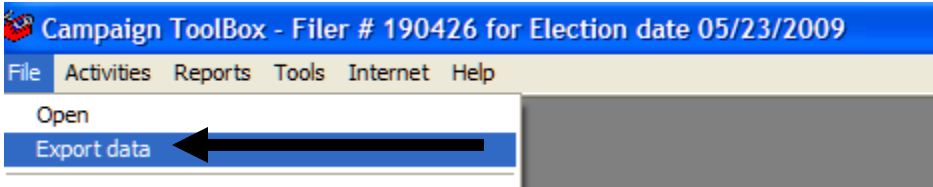
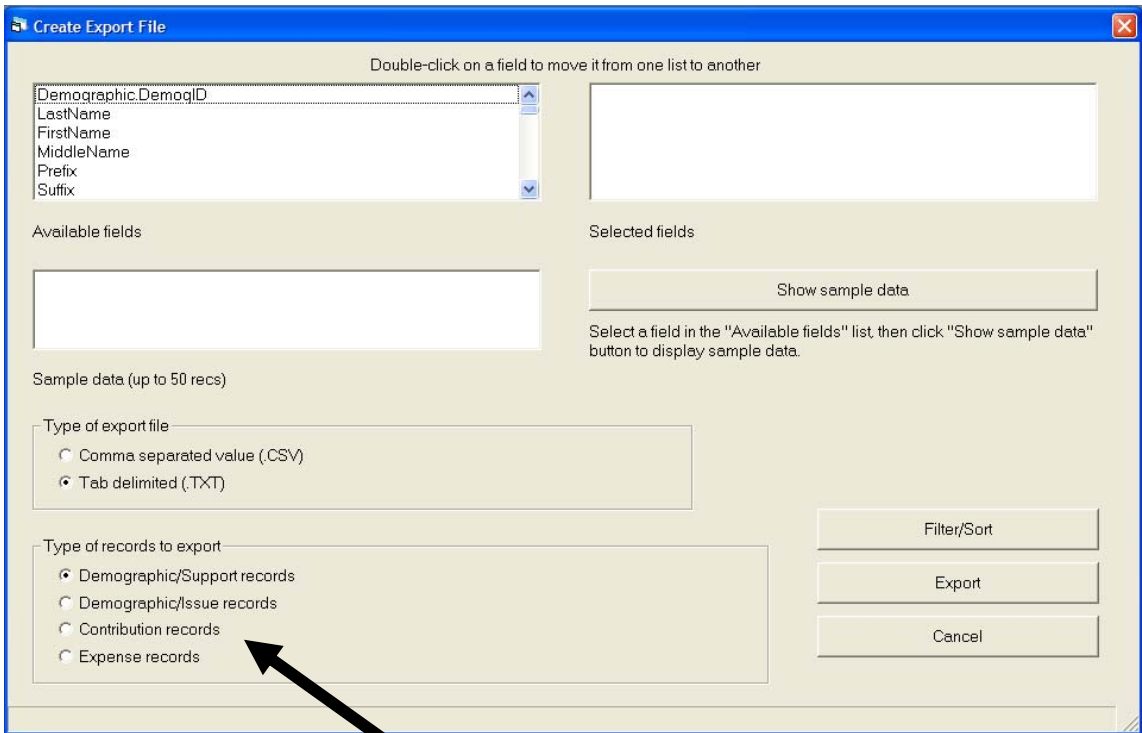


How to Create an Electronic File Using the Export Feature in Campaign ToolBox

In ToolBox, click on **File** and click on **Export data**.

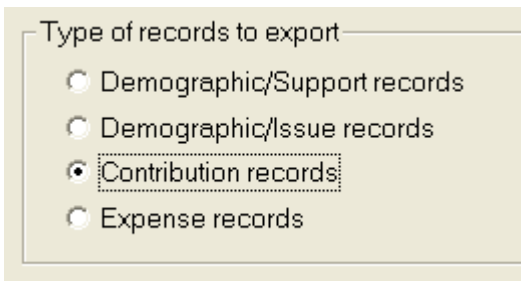


The Create Export File window will appear:



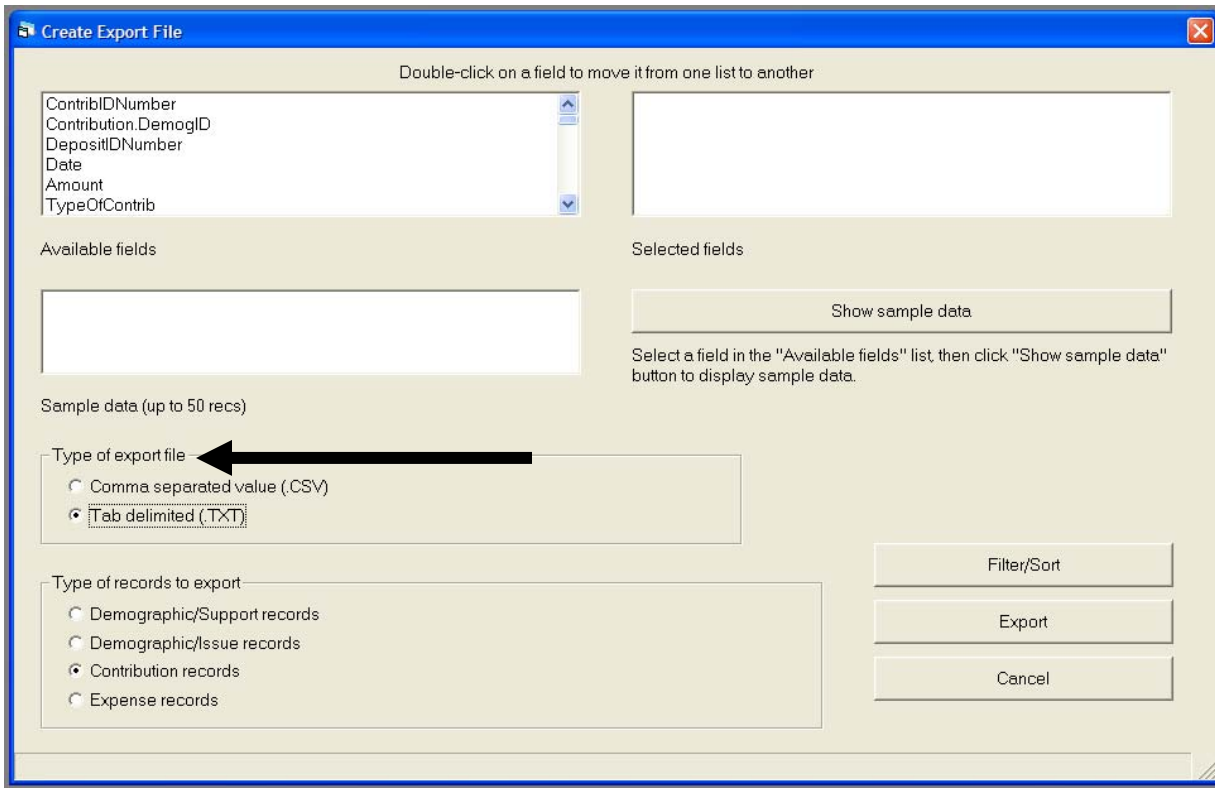
Choose the type of records you want to export.

In this example we want to export all the Unitemized Contributions. Click on the circle to the left of "Contribution records."



How to Create an Electronic File Using the Export Feature in Campaign ToolBox

Next, choose the type of export file.

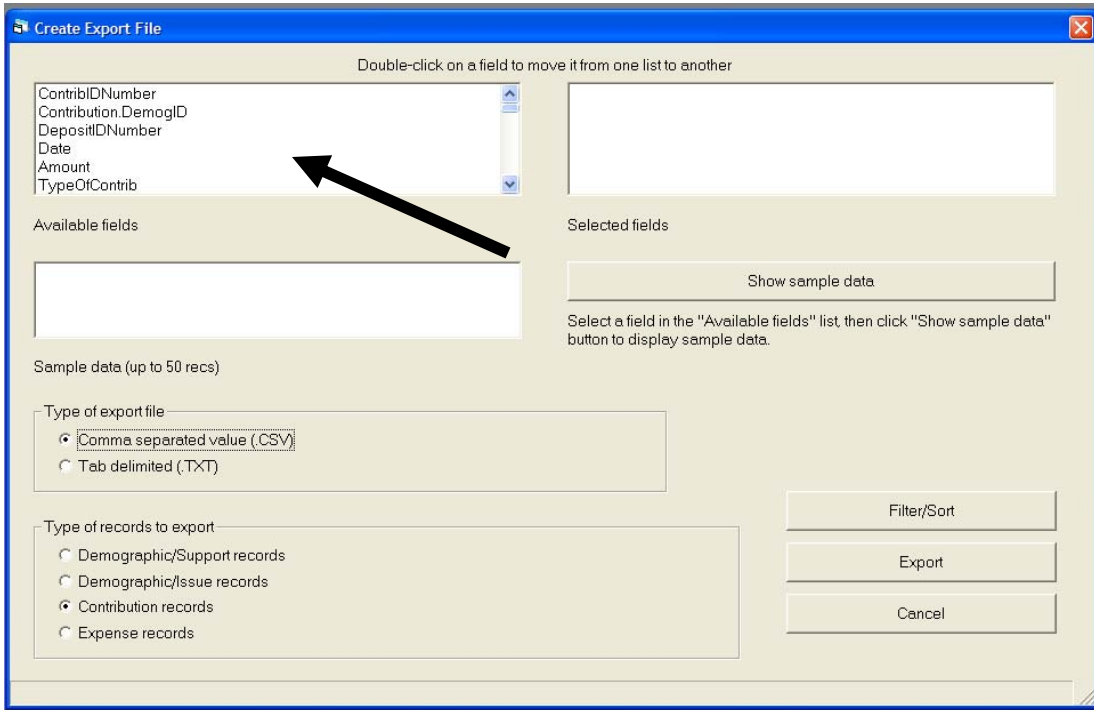


Since we are exporting this data to an Excel spreadsheet, choose “Comma separated value.”



How to Create an Electronic File Using the Export Feature in Campaign ToolBox

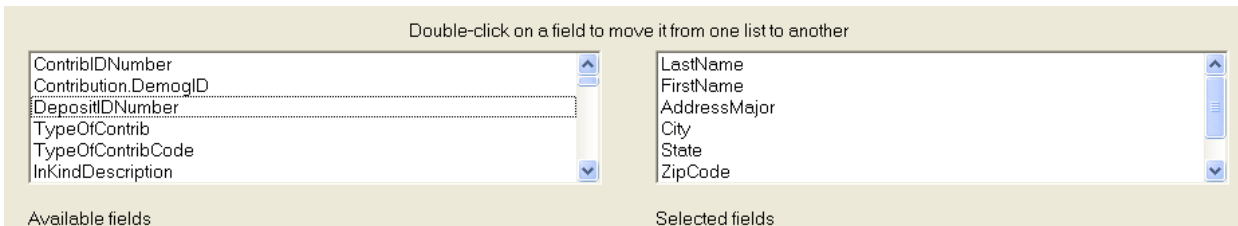
Locate the “Available Fields” section.



