Campaign Finance Reporting System Instructions

1. Creating Packet
2. Importing/Upload and Templates
3. Carry Forward Feature
4. Creating Correction Affidavit
5. Closing Out
6. Managing Address Book

CITY OF SAN ANTONIO
ELECTRONIC CAMPAIGN FINANCE FILING SYSTEM
USER'S GUIDE

CREATING PACKET

Accessing Electronic Campaign
Finance Filing System

1. Enter http://www.sanantonio.gov/clerk/elections/CampFinElecFilSys.aspx
2. Select "Candidate / PAC Logon."
* Note: Must disable pop-up blocker.

Sign-on

1. Enter the User ID and Password issued by the Office of the City Clerk. Click *Sign On.* If you do not have a User ID or have trouble accessing the System, please call the Office of the City Clerk at 207-7253.

Create Packet

1. To create a new packet, select Report Type COH.
2. Select Report.
3. Select "Create Packet."

Cover Sheet 1
Candidate/Officeholder Information

1. To begin report, enter contact information for Candidate/Officeholder OR click on "Select Candidate/ Officeholder" hyperlink.

Cover Sheet 1
Campaign Treasurer Information

1. Enter contact information for Campaign Treasurer OR click on "Select Campaign Treasurer" hyperlink.
2. Save data by selecting "Save Page."

Record Added and Navigating Report

1. As contact information for the Candidate/Officeholder AND Campaign Treasurer is successfully saved, "**Record Added**" will be displayed at the top of the page.
2. In addition, Cover Sheet 2 and Report Schedules will be displayed at the top of the page.

Coversheet 1
Notice of Direct Campaign Expenditures
by Other Individuals – Correcting Errors

1. If record was not successfully added, the User will see an error message at the top of the page. Error messages (which will be highlighted in red) will indicate what information is missing and/or needs correcting.
2. Enter required data and select "Save."

Coversheet 1
Notice of Direct Campaign Expenditures
by Other Individuals

Notice of Direct Campaign Expenditure By Other Individuals

** Direct campaign expenditures are campaign expenditures made by others without the candidate's prior consent or approval. Candidates are required to disclose this information only if they receive notification of the direct campaign expenditure.**

Select Campaign Expenditure By Other Individual

[Clear Contact Info]

Individuals Name:

Title: [▾] First Name: [   ] MI: [   ]

Last Name: [   ] Suffix: [   ]

Other Name: [   ]

Individuals Address:

Street No: [   ] Street Name: [   ] Apt/Suite: [   ]

or

PO Box: [   ]

City: [   ] State: [▾] Zip Code: [   ] [   ]

[Save]

1. If Direct Campaign Expenditures by Other Individuals does not apply, go directly to Coversheet 2 **without** saving.

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Coversheet 1
Notice of Direct Campaign Expenditures
by Other Individuals – Entering Data, if applicable

Notice of Direct Campaign Expenditure By Other Individuals

** Direct campaign expenditures are campaign expenditures made by others without the candidate's prior consent or approval. Candidates are required to disclose this information only if they receive notification of the direct campaign expenditure.**

Select Campaign Expenditure By Other Individual

[Clear Contact Info]

Individuals Name:

Title: [▾] First Name: [   ] MI: [   ]

Last Name: [   ] Suffix: [   ]

Other Name: [   ]

Individuals Address:

Street No: [   ] Street Name: [   ] Apt/Suite: [   ]

or

PO Box: [   ]

City: [   ] State: [▾] Zip Code: [   ]

[Save]

1. If you **do** have entries, enter contact information OR click on "Select Campaign Expenditure By Other Individual" hyperlink.
2. Save data by selecting "Save."

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Coversheet 1
Notice of Direct Campaign Expenditures
by Other Individuals – Saved Data, if applicable

1. As contact information for Direct Campaign Expenditure data is successfully saved, "**Expenditure Record Added**" will be displayed at the top of the page.

Coversheet 2
Notice of Direct Campaign Expenditures
From Political Committees

Notice From Political Committee(s)
** This box is for notice of political expenditures by political committees to support the candidate/officeholder. These expenditures may have been without the candidate's or officeholder's knowledge or consent. Candidates and officeholders are required to report this information only if they receive notice of such expenditures. **

Committee Type: General ▼

Select Committee

[Change Contact Info] [Clear Contact Info]

Committee Name

Committee Address

Street No: [ ]   **Street Name:** [ ]   **Apt/Suite:** [ ]

or

PO Box: [ ]

City: [ ]   **State:** [▼]   **Zip Code:** [ ]

Select Committee Campaign Treasurer

[Change Contact Info] [Clear Contact Info]

1. If Direct Campaign Expenditures by Political Committee does not apply, go directly to Schedule A **without** saving.

Coversheet 2
Notice of Direct Campaign Expenditures
From Political Committees – Entering Data, if applicable

