

Campaign Finance Remote Filing Software

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Introduction

The NC State Board of Elections has developed and maintains free software that enables the storing of all campaign finance information required by the State and allows the committee to generate electronic disclosure reports. The Campaign Finance Remote Software is a standalone application built for the Microsoft Windows operating system. The software will operate on various Windows versions.

All committees that raise or spend over \$10,000 in an election cycle will be required to use the reporting software and to submit their report to the State Board of Elections. However, all committees are strongly encouraged to use the campaign finance reporting software as it has several advantages over manual filing with paper forms. It Provides:

- An audit feature that identifies possible violations or discrepancies as the report is being compiled
- Tracking of all transactions entered into the system
- Tracking of election sum totals for each contributor
- Function for including only those transactions required for a given reporting period

This guide will assist County Candidates with the reporting software. It will walk you through how to download and install the software, setting up committee information and elections, and getting started with entering transactions. It will also provide information for creating, saving and filing a report.

Before you start, please make sure you have access to information related to the committee bank account, officers and which elections the candidate will be participating in. The State Board of Elections will be able to assist you with Campaign Finance Remote Software related questions.

Before you Begin – Tips to Assist

Please read the following information before setting up your software.

DO update your software to the latest version before submitting a report.

DO backup your software regularly. If your computer crashes, and you have no backup, all data will be lost. Information for backing up the database is included later in this guide.

DO remember to email a completed report to the State Board of Elections. Reports are not transmitted automatically; you must attach a report to an email and send to the appropriate address.

DO remember to mail or hand deliver a signed cover page and summary page for each electronic report you file, including amendments. Report cover and summary pages should be postmarked or hand-delivered by the report due date. Your signed cover page and summary page **MUST** be sent to the appropriate Board of Elections. State and Federal Committees will file their signed cover page and summary page to the State Board of Elections and County and Municipal Committees will file with their County Board of Elections.

DON'T enter duplicate names in the database. When entering transactions, you should use the Find Contributor or Find Payee buttons FIRST. Only if you do not locate a name in your database should you use Add Contributor or Add Payee. If you find that you have already entered duplicate names in the database, there are instructions in the software help files to correct this. Go to Help - CF Remote Help, select Other from the content list and then select Removing Duplicate Names from CF Remote Software.

DON'T select Print Report in the Method drop-down box on the Save Official Report screen. If you intend to file electronically via e-mail, you must choose the Save File to Disk option. If you wish to print your report to review it prior to submitting it, you should go to Reporting - Report Information, highlight the report you wish to print, select View Report, and print using the printer icon in the top left hand corner.

Downloading and Installing the Software

The free campaign finance reporting software can be downloaded directly from the NC State Board of Elections website:

<https://www.ncsbe.gov/campaign-finance/campaign-finance-reporting-software>

Scroll down to Installation and download, under current version of the campaign finance remote software, click on download

Installation and Download

Installation for the Campaign Finance Remote Software has been redesigned. Any user running a version of the software that is version 4.4.23 or older will need to:

- Back up the database (read “Backing up your database” under Campaign Finance Remote Software Supplemental Help Topics below).
- Read detailed [instructions to uninstall the Campaign Finance Remote Software \(PDF\)](#).

Current Version of the Campaign Finance Remote Software

[Download v4.4.27 of the Campaign Finance Remote Software \(EXE\)](#)

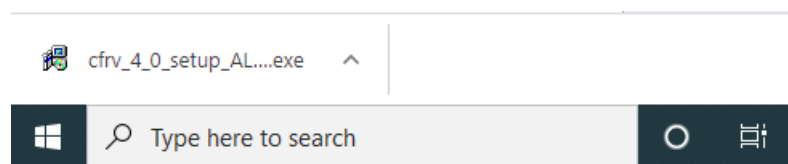
Version: v4.4.27

Size: 13.6 MB

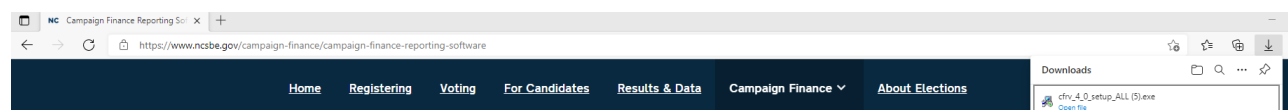
Late Update: Oct. 22, 2020

Open the downloaded file (this process will differ depending on which web browser you are using)

If using Google Chrome: downloaded file should appear in the bottom left corner



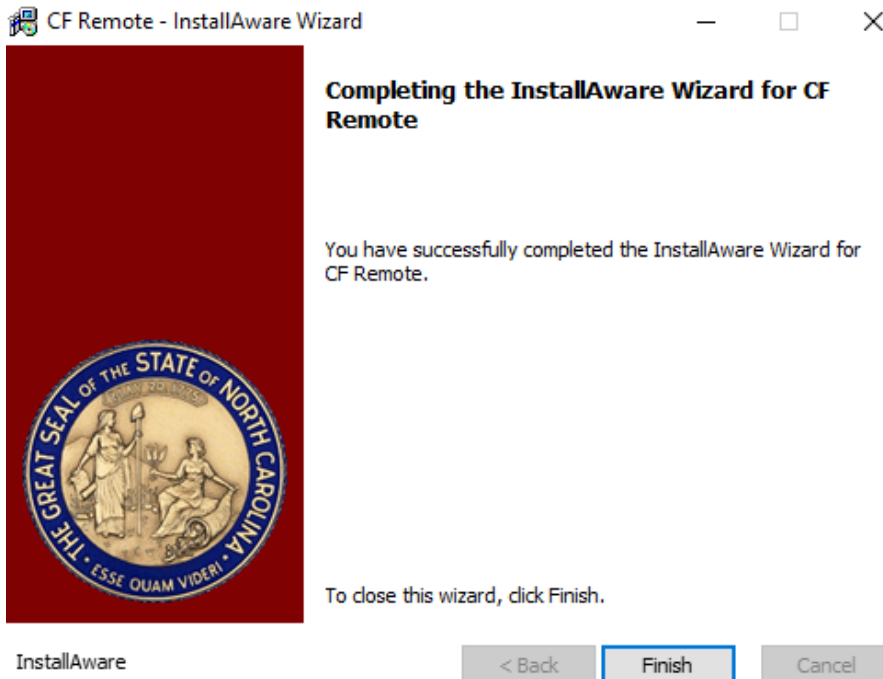
If using Microsoft Edge: Should appear in the top right corner



A CF – Remote – InstallAware Wizard window will appear, click next to begin the installation

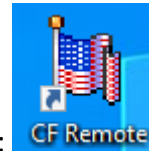


A prompt will appear saying you have successfully completed the installaware wizard for CF Remote, click next



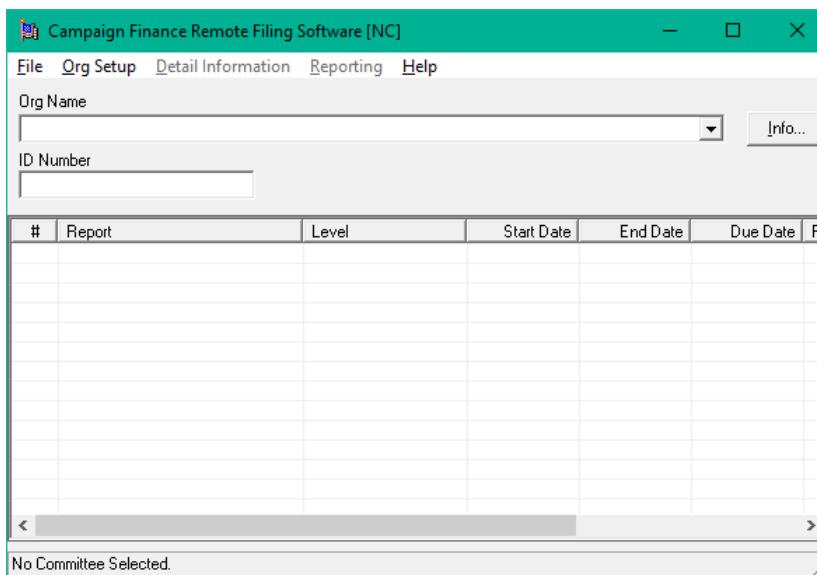
Setting up a County Candidate Committee

Once the software is downloaded and installed, you will need to set up your committee. For this example, we will be setting up a County Commissioner race. All screenshots will be shown for this office. When information is asked for that is different for your office, the different options will be detailed.