Select the fields you want in the electronic file. For example:

- Last name
- First name
- Address
- City
- State
- Zip
- Amount
- Date

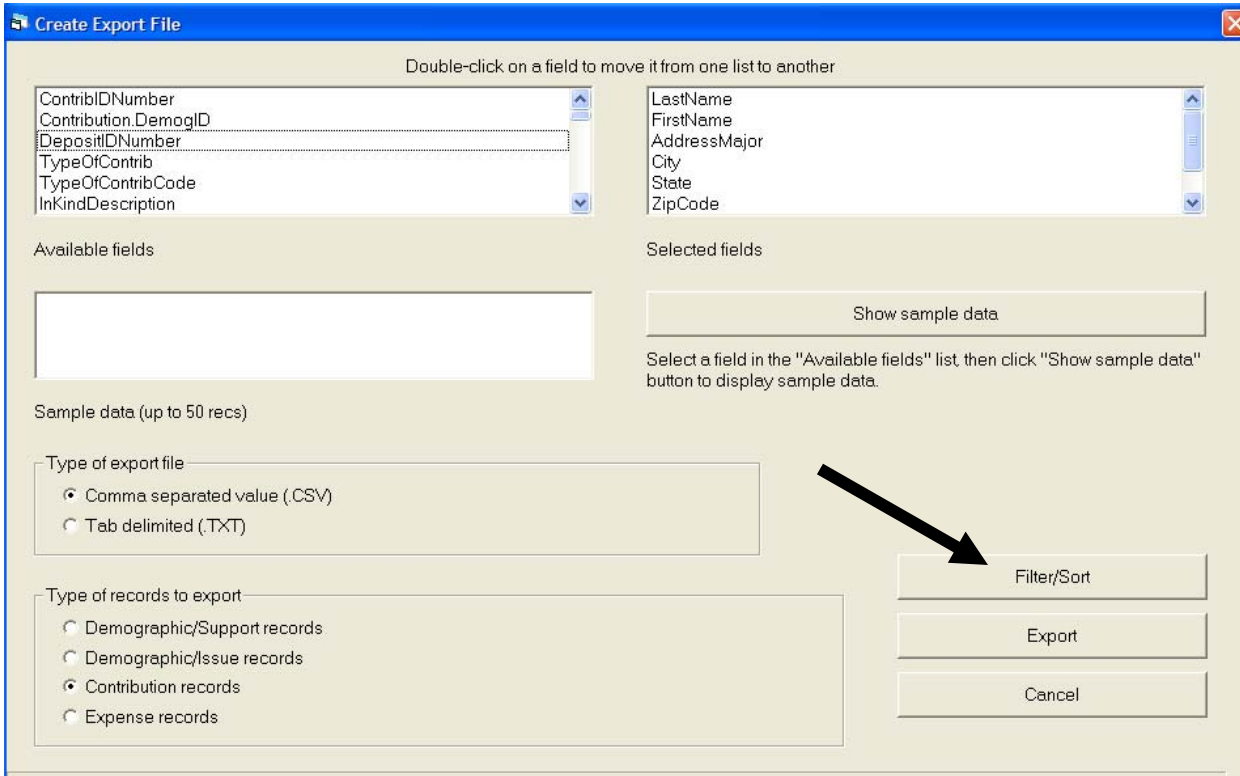
Double Click on the fields in the “Available fields” section and they will appear in the “Selected fields” section.



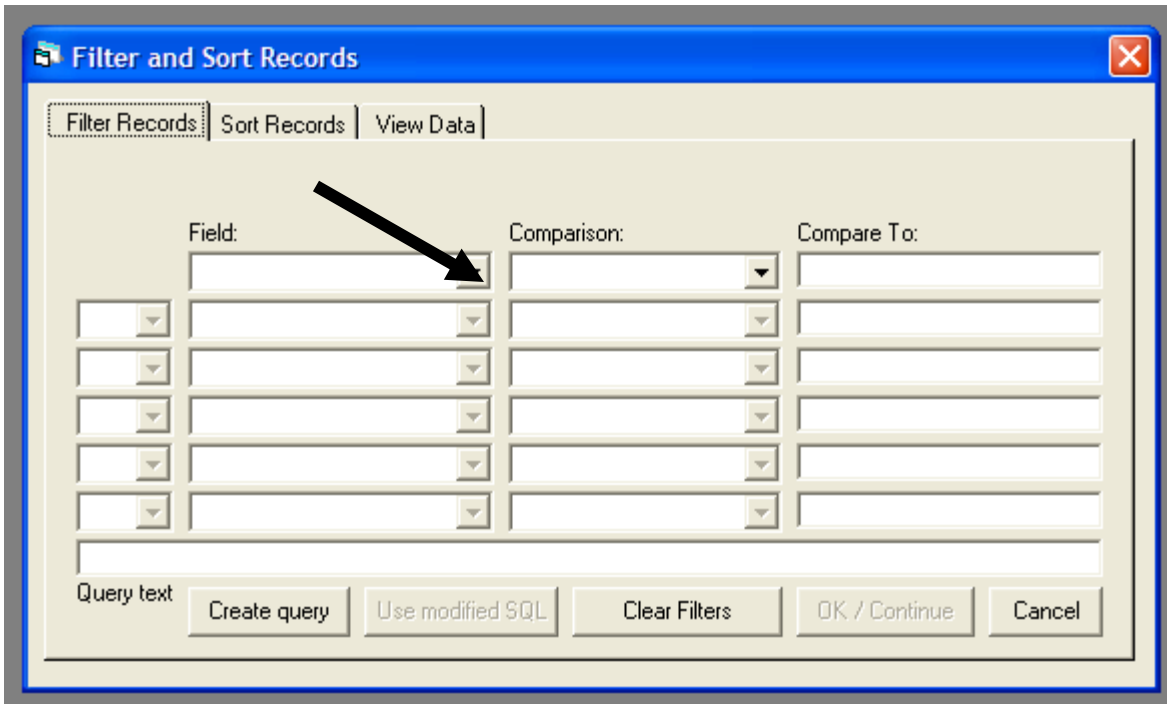
If you accidentally double click on a field you do not want, simply double click on the same field in the “Selected fields” section and it will move back to the “Available fields” section.