Notice From Political Committee(s)
** This box is for notice of political expenditures by political committees to support the candidate/officeholder. These expenditures may have been without the candidate's or officeholder's knowledge or consent. Candidates and officeholders are required to report this information only if they receive notice of such expenditures. **

Committee Type: General ▾

Select Committee
[Change Contact Info] [Clear Contact Info]

Committee Name
[_____]

Committee Address
Street No: [_____] **Street Name:** [_____] **Apt/Suite:** [_____]
or
PO Box: [_____]
City: [_____] **State:** [__▾] **Zip Code:** [_____] [_____]

Select Committee Campaign Treasurer
[Change Contact Info] [Clear Contact Info]

1. If you do have entries, enter contract information for Committee Campaign Treasurer OR click on "Select Committee" hyperlink.

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Coversheet 2
Notice of Direct Campaign Expenditures
by Political Committees – Saved Data

Add Notice From Political Committees   Clear

1. Save data by selecting "Add Notice From Political Committees."

Campaign Finance ELECTRONIC FILING SYSTEM   Candidate/Officeholder Report: Support & Totals CS2

Log off   Help

COH: Main Menu   Print Report   Instruction Guide

CS1 ▶CS2   SchA   SchB   SchE   SchF   SchG   SchH   SchI   SchK   SchT

Final Report (Close Out Campaign)   Submit to City Clerk

Record Added

C/OH Name: Joe Candidate

Notice From Political Committee(s)
** This box is for notice of political expenditures by political committees to support the candidate/officeholder. These expenditures may have been without the candidate's or officeholder's knowledge or consent. Candidates and officeholders are required to report this information only if they receive notice of such

1. Once data is successfully saved, "**Record Added**" will be displayed at the top of the page.

Coversheet 2
Notice of Direct Campaign Expenditures
From Political Committees – Saved Data

Committee Type	Committee Name	Committee Address	Campaign Treasurer Name	Campaign Treasurer Address	Created Date	Edit	Delete
G	Joe for a Better San Antonio	100 Victory Lane San Antonio, TX 78200	Joleen Candidate	100 Victory Lane San Antonio, TX 78200	4/21/2011 6:11:34 PM	Edit	Delete
1							

1. Data successfully saved will be displayed at the bottom of the page.

Coversheet 2
Totals

1. Enter data for "Applicant Filled" fields (unitemized political contributions and expenditures as well as contribution balance).
2. Save data by selecting "Save Page."

Coversheet 2
Totals

1. Once data is successfully saved, "**Totals Added**" will be displayed at the top of the page while saved financial data will be displayed at the bottom of the page.

Schedule A – Entering Data

1. Enter Date of contribution. Date must be within designated time period. If entry is not within contribution period, error message will be displayed at top of page.
2. Enter Contributor contact information OR click on "Select Contributor Name." hyperlink.
3. Enter required information.
4. Save data by selecting "Save."

Schedule A – Saved Data

1. Once data is successfully saved, "**Record Added**" will be displayed at the top of the entry while the entry will be displayed at the bottom of the page.

Schedules B thru T

Follow directions denoted for Schedule A

- Schedule B – Pledged Contributions
- Schedule E – Loans
- **Schedule F – Political Expenditures**
- Schedule G – Political Expenditures Made from Personal Funds
- Schedule H – Payment from Political Contributions to a Business of C/OH
- Schedule I – Non-Political Expenditures Made from Political Contributions
- Schedule K – Credits
- Schedule T – In-kind Contribution or Political Expenditure for Travel outside of Texas.

Submit to City Clerk
Submit for Posting to the Web

1. Print/Review Report for accuracy.
2. To submit completed Report to the Office of the City Clerk for posting to the web, select "Submit to City Clerk."
3. For verification purposes, the user will be asked if his/her intent is to submit the Report to the Office of the City Clerk.
   a. If so, select "Continue." User will be asked to complete Oath.
   b. If not, select "Main Menu." Users will be directed to Main Menu.

Completing Oath
Submit Report to City Clerk

1. Complete Oath by selecting "OK."
2. Once Oath is completed, User will be directed back to Main Menu.

Report Status
Complete Packets / Locked Down

1. Upon completion of Oath, the "Lock down Status" of the Report will be denoted as "Pending."
2. User will be notified via e-mail when report has been "Locked down."

Report Status
Incomplete Packets

1. Reports started but not submitted to the Office of the City Clerk will be denoted as an "Incomplete Packet."
2. Reports can be accessed by clicking on the Report Type to enter additional data.

Campaign Finance System
Import/Upload Instructions

The Campaign Finance System includes a function for users to import contributions & expenses into the database from a specially formatted excel spreadsheet. Instructions below are intended to assist a user on performing the Import function for contributions (Sch A) and Expenses (Sch F). These instructions assume that you are already in the specific schedule report. Clarification on terminology: **Upload** is the act of uploading information in an excel template into the system for review prior to importing the information into the database. **Import** is a term used to express the act of importing information into the database.

