

# 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

City of San Antonio | Official Web Site - Elections - Microsoft Internet Explorer provided by City of San Antonio

http://www.sanantonio.gov/clerk/elections/CampFinElecFilSys.aspx

File Edit View Favorites Tools Help

City of San Antonio | Official Web Site - Elections

City Clerk Home Boards & Commissions Elections Ceremonials Ethics

## Elections - Campaign Finance - Electronic Filing System

**CAMPAIGN FINANCE**  
**ELECTRONIC FILING SYSTEM**

**SEARCH** The City of San Antonio Campaign Finance Filing System database contains financial records that candidates and PACs are required to disclose by law. You may search for specific reports or contribution and expense information according to criteria that you specify.

**CANDIDATE / PAC LOGON** Candidates and PACs who wish to file campaign finance information online, logon here.

[Campaign Finance Help](#)

**Department Director**

Leticia M. Vacek,  
TRMC/CMC

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.



Campaign Finance  
**ELECTRONIC FILING SYSTEM**

Sign On

[Log off](#) [Help](#)

→ User ID:

Password:

[Forgot Password?](#)

→

[Services](#) | [Government](#) | [Business](#) | [Neighborhoods](#) | [Recreation](#)  
[Home](#) | [Privacy Policy and Disclaimer](#) | [Text Only](#)

# Create Packet

Campaign Finance  
**ELECTRONIC FILING SYSTEM**

Main Menu  
[Log off](#) [Help](#)

[Change Group](#) [Change Password](#)

**TEST**

Create New Packet

COH  
 SPAC  
 UC

January 15 Semi-Annual 2011  
 30th Day Before General Election 2011  
 8th Day Before General Election 2011  
 3rd day Before General Election 2011  
 July 15: Semi-Annual 2011  
 15 days after Campaign Treasurer Appointment  
 Exceeded \$500 limit  
 Final Report COH

Create Packet

Incomplete Packets

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

# Cover Sheet 1

## Candidate/Officeholder Information

Campaign Finance  
**ELECTRONIC FILING SYSTEM**

Candidate/OfficeHolder Campaign Finance Report CS1

[Log off](#) [Help](#)

COH: [Main Menu](#) [Print Report](#) [Instruction Guide](#)

▶ [CS1](#)

[Select Candidate/Officeholder](#)  Change Of Address

Candidate/Officeholder Name:

Title:  ▼

First Name:  MI:

Nickname:  Last Name:  Suffix:

Candidate/Officeholder Mailing Address:

Street No:  Street Name:  Apt/Suite:

or

PO Box:

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

# Cover Sheet 1

## Campaign Treasurer Information

[Select Campaign Treasurer](#)

Clear Contact Info

Campaign Treasurer Name:

Title:

First Name:  MI:

Nickname:  Last Name:  Suffix:

Campaign Treasurer Mailing Address:

Street No:  Street Name:  Apt/Suite:

or

PO Box:

City:  State:   Zip Code:

Campaign Treasurer Phone: (  )  -  Ext.

Report Type:

Period Covered:  /  /  **Through**  /  /

Election Date:  /  /

Election Type:  Primary  Runoff  General  Special  Not Applicable

Office Held:

Office Sought:

Save Page

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

The screenshot displays the Campaign Finance Electronic Filing System interface. At the top left is the system logo. The main header reads 'Candidate/OfficeHolder Campaign Finance Report CS1'. Below this are links for 'Log off' and 'Help'. A navigation bar contains links for 'Main Menu', 'Print Report', and 'Instruction Guide'. A secondary navigation bar lists report sections: 'CS1', 'CS2', 'SchA', 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT'. Below these are links for 'Final Report (Close Out Campaign)' and 'Submit to City Clerk'. A red arrow points from the 'Submit to City Clerk' link to a red 'Record Added' message centered on the page. Below the message is a form for entering candidate information, including fields for name, address, and contact info.

Campaign Finance  
**ELECTRONIC FILING SYSTEM**

Candidate/OfficeHolder Campaign Finance Report CS1

[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](#)

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**Record Added**

[Select Candidate/Officeholder](#) [Change Of Address](#)

Candidate/Officeholder Name:

Title:

First Name:  MI:

Nickname:  Last Name:  Suffix:

Candidate/Officeholder Mailing Address:

Street No:  Street Name:  Apt/Suite:

or

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

The screenshot shows the 'Candidate/OfficeHolder Campaign Finance Report CS1' page. At the top left is the 'Campaign Finance ELECTRONIC FILING SYSTEM' logo. To the right of the logo are links for 'Log off' and 'Help'. Below the logo is a navigation bar with links for 'COH: Main Menu', 'Print Report', and 'Instruction Guide'. A secondary navigation bar contains links for 'CS1', 'CS2', 'SchA', 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT', along with 'Final Report (Close Out Campaign)' and 'Submit to City Clerk'. A red error message is displayed: 'Candidate/OfficeHolder Street No is a required field'. Below the error message is a form with the following fields: 'Select Candidate/Officeholder' (a dropdown menu), 'Change Of Address' (a checkbox), and a 'Clear Contact Info' button. The 'Candidate/Officeholder Name' section includes 'Title' (a dropdown menu), 'First Name' (text box with 'Joe'), 'MI' (text box), 'Nickname' (text box), 'Last Name' (text box with 'Candidate'), and 'Suffix' (text box). The 'Candidate/Officeholder Mailing Address' section includes 'Street No' (text box), 'Street Name' (text box with 'Victory Lane'), and 'Apt/Suite' (text box). Below these fields is the word 'or' followed by a partially visible text box.

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.

# 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](#)

**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:

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.”