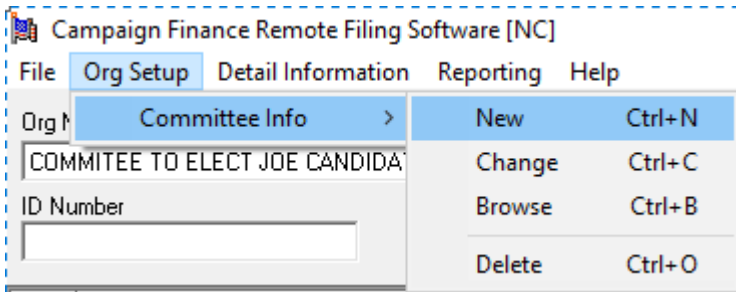


On your desktop click on the CF Remote Icon. It will look like this:


The Campaign Finance Reporting Software screen will appear



Select Org Setup – Committee Info – New.



The following screen will be displayed:

Note that the  button is grayed out. You will need to add **ALL** required information to all tabs before the OK button becomes active. **DO NOT** hit cancel, or you will lose all information you have entered.

Type tab:

Committee Type - Use the drop down list and select CANDIDATE

NOTE: When you select candidate, additional fields will be shown. You will also have an extra Candidate tab. This will happen throughout use of the software. The fields shown on any given screen may change, dependent on the selections you make.

Committee Org Level – Use the drop down list and select the organization level of County. This shows at which level your committee is registered, i.e. where you file your reports.

County – select the County that the candidate is running in.

Election Cycle Length – use the drop down list to select the term of the office that the candidate is running for.

Last General Election Year – enter the year of the last general election for the office.

NOTE: We are setting up a County Commissioner committee. If the term of office is 4 years, the last general election for the office would have been 2018. Regardless of what the candidate ran for previously, you will set this up as the last general election for the office.

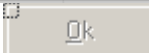
Date Organized – add the date that the committee was organized

Your screen should now look like this:

The screenshot shows a 'Committee Information' dialog box with three tabs: 'Accounts', 'Candidate', and 'Officers'. The 'Candidate' tab is active, and the 'Type' sub-tab is selected. The form contains the following fields:

Committee Type	CANDIDATE	Election Cycle Length	4 Years
Committee Org Level	COUNTY	Last General Election Year	2018
County	ALEXANDER	Date Organized	8/10/2021

At the bottom, there are 'OK' and 'Cancel' buttons. The 'OK' button is currently disabled (grayed out).

NOTE: The  button is still grayed out. You have not entered enough information yet to save the committee.

Name tab:

The screen will look like this:

The screenshot shows the 'Committee Information' dialog box with the 'Name' sub-tab selected. The form contains the following fields and buttons:

Committee Name/Address	Acronym
<input type="text"/>	<input type="text"/>
<input type="text"/>	BoE ID Number
<input type="text"/>	<input type="text"/>
<input type="button" value="Add Committee ..."/>	<input type="button" value="Find Committee ..."/>
<input type="button" value="Edit ID..."/>	

At the bottom, there are 'OK' and 'Cancel' buttons.

Select 

The following screen will be displayed:

Enter information on each tab on this screen:

Name tab – under Org Name add the name of your committee. This should match the name you put on the Statement of Organization

Mailing Address tab – enter the mailing address of the committee

Email Address – if you have set up a separate email address for the committee you can add it here

Phone Numbers – If you have a separate phone number for the committee you can add it here

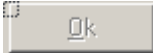
Org Info – confirm that the Committee Level and County have been completed.

Office – add the office that the candidate is running for

District – add the district (if any) that the

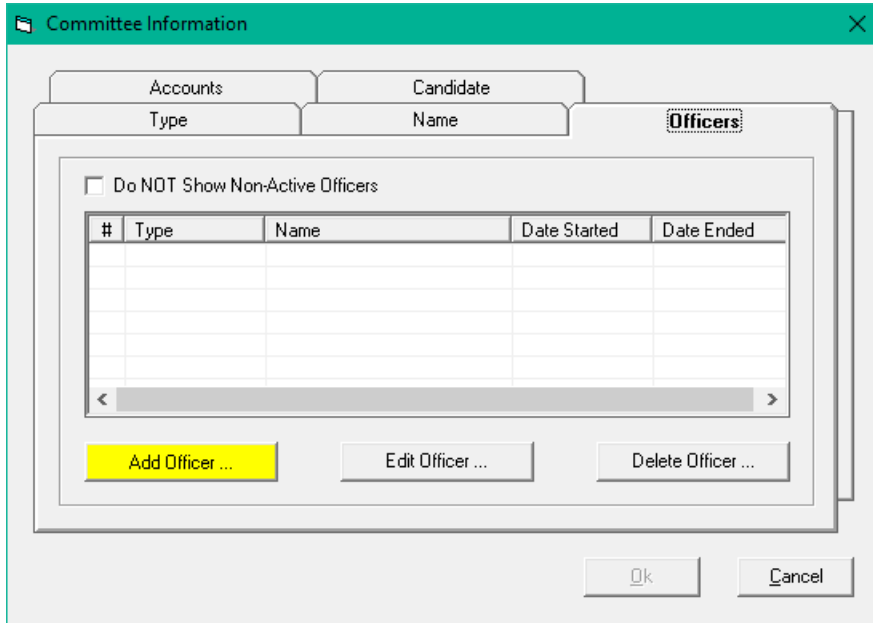
candidate is running for Select

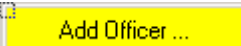
Your screen should look like this:

At the Committee Information screen, note that the  button is still grayed out. You have not entered enough information at this point to save the committee.

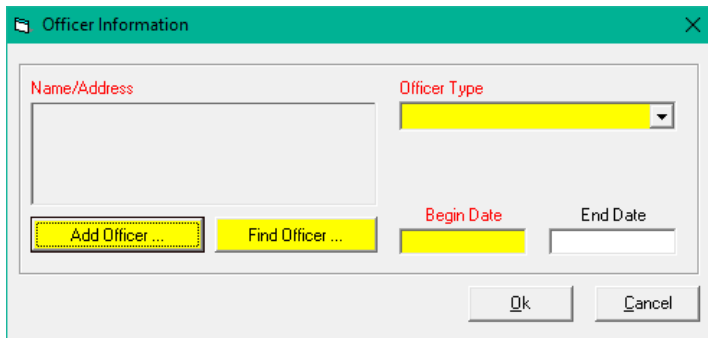
Officer tab:

Under the officer tab you will enter the treasurer, custodian of books and assistant treasurer if you have one.



Select .

The following screen will be displayed:



Select **Add Officer ...** again. The following screen will be displayed:

The screenshot shows a window titled "Name/Address Screen" with a close button (X) in the top right. A dropdown menu labeled "Type:" is set to "INDIVIDUAL". Below this are four tabs: "Notes", "Name", "Mailing Address", "Email Address", and "Phone Numbers". The "Name" tab is selected and contains several input fields: "Title" with sub-fields for "First", "Middle", "Last", and "Suffix"; "Nick Name"; "Gender" (a dropdown menu); "Date of Birth"; and "NC Voter Registration Number". There are two radio button options: "Profession" (selected) and "Job Title", followed by a text input field. Below that are "Specific Field" (unselected) and "Employer's Name" (selected), followed by another text input field. At the bottom of the window are three buttons: "Reset", "Ok", and "Cancel".

This is your basic entry screen. All individuals will be entered using this same screen.

Add the First and Last name of the treasurer, the profession/job title and specific field/employer name.

Add mailing address, email address and phone numbers on those three tabs.

Select OK.

You will now be back at the officer information screen, and the name/address field will be populated:

The screenshot shows a window titled "Officer Information" with a close button (X) in the top right. It features a "Name/Address" text area containing "JANE TREASURER", "123 TREASURER STREET", and "TAYLORSVILLE, NC 28681". To the right is a dropdown menu for "Officer Type" set to "Treasurer". Below these are two date fields: "Begin Date" (populated with "08/10/2021") and "End Date" (empty). At the bottom are four buttons: "Edit Officer ...", "Find Officer ...", "Ok", and "Cancel".