A. Upload File – Excel Templates

The system requires that a specially formatted excel file be used for the import to work. These uniquely formatted excel files must include required column headings, sheet/tab name and some required entries. These excel templates for contributions and expenses can be found in the Office of the City Clerk's Elections Web Site (http://www.sanantonio.gov/clerk/elections/) at the bottom of the column with heading "Campaign Finance Information".

B. Create the Upload File

First you must complete the upload file. This is an excel file with specific columns which must be completed and meet information requirements.

1.) The sheet/tab name must be '**Sheet1**'. Do not change the sheet/tab name that is used by the template.
2.) Information on the excel sheet/tab must meet specific requirements. These requirements can be found in the appendices as listed below:
   a. **Appendix A – Schedule A – Upload File Data Requirements**
   b. **Appendix F – Schedule F – Upload File Data Requirements**
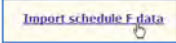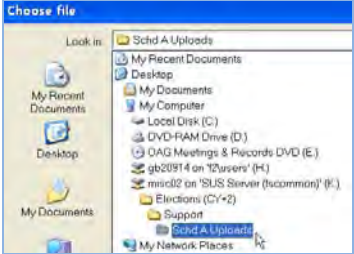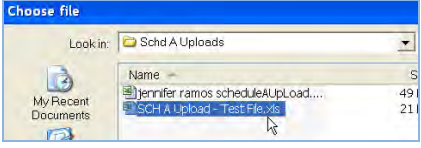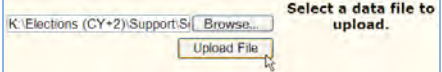
C. Uploading information into the Campaign Finance System

Once you have completed the upload file as described in "Create the Upload File", you are now ready to upload the information into the Campaign Finance System. These instructions assume that you are already in the Campaign Finance System and in the specific "New" or "Pending" Schedule Report screen shown below:

SCHEDULE A (Contributions)

SCHEDULE F (Expenses)
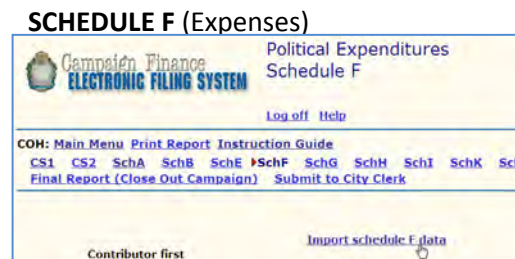
Step by Step instructions follow on the next page. Keep in mind that you can execute Steps 1-6 as many times as you want in order to check for errors on your import file (xls). Information on your import file does not populate the database until you execute Step 7.

Step by Step Instructions

1. Click on "**Import schedule <x> data**, where <x> is the specific schedule you are working on.	Import schedule F data
2. Clik on "**Browse**"	Select a data file to upload. [Browse...] [Upload File]
3. Using the 'Choose File' dialog window, **navigate to the directory where your upload file is located**.	Choose file
4. **Double-Click on the upload file** you created.	Choose file
5. Click on "**Upload File**" button	Select a data file to upload. K:\Elections (CY+2)\Support S [Browse...] [Upload File]

6. **If errors are detected** on the upload file, the system will display an error message as shown on the first print screen (6.a.) below. The screen shows the columns and the information as it existed in the upload file you created. There will be an additional column to the left which describes the error encountered. **If no errors were found**, you will get the message shown on the 2ⁿᵈ print screen (6.b.) below.
    a. **If errors are encountered**, **correct errors** on upload file and **repeat steps 1-6**
    b. **If no errors are encountered**, proceed to **step 7**.	

6.a. - ERRORS ENCOUNTERED

Column describing any errors

Invalid data found.
Please correct your data file and upload again.

Columns of information from the excel upload file

2 record(s) with errors.

Print Errors

***************Errors***************	Title	FName	MI	LName	Suffix	NickName	OtherName	AreaCode	PhonePre
ContrDate must be between 5/5/2011 and 6/30/2011		Test1-First Name		Test1-Last Name					

6.b. - NO ERRORS FOUND

Back to schedule

Select a data file to upload.
[Browse...]
[Upload File]

Message indicating the number of records found in excel file and ready for import.

Data is valid.
Click Import Data button to continue.
[Import Data]

2 record(s) valid for import.

If you get this error, the excel upload file is not formatted correctly, please use template from Elections library.