# Coversheet 1

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

The screenshot displays the 'Candidate/OfficeHolder Campaign Finance Report CS1' page. At the top left is the 'Campaign Finance ELECTRONIC FILING SYSTEM' logo. To the right, the page title 'Candidate/OfficeHolder Campaign Finance Report CS1' is shown, along with 'Log off' and 'Help' links. Below this is a navigation bar with links for 'Main Menu', 'Print Report', and 'Instruction Guide'. A menu of report types is listed: 'CS1', 'CS2', 'SchA', 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT'. Below the menu are links for 'Final Report (Close Out Campaign)' and 'Submit to City Clerk'. A red message 'Expenditure Record Added' is centered at the top of the main content area. Below the message is a form for entering candidate information. The form includes a 'Select Candidate/Officeholder' dropdown, a 'Change Of Address' checkbox, and a 'Clear Contact Info' button. The 'Candidate/Officeholder Name' section contains fields for Title (a dropdown menu), First Name (filled with 'Joe'), MI (a small box), Nickname, Last Name (filled with 'Candidate'), and Suffix. The 'Candidate/Officeholder Mailing Address' section contains fields for Street No., Street Name (filled with 'Victory Lane'), and Apt/Suite. Below these fields is the text 'or'.

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:

[Select Committee](#)

Committee Name

Committee Address

Street No:  Street Name:  Apt/Suite:

or

PO Box:

City:  State:  Zip Code:

[Select Committee Campaign Treasurer](#)

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:

[Select Committee](#)

Committee Name

Committee Address

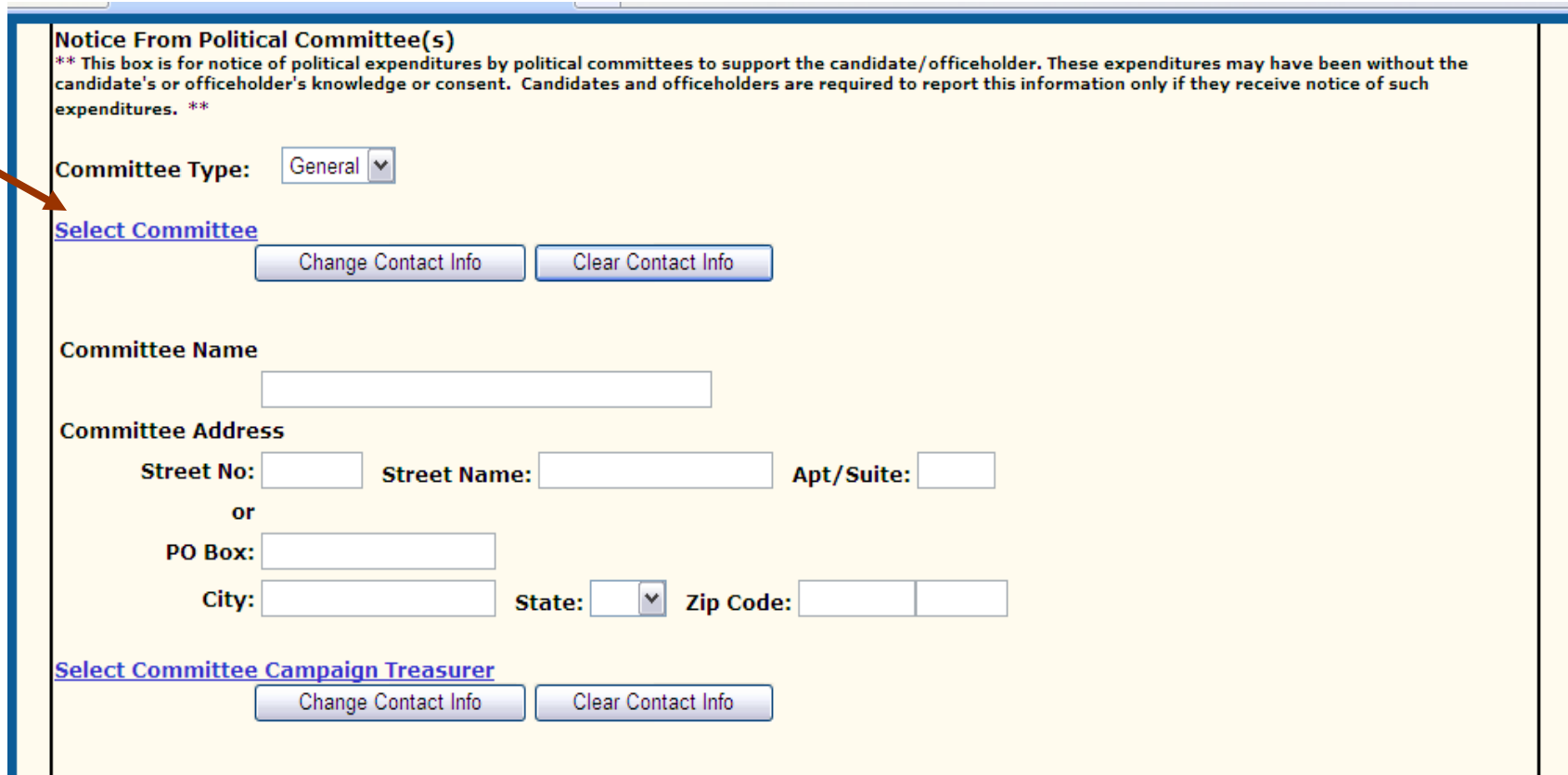
Street No:  Street Name:  Apt/Suite:

or

PO Box:

City:  State:  Zip Code:

[Select Committee Campaign Treasurer](#)



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

# 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	<a href="#">Edit</a>	<a href="#">Delete</a>
1							

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



# Coversheet 2

## Totals

**Contribution Totals**

Total Political Contributions of \$50 or less  
(Other than pledges, loans, or guarantees of loans), unless itemized: \$  Applicant Filled ←

Total Political Contributions  
(Other than pledges, loans, or guarantees of loans): \$

**Expenditure Totals**

Total political expenditures of \$50 or less, unless itemized: \$  Applicant Filled ←

Total Political Expenditures: \$

**Contribution Balance**

Total political contributions maintained as of the last day of reporting period: \$  Applicant Filled ←

**Outstanding Loan Totals**

Total principal amount of all outstanding loans as of last day of the reporting period. \$  Applicant Filled ←

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

The screenshot shows the top portion of a web application. On the left is the logo for 'Campaign Finance ELECTRONIC FILING SYSTEM'. To the right, the page title is 'Candidate/Officeholder Report: Support & Totals CS2'. Below the title are links for 'Log off' and 'Help'. A horizontal menu contains links for 'COH: Main Menu', 'Print Report', and 'Instruction Guide'. Below this is a secondary menu with links for 'CS1', 'CS2' (which is selected with a red triangle), 'SchA', 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT'. At the bottom of the menu are links for 'Final Report (Close Out Campaign)' and 'Submit to City Clerk'. The main content area shows 'C/OH Name: Joe Candidate' and a text box containing 'Notice From Political Committee(s)'. The text 'Totals Added' is displayed in red above the text box.