How to Create an Electronic File Using the Export Feature in Campaign ToolBox

Once you have selected all the fields you want in your export, click on the Filter/Sort button:



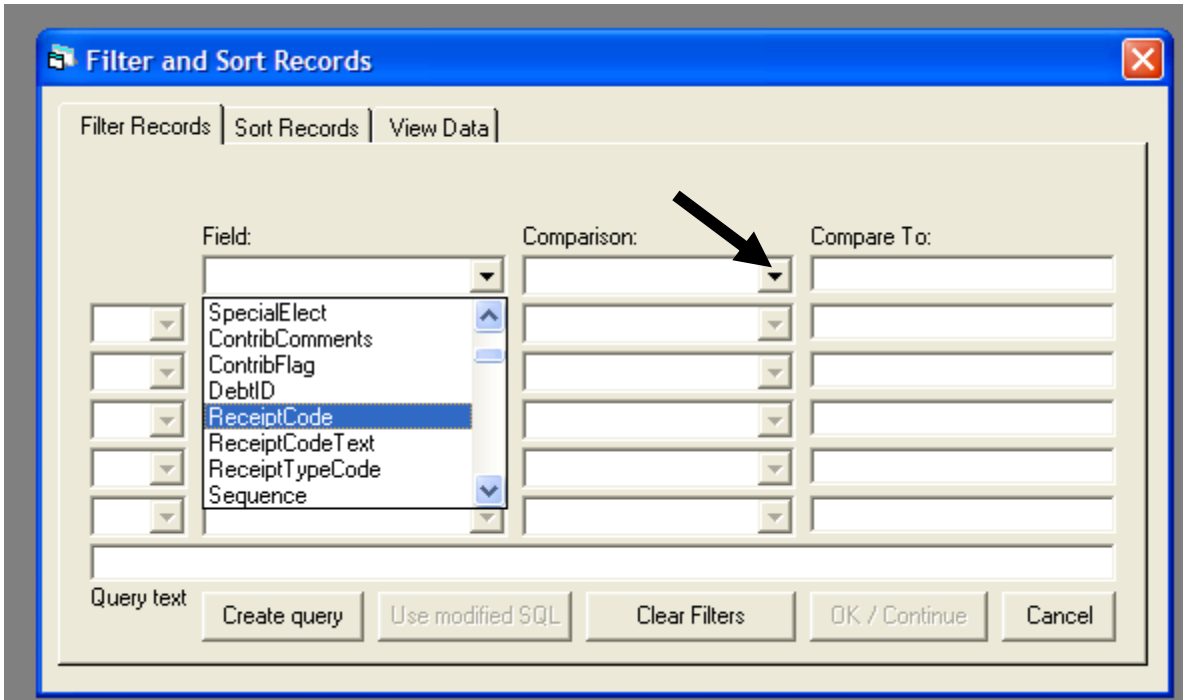
The Filter and Sort Records window will appear:



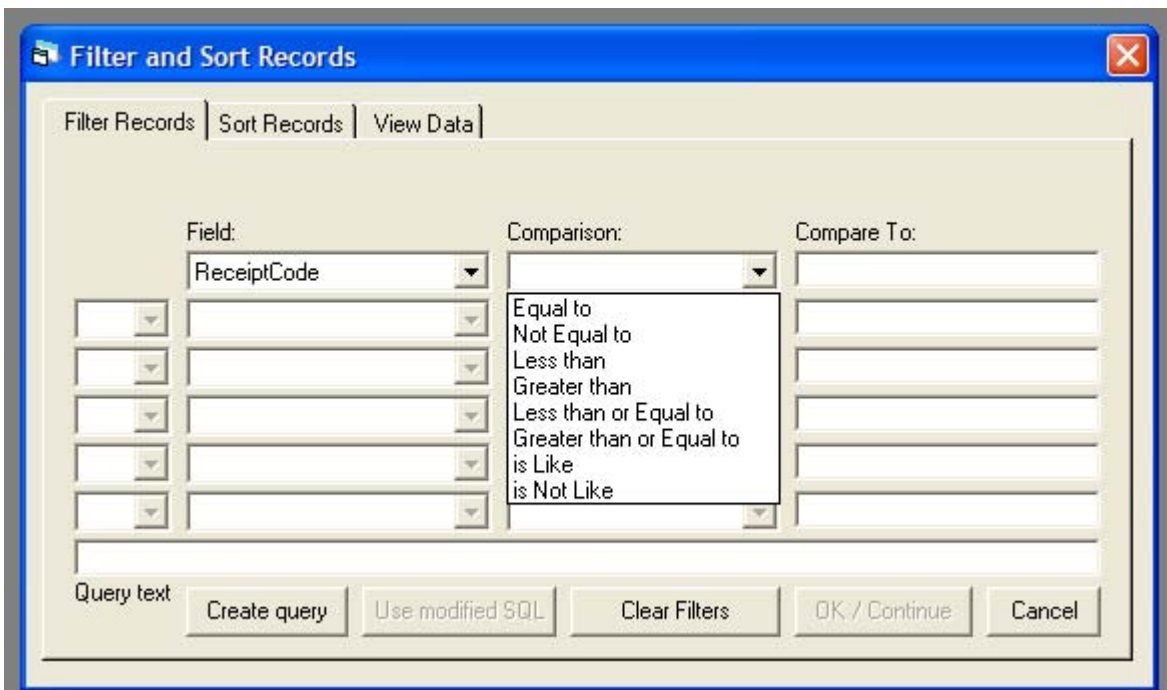
How to Create an Electronic File Using the Export Feature in Campaign ToolBox

Click on the arrow to the right of the “Field” box to select a field to filter your records.