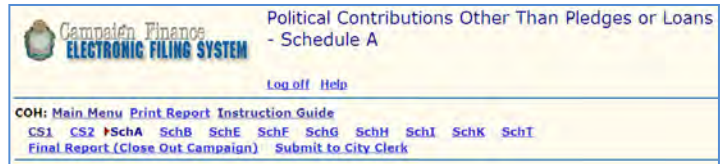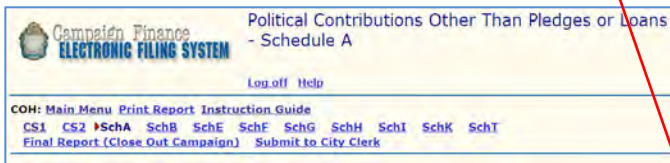[Browse...] Select a data file to upload.
[Upload File]

Data file invalid.

7. Click on "**Import Data**"	Import Data
8. System will present message showing the number of records imported. Click "**Back to schedule**"	Back to schedule Select Browse... Upload File 2 Records Imported
9. Notice that the information uploaded into the system is listed at the bottom of the report as shown in the print screen below. You have successfully imported your information. You may proceed with updating/completing other schedules, print & review your information and/or submit report to the Office of the City Clerk.	
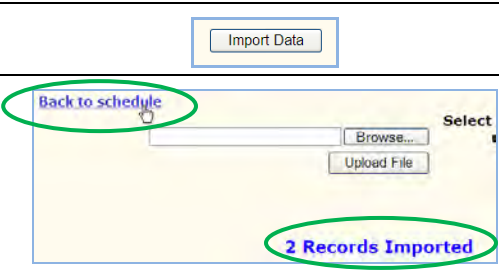
Date	Name	Address	Amount	Description	Created Date	Edit	Delete
05-15-2011	Test1- Last Name, Test1- First Name	111 One Street San Antonio, TX 78111	$111.00		5/2/2011 4:21:58 PM	Edit	Delete
05-15-2011	Test2- Last Name, Test2- First Name	PO Box 222 San Antonio, TX 78222	$222.00		5/2/2011 4:21:58 PM	Edit	Delete
1							

Before Upload

After Upload

Appendix A – Schedule A Upload File Data Requirements
Excel Columns and Information Requirements

Col-umn	Column Heading	Field Description	Data Type & Field Length Allowed	Required (Y OR N)	Example
A	Title	Title	Character 3	N	Mr/Mrs/Ms
B	**Fname**	First Name	Character 50	**Y - only required if Contributor Organization is left blank**	
C	MI	Middle Initial	Character 1	N	
D	**Lname**	Last Name	Character 50	**Y - only required if Contributor Organization is left blank**	
E	Suffix	Suffix	Character 10	N	Jr/Sr/III/MD
F	NickName	Nick Name	Character 50	N	
G	**OtherName**	Contributor Organization	Character 100	**Y - only required if First Name and Last Name are left blank**	Business Name
H	AreaCode	Phone Area Code	Character 3	N	210
I	PhonePre	Phone Prefix	Character 3	N	999
J	PhoneNbr	Phone Suffix	Character 4	N	9999
K	PhoneExt	Phone Extension	Character 8	N	
L	**HouseNbr**	Street No.	Character 5	**Y - only required if no PO BOX**	
M	**StreetName**	Street Name	Character 50	**Y - only required if no PO BOX**	No commas allowed, no 'PO BOX' allowed.
N	**POBox**	Post Office Box	Character 15	**Y - only required if Street No. and Street Name are left blank.**	"123" (do not prefix with "PO BOX")
O	AptSuite	Apt/Suite	Character 5	N	
P	**City**	City	Character 50	**Y**	
Q	**fkStateAbbr**	State	Character 2	**Y**	TX
R	**ZipCode**	Zip Code	Character 5	**Y**	
S	ZipCodeExt	Zip Code Extension	Character 4	N	
T	**ContrDate**	Contribution Date	DATE	**Y**	MM/DD/YYYY **(*)**
U	OutOfStatePACYN	Out of State PAC	Character 1	N	Y OR N
V	OutOfStatePACId	Out of State PAC Id #	Character 25	N	
W	**TransAmt**	Amount of Contribution	NUMBER	**Y**	9999999.99
X	InKindDescr	In-Kind Description	Character 250	N	
Y	JobTitle	Occupation/Job Title	Character 75	N	
Z	Employer	Employer	Character 150	N	

(*) – The Contribution date must fall within the date period specified by the "City of San Antonio Contribution Cycles". You can reference these report cycles at the Office of the City Clerk's Elections WEB site (http://www.sanantonio.gov/clerk/elections/). If you have an incomplete report already created, you can also see the date period under the list of Incomplete Packets, as shown below.