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.

The screenshot shows the financial data entry section of the web application. It is organized into several categories, each with a text input field and a status indicator:

- Contribution Totals**
  - Total Political Contributions of \$50 or less (Other than pledges, loans, or guarantees of loans), unless itemized: \$  Applicant Filled
  - Total Political Contributions (Other than pledges, loans, or guarantees of loans): \$
- Expenditure Totals**
  - Total political expenditures of \$50 or less, unless itemized: \$  Applicant Filled
  - Total Political Expenditures: \$
- Contribution Balance**
  - Total political contributions maintained as of the last day of reporting period: \$  Applicant Filled
- Outstanding Loan Totals**
  - Total principal amount of all outstanding loans as of last day of the reporting period: \$  Applicant Filled

At the bottom center, there is a 'Save Page' button.

# Schedule A – Entering Data

The screenshot shows a web form for entering contribution data. At the top left, there is a 'Date' field with three input boxes for month, day, and year, with a red arrow pointing to it. Below the date is a blue hyperlink 'Select Contributor Name'. To the right of the date is an 'Out-of-State PAC' checkbox and an 'ID#' input field. A 'Clear Contact Info' button is located below the date field. The form is divided into sections: 'Contributor Name' with fields for Title (dropdown), First Name, MI, Last Name, and Suffix; 'Contributor Organization' with a text input field; 'Contributor Address' with fields for Street No., Street Name, Apt/Suite, PO Box, City, State (dropdown), and Zip Code; 'Amount of contribution (\$)' with a text input field and a red arrow pointing to it; 'In-Kind contribution description: (if applicable)' with a large text area and a red arrow pointing to it; 'Principal occupation/Job title' with a text input field; and 'Employer' with a text input field and a red arrow pointing to it. At the bottom, there are 'Save' and 'Clear Page' buttons, with a red arrow pointing to the 'Save' button.

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

**Record Added**

[Import schedule A data](#)

Filer name: Joe Candidate

Date:  /  /

[Select Contributor Name](#)

Out-of-State PAC:  ID#:

Clear Contact Info

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.

Date	Name	Address	Amount	Description	Created Date	Edit	Delete
07-02-2010	Candidate, Junior	100 Victory Lane San Antonio , TX 78200	\$500.00		12/7/2010 1:05:12 PM	<a href="#">Edit</a>	<a href="#">Delete</a>
1							

# 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

Campaign Finance  
**ELECTRONIC FILING SYSTEM**

Finalize / Submit to City Clerk

[Log off](#) [Help](#)

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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** ←

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If you are not ready to finalize you may return to main menu or review instruction guide.

[MAIN MENU](#) [INSTRUCTION GUIDE](#)

If you are ready to submit please click continue.

→

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

The screenshot displays the 'Campaign Finance ELECTRONIC FILING SYSTEM' interface. At the top left is a logo featuring a seal. To its right, the text 'Campaign Finance ELECTRONIC FILING SYSTEM' is displayed. Further right, the text 'Finalize / Submit to City Clerk' is visible. Below this, there are links for 'Log off' and 'Help'. A horizontal line separates the header from the main content area. Below the line, the text 'COH: [Main Menu](#) [Print Report](#) [Instruction Guide](#)' is shown. Below this, a row of menu items includes [CS1](#), [CS2](#), [SchA](#), [SchB](#), [SchE](#), [SchF](#), [SchG](#), [SchH](#), [SchI](#), [SchK](#), and [SchT](#). Below the menu items, the text 'Final Report (Close Out Campaign) ▶ [Submit to City Clerk](#)' is displayed. A horizontal line separates the main content area from the bottom section. In the bottom section, a 'Windows Internet Explorer' dialog box is open. The dialog box has a title bar with 'Windows Internet Explorer' and a close button. Inside the dialog box, there is a question mark icon and the text: 'I swear, or affirm, under penalty of perjury, that the accompanying report is true and correct and includes all information required to be reported by me under Title 15, Election Code.' Below the text, there is a red arrow pointing to the right, and two buttons: 'OK' and 'Cancel'.

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

### TEST

Create New Packet

COH

SPAC

UC

January 15 Semi-Annual 2011

30th Day Before General Election 2011

15 days after Campaign Treasurer Appointment

Exceeded \$500 limit

Final Report COH

---

Incomplete Packets

**No incomplete packets found.**

---

Complete Packets / Locked Down

Report Type	Description	Created Date	Lockdown Status	Report ID	History	SDateRptType	EDateRptType
<a href="#">January 15 Semi-Annual 2011</a>	COH	2/23/2011 1:41:44 PM	Pending	1012	<a href="#">History</a>	7/1/2010	12/31/2010
1							

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

**TEST**


Create New Packet

COH
  SPAC
  UC

January 15 Semi-Annual 2011
  30th Day Before General Election 2011
  15 days after Campaign Treasurer Appointment
  Exceeded \$500 limit
  Final Report COH

[Create Packet](#)

---

 [Incomplete Packets](#)

**No incomplete packets found.**

---

Complete Packets / Locked Down

Report Type	Description	Created Date	Lockdown Status	Report ID	History	SDateRptType	EDateRptType
<a href="#">January 15 Semi-Annual 2011</a>	COH	2/23/2011 1:41:44 PM	Pending	1012	<a href="#">History</a>	7/1/2010	12/31/2010
1							

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 \(http://www.sanantonio.gov/clerk/elections/\)](http://www.sanantonio.gov/clerk/elections/) at the bottom of the column with heading "Campaign Finance Information".



