

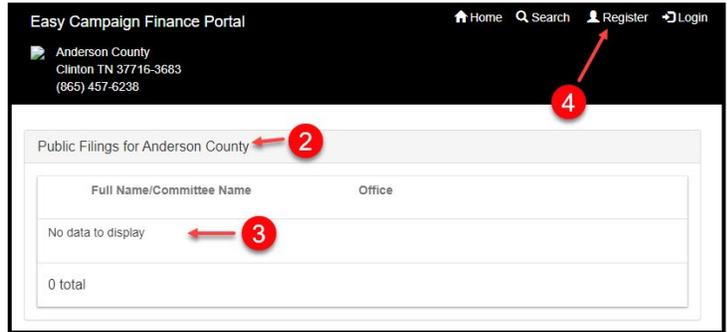
# QUICK START GUIDE

## Campaign Finance — Website User Guide

### PUBLIC PORTAL

1. Go to your city, county, or state’s website using your web browser. The following browsers are supported: Internet Explorer, Google Chrome, Mozilla Firefox, and Microsoft Edge. While Internet Explorer is supported, it is recommended that you use one of the other browsers. Microsoft no longer supports Internet Explorer. Google Chrome is the preferred browser.

**Note:** Enable pop-ups and cookies in your web browser. Disable any ad-blocker extensions in your web browser. Failure to do the items may cause issues when trying to create, preview, or submit a document.

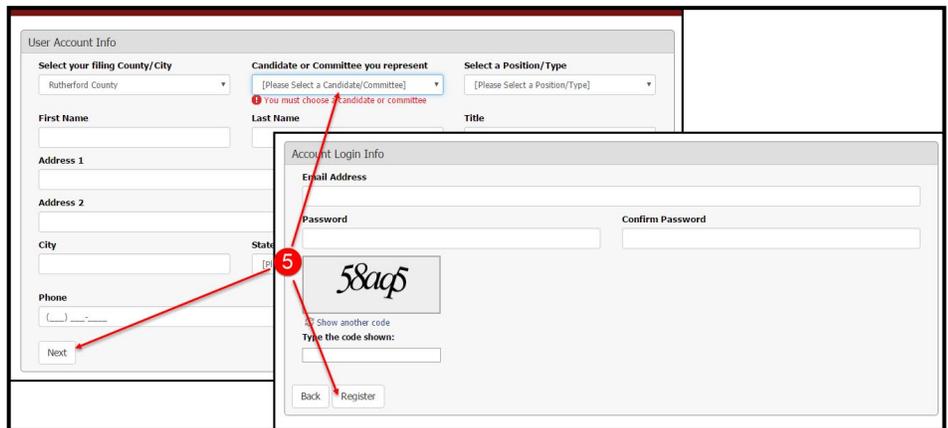


2. The records of existing candidates/committees appear on the Home page.
3. Candidates/Committees will appear in the grid. Click on the > button to expand a Candidate/Committee record. When a Candidate/Committee has been expanded, you can click on the **document name** to view the document.

### HOW TO REGISTER FOR CANDIDATE/COMMITTEE PORTAL

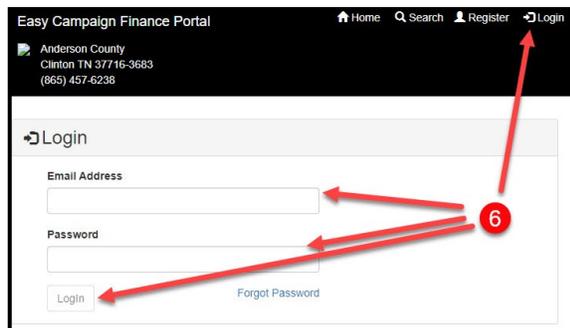
4. To register a new account, click on the **Register** button at the top of the page or from the button below the view records page.
5. Complete the data fields in User Account Info screen, and then click the **Next** button. Complete the remaining fields in the final registration screen and then click the **Register** button to submit your registration.

**Note:** When registering, you must select a candidate/committee from the dropdown box. If the candidate /committee you represent DOES NOT appear in the dropdown box—you MUST contact your Elections office and have them add the candidate/committee you are wanting to manage, before you can register for the system.