Appendix F – Schedule F – Upload File Data Requirements
Excel Columns and Information Requirements

Col-umn	Column Heading	Field Description	Data Type	Required (Yes / No)	Example
A	Title	Title	Character 3	N	Mr/Mrs/Ms
B	**Fname**	First Name	Character 50	**Y - only required if Payee Organization is left blank**	
C	MI	Middle Initial	Character 1	N	
D	**Lname**	Last Name	Character 50	**Y - only required if Payee Organization is left blank**	
E	Suffix	Suffix	Character 10	N	Jr/Sr/III/MD
F	NickName	Nick Name	Character 50	N	
G	**OtherName**	Payee Organization	Character 100	**Y - only required if First Name and Last Name are left blank**	Business Name
H	AreaCode	Phone Area Code	Character 3	N	210
I	PhonePre	Phone Prefix	Character 3	N	999
J	PhoneNbr	Phone Suffix	Character 4	N	9999
K	PhoneExt	Phone Extension	Character 8	N	
L	**HouseNbr**	Street No.	Character 5	**Y - only required if no PO BOX**	
M	**StreetName**	Street Name	Character 50	**Y - only required if no PO BOX**	No commas allowed, no 'PO BOX' allowed.
N	**POBox**	Post Office Box	Character 15	**Y - only required if Street No. and Street Name are left blank.**	"123" (do not prefix with "PO BOX")
O	AptSuite	Apt/Suite	Character 5	N	
P	**City**	City	Character 50	**Y**	
Q	**fkStateAbbr**	State	Character 2	**Y**	TX
R	**ZipCode**	Zip Code	Character 5	**Y**	
S	ZipCodeExt	Zip Code Extension	Character 4	N	
T	**TransDate**	Payment Date	DATE	**Y**	MM/DD/YYYY **(*)**
U	**TransAmt**	Amount of Payment	NUMBER	**Y**	9999999.99
V	**PurposeOfExpDescription**	Purpose of Payment	Character 150	**Y**	
W	**COHName**	Candidate/Office Holder Name	Character 100	**Y**	
X	OffSought	Office Sought	Character 50	N	**Must be one of the following:** • Mayor • Council District <#>, *Where <#> is 1-10* • Not Applicable
Y	OffHeld	Office Held	Character 50	N	
	PurposeOfExpCategory				

(*) – see note in Appendix A

CITY OF SAN ANTONIO
ELECTRONIC CAMPAIGN FINANCE FILING SYSTEM
CARRY OVER PROCEDURES

GENERAL INFORMATION

The Carry Over feature of the System is utilized under the following circumstances:

**Not involved in Run-off Election (1 instance)**
- The Carry Over feature allows for contributions reported in Schedule A from the 3-day Before General Election Report to be transferred into the July 15 Semi-Annual 2011.

Involved in Run-off Election (2 instances)
- The Carry Over feature allows for contributions reported in Schedule A from the 3-day Before General Election Report to be transferred into the 8-day Before Run-off Election Report
- The Carry Over feature allows for contributions reported in Schedule A from the 3-day Before the Run-off Election Report into the July 15 Semi-Annual Report 2011

INSTRUCTIONS

1. User/Filer will create the required packet and complete Coversheet 1 and 2. On Schedule A of the newly created report, User/Filer will see a hyperlink entitled "Carry Over Contributions from …"
2. Select the hyperlink.
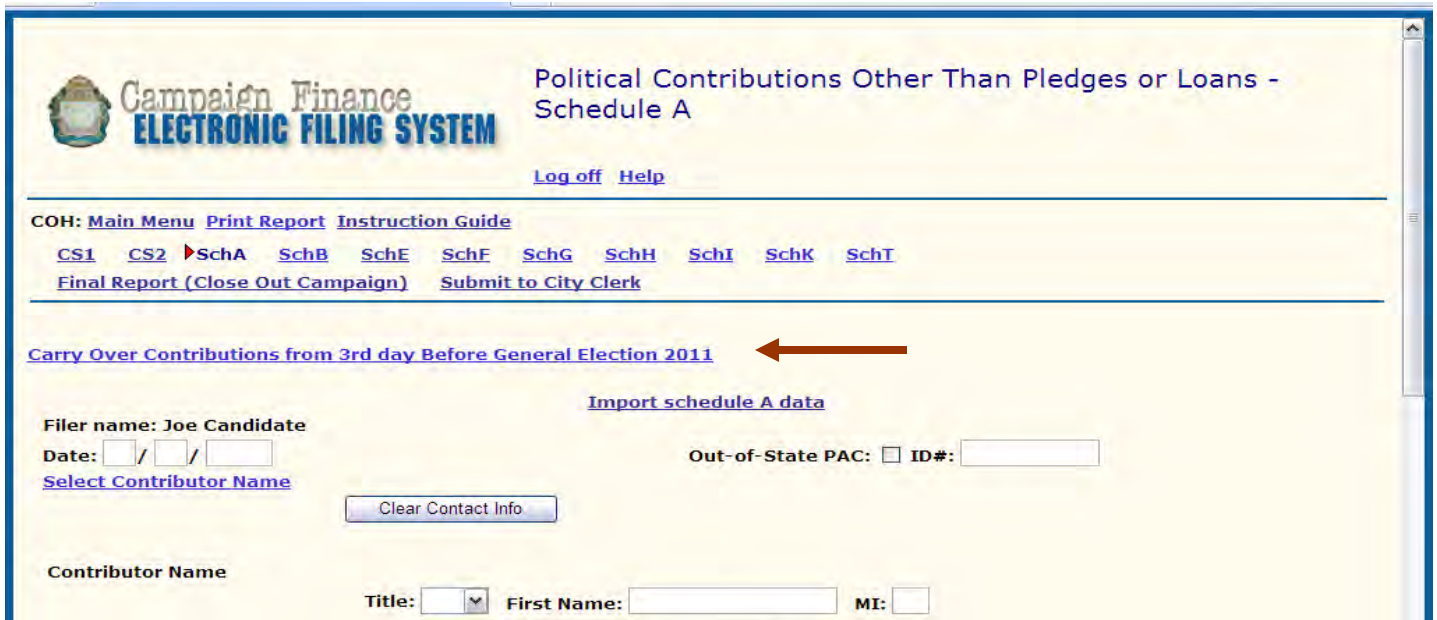
1. User/Filer will be directed to a new page displaying the number of contributions to be carried over to the current report.
2. Select "Continue" to proceed with the process.
3. Once "Continue" has been selected, ALL contributions listed on Schedule A from the denoted report will automatically be transferred into the current report and will be displayed at the bottom of the page. There is no need to save.