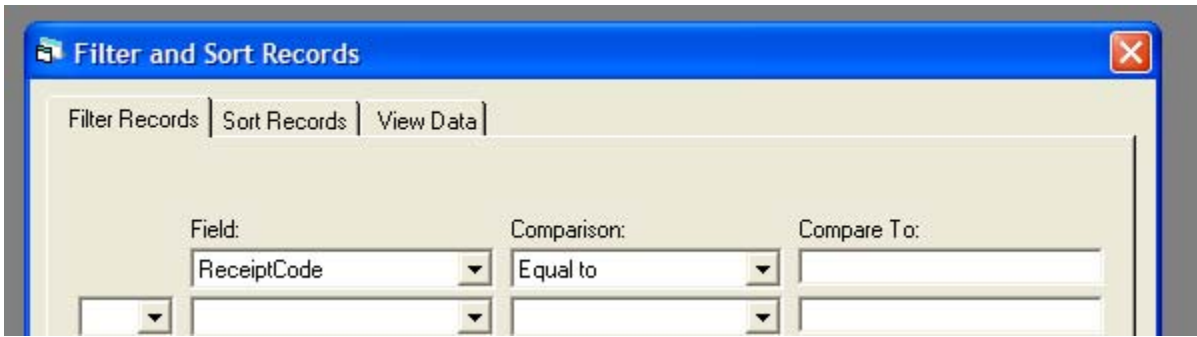
Scroll down until you see “ReceiptCode” and click on it to select.



Click on the arrow to the right of “Comparison” box to select an action. Since we are looking for a specific receipt code (Unitemized Contributions) choose (click on) “Equal to.”



How to Create an Electronic File Using the Export Feature in Campaign ToolBox



In the “Compare to” box we need to key in a code that will display only Unitemized Contributions. The following is a list of Receipt codes:

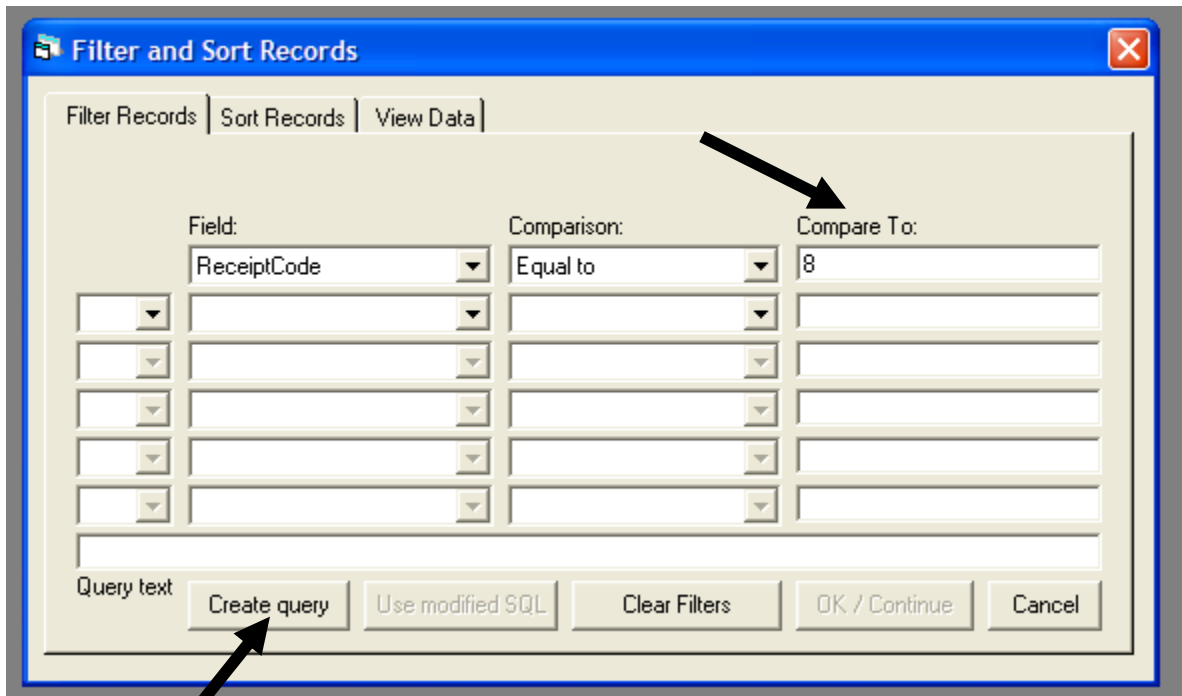
ReceiptCode corresponds to Contributor Type Code on the Contribution Screen

- 1 Candidate
- 2 Individual
- 3 Contributing Organization
- 4 KY PAC
- 5 Federal PAC
- 6 Executive Committee
- 7 Anonymous
- 8 Unitemized ←
- 9 CASH
- 10 Other Candidates
- 11 Other Camp Committee
- 12 Interest
- 13 Balance Carry Forward
- 14 Income Tax CheckOff
- 15 Not Used
- 16 Dues
- 17 General Funds
- 18 Collections
- 19 Other
- 20 Candidate Debt Assumption
- 21 ECF Transfer
- 22 Governor
- 23 Lt. Governor
- 24 Executive Committee – Unitemized
- 25 Executive Committee – CASH
- 26 Out of State PAC
- 27 National Executive Committee
- 28 Authorized Entity
- 29 Affiliate

How to Create an Electronic File Using the Export Feature in Campaign ToolBox

Find Unitemized in this list to determine the Receipt Code. It is 8.