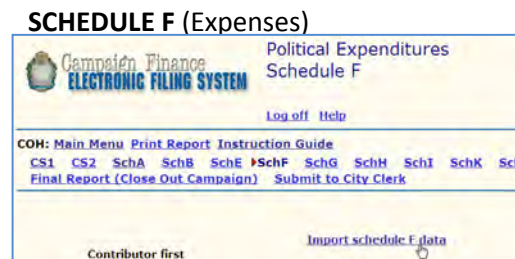
## B. Create the Upload File

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**

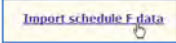

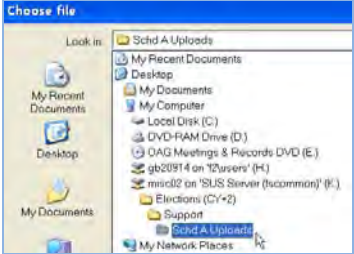
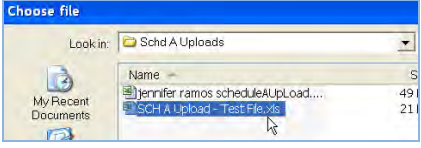
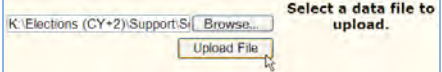
## C. Uploading information into the Campaign Finance System

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:



**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

<p>1. Click on <b>“Import schedule &lt;x&gt; data</b>, where &lt;x&gt; is the specific schedule you are working on.</p>	
<p>2. Click on <b>“Browse”</b></p>	 <p>Select a data file to upload.</p>
<p>3. Using the ‘Choose File’ dialog window, <b>navigate to the directory where your upload file is located.</b></p>	
<p>4. <b>Double-Click on the upload file</b> you created.</p>	
<p>5. Click on <b>“Upload File”</b> button</p>	 <p>Select a data file to upload.</p>
<p>6. <b>If errors are detected</b> 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. <b>If no errors were found</b>, you will get the message shown on the 2<sup>nd</sup> print screen (6.b.) below.</p> <ol style="list-style-type: none"> <li><b>If errors are encountered, correct errors</b> on upload file and <b>repeat steps 1-6</b></li> <li><b>If no errors are encountered</b>, proceed to <b>step 7</b>.</li> </ol>	

### 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

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

2 record(s) valid for import.

Data is valid.  
Click Import Data button to continue.

Import Data

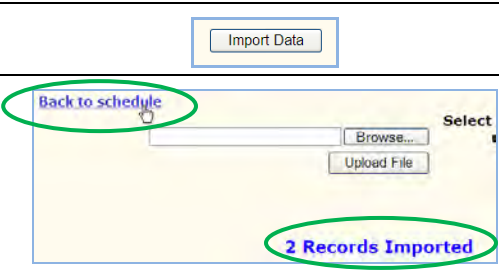
If you get this error, the excel upload file is not formatted correctly, please use template from Elections library.

Select a data file to upload.

Upload File

Data file invalid.

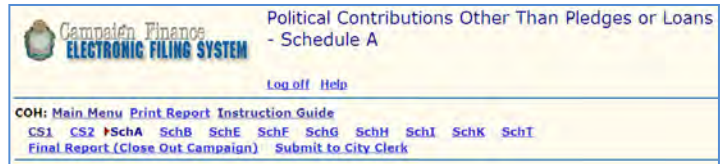
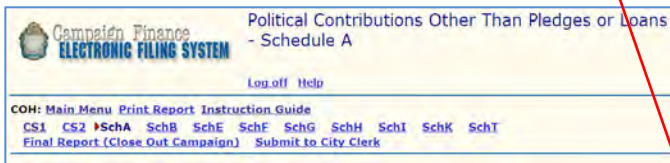
- Click on **"Import Data"**
- System will present message showing the number of records imported. Click **"Back to schedule"**
- Notice that the information uploaded into the system is listed at the bottom of the report as shown in the print screen below. You have successfully imported your information. 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



The screenshot shows the 'Import schedule A data' form. Fields include 'Filer name: Ms Diane Adobe', 'Date', 'Out-of-State PAC', 'Contributor Name', 'Contributor Address', 'Amount of contribution (\$)', 'In-Kind contribution description', and 'Principal occupation/Job title'. The 'Employer' field is circled in red. At the bottom, there is a table with one row of data, also circled in red.

The screenshot shows the 'Import schedule A data' form after the upload. The form fields are the same as in the 'Before Upload' screenshot. At the bottom, a table displays the imported records, circled in red. The table has columns for Date, Name, Address, Amount, Description, Created Date, Edit, and Delete.

**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	<b>Fname</b>	First Name	Character 50	<b>Y - only required if Contributor Organization is left blank</b>	
C	MI	Middle Initial	Character 1	N	
D	<b>Lname</b>	Last Name	Character 50	<b>Y - only required if Contributor Organization is left blank</b>	
E	Suffix	Suffix	Character 10	N	Jr/Sr/III/MD
F	NickName	Nick Name	Character 50	N	
G	<b>OtherName</b>	Contributor Organization	Character 100	<b>Y - only required if First Name and Last Name are left blank</b>	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	<b>HouseNbr</b>	Street No.	Character 5	<b>Y - only required if no PO BOX</b>	
M	<b>StreetName</b>	Street Name	Character 50	<b>Y - only required if no PO BOX</b>	No commas allowed, no 'PO BOX' allowed.
N	<b>POBox</b>	Post Office Box	Character 15	<b>Y - only required if Street No. and Street Name are left blank.</b>	"123" (do not prefix with "PO BOX")
O	AptSuite	Apt/Suite	Character 5	N	
P	<b>City</b>	City	Character 50	<b>Y</b>	
Q	<b>fkStateAbbr</b>	State	Character 2	<b>Y</b>	TX
R	<b>ZipCode</b>	Zip Code	Character 5	<b>Y</b>	
S	ZipCodeExt	Zip Code Extension	Character 4	N	
T	<b>ContrDate</b>	Contribution Date	DATE	<b>Y</b>	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	<b>TransAmt</b>	Amount of Contribution	NUMBER	<b>Y</b>	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 \(http://www.sanantonio.gov/clerk/elections/\)](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.