Officer Type – Use the drop down list to select the officer type

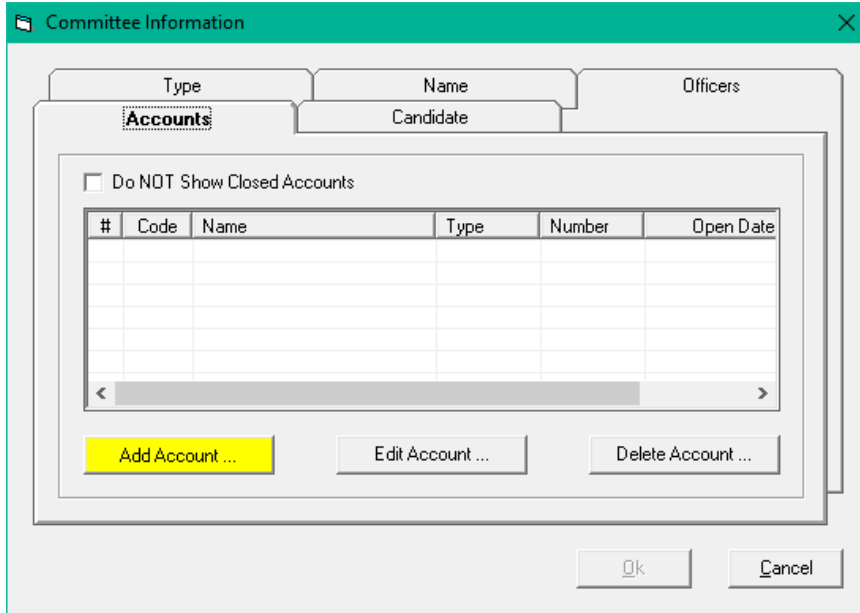
Begin Date – Enter the date that the officer was appointed

Select OK

At the Committee Information screen note that the **Ok** button is still grayed out. You have not entered enough information at this point to save the committee.

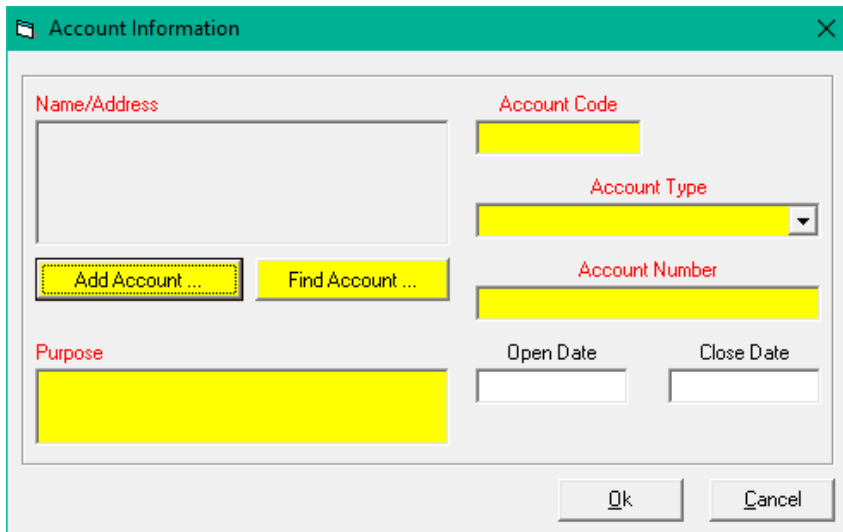
Accounts tab

The accounts tab is where you will enter bank account information. Select the accounts tab and you will see the following:



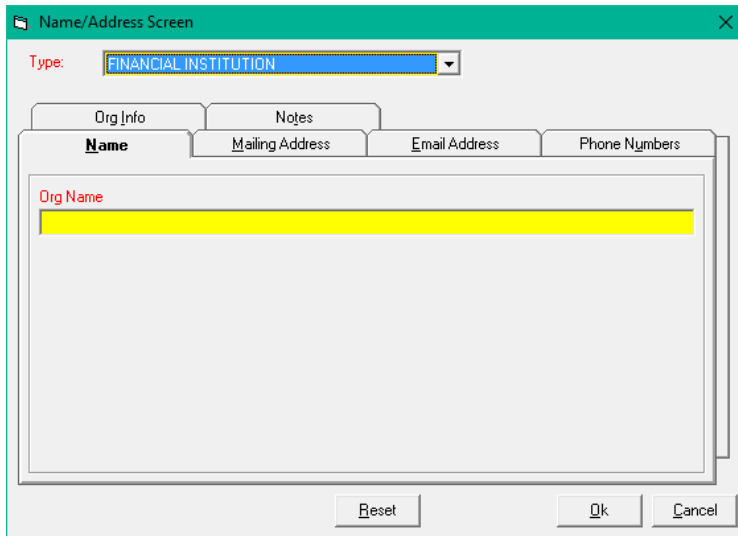
Select 

The Account Information screen will be shown:



Select 

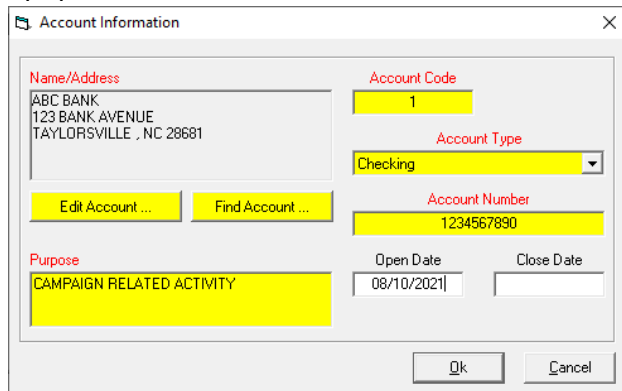
At the Name/Address screen, the type will default to Financial Institution:



Under Org Name, enter the name of the bank. Go to the Mailing Address tab and enter the address of the bank.

Select 

You are now back at the Account Information screen. The Name/Address field will be populated:



Enter information for the rest of the fields on the screen.

Account Code – This is a code that you assign to the bank account. This is the code that will be shown for each entry on your reports. You should not use the bank account number, as this is confidential. You should also not use a pin number associated with debit/credit cards.

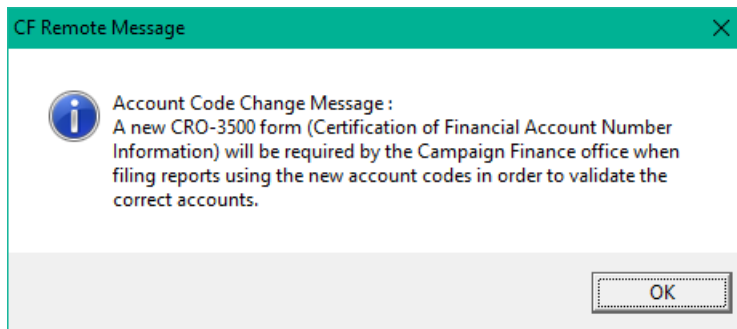
Account Type – Use the drop down list to select the Account Type

Account Number – Enter the bank account number. This is confidential information and so will not be listed on any reports

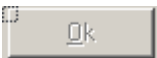
Purpose – Enter the purpose of the account

Open Date – Enter the date the account was opened

Once all information has been entered, select OK. You will see the following message:

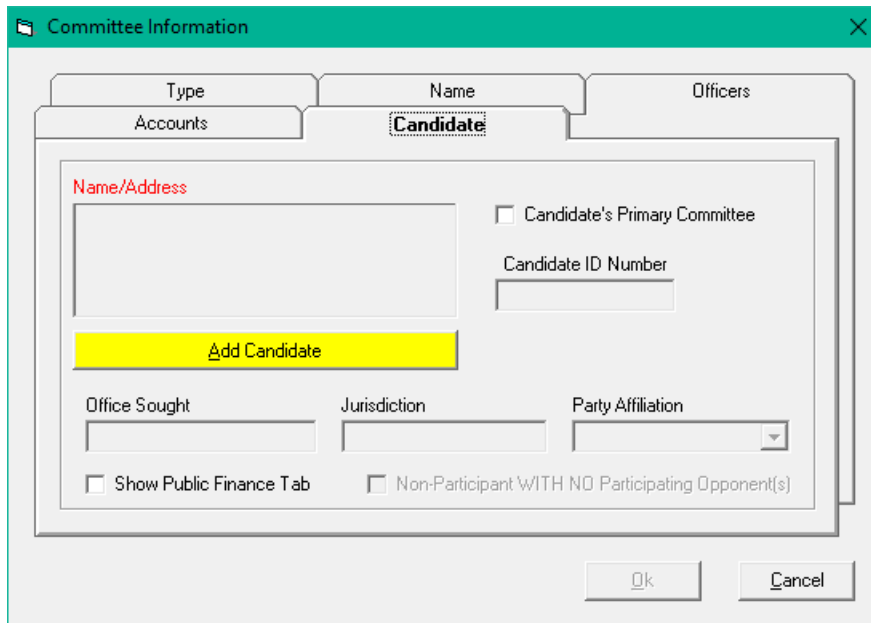


If you have already filed the CRO-3500 there is no requirement to file this again, unless changes are made to the bank account information.

At the Committee Information screen note that the  button is still grayed out. You have not entered enough information at this point to save the committee.

Candidate tab

Select the candidate tab, and the following screen will be displayed:



At this screen you will enter all information for the candidate.

Select **Add Candidate** and the Candidate Information screen will be displayed:

The screenshot shows a dialog box titled "Candidate Information". It contains several input fields: "Name/Address" (a large text area), "Candidate ID" (a text field), "Office Sought" (a text field), "Jurisdiction" (a text field), and "Party Affiliation" (a dropdown menu). There are two buttons: "Add Candidate ..." and "Find Candidate ...". At the bottom are "Ok" and "Cancel" buttons.

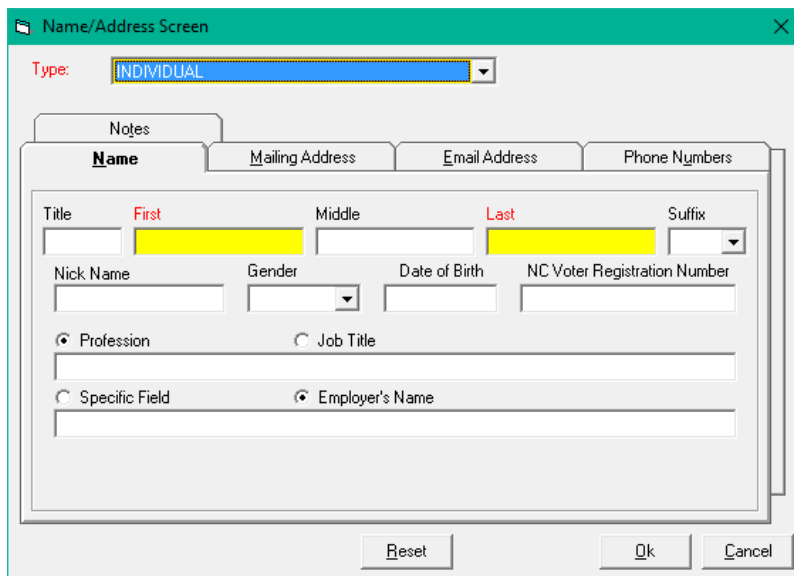
If the candidate was previously entered under the officer tab, select **Find Candidate ...** and the Name List will be displayed:

The screenshot shows a dialog box titled "Name List". It has a "Type" dropdown menu set to "Individual", a "Name (or beginning part of a name)" text field, and a "Show All" checkbox. A "Display" button is next to the name field. On the left side, there are buttons for "Add New", "Edit", "Delete", and "Clear". The main area is a table with columns: "#", "Name", "Type", "G.", "C.", "L.", "Street", and "City". The table is currently empty. At the bottom, it says "No names listed." and has "Ok" and "Cancel" buttons.

#	Name	Type	G.	C.	L.	Street	City
No names listed.							

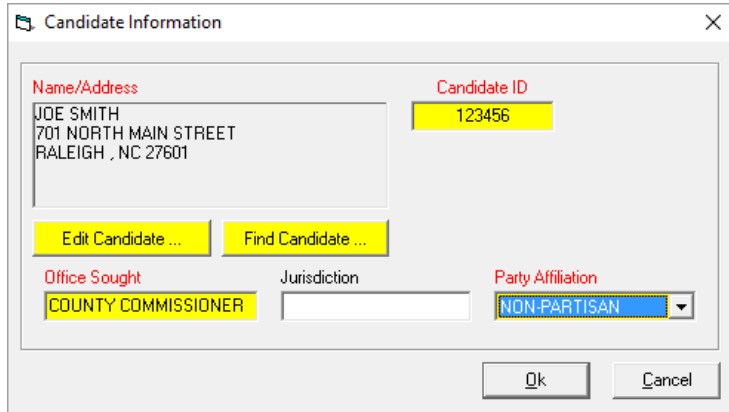
Enter the last name in the Name field and select display and you will see the candidate's name on the list. Highlight the candidate's name and select OK.

If the candidate was not already entered as an officer select **Add Candidate ...** and the Name/Address Screen will be displayed:



The screenshot shows a window titled "Name/Address Screen" with a close button (X) in the top right corner. At the top, there is a "Type:" dropdown menu set to "INDIVIDUAL". Below this are four tabs: "Notes", "Name", "Mailing Address", "Email Address", and "Phone Numbers". The "Name" tab is active. The form contains several fields: "Title", "First", "Middle", "Last", and "Suffix" (a dropdown); "Nick Name", "Gender" (a dropdown), "Date of Birth", and "NC Voter Registration Number"; radio buttons for "Profession" (selected) and "Job Title"; a text field; radio buttons for "Specific Field" and "Employer's Name"; and another text field. At the bottom are "Reset", "Ok", and "Cancel" buttons.

Enter the candidate's first and last name, profession/job title, specific field/employers name, mailing address, email address and phone number. Select OK. This will take you back to the Candidate Information screen, and the Name/Address field will be populated:



The screenshot shows a window titled "Candidate Information" with a close button (X) in the top right corner. It features a "Name/Address" field containing "JOE SMITH", "701 NORTH MAIN STREET", and "RALEIGH , NC 27601". To its right is a "Candidate ID" field with the value "123456". Below these are two buttons: "Edit Candidate ..." and "Find Candidate ...". Further down are "Office Sought" (set to "COUNTY COMMISSIONER"), "Jurisdiction" (empty), and "Party Affiliation" (set to "NON-PARTISAN" in a dropdown menu). At the bottom are "Ok" and "Cancel" buttons.

Add the Candidate ID – this is the ID that was assigned to the candidate when they filed for office. If you do not know this number enter six zero's in the field.

Office Sought – add the office that the candidate is running for. In our example this will be County Commissioner.

Jurisdiction – Add the jurisdiction that the candidate is running for.

Party Affiliation – Use the drop down list to select the Party Affiliation of the candidate (Note: I have used Non-Partisan simply to not pick one party over another. In reality this is a partisan race, so the party affiliation should be shown here)

When all fields are complete your screen will look like this:

Candidate Information

Name/Address: JOHN SMITH
123 CANDIDATE STREET
TAYLORSVILLE, NC 28681

Candidate ID: 000000

Office Sought: COUNTY COMMISSIONER

Jurisdiction: [Empty]

Party Affiliation: OTHER

Buttons: Edit Candidate ..., Find Candidate ..., Ok, Cancel

Select OK.