Key in an “8” in the “Compare to” box.



Filter and Sort Records

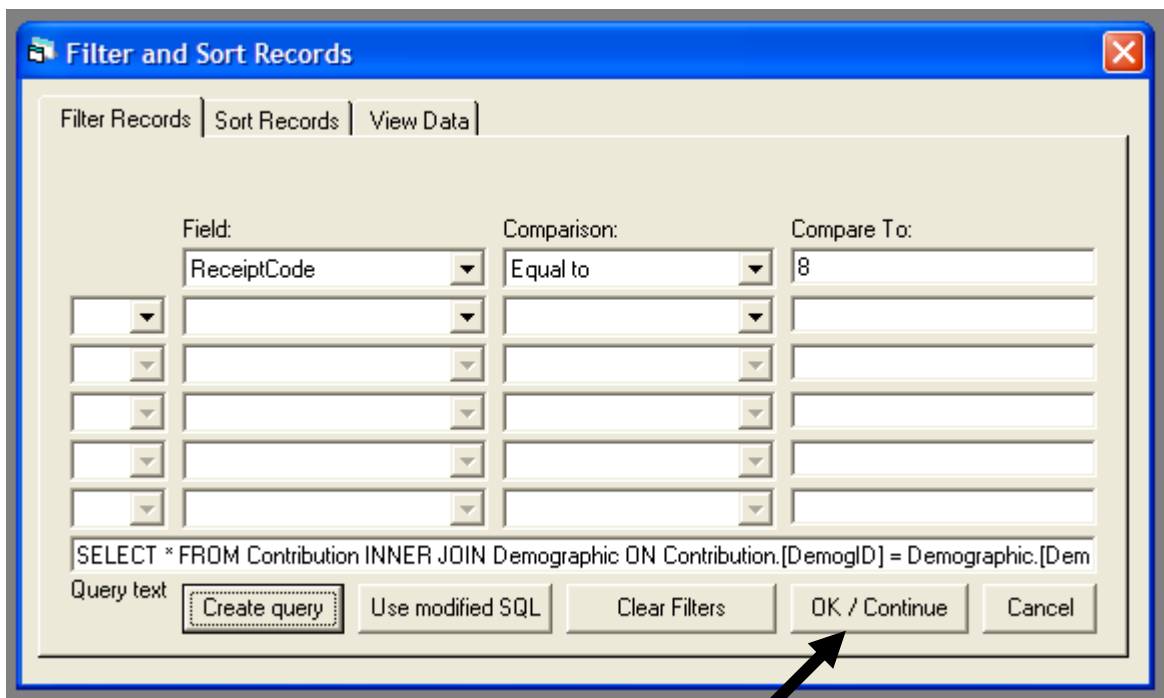
Filter Records | Sort Records | View Data

Field:	Comparison:	Compare To:
ReceiptCode	Equal to	8

Query text

Create query Use modified SQL Clear Filters OK / Continue Cancel

Click on “Create query.”



Filter and Sort Records

Filter Records | Sort Records | View Data

Field:	Comparison:	Compare To:
ReceiptCode	Equal to	8

Query text

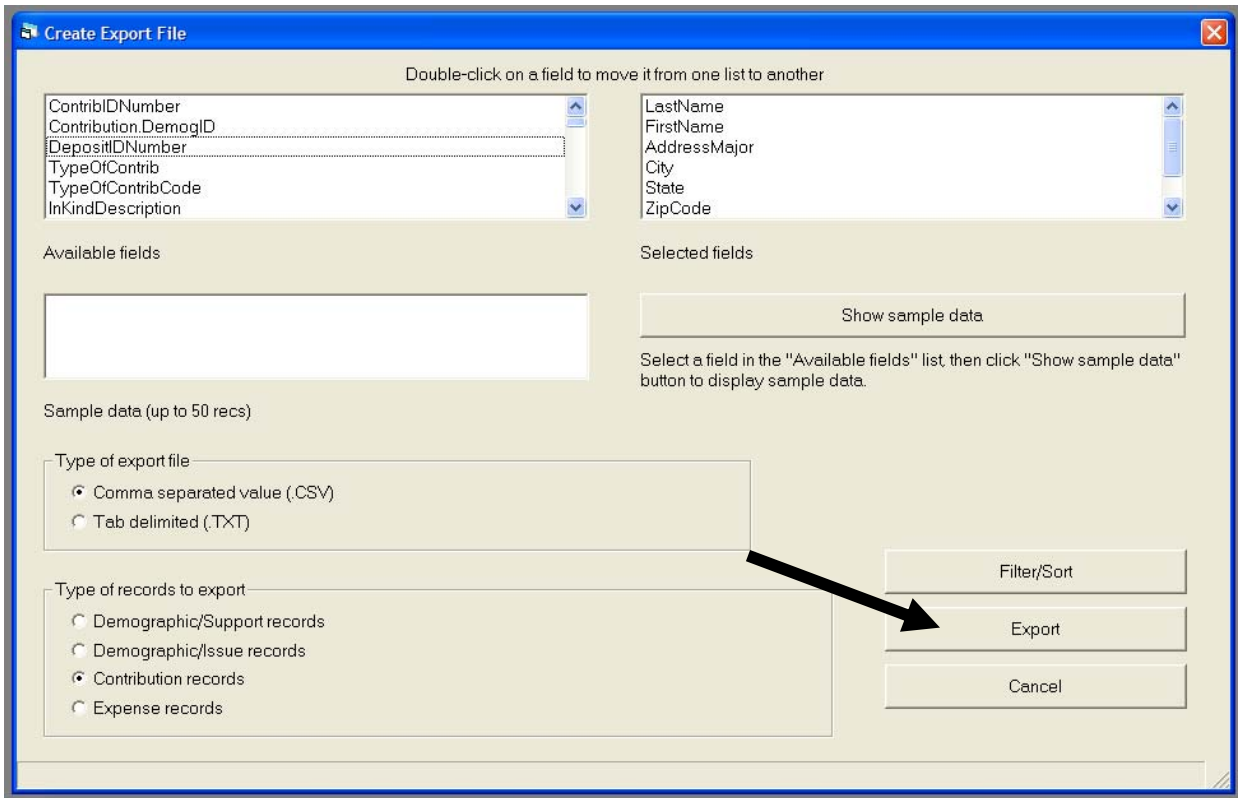
```
SELECT * FROM Contribution INNER JOIN Demographic ON Contribution.[DemogID] = Demographic.[DemogID]
```