Incomplete Packets								
Report Type	Description	Created Date	Lockdown Status	Report ID	History	SDateRptType	EDateRptType	Delete Report
July 15: Semi-Annual 2011	COH	4/26/2011 7:43:04 AM	Open	1093	History	5/5/2011	6/30/2011	Delete

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

Column	Column Heading	Field Description	Data Type	Required (Yes / No)	Example
A	Title	Title	Character 3	N	Mr/Mrs/Ms
B	<b>Fname</b>	First Name	Character 50	<b>Y - only required if Payee Organization is left blank</b>	
C	MI	Middle Initial	Character 1	N	
D	<b>Lname</b>	Last Name	Character 50	<b>Y - only required if Payee Organization is left blank</b>	
E	Suffix	Suffix	Character 10	N	Jr/Sr/III/MD
F	NickName	Nick Name	Character 50	N	
G	<b>OtherName</b>	Payee Organization	Character 100	<b>Y - only required if First Name and Last Name are left blank</b>	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	<b>HouseNbr</b>	Street No.	Character 5	<b>Y - only required if no PO BOX</b>	
M	<b>StreetName</b>	Street Name	Character 50	<b>Y - only required if no PO BOX</b>	No commas allowed, no 'PO BOX' allowed.
N	<b>POBox</b>	Post Office Box	Character 15	<b>Y - only required if Street No. and Street Name are left blank.</b>	"123" (do not prefix with "PO BOX")
O	AptSuite	Apt/Suite	Character 5	N	
P	<b>City</b>	City	Character 50	<b>Y</b>	
Q	<b>fkStateAbbr</b>	State	Character 2	<b>Y</b>	TX
R	<b>ZipCode</b>	Zip Code	Character 5	<b>Y</b>	
S	ZipCodeExt	Zip Code Extension	Character 4	N	
T	<b>TransDate</b>	Payment Date	DATE	<b>Y</b>	MM/DD/YYYY (*)
U	<b>TransAmt</b>	Amount of Payment	NUMBER	<b>Y</b>	9999999.99
V	<b>PurposeOfExpDescription</b>	Purpose of Payment	Character 150	<b>Y</b>	
W	<b>COHName</b>	Candidate/Office Holder Name	Character 100	<b>Y</b>	
X	OffSought	Office Sought	Character 50	N	<b>Must be one of the following:</b> <ul style="list-style-type: none"> <li>• Mayor</li> <li>• Council District &lt;#&gt;, Where &lt;#&gt; is 1-10</li> <li>• Not Applicable</li> </ul>
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)

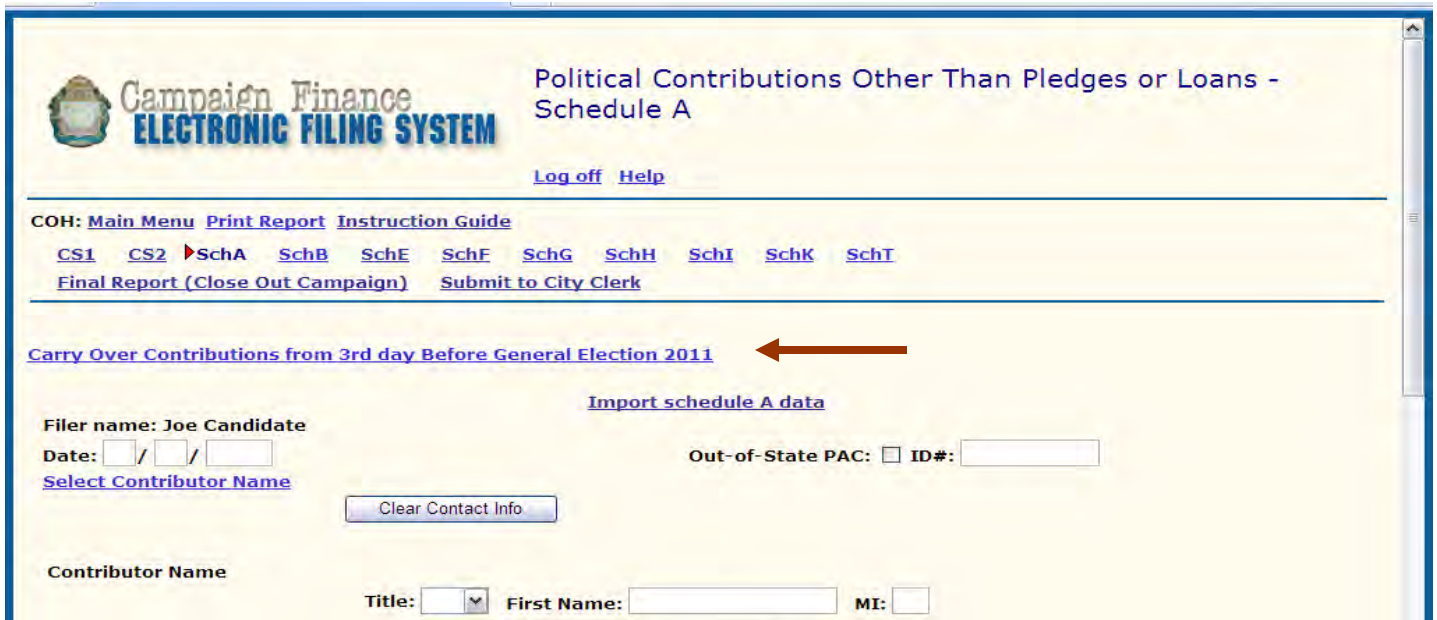
- The Carry Over feature allows for contributions reported in Schedule A from the 3-day Before General Election Report to be transferred into the July 15 Semi-Annual 2011.