### CANDIDATE/COMMITTEE PORTAL

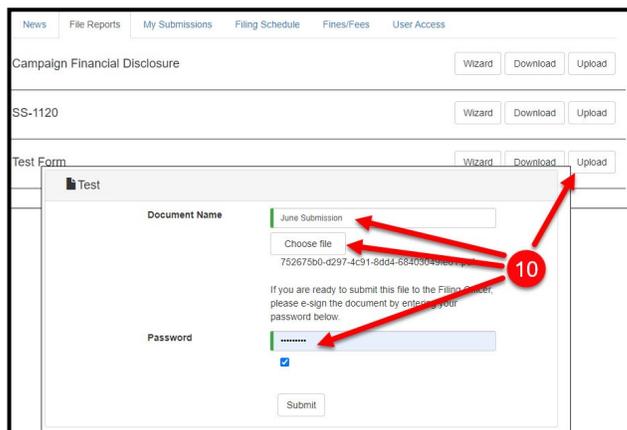
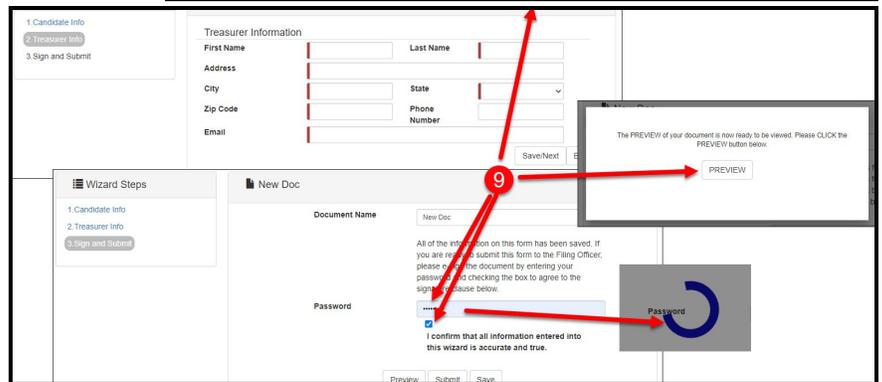
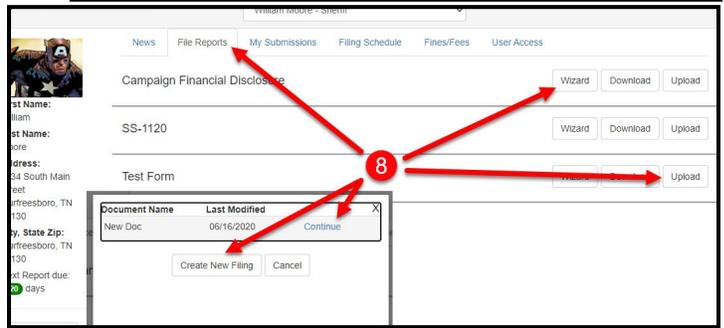
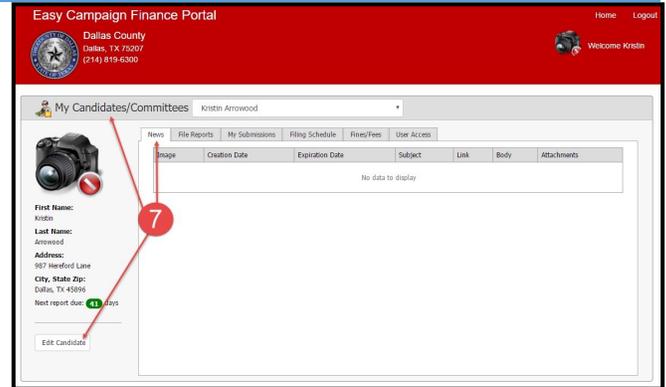
6. Click on the **Login** button to access your account. Then enter your Email Address and Password, after which you can update your information, file a document, view any incurred fines or fees, and designate account managers. **NOTE:** Documents under *File Reports* tab WILL NOT be visible until you have been approved as a user for the system.