Create query Use modified SQL Clear Filters OK / Continue Cancel

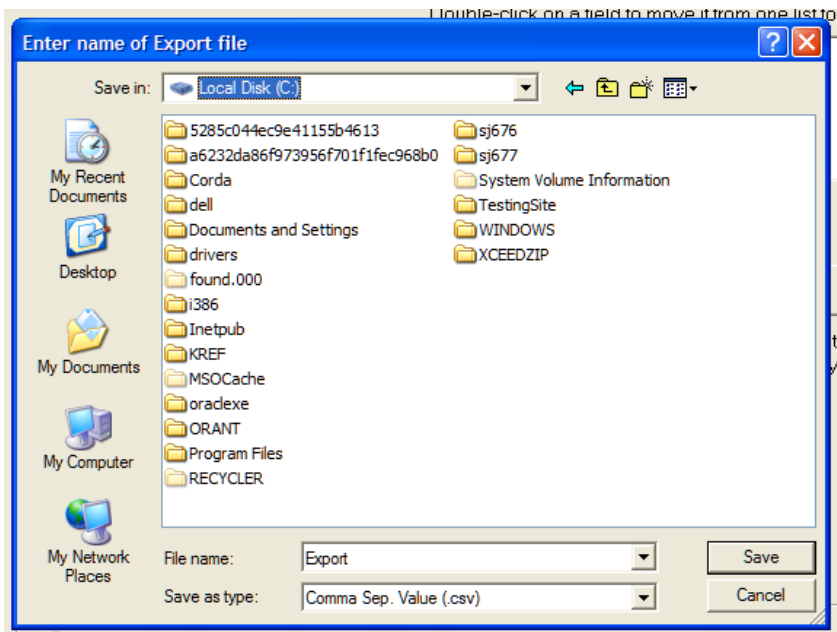
How to Create an Electronic File Using the Export Feature in Campaign ToolBox

Once the query has been created, click “OK/Continue.”

The Create Export file window will appear. Click on “Export.”

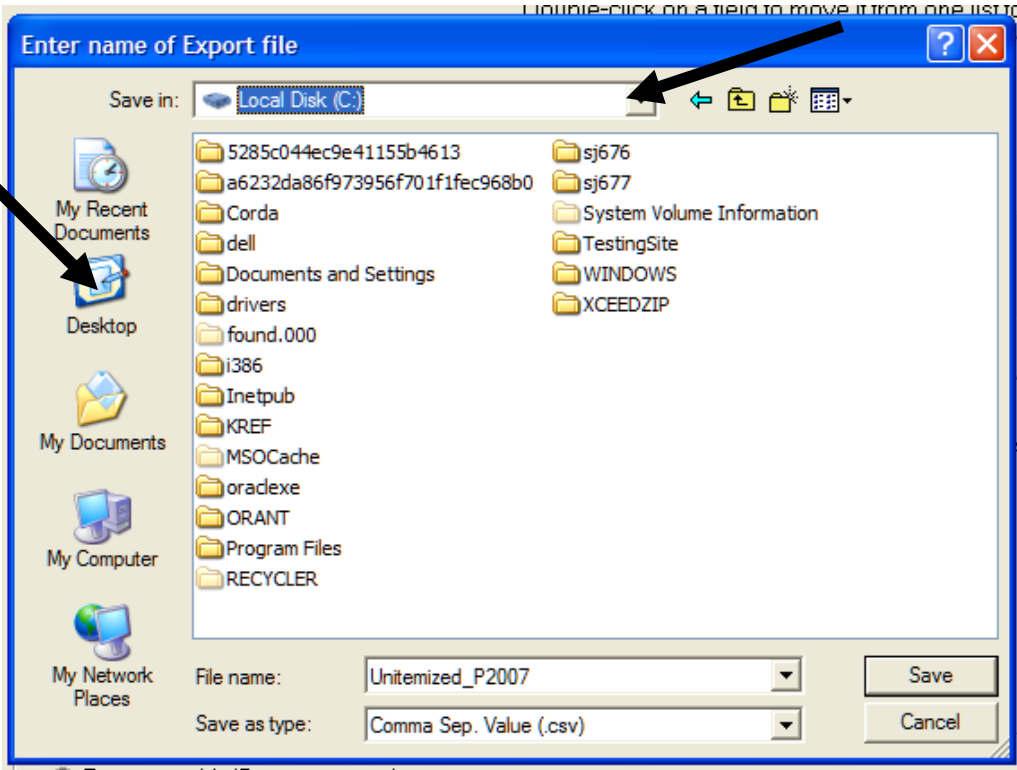


The default name given to the export is “Export.” To change the name, click in the file name box and key in a more descriptive name.