At the Committee Information screen check the box for Candidate's Primary Committee:

Committee Information

Type: Accounts | Name: **Candidate** | Officers

Name/Address: JOE SMITH
701 NORTH MAIN STREET
RALEIGH, NC 27601

Candidate's Primary Committee

Candidate ID Number: 123456

Office Sought: COUNTY COMMISSIONER


Jurisdiction: [Empty]

Party Affiliation: NON-PARTISAN

Show Public Finance Tab

Non-Participant WITH NO Participating Opponent(s)

Buttons: Ok, Cancel

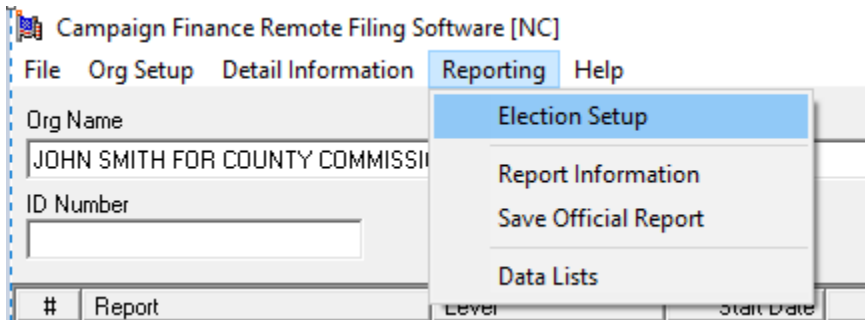
NOTE: The  button is no longer grayed out. You have entered enough information to save the committee setup information.

Select .

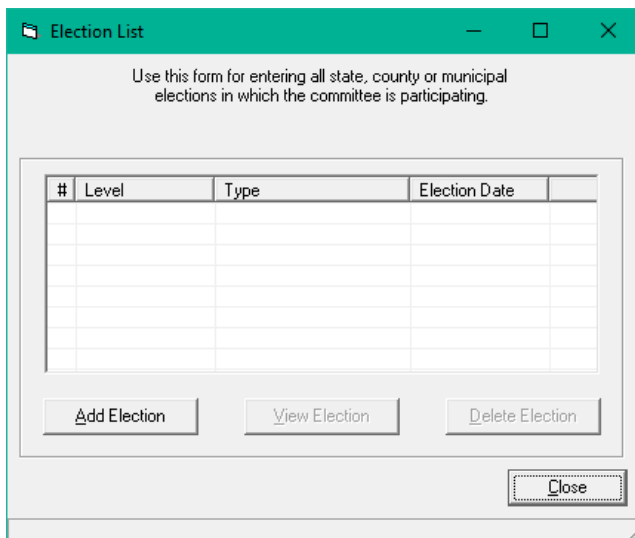
Set up Elections


In order for the software to calculate sum to date totals for each contributor and payee you must set up elections in the software. Elections will be set up for a Primary Election and General Election for 2020. A Second Primary will only be set up if the candidate is on the ballot in the Second Primary.

Select Reporting – Election Setup.



The following screen will be displayed:



Select  and the following screen will be displayed:

Election Year – under the drop down, select 2022

Type - Use the drop down list to select State/County

Election – Select 2022 Primary or 2022 General

Comments – should be entered automatically based on previous selection

The 'Outside Election Information' dialog box contains the following fields:

- Election Year:** 2022
- Type:** STATE/COUNTY
- Election:** 2022 PRIMARY (3/8/2022)
- Comments:** First Primary

Buttons: Ok, Cancel

Select OK, and you will be back at the Election List. You will see the Primary Election that you just created:

Use this form for entering all state, county or municipal elections in which the committee is participating.

#	Level	Type	Election Date	
1	[S]	2022 Primary	03/08/2022	
2	[S]	2022 General	11/08/2022	

Buttons: Add Election, View Election, Delete Election, Close

2 Elections Listed.

Follow the same process to set up any other election.

This completes the Election Setup. You can now begin to enter transactions into the database.

Entering Basic Transactions

All contributions and expenditures are entered using a similar procedure. Go to Detail Information - Receipts (or Expenditures). At the Receipts List select Add New.

#	Name	Name Type	Type	Date	Amount
---	------	-----------	------	------	--------

At the Receipt Information screen select Find Contributor (or Find Payee for expenditures).
NOTE: You MUST first search for a name in your database. If you do not find the name in your database, then select Add Contributor (or Add Payee for expenditures).

Form of Payment	Amount	Date
-----------------	--------	------

At the Name List screen search for the contributor (or payee) using the Name (or beginning part of a name) field. For individuals, just use the last name, and for organizations use the beginning part of the name. For instance, for ABC Printers just use ABC, as you may have previously entered them as ABC Printing.

Select Display

All entries will be listed that contain what you showed in the name field. Highlight the correct name and select OK

The screenshot shows a window titled "Name List". At the top, there are two input fields: "Type" set to "Individual" and "Name (or beginning part of a name)" set to "PUBLIC". A "Show All" checkbox is checked, and a "Display" button is to the right. Below these are buttons for "Add New", "Edit", "Delete", and "Clear". A table lists the search results:

#	Name	Type	G.	C.	L.	Street	City
1	JOE PUBLIC	IND	N	N		789 N MAIN ST	RALEI

At the bottom, it says "1 Names listed." and has "Ok" and "Cancel" buttons.

At the Receipt Information screen add the Form of Payment, Amount, Date and Bank Account. For Expenditures you will also need to add the Purpose Type Code and Purpose.

The screenshot shows a window titled "Receipt Information". At the top, "Receipt Type" is set to "General Contribution" and there is a "Note(s)" button. Below is a "Name/Address" field containing "JOE PUBLIC", "789 N MAIN ST", and "RALEIGH, NC 27601". To the right is a "Summary Information" field with "Sum to Date (Election Cycle): \$.00", "Sum to Date (To Receipt Date): \$.00", and "Sum to Date (Current Election): \$.00". Below these are buttons for "Edit Contributor ..." and "Find Contributor ...". Further down are fields for "Form of Payment", "Amount", and "Date", all highlighted in yellow. Below that is an "Account" field set to "1 [Checking (1234567890) FROM ABC BANK]". At the bottom are buttons for "Add Close", "Add Refresh", "Add Exist", "Refresh", and "Cancel".

Select Add Close to save the transaction and close the screen.

Select Add Refresh to save the transaction and enter a new one.

Select Add Exist to add another transaction for the same entity.

This process is used to add most receipts and disbursements. There are other types of transactions that you may need to enter, such as refunds or loans. A complete list of help topics can be found on the State Board of Elections website, on the Campaign Finance Reporting Software page.

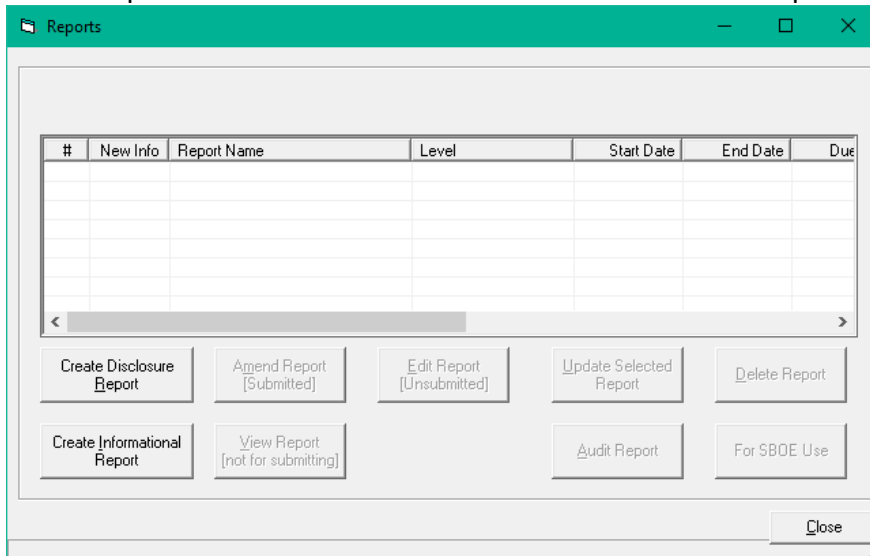
<http://www.ncsbe.gov/Campaign-Finance/reporting-software>

Create a Report

Once all contributions and expenses have been entered, and you are ready to create your report, follow the steps set out below.

Select Reporting - Report Information.