1. Print and review for accuracy.
2. From this point forward you may proceed with entering data for the reporting period.

CITY OF SAN ANTONIO
ELECTRONIC CAMPAIGN FINANCE FILING SYSTEM
USER'S GUIDE

CREATING CORRECTION AFFIDAVIT

Correction Affidavit Mode

1. Select the locked report that requires correcting.

1. Select "Correction Affidavit" from the Main Menu.

Correction Affidavit Mode

1. Enter Explanation of ALL Corrections.
2. Check box containing Oath.
3. Click "Save Corrections."

Correction Affidavit Mode

1. Once data is successfully saved, "**Correction Affidavit Added**" will be displayed at the top of the entry.
2. Main Menu and Schedules will be displayed at the top of the page.

Correction Affidavit Mode
Adding Data

COH Correction Affidavit: **Main Menu**   **Print Report**   **Instruction Guide**

Correction Affidavit   **CS1**   **CS2** ▶**SchA**   **SchB**   **SchE**   **SchF**   **SchG**   **SchH**   **SchI**   **SchK**   **SchT**
Final Report (Close Out Campaign)   **Submit to City Clerk**
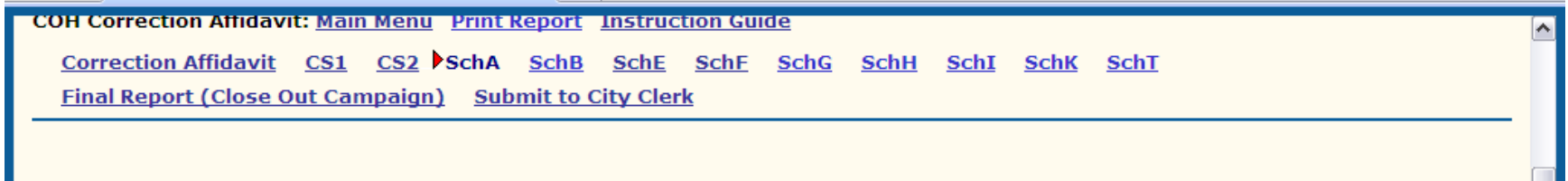
1. To add data, select the appropriate Schedule.

2. Follow the same process for entering data.

Correction Affidavit Mode
Editing Amounts, Description, Job Title, and Employer

1. To edit contribution amounts, description of contribution, job title, and employer; select the appropriate Schedule containing the entry that requires correcting.
2. From the entries listed at the bottom of the page, select the entry that requires correcting.
3. Select "Edit."
4. Edit data within the entry.
5. Click "Save."

Correction Affidavit Mode
Editing Amounts, Description, Job Title and Employer

1. Once data is successfully saved, "**Record Updated**" will be displayed at the top of the entry.
2. Corrected data will be displayed at the bottom of the page.
3. Upon completion of all corrections, follow the same process for submitting a Report and completing Oath.

Correction Affidavit Mode
Editing Contact Information

1. To edit Contact information, select the appropriate Schedule containing the entry that requires correcting.
2. From the entries listed at the bottom of the page, select the entry that requires correcting.
3. Select "Edit.

Correction Affidavit
Editing Contact Information

1. Select "Change Contact Info."

*Note: Must disable pop-up blocker.

Correction Affidavit Mode
Editing Contact Information

1. Make corrections to contact information within the pop-up window.
2. Select "Update."
3. From Main Menu, select "Save."

