

Adjutant Software Customer Support Tech Notes

Document Title: Amended Reports - demographic information
Document Number: 020
Applies to: Campaign ToolBox - FLORIDA

SUMMARY

This Tech Note illustrates and describes how to create an amended report where a demographic field is being changed. A demographic field is anything that relates to the individual person or organization (name, address, etc.), and not to the transaction (date, amount, etc.). Screen captures are used to illustrate this process. The key to this type of amendment is understanding that you will end up with two demographic records for a single person - something that normally should not be done. This should be corrected after the report is submitted, but is necessary during the report creation process.

PROCEDURE

For this illustration, we will be changing the Occupation field from "Business Owner" (not allowed because it is not specific enough) to an accurate description of the contributor's occupation.

First step will be to set the original record (as originally reported) to "DEL Amend". We will make no other changes to this record. Begin by clicking on the menu item "Amend" at the top of the screen. A message box will appear - click on "OK" to close it. At that point, a new field will appear on the form as shown below.

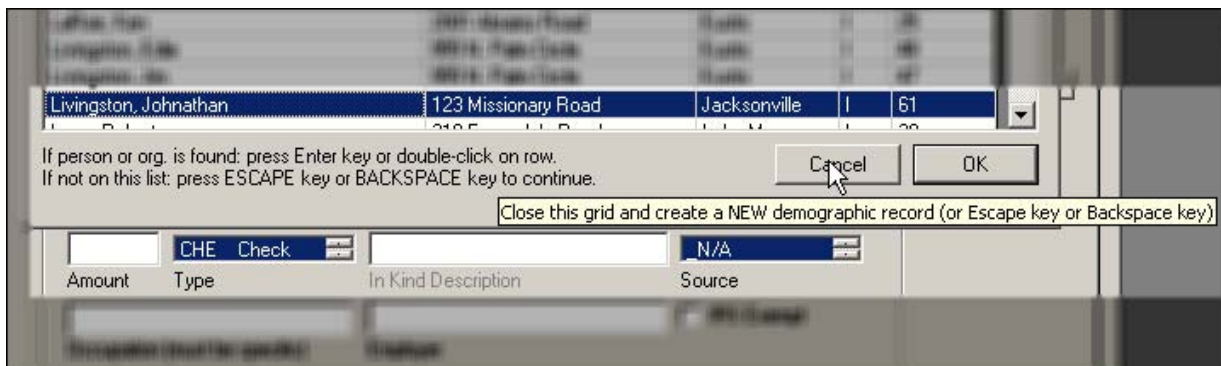
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Clicking on the new field will expose the items in that list. Scroll to the right to see a description of the items in the list. Double-click on “DEL Amend” to select it. It MUST be highlighted as shown in order to be selected. Click the “Save” button to save the change. After saving, you should still see the amendment field showing “DEL Amend”.



The next step will be to create a NEW RECORD with the correct occupation. You will enter all information as though it had never been entered before. You will NOT be selecting it from the look-up list.

Begin by clicking the “Add” button, change the date to the same date as originally reported (assuming that this was correct on the original report) and begin entering the name. The look-up list will appear, and the contributor will be on that list. **DO NOT** select from that list. Click on “Cancel” (or press the Escape or Backspace key).



Continue entering the information into the record. Make sure that you enter the **CORRECT** occupation (or whatever demographic field you are amending).

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At the top of the screen, click on the menu item “Amend”, and continue as you did on the “Delete” record, only this time double-click on “ADD Amend”. Click the “Save” button to save the record. The field should still be visible, and should still show “ADD Amend” as illustrated.

The screenshot shows a software window titled "Test.mdb - Contribution - Expire date = 12/31/2004". The window has three tabs: "Contribution", "More demographic", and "Association, misc.". The "Contribution" tab is active. The form contains the following fields and controls:

- Organization: [Empty]
- Date: 06/12/2004
- Livingston (Last Name), Johnathan (First Name), [Empty] (Mid Name), [Empty] (Suffix), Mr. (Prefix)
- 123 Missionary Road (Address - major (required)), Individual (Entity Type), Johnathan (Informal Name)
- [Empty] (Address - minor (optional))
- Jacksonville (City), FL (State), 33333 (Zip Code)
- 250.00 (Amount), CHE Check (Type), [Empty] (In Kind), [Empty] (Description), N/A (Source)
- Book Store Owner (Occupation (must be specific)), [Empty] (Employer)
- [Empty] (Comments (for this transaction))

On the right side of the form, there are buttons for "Add", "Save", "Cancel", and "Delete". Below these are navigation arrows: "<<", "<", ">", and ">>". At the bottom right, there is a button labeled "ADD Amend" with a mouse cursor pointing to it.

The record changes have now been completed, and you have one record marked “DEL” and one new record marked “ADD”.

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The next step is to actually create the Amendment report. From the blank screen, click on the menu item “Reports”, then select “Statutory Reports”. The Statutory Reports form will appear.

- Select the report type and the dates of the original report that is being amended.
- Check the box that says “Amendment report”.

Statutory Reports

Q1	First Quarter
Q2	Second Quarter
Q3	Third Quarter
Q4	Fourth Quarter
F1	First Primary, 32nd day prior
F1B	First Primary, Governor/Cabinet ONLY

04/01/2004 06/30/2004 Q2 11/02/2004
Start Date End Date Report Code Election Cycle Start Date

Amendment report
 Special election
 Address change
 Disband Pol. Comm.
 Disband CCE

Prepare Statutory report Cancel

Click on the “Prepare Statutory report” button to begin the report creation sequence. This will go exactly like a regular report except that you will be prompted for the record sequence numbers.

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Verify and change Sequence Numbers if needed.

- The sequence number for the “DEL” record must be the same as reported on the original report. Refer to your paper copy of the report to get that number.
- The sequence number for the “ADD” record will be the next available number. For example, if your original report had contributions going through sequence 000025, then the “ADD” record will be sequence 000026. Again, refer to your paper copy of the original report to get this number.

In most cases, the program will correctly assign these numbers automatically; however, if you have added and/or deleted records in that time period after creating the original report, it is possible that you will need to change the sequence numbers.

The Change Sequence Number form defaults to Contributions. If you are amending expenses, click on the “Expenses” option button to display the amended expense records. If a sequence number needs to be changed, select it from the list, enter the new sequence number in the “New Sequence Number” field, then click on “Change selected number”. When you are finished, click on the “Finished - Continue report” button.

Sequence	Date	Amend	Name
000004	06/12/2004	DEL	Livingston, Johnathan
000005	06/12/2004	ADD	Livingston, Johnathan

Amended records --> Sequence | Date | Amend | Name

Type of records to view / edit

Contributions
 Expenses
 Other Distributions
 Fund Transfers

New Sequence Number

Change selected number

Finished - Continue report

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The finished report will ONLY show records that are marked as “ADD” or “DEL”. Submit it just like you would for a regular original report. For an amended report, it may be helpful to also include the itemized printed reports along with the disk even if it is not required.

(5) Date	(7) Full Name (Last, First, Middle) Street Address & City, State, Zip Code	(8) Contributor		(9) Contributor Type	(10) In-kind Description	(11) Amendment	(12) Amount
(6) Sequence Number		Type	Occupation				
06/12/2004	Livingston, Johnathan 123 Missionary Road Jacksonville, FL 33333-0000	I	Business Owner	CHE		DEL	\$ 250.00
000004							
06/12/2004	Livingston, Johnathan 123 Missionary Road Jacksonville, FL 33333-0000	I	Book Store Owner	CHE		ADD	\$ 250.00
000005							

End of Tech Note