At the Reports screen select the button Create Disclosure Report



The following screen will be displayed:

The screenshot shows a window titled "Report Information" with several input fields and checkboxes. The fields include: Year, Filing Schedule (County), County (Wake), Previous Report Link, Report Type, Special Name, Is Amendment (Yes/No), Report Period Dates (Start Date, End Date, Due Date, Submit Date), and Fundraiser Activity (Num of Fundraisers). There are also checkboxes for "Show ALL Detailed Contributor Information (Optional)" and "Show ALL Detailed Expenditure Information (Optional)". At the bottom, there are tabs for "Account Summary List" and "Exempt Sale List", a table with columns Name, Code, Begin Balance, and End Balance, and buttons for "Reset Defaults", "Ok", and "Close".

Complete all yellow fields as follows:

- **Year:** Enter the year of the report
- **Filing Schedule:** this will default to County
- **County** – this will default to the county you selected in your committee setup.
- **Previous Report Link:** Use the drop down list and select the last report in the cycle. Remember, if you have amended the last report you must select the amendment. For the first report entered you will select [No Previous Report]
- **Report Type:** Use the dropdown list to select the report type
- **Report Period Dates:** Once you have selected the report type the dates will automatically populate
- **Fundraiser Activity:** Enter the number of fundraisers held this reporting period

Under the Account Summary List, highlight the bank account and select Edit Account

Report Information

Year: 2018, Filing Schedule: County, County: Wake

Previous Report Link: [No Previous Report]

Report Type: First Quarter

Report Period Dates: Start Date: 01/01/2018, End Date: 04/21/2018, Due Date: 04/30/2018

Fundraiser Activity: Num of Fundraisers: 0

Name	Code	Begin Balance	End Balance
WELLS FARGO	1		

Account Summary List

Exempt Sale List

Edit Account

Add the beginning bank balance in the Begin Balance field and select OK

Report Account Summary

Account Information

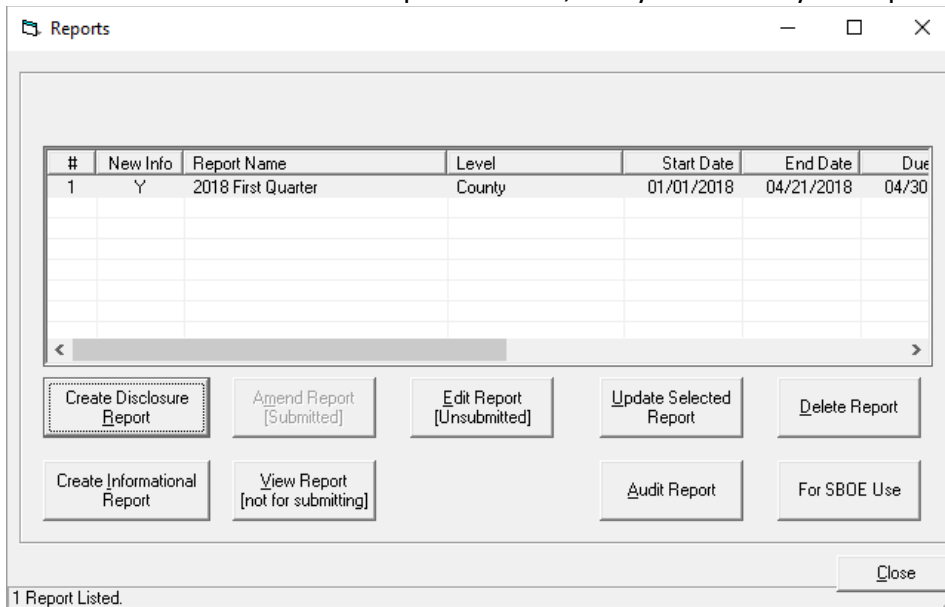
Name: WELLS FARGO

Code: 1, Begin Balance: [Yellow], End Balance:

Ok, Cancel

Select OK once again on the Report Information screen.

You will now be back at the Reports screen, and you will see your report in the list:



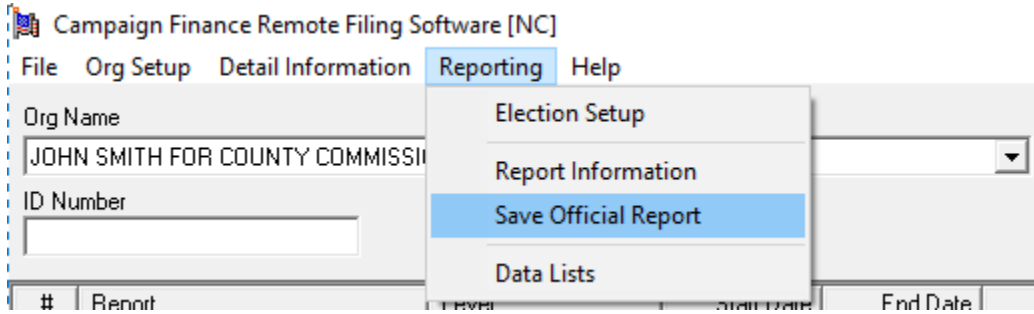
You can now use the View Report (not for submitting) button to see the report. You should check the report to make sure all balances and totals are correct.

Next, you should audit the report, which will highlight any missing information. Your final step will be to submit the report. This process will differ depending on if you committee is required to electronically submit.

Committees that raise or spend over \$10,000.00 in an election cycle are required to file electronically. Committees that have not raised or spent over \$10,000.00 can either file electronically or can print out the reports and submit the paper reports to the board of elections.

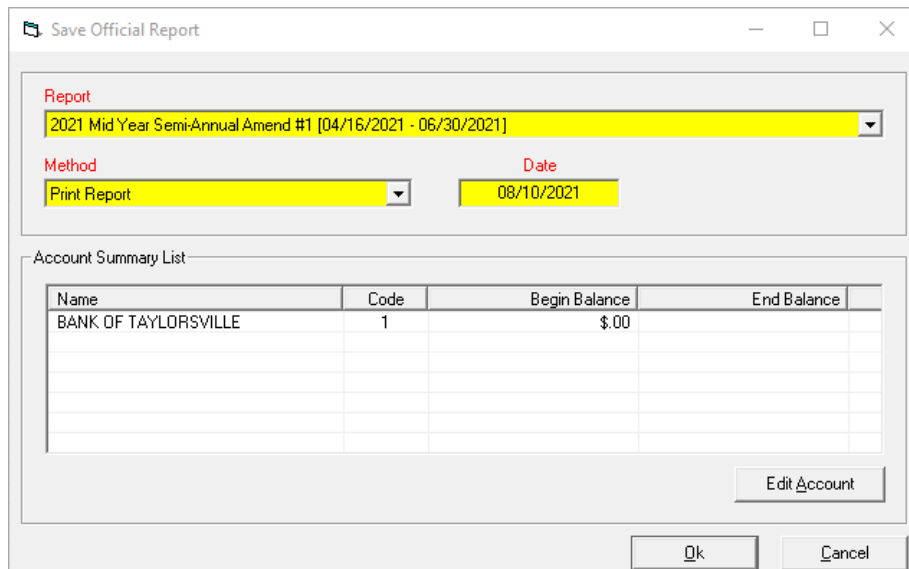
Submitting a printed Official Report (only for committees under \$10,000)

Go to Reporting - Save Official Report.



The Save Official Report screen below will be shown.

- **Report** – Select the name of the report you wish to save.
- **Method** – Select Print Report.
- **Date** – Enter today's date.



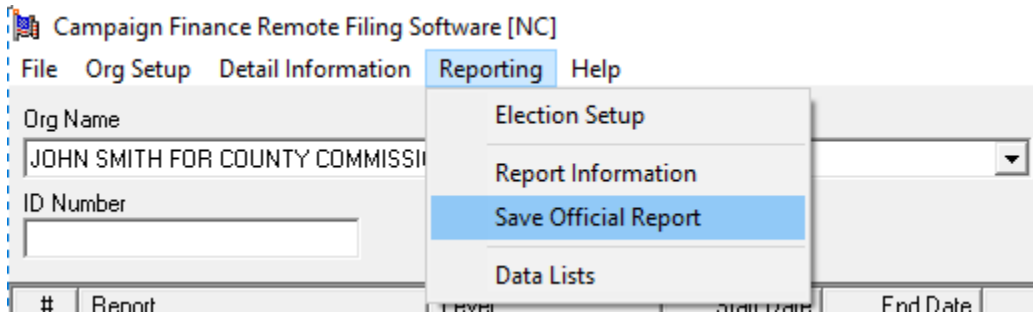
The 'Save Official Report' dialog box is shown. It has a title bar with 'Save Official Report' and standard window controls. The 'Report' dropdown is set to '2021 Mid Year Semi-Annual Amend #1 [04/16/2021 - 06/30/2021]'. The 'Method' dropdown is set to 'Print Report'. The 'Date' field is set to '08/10/2021'. Below these fields is an 'Account Summary List' table with columns for Name, Code, Begin Balance, and End Balance. The table contains one entry: 'BANK OF TAYLORSVILLE' with Code '1' and Begin Balance '\$.00'. There is an 'Edit Account' button below the table. At the bottom of the dialog are 'Ok' and 'Cancel' buttons.