Correction Affidavit Mode
Editing Contact Information

COH Correction Affidavit: **Main Menu**   **Print Report**   **Instruction Guide**

Correction Affidavit   **CS1**   **CS2**   ▶**SchA**   **SchB**   **SchE**   **SchF**   **SchG**   **SchH**   **SchI**   **SchK**   **SchT**
Final Report (Close Out Campaign)   **Submit to City Clerk**

Record Updated
Import schedule A data

Filer name: Joe Candidate

Date: ☐ / ☐ / ☐   **Out-of-State PAC:** ☐ **ID#:** ☐

Select Contributor Name

[Clear Contact Info]

Contributor Name

Title: ☐ ▾   **First Name:** ☐   **MI:** ☐

1. Once data is successfully saved, "**Record Updated**" will be displayed at the top of the entry.
2. Corrected data will be displayed at the bottom of the page.
3. Upon completion of all corrections, follow the same process for submitting a report and completing Oath.

CITY OF SAN ANTONIO
ELECTRONIC CAMPAIGN FINANCE FILING SYSTEM
USER'S GUIDE

CLOSING OUT

Final Report
Closing Out Campaign

Candidate/Officeholder Report:
Designation of Final Report

Log off   Help

COH Correction Affidavit: Main Menu   Print Report   Instruction Guide

Correction Affidavit   CS1   CS2   SchA   SchB   SchE   SchF   SchG   SchH   SchI   SchK   SchT

▶Final Report (Close Out Campaign)   Submit to City Clerk

** Complete only if "Report Type" on page 1 is marked "Final Report" **

If a selection mistake has been made, please click the 'Clear Form' button to reset the page.

[Clear Form]

1. C/OH NAME: Joe Candidate

3. SIGNATURE

○ Agree ○ Disagree

I do not expect any further political contributions or political expenditures in connection with my candidacy. I understand that designating a report as a final report terminates my campaign treasurer appointment. I also understand that I may not accept any campaign contributions or make any campaign expenditures without a campaign treasurer appointment on file.

1. Select "Final Report (Close Out Campaign)."
2. Click on the appropriate radio buttons for Questions 3, 4, and 5.
3. Select "Save."

Final Report
Closing Out Campaign

Campaign Finance
ELECTRONIC FILING SYSTEM

Candidate/Officeholder Report:
Designation of Final Report

Log off   Help

COH Correction Affidavit: Main Menu   Print Report   Instruction Guide

Correction Affidavit   CS1   CS2   SchA   SchB   SchE   SchF   SchG   SchH   SchI   SchK   SchT

▶**Final Report (Close Out Campaign)   Submit to City Clerk**

Final report has been saved.
** Complete only if "Report Type" on page 1 is marked "Final Report" **

If a selection mistake has been made, please click the 'Clear Form' button to reset the page.

Clear Form

1. C/OH NAME: Joe Candidate

3. SIGNATURE
⊙ Agree ○ Disagree
I do not expect any further political contributions or political expenditures in connection with my candidacy. I understand that designating a report as a final report terminates my campaign treasurer appointment. I also understand that I may not accept any campaign contributions or make any campaign expenditures without a campaign treasurer appointment on file.

1. Once data is successfully saved, "**Final Report has been saved**" will be displayed at the top of the entry.
2. Continue with completion of report by selecting "Submit to City Clerk"

CITY OF SAN ANTONIO
ELECTRONIC CAMPAIGN FINANCE FILING SYSTEM
USER'S GUIDE

MANAGING ADDRESS BOOK

Address Book
Selecting Contact Information

1. To select an entry from the Address Book, click on "Select Candidate/Officeholder" or appropriately titled hyperlink (Treasurer Name for CS2; Contributor Name for Schedule A; Payee Name for Schedule F; etc.).

Address Book
Selecting Contact Information

1. Address Book entries will appear in a pop-up window.
2. Click on "Select" for the appropriate entry.
3. Entry will auto-populate with contact information selected. Note that only contact information is transferred.

Address Book
Editing Contact Information

1. To edit Contact information, select the appropriate Schedule containing the entry that requires correcting. Entries can not be edited within the Address Book.
2. From the entries listed at the bottom of the page, select the entry that requires correcting.
3. Select "Edit.

Address Book
Editing Contact Information

1. Select "Change Contact Info."

*Note: Must disable pop-up blocker.

Address Book
Editing Contact Information

1. Make corrections to contact information within the pop-up window.
2. Select "Update."
3. From Main Menu, select "Save."

Address Book
Editing Contact Information

COH Correction Affidavit: **Main Menu** **Print Report** **Instruction Guide**

Correction Affidavit   **CS1**   **CS2** ▶**SchA**   **SchB**   **SchE**   **SchF**   **SchG**   **SchH**   **SchI**   **SchK**   **SchT**

Final Report (Close Out Campaign)   **Submit to City Clerk**

Record Updated
Import schedule A data

Filer name: Joe Candidate

Date: ☐ / ☐ / ☐

Select Contributor Name

Out-of-State PAC: ☐ **ID#:** ☐

[Clear Contact Info]

Contributor Name

Title: [▾]   **First Name:** ☐   **MI:** ☐

1. Once data is successfully saved, "**Record Updated**" will be displayed at the top of the entry.
2. Corrected data will be displayed at the bottom of the page.