### 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.

Date	Name	Address	Amount	Description	Created Date	Edit	Delete
05-05-2011	Candidate , Grandma	1000 River Bend San Antonio , TX 78200	\$500.00		4/27/2011 10:39:04 AM	<a href="#">Edit</a>	<a href="#">Delete</a>
05-06-2011	Candidate, Grandpa	1000 River Bend San Antonio, TX 78200	\$500.00		4/27/2011 10:39:04 AM	<a href="#">Edit</a>	<a href="#">Delete</a>
1							

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

Report Type	Description	Created Date	Lockdown Status	Report ID	History	SDateRptType	EDateRptType	Lockdown	Delete Report
<a href="#">January 15 Semi-Annual 2011</a>	COH	4/7/2011 3:45:32 PM	Locked	1027	<a href="#">History</a>	7/1/2010	12/31/2010	<a href="#">Lockdown</a>	<input type="button" value="Delete"/>

1

1. Select the locked report that requires correcting.

COH: [Main Menu](#) [Instruction Guide](#) [Correction Affidavit](#) [CS1](#) [CS2](#) [SchA](#) [SchB](#) [SchE](#) [SchF](#) [SchG](#) [SchH](#) [SchI](#) [SchK](#) [SchT](#) [Final Report](#)

1. Select “Correction Affidavit” from the Main Menu.

# Correction Affidavit Mode

The screenshot shows the 'Correction Affidavit Mode' interface. At the top left is the 'Campaign Finance ELECTRONIC FILING SYSTEM' logo. To the right, the title 'Correction Affidavit for Candidate/Officeholder' is displayed, along with 'Log off' and 'Help' links. Below this is a navigation bar with 'COH Correction Affidavit: [Main Menu](#) [Instruction Guide](#)' and a sub-menu 'Correction Affidavit'. The main form area contains several input fields: 'Title' (dropdown), 'First Name' (text, 'Joe'), 'Mi' (checkbox), 'Nickname' (text), 'Last Name' (text, 'Candidate'), and 'Suffix' (checkbox). Below these are 'Original Report Type' (text, 'January 15 Semi-Annual 2011') and 'Original Period Covered' (date range: 7 / 1 / 2010 through 12 / 31 / 2010). A large text area for 'Explanation of Correction:' is at the bottom, with a brown arrow pointing to it from the left.

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

# Correction Affidavit Mode

▶ Correction Affidavit [CS1](#) [CS2](#) [SchA](#) [SchB](#) [SchE](#) [SchF](#) [SchG](#) [SchH](#) [SchI](#) [SchK](#) [SchT](#)  
[Final Report \(Close Out Campaign\)](#)

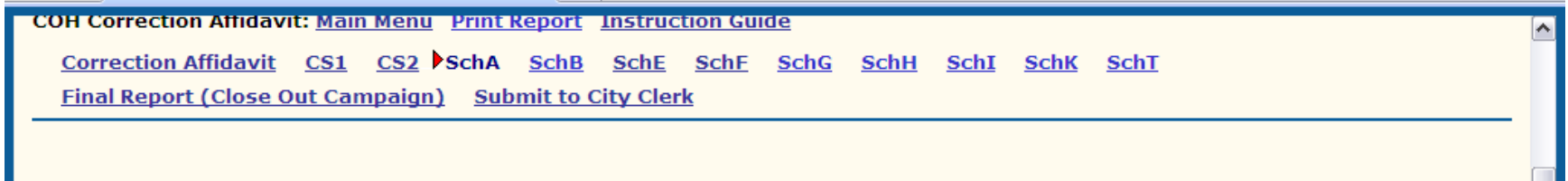
**Correction Affidavit Added**

Title:  First Name:  Mi:   
Nickname:  Last Name:  Suffix:   
Original Report Type:   
Original Period Covered:  /  /  through  /  /   
Explanation of Correction:   
I swear, or affirm, under penalty of perjury, that this corrected report is true and correct.  
Check ONLY if applicable:  
 I swear, or affirm, that I am filing this corrected report not later than the 14th business day after the date I learned that the report as originally filed is inaccurate.

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



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

**Contributor Name**

Title:  Last Name:  First Name:  MI:  Suffix:

Contributor Organization:

**Contributor Address**

Street No:  Street Name:  Apt/Suite:

or

PO Box:


City:  State:  Zip Code:

Amount of contribution (\$):

In-Kind contribution description:  
(if applicable)

Principal occupation/Job title:

Employer:



Date	Name	Address	Amount	Description	Created Date	Edit	Delete
07-02-2010	Candidate , Joleen	100 Victory Lane San Antonio , TX 78205-	\$500.00		4/25/2011 12:57:46 PM	<a href="#">Edit</a>	<a href="#">Delete</a>
1							

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

[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](#)

**Record Updated**  
[Import schedule A data](#)

Filer name: Joe Candidate

Date:  /  /

Out-of-State PAC:  ID#:

[Select Contributor Name](#)

Clear Contact Info

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

**Contributor Name**

Title:  Last Name:  First Name:  MI:  Suffix:

Contributor Organization:

**Contributor Address**

Street No:  Street Name:  Apt/Suite:

or

PO Box:

City:  State:  Zip Code:

Amount of contribution (\$):

In-Kind contribution description:  
(if applicable)

Principal occupation/Job title:

Employer:

Date	Name	Address	Amount	Description	Created Date	Edit	Delete
07-02-2010	Candidate , Joleen	100 Victory Lane San Antonio , TX 78205-	\$500.00		4/25/2011 12:57:46 PM	<a href="#">Edit</a>	<a href="#">Delete</a>
1							

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

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

[Import schedule A data](#)

Filer name: Joe Candidate  
Date: 7 / 2 / 2010  
Out-of-State PAC:  ID#:

[Select Contributor Name](#)



**Contributor Name**  
Title:  First Name: Joleen MI:   
Last Name: Candidate Suffix:   
Contributor Organization:

**Contributor Address**  
Street No: 100 Street Name: Victory Lane Apt/Suite:   
or  
PO Box:   
City: San Antonio State: TX Zip Code: 78205

1. Select “Change Contact Info.”

\*Note: Must disable pop-up blocker.

# Correction Affidavit Mode

## Editing Contact Information

Title:   MI:

Last Name:  Suffix:

Contributor Organization


**Contributor Address**

Street No:  Street Name:  Apt/Suite:

or

PO Box:

City:  State:  Zip Code:



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](#)

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



The screenshot shows the 'Campaign Finance ELECTRONIC FILING SYSTEM' logo on the left and the title 'Candidate/Officeholder Report: Designation of Final Report' on the right. Below the title are links for 'Log off' and 'Help'. A navigation bar contains links for 'COH Correction Affidavit: Main Menu', 'Print Report', and 'Instruction Guide'. Below this are links for 'Correction Affidavit', 'CS1', 'CS2', 'SchA', 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT'. The 'Final Report (Close Out Campaign)' link is highlighted with a red arrow, and a 'Submit to City Clerk' link is also present. A red warning message states: '\*\* Complete only if "Report Type" on page 1 is marked "Final Report" \*\*'. Below this is another red message: 'If a selection mistake has been made, please click the 'Clear Form' button to reset the page.', with a 'Clear Form' button. The form content includes: '1. C/OH NAME: Joe Candidate' followed by a horizontal line; '3. SIGNATURE' with radio buttons for 'Agree' and 'Disagree'; and a paragraph: '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