Name	Code	Begin Balance	End Balance
BANK OF TAYLORSVILLE	1	\$.00	

Click ok, This will print out all the necessary disclosure reporting forms for that reporting period. The Treasurer will need to sign the disclosure report cover sheet. All printed forms need to be mailed or delivered in person to the board of elections.

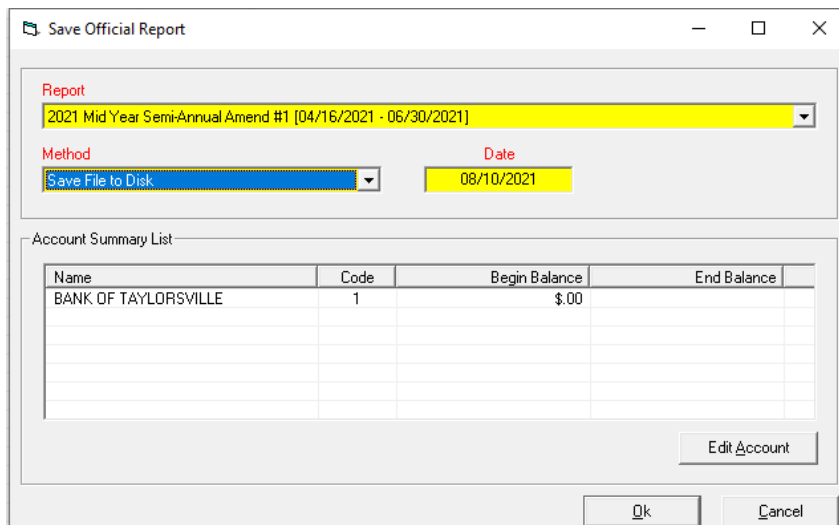
Electronically Submit the Official Report (REQUIRED for committees OVER \$10,000)

Go to Reporting - Save Official Report.



The Save Official Report screen below will be shown.

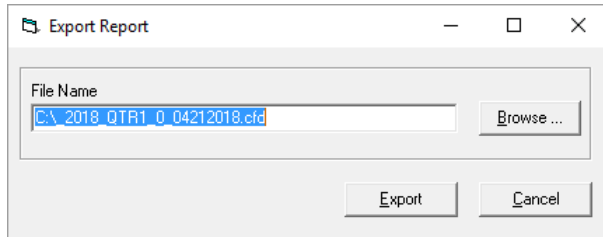
- **Report** – Select the name of the report you wish to save.
- **Method** – Select Print Report.
- **Date** – Enter today's date.



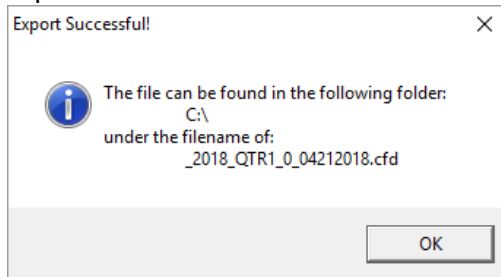
On the Save Official Report screen, select OK once again. This will bring up an Export Report screen.

- Click browse and navigate to the location of your choice. Saving the file to your desktop or a designated campaign finance folder will make locating the file easier. Do not rename the file. Make a note of your file name, as you will need it to find this file again.

- Select Export

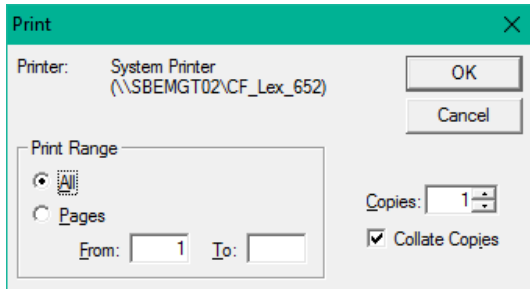


An Export Successful screen appears. This screen reminds you of the location and name of the report. Select OK.

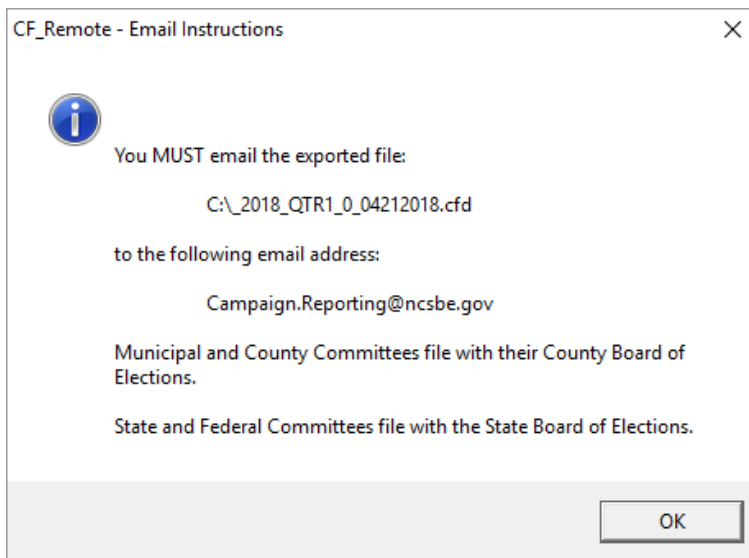


A Print screen will be shown. You **MUST print** at this screen. Select OK.

- Only the cover and summary pages will be printed. These should be signed and mailed or hand delivered to your County Board of Elections office.



A CF_Remote Email Instructions screen will be shown next. This screen is a reminder that you **MUST send** the created report file by e-mail and you **MUST send** the signed cover page by mail or hand-delivery. NOTE: The Signed Cover Page **MUST** be sent to the **appropriate Board of Elections**, as detailed in the screen below.



You have now successfully saved your report. Compose an email to Campaign.Reporting@ncsbe.gov and attach the file that you just exported. Once the e-mailed report is received, Campaign Finance staff will process the report and send an e-mail reply advising that your report has been received.

Backup Your Database

Your database should be backed up periodically to prevent loss of data and to avoid a potential need to re-key all data.

You should always backup your data before updating your software.

- If you have a computer crash all your data will be lost
- If you are updating the version of your software and there are problems, you may lose your data

Protect your data! Follow this simple, quick process to ensure that your data remains secure.

You will need a flash drive, external hard drive, or the ability to write to a CD. Ideally you should choose an external source that you can write to again and again, such as a flash drive. A CD can only be written to once, and so is not an ideal choice, but will work if you have no other external drive.

You should store a copy of your database away from your computer. If you have your backup on the same computer as your database, and you have a computer crash, you will lose both database and copy.

