results from paper or a spreadsheet.
8. **Export. Export Raw Data** downloads the rows. **Export Toplines by Day** downloads daily totals.

Asking Marly about your data

Reports is a conversation with Marly about the campaign's numbers. You ask in plain words and Marly answers from the campaign's own records.

1. In the sidebar, click **Organizing**, then click **Reports**.
   → The page **Reports** opens with the panel **Marly**, **Ask about your data**.
2. Click one of the starter questions, or enter your own in the box **Ask about metrics, volunteers, trends...**
3. Press **Enter** to send. **Shift** + **Enter** adds a line.
   → Marly's answer appears in the conversation.
4. Click **New conversation** to clear the conversation and start again.



Reports before the first question, with its three starter questions.

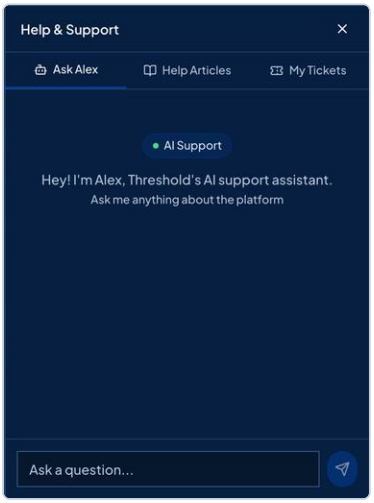
ASK ABOUT	MARLY ANSWERS WITH
Program totals	Volunteers, conversations and contacts added, by region, turf, organizer or volunteer.
The leaderboard	Who has the most conversations and contacts.
Trends	Daily or weekly numbers over a period.
Contact work	Records, breakdowns and outreach activity for relational, walk, phones and hybrid.
Survey answers	Counts of each answer to a survey question.
Texts and phone banks	Texting results and phone bank reporting.
A list of voters	On a campaign with Marly: the count, with **Save**, **Cut turf** and **Open in Manual ListMaker**. After saving, **View list** opens the saved list. An answer that is a table can open in **Threshold Tables**.

Getting help

Help is one click away on every screen, at the bottom of the sidebar.

1. At the bottom of the sidebar, click **Help and first steps**.
   → The **Help & Support** panel opens on **Ask Alex**.
2. Enter a question in **Ask a question...** and send it.
   → Alex, Threshold's AI support assistant, answers in the panel.
3. Click **Help Articles** and enter a word in **Search help articles...** to read a guide.
4. Click **My Tickets** to see the support tickets you have open under **Your Tickets**.

Resources	The public page **thresholdvote.com/resources** holds Threshold's published guides, including **Threshold User Guide: Setup to Export**.



The **Help & Support** panel on **Ask Alex**.

Where to find it

The job on the left, the place in the sidebar on the right.

TO	GO TO
Invite someone	Admin › Team Members
Add a survey question	Admin › Survey, Activist Codes and Scripts
Write a script	Admin › Survey, Activist Codes and Scripts › Scripts & event asks
Look up one voter	Voters › Voter Lookup
Build a list	Voters › ListBuilder
Open a saved list	Voters › Lists & Searches
Cut turf	Lists & Searches › the list › Cut Turf
Assign and track turf	Turfs › Turf Portal
Print walk packets	Print & Export › Print

TO	GO TO
Knock doors	The phone app › Canvass
Read door results	Turfs › Organizing Metrics
Enter results from paper	Scan / Upload
Create a phone bank	Phones › Create
Run a phone bank	Phones › Manage
Make calls	Phones › Make Calls
Create a text campaign, send texts	Phones › Texting
Ask about the numbers	Organizing › Reports
Change your language or password	Your initials, top right

Words used in Threshold

Activist code
A tag a campaign puts on a person, such as Volunteer.

Auto Cut
The button that cuts a whole list into turfs of about the same size.

Blast Mode
A text campaign where an organizer sends one approved message to the whole audience.

Call disposition
The result of a call, such as Reached this person, Not Home or Wrong Number.

Canvass
Knocking doors and talking with voters. Also the tab in the phone app where a canvasser's turfs open.

Conversation
A contact where the volunteer reached the voter.

Door
One address on a walk list. A door can hold several people.

Folder
Where saved lists and searches are kept, and shared.

Join code
A short code that opens a phone bank for a caller.

List
A saved set of people. A List keeps the people who matched on the day it was saved.

ListBuilder
The page where lists are built, step by step. Also called Manual ListMaker.

Manual phone bank
A phone bank where callers dial each number on their own phones.

Marly
Threshold's assistant. Marly builds lists and answers questions about the campaign's data.

P2P (Peer-to-Peer)
A text campaign where texters send each first message one at a time.

Pass
One round through a list or a region. Passes are numbered: Pass 1, Pass 2, Pass 3.

Phone bank
A call list with a script, opened by callers under Make Calls.

Predictive phone bank
A phone bank where Threshold dials and connects each caller when a voter answers.

Region
In My Turfs, a saved list that has been cut, with all of its turfs.

Response template
A ready-made reply a texter sends with one click.

Script
The conversation a volunteer follows, step by step.

Search
A saved set of ListBuilder steps. A Search runs its steps again each time it is opened.

Support level
Where a voter stands, such as Supporter or Undecided.

Survey question
A question with a fixed set of answers, recorded during a conversation.

Text campaign
An audience, an initial script and the texters who send it.

Turf
A group of doors for one canvasser to knock in one shift.

Universe
The full set of voters a program is aimed at.

Voter file
The campaign's record of voters, with addresses, phones, districts and voting history.

Walk packet
The printed version of a turf: a cover sheet, a map and the walk list.

THRESHOLD

Lists, turf, doors, calls and texts, in one place.

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