The screenshot shows the 'Campaign Finance ELECTRONIC FILING SYSTEM' logo on the left and the title 'Candidate/Officeholder Report: Designation of Final Report' on the right. Below the title are links for 'Log off' and 'Help'. A horizontal line separates the header from the main content area. The main content area contains a navigation menu with links for 'COH Correction Affidavit: Main Menu', 'Print Report', and 'Instruction Guide'. Below this are links for 'Correction Affidavit', 'CS1', 'CS2', 'SchA', 'SchB', 'SchE', 'SchF', 'SchG', 'SchH', 'SchI', 'SchK', and 'SchT'. A red arrow points to the 'Final Report (Close Out Campaign)' link, with a 'Submit to City Clerk' link next to it. Below the navigation menu is a red confirmation message: 'Final report has been saved.' followed by a double asterisk warning: '\*\* Complete only if "Report Type" on page 1 is marked "Final Report" \*\*'. Below this is another red instruction: 'If a selection mistake has been made, please click the 'Clear Form' button to reset the page.' with a 'Clear Form' button. Below the button is the text '1. C/OH NAME: Joe Candidate' followed by a horizontal line. Below the line is the section '3. SIGNATURE' with radio buttons for 'Agree' (selected) and 'Disagree'. Below the radio buttons is a paragraph of text: '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



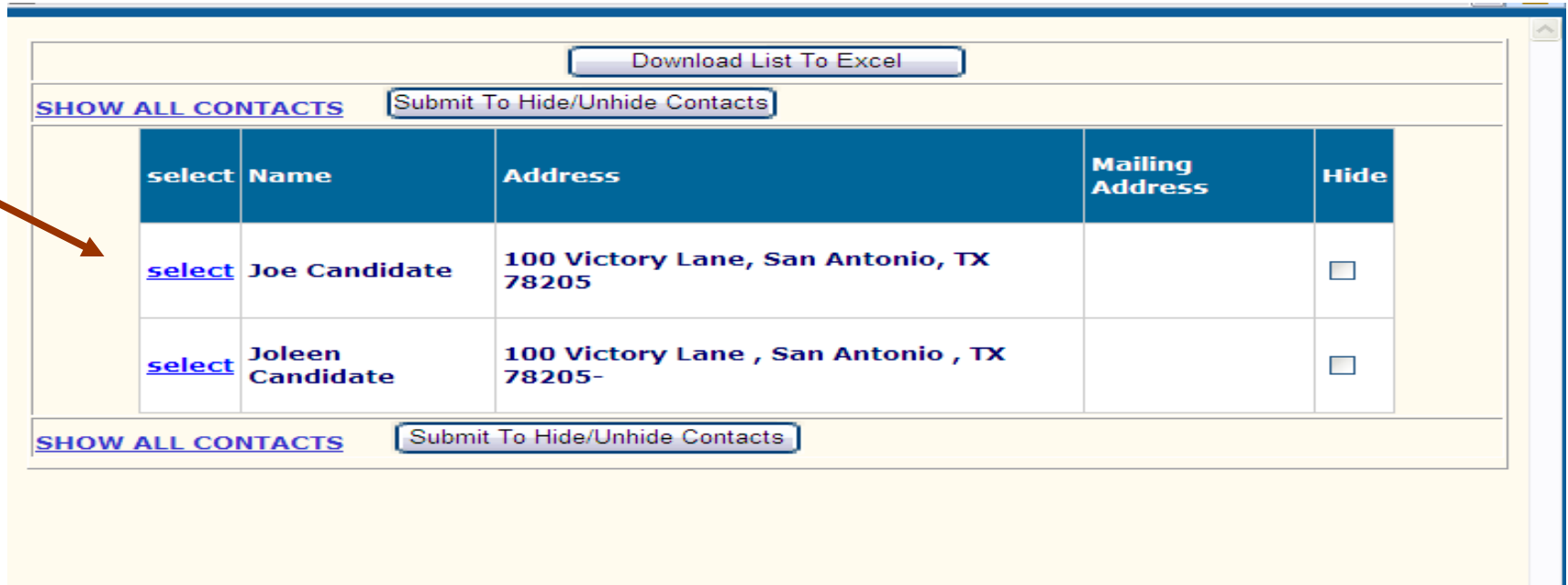
The screenshot shows the 'Campaign Finance ELECTRONIC FILING SYSTEM' interface. At the top right, it says 'Candidate/OfficeHolder Campaign Finance Report CS1'. Below this are links for 'Log off' and 'Help'. A navigation bar contains 'COH: Main Menu Print Report Instruction Guide'. Underneath, there is a 'CS1' link. The main form area is titled 'Select Candidate/Officeholder' and includes a 'Change Of Address' checkbox and a 'Clear Contact Info' button. The form fields are organized into two sections: 'Candidate/Officeholder Name' and 'Candidate/Officeholder Mailing Address'. The name section includes fields for Title (a dropdown menu), First Name, MI, Nickname, Last Name, and Suffix. The mailing address section includes fields for Street No., Street Name, and Apt/Suite, with an 'or' option and a PO Box field below.

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



The screenshot shows a web interface for an address book. At the top, there is a button labeled "Download List To Excel". Below this, there are two links: "SHOW ALL CONTACTS" and "Submit To Hide/Unhide Contacts". The main part of the interface is a table with the following columns: "select", "Name", "Address", "Mailing Address", and "Hide". There are two rows of contact information. The first row is for "Joe Candidate" at "100 Victory Lane, San Antonio, TX 78205". The second row is for "Joleen Candidate" at "100 Victory Lane , San Antonio , TX 78205-". Each row has a "select" link in the first column and a checkbox in the "Hide" column. A brown arrow points to the "select" link for the first contact.

select	Name	Address	Mailing Address	Hide
<a href="#">select</a>	Joe Candidate	100 Victory Lane, San Antonio, TX 78205		<input type="checkbox"/>
<a href="#">select</a>	Joleen Candidate	100 Victory Lane , San Antonio , TX 78205-		<input type="checkbox"/>

At the bottom of the table, there are two more links: "SHOW ALL CONTACTS" and "Submit To Hide/Unhide Contacts".