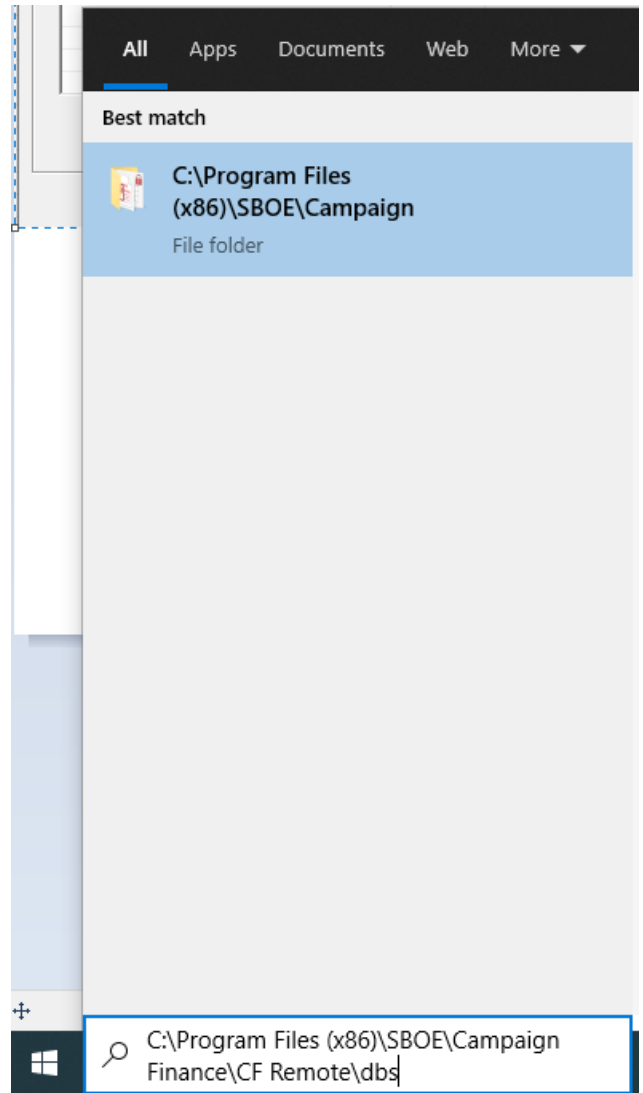
Close your software before beginning this process.

Navigate to the following location:

C:\Program Files (x86)\SBOE\Campaign Finance\CF Remote\db

Copy and paste the above path into the windows search bar

Click on the folder that appears under best match after the search





Your database is a file called **cf_data.mdb**.

Right click on your database and select copy

Navigate to your external drive, right click the

external drive and select paste. Don't change the name of this backup copy.

Name	Date modified	Type	Size
 cf_data	8/10/2021 10:18 AM	Microsoft Access ...	5,780 KB
 cf_data_empty	10/22/2020 2:58 PM	Microsoft Access ...	5,780 KB

Your backup is complete!

If you need to restore your database due to a computer crash, or to changing computers, you will simply copy the backup file from your external drive, navigate to the location C:\Program Files (x86)\SBOE\Campaign Finance\CF Remote\db, and paste the database file (**cf_data.mdb**) to this location.

Starting in the Middle of an Election Cycle

Committees are required to file Campaign Finance disclosure reports once the committee has exceeded \$10,000.00 in receipts or disbursements. A committee could potentially file the first couple of reports manually, exceed the maximum limits, and then have to file all remaining reports electronically.

When a committee starts to use the software in the middle of an election cycle they do not have the benefit of having prior records and reports in the software. Reports must include election cycle totals for the full cycle, not just for the period that the committee is a mandatory electronic filer. Similarly, you must have access to any prior contributions received, as sum to date totals must accrue through an entire election (Primary or General).

Ideally, if you believe that the committee will exceed \$10,000.00 in receipt or disbursements, the easiest way to show a full accounting would be to use the software from the start of the election cycle. For county candidates running in 2022 for a four-year term office the election cycle started on 01/01/2019.

The following process will assist with starting to use software part way through the election cycle. For our example, the term of office is four years, and the last election was in 2018. The election cycle will start on 01/01/19. This committee filed all reports for 2019, 2020 and 2021 manually, and is going to start using the software with the 2022 First Quarter Report.

The first step would be to create the 2022 First Quarter Report and manually add the ending balance from the last report.

Go to Reporting – Report Information.

Select the button Create Disclosure Report. You will see the following screen:

The 'Report Information' window includes the following sections:

- Year:** A text input field.
- Filing Schedule:** A dropdown menu with 'County' selected.
- County:** A dropdown menu with 'Wake' selected.
- Previous Report Link:** A dropdown menu.
- Report Type:** A dropdown menu.
- Special Name:** A text input field.
- Is Amendment:** Radio buttons for 'Yes' and 'No' (selected).
- Report Period Dates:** Fields for 'Start Date', 'End Date', 'Due Date', and 'Submit Date'.
- Fundraiser Activity:** A field for 'Num of Fundraisers'.
- Message text...:** A text area.
- Checkboxes:** 'Show ALL Detailed Contributor Information (Optional)' and 'Show ALL Detailed Expenditure Information (Optional)'.
- Account Summary List:** A table with columns: Name, Code, Begin Balance, End Balance.
- Buttons:** 'Reset Defaults', 'Ok', 'Close', 'Edit Summary Values', 'Edit Account'.

Enter a year of 2022. The Filing Schedule and County should be populated from the information entered in Org Setup.

Under Previous Report Link select [No Previous Report]. This will allow the Edit Summary Values button to be selected. Select this button and you will see the following screen:

The 'Summary Amounts for Pre-Software Reporting' window displays the following information:

- Previous Period Ending Balance:** \$0.00
- Cash on Hand at Start of Election Cycle:** \$0.00
- Cash on Hand at End of Election Cycle:** \$0.00
- Election Cycle Receipt Totals:**
 - Aggregated Contributions from Individuals: \$0.00
 - Contributions from Individuals: \$0.00
 - Contributions from Political Party Committees: \$0.00
 - Contributions from Other Political Committees: \$0.00
 - Loan Proceeds: \$0.00
 - Refunds/Reimbursements To the Committee: \$0.00
 - Interest: \$0.00
 - Contributions from Not-for-Profit Organizations: \$0.00
 - Outside Sources of Income: \$0.00
 - Legal Expense Fund - Other Sources: \$0.00
 - Exempt Purchase Price Sales: \$0.00
 - Total Receipts:** \$0.00
- Election Cycle Expenditure Totals:**
 - Operating Expenditures: \$0.00
 - Contributions to Candidates/Political Committees: \$0.00
 - Coordinated Party Expenditures: \$0.00
 - Aggregated Non-Media Expenditures: \$0.00
 - Loan Repayments: \$0.00
 - Refunds/Reimbursements From the Committee: \$0.00
 - In-Kind Contributions: \$0.00
 - Total Expenditures:** \$0.00
- Election Cycle Additional Information Totals:**
 - Administrative Support: \$0.00
 - Forgiven Loans: \$0.00
 - 48-Hour Notice Reports Sum: \$0.00
 - Contributions to be Refunded: \$0.00
- Buttons:** 'Ok', 'Cancel'.

You can now add an accumulation of the totals shown on reports up to this point, as well as a balance.

Remember, you will enter totals based on your Election Cycle. For County candidates running in 2022 for a four-year term office the election cycle started on 01/01/2019.

NOTE: You are only entering totals up to the day before the start date on the report you are creating. For example, I am completing a 2018 First Quarter Plus Report. My Election Cycle started on 01/01/19 so I am entering an accumulation of the totals from 01/01/15 through 12/31/21. When I add my 2022 transactions my election cycle to date totals will automatically be increased with the 2022 amounts. The previous period ending balance will be the end balance on the last report filed. The cash on hand at start of election cycle will be the beginning balance that was listed on the first report filed in 2019.

Once your report has been created, and previous totals and balances entered, you are ready to start entering transactions. When you enter a contribution from an individual that has already given during the current election period you will need to add the previous amount they gave. For example, Jane Smith gave \$1,000.00 on 06/30/19, and gave another \$500.00 on 01/01/22. Create a name entry for Jane Smith (as detailed in the section Entering Basic Transactions). Select Add Contributor, and you will see the following screen:

Enter the name, occupation information and mailing address for the individual. Now select the Notes tab, and the following screen will be shown:

The screenshot shows a software window titled "Name/Address Screen". At the top, there is a dropdown menu labeled "Type:" with "INDIVIDUAL" selected. Below this are four tabs: "Name", "Mailing Address", "Email Address", and "Phone Numbers". The "Notes" tab is currently active. Under the "Notes" tab, there are three input fields: "Last Effective Date", "Pre-Software Receipt Amount", and "Pre-Software Expenditure Amount". Below these fields is a large, empty text area for notes. At the bottom of the window, there are three buttons: "Reset", "Ok", and "Cancel".

Enter the last effective date, which will be the last date that a contribution was received from this individual. Enter the Pre-Software Receipt Amount for the election period. Select OK. This will then add the amount you entered to any new amount, and the sum to date total will be correct.

The same process should be used for expenses.