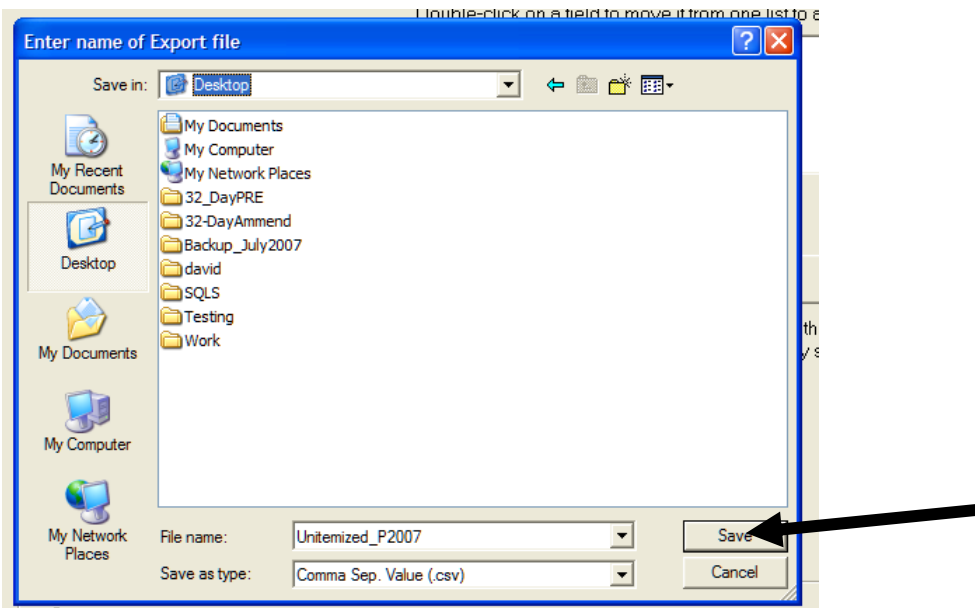


How to Create an Electronic File Using the Export Feature in Campaign ToolBox

To make the file easier to locate, choose to save the export to your desktop. To change your location either click on the Desktop icon to the left of the window, or click on the down arrow and choose Desktop.

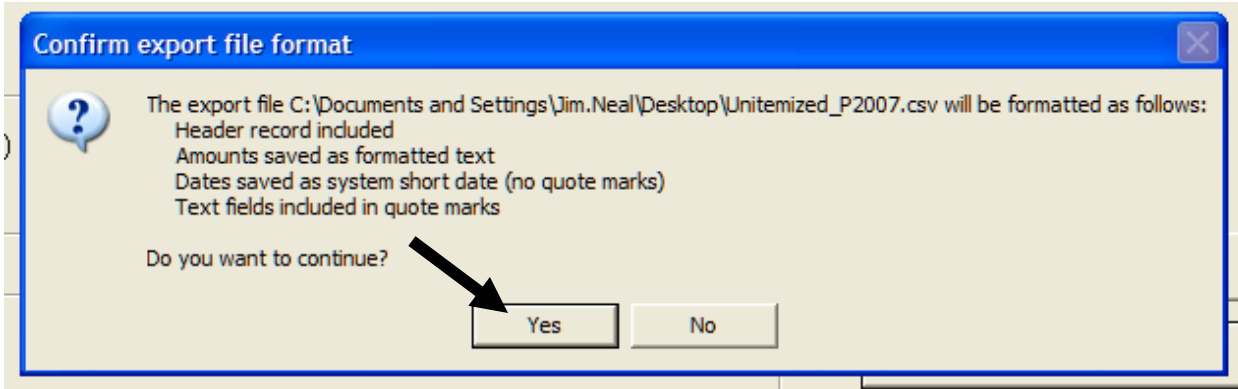


Click on "Save."

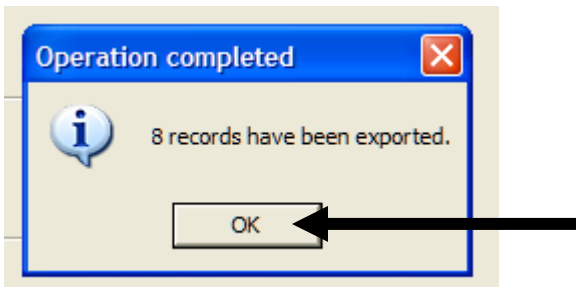


How to Create an Electronic File Using the Export Feature in Campaign ToolBox

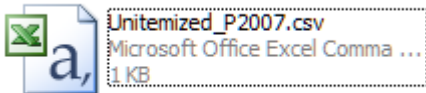
Confirm you want to export the file in the chosen format. Click “Yes.”



A message will appear informing you how many records were exported. Click “OK.”



Minimize or close Campaign ToolBox. Navigate to your Desktop and locate the export you just created. Double click on the file to open.



How to Create an Electronic File Using the Export Feature in Campaign ToolBox

Additional Contribution Export Fields and descriptions in addition to the Receipt Code:

TypeOfContribCode corresponds to Contribution Mode on the Contribution Screen.

- 1 Monetary
- 2 InKind
- 3 NSF

ReceiptTypeCode corresponds to Contribution Type Code on the Contribution Screen.

- 1 Direct
- 2 Loan
- 3 Fundraiser Person
- 4 Event – Fundraising
- 5 Transfer
- 6 Close Out Account
- 7 Miscellaneous