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

**Contributor Name**

Title:  Last Name:  First Name:  MI:  Suffix:

Contributor Organization:

**Contributor Address**

Street No:  Street Name:  Apt/Suite:

or

PO Box:

City:  State:  Zip Code:

Amount of contribution (\$):

In-Kind contribution description:  
(if applicable)

Principal occupation/Job title:

Employer:

Date	Name	Address	Amount	Description	Created Date	Edit	Delete
07-02-2010	Candidate , Joleen	100 Victory Lane San Antonio , TX 78205-	\$500.00		4/25/2011 12:57:46 PM	<a href="#">Edit</a>	<a href="#">Delete</a>
1							

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

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

[Import schedule A data](#)

Filer name: Joe Candidate  
Date: 7 / 2 / 2010  
Out-of-State PAC:  ID#:

[Select Contributor Name](#)



**Contributor Name**

Title:  First Name: Joleen MI:   
Last Name: Candidate Suffix:   
Contributor Organization:

**Contributor Address**

Street No: 100 Street Name: Victory Lane Apt/Suite:   
or  
PO Box:   
City: San Antonio State: TX Zip Code: 78205

1. Select “Change Contact Info.”

\*Note: Must disable pop-up blocker.

# Address Book

## Editing Contact Information

Title:  Last Name:  First Name:  MI:

Last Name:  Suffix:

Contributor Organization


Contributor Address

Street No:  Street Name:  Apt/Suite:

or

PO Box:

City:  State:  Zip Code:



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:  /  /  Out-of-State PAC:  ID#:   
[Select Contributor Name](#)

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

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#:

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.

# Address Book

## Downloading Contacts to Excel



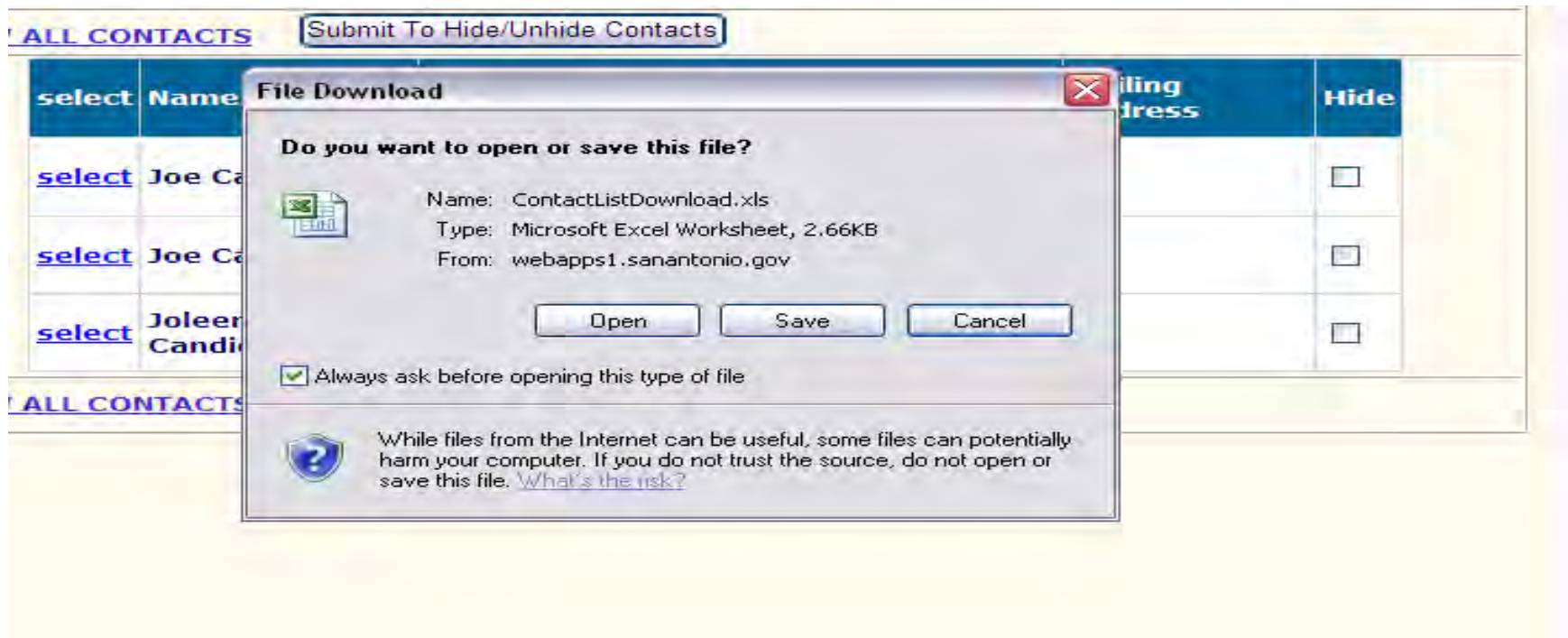
The screenshot shows a web interface for an address book. At the top, there is a button labeled "Download List To Excel". Below this, there are two links: "SHOW ALL CONTACTS" and "Submit To Hide/Unhide Contacts". The main part of the interface is a table with the following columns: "select", "Name", "Address", "Mailing Address", and "Hide". There are two rows of contact data. The first row shows "Joe Candidate" at "100 Victory Lane, San Antonio, TX 78205". The second row shows "Joleen Candidate" at "100 Victory Lane , San Antonio , TX 78205-". Each row has a "select" link and a "Hide" checkbox. At the bottom, there are again the links "SHOW ALL CONTACTS" and "Submit To Hide/Unhide Contacts".

select	Name	Address	Mailing Address	Hide
<a href="#">select</a>	Joe Candidate	100 Victory Lane, San Antonio, TX 78205		<input type="checkbox"/>
<a href="#">select</a>	Joleen Candidate	100 Victory Lane , San Antonio , TX 78205-		<input type="checkbox"/>

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

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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.



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	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
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
7													
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9													
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1. Address Book entries will be successfully downloaded.