Address Book
Editing Contact Information

1. Once data is successfully saved, "**Record Updated**" will be displayed at the top of the entry.
2. Corrected data will be displayed at the bottom of the page.
3. Upon completion of all corrections, follow the same process for submitting a report and completing Oath.
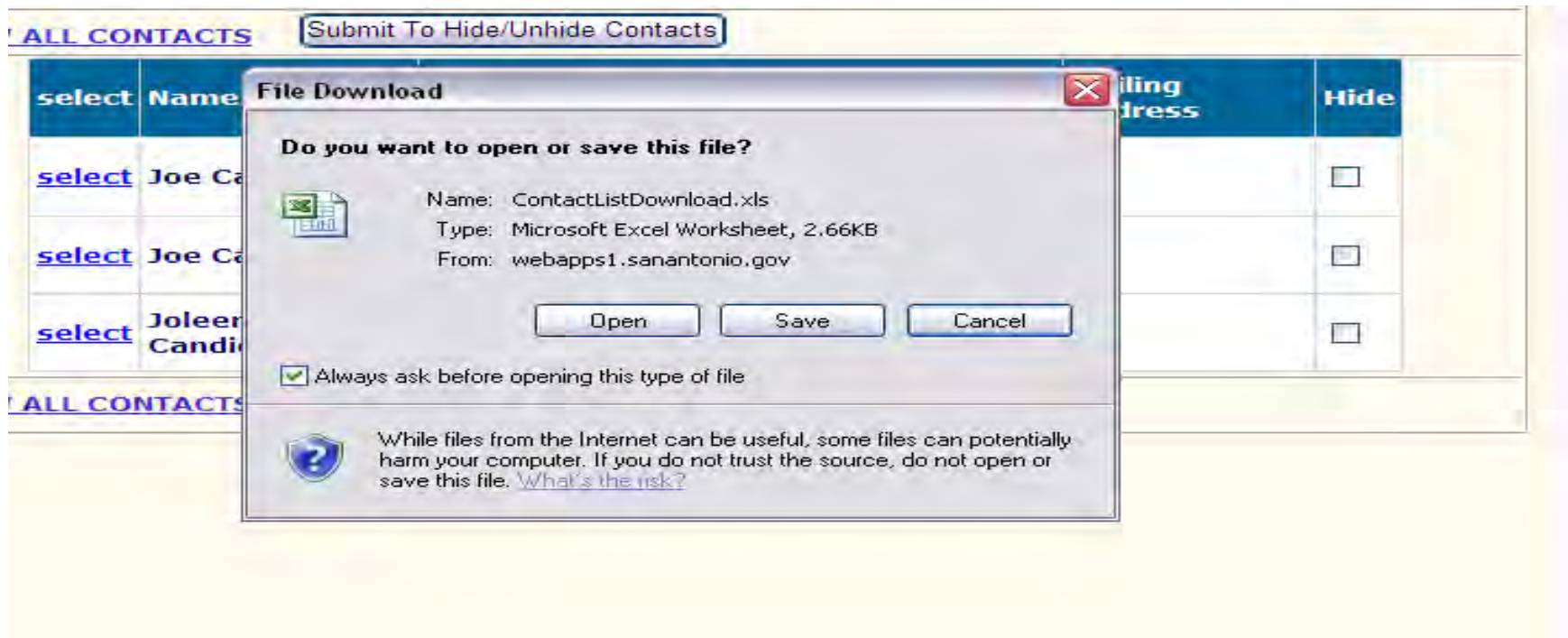
Address Book
Downloading Contacts to Excel

1. To transfer data maintained within Address Book to an excel document, select "Download List to Excel".

Address Book
Downloading Contacts to Excel

1. To transfer data maintained within Address Book to an excel document, select "Download List to Excel".
2. User/Filer will be asked "Do you want to open or save this file." Select the appropriate option.

Address Book
Downloading Contacts to Excel

	Title	FName	MI	LName	Suffix	NickName	OtherName	HouseNbr	StreetName	POBox	AptSuite	City	fkStateAb
3	Title	FName	MI	LName	Suffix	NickName	OtherName	HouseNbr	StreetName	POBox	AptSuite	City	fkStateAb
4		Joe		Candidate				100	Victory Lane			San Antonio	TX
5							Joe Candidate	105	Victory Lane			San Antonio	TX
6		Joleen		Candidate				100	Victory Lane			San Antonio	TX

1.   Address Book entries will be successfully downloaded.