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- After you log in to your account, the first tab you see will be the **News** tab which displays any pertinent information you need to be aware of. If you are an Account Manager for multiple accounts, select the appropriate **Candidate/Committee** from the dropdown box. You can also click on the **Edit Candidate** button to update a candidate/committee information.
- The **File Reports** tab allows you to submit documents by either completing the document using the **Wizard** or by **Uploading** the document (the documents **WILL NOT** be visible until you have been approved for access to the system). When you click the Wizard button, you can continue previously saved, unsubmitted documents or create a new filing.
- When completing a document via the **Wizard**, information about the candidate/committee will be pre-populated into the data fields (from candidate/committee information) to help save time. Complete each page of the **Wizard** and then click the **Save/Next** button to continue on to the next page. (**NOTE:** you **MUST** click **Save/Next** to save the data on the current screen.) To return to a previous page, click the **Back** button. The Sign and Submit page is the last page of a document, and it requires you to **Preview** the document before you can **Submit** or **Save**. The **Save** button allows you to save all of your progress, but **DOES NOT** submit the document for approval. You can continue the document at any time by returning to the **File Reports** tab and then by clicking on the corresponding **Wizard** button for that form or by going to the **My Submissions** tab and clicking **Edit** beside the document you wish to continue working on. You must enter your **password** and check the **submission clause checkbox**. A blue progress wheel will appear while the document is being submitted. If the document has a lot of contributions, expenditures, etc., the upload process may take a minute or two.
- To **Upload** a document, click the **Upload** button beside the document name you are uploading. Click the **Choose File** button to select a file from your computer and then name the document. Click the **submission clause checkbox**. Click the **Submit** button when you are ready to upload your document.



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11. The **My Submissions** tab displays the history for all of the Candidate/Committee documents. Documents can be amended by clicking on the **Amend** button. If you start a document and Save it—**Edit** and **Delete** will be an option. Click **Edit** beside the document you want to work on.
12. The **Filing Schedule** tab displays any due dates pertaining to required documents.
13. The **Fines/Fees** tab displays the history of any assessed fines/fees and any corresponding Payments or Credits.
14. The **User Access** tab allows you to control Account Manager access to your account. Click on the **Add Account Manager** button to add an account manager. Enter the email address of the account manager you are adding. Then complete the data fields and click the **Add** button. Click on the **Remove Access** button next to an Account Manager's name to revoke access to an account. (**NOTE:** If the person already exist in the system—you will get a notice that says the email is already registered. You will need to contact your Election Office to get them to add the person as your Account Manager.)

#	Status	Doc Type	Doc Name	Doc Date	Created	Submitted	Acc/Reg
		CTA	CTA	05/17/2017	05/17/2017	05/17/2017	
		CTA	CTA	04/12/2017	04/12/2017	04/12/2017	
		JCTA	JCTA	04/07/2017	04/07/2017	04/07/2017	04/07/2017
		CTA	CTA FINAL	04/07/2017	04/07/2017	04/07/2017	04/07/2017
		CTA	CTA Frank	04/07/2017	04/07/2017	04/07/2017	04/12/2017
		COH	COH	04/07/2017	04/07/2017	04/07/2017	04/07/2017
		JCTA	JCTA	04/07/2017	04/07/2017	04/07/2017	04/07/2017
		ACTA	ACTA2	04/07/2017	04/07/2017	04/07/2017	04/07/2017
		CTA	CTA2	04/07/2017	04/07/2017	04/07/2017	04/07/2017

