

Adjutant Software Customer Support Tech Notes

Document Title: Transitioning from Primary to General Elections
Document Number: TN-046
Applies to: Campaign ToolBox Kentucky

SUMMARY

Kentucky law treats a Primary election as completely separate from the General election that follows it. This Tech Note describes how to transaction from the Primary to the General and get funds moved from the Primary to the General.

PROCEDURE

Create a separate database file for the General election that includes the demographic information from the Primary, but none of the actual Contribution or Expense records.

1. Start Campaign ToolBox, and click on “Close this form” to take you to the blank screen.
2. Click on the menu item Tools > New data file with existing demographic records.
3. When prompted and asked if you want to continue, click “Yes”.
4. You will be prompted for a name for the new database file. Enter something meaningful so you can easily identify what the file contains.
5. A message box will appear saying that the new database file has been created. Click “OK”.
6. Click on the menu item File > Open, and select the file that you just created.
7. From the blank screen, click on Tools > Show Opening Form.
8. Click on the “Initial Program Setup” button and follow the prompts to use the file that you just created.
9. Keep click on “Next” until you get to the “Election Date” field.
10. Change the election date to the correct date for this election (we are assuming the General election).
11. Click “Next” and continue until you get to the “Filer Number” field.
12. You will be sent a new Filer Number by KREF for this new election. Enter that number here. Note that most campaigns will be creating the new database file before receiving the new Filer Number, since Filer Numbers for the General election usually don't go out until late August or early September. If that is the case here, enter a temporary number such as “11111” and then go back and change it when you receive your General Election Filer Number.
13. Click “Next” and continue until you get to the “Campaign Start Date” field. If you are setting this up for the General election, enter the day after the Primary.
14. Click “Next”, then click “Cancel/Close”.

Should you have a remaining debt or surplus in a previous database, you should remember to change over to that database any time you'll be entering transactions for that election. It is possible that you will still report on the old election at the same time you are reporting on the new election.

To get back to a previous database, Click on "File" at the top of the page. You should see currently used databases listed at the bottom. Just double click on the one you need to work in.

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Create a record to transfer funds from the Primary to the General. This will be classed as an “Other Receipt”. Here is how you do it:

1. Create a Contribution record with a date after the Primary election. You can use the name of the candidate or committee and the appropriate address information.
2. Enter the amount that is being transferred from the Primary to the General election, and select Monetary.
3. The Contribution Type Code will be “1 Direct”. Remember that items must be highlighted (typically in blue) in order for them to be selected. If an item appears, but is not highlighted in a color, it has not been selected.
4. For the Contributor Type Code, select “19 Other”
5. When “19 Other” is selected, the “Contrib Type 19 Description” field is enabled. Enter “Balance Transfer from Primary”.
6. Click Save.

The screenshot shows a web-based form for creating a contribution record. The form is divided into several sections. Red arrows point to the following fields:

- Date:** 07/20/2012
- City:** Anywhere
- Amount:** 12345.67
- Mode:** 1 MONETARY
- Contribution Type code:** 1 DIRECT
- Contrib Type 19 Description:** Balance Transfer from Primary
- Contributor Type Code:** 19 OTHER

The form also includes fields for Name of Candidate Or Committee, Organization, Last Name, First Name, Mid Name, Suffix, Prefix, Address - major (required), Address - minor (optional), Entity Type, Informal Name, Source, State, Zip Code, In Kind Descrip., Occupation, Employer, and PAC Interest. There is also an Amendment checkbox.

NOTES

- Make sure that when you are working on a database file, you are using the correct one. That is why it is so important to use descriptive names when naming your files.
- In some cases, you might be using both the Primary and the General election databases at the same time.
- The Registration information that you have for your Campaign ToolBox license will work on either of your database files.
- The Tech Support file CreatingaNewDatabase.pdf goes into more detail about creating the new database file.