Due Date	Document
7/15	JCOH

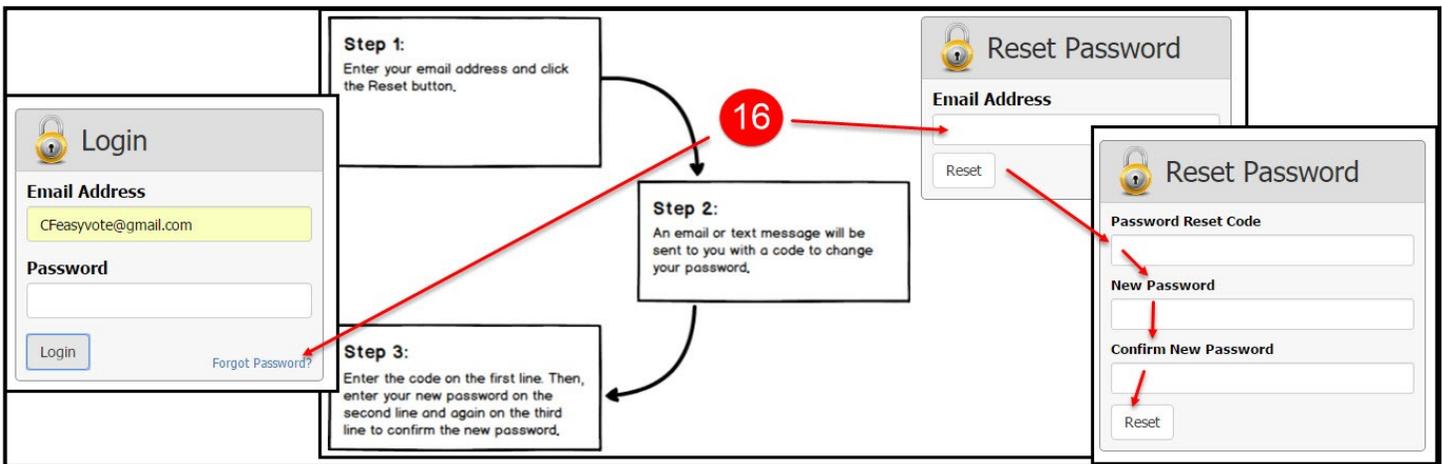
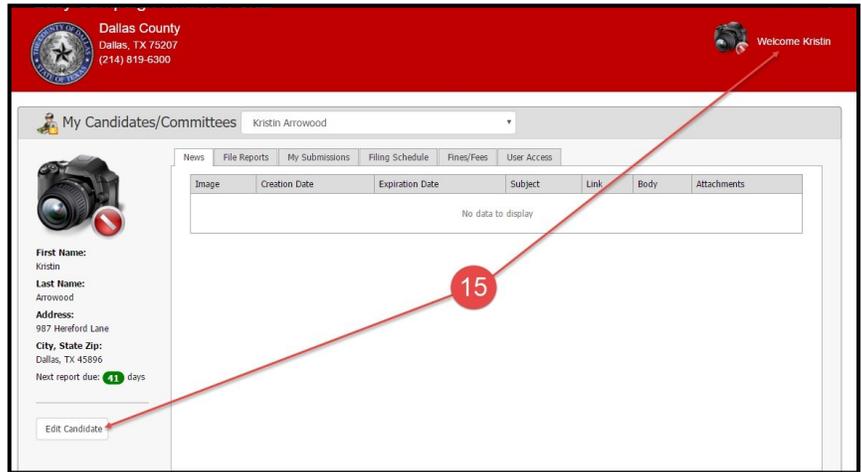
Date	Description	Transaction Id	Payment	Fee
No data to display				

#	Full Name	Position	Email Address
	John Phillips	Accountant	johnphillip@easyvote.com
	Rhett Caney	Accountant	rhett@caneybranch.com
	Jason Todd	Accountant	jtwest@easyvotesolutions.com
	Sally Summers	Assistant	easyvotester@gmail.com

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- To **update** or **edit** your Account Manager information, click on your name in the top right corner where your **name** appears after the word **“Welcome”**. To **update** or **edit** the candidate/committee information, click on the **Edit Candidate** button at the bottom left side of the page.
- To reset your password or if you have forgotten your password for access to the Campaign Finance website, click on the **Forgot Password?** button, on the login screen. In the next window, enter the **email address** associated with your account and click the **Reset** button. A password reset code will be sent by either a text message or email. Enter that code into the **Password Reset Code** field and then enter your new password. You will need to type the new password into two separate fields to help avoid any typing errors, then click the **Reset** button.



- To **Amend** a document you must go under the **My Submissions** tab and click **AMEND** next to the document you wish to amend. By doing this the wizard brings in all the data from the last report you filed and you will only have to make your corrects and resubmit the document.

