



CAMPAIGN FINANCE eFILING SYSTEM

USER GUIDE FOR COMMITTEES

HOW TO UPLOAD INFORMATION USING THE EXCEL TEMPLATE

Four campaign finance reporting schedules are available to upload data using a formatted Excel template that must be downloaded from within the eFiling application. The maximum number of entries that can be uploaded for each schedule, using the Excel template, is 4,990 entries. The four schedules are:

- SCHEDULE A(1)(A) - MONETARY CONTRIBUTIONS RECEIVED FROM INDIVIDUALS - MORE THAN \$50 DURING ELECTION CYCLE
- SCHEDULE A(1)(D) - MONETARY CONTRIBUTIONS FROM POLITICAL ACTION COMMITTEES
- SCHEDULE B(1) - DISBURSEMENTS FOR OPERATING EXPENSES
- SCHEDULE B(2)(A) - MONETARY CONTRIBUTIONS TO CANDIDATE COMMITTEES

LOG ON TO THE CAMPAIGN FINANCE eFILING SYSTEM:

Go to <https://apps-secure.phoenix.gov/CampaignFinance/>

Select the ***eFiling tab and log on:***

Select ***Finance Reports:***

Political Committee Name	Political Committee Type	Status
YOUR MAYOR CHOICE	Candidate Committee	Current Status: Active
Address: 200 W Washington St Phoenix AZ 85003 Phone: (602)334-0002	Statement of Organization Last Filed Statement: 10/26/2017 2:30:20 PM Active	Finance Reports Amendment Terminate

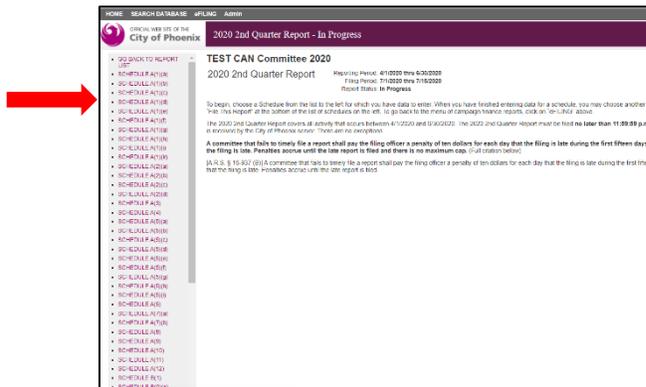
NAVIGATE TO THE REPORTING SCHEDULES:

Navigate to the report you would like to input data into by clicking on **Enter Data** for the Reporting Period Name:

Report Period Name	Filing Period Start	Report Due Date	Status	
Quarter 1, 2020 - PAC - AMENDMENT	1/1/2020 12:00:00 AM	2/7/2020 11:59:00 PM	In Progress	Enter Data

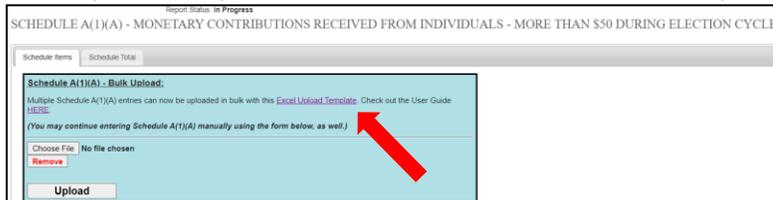
There are only four schedules available to upload data using the Excel template. All other schedules will accept entries by selecting the schedule and entering the data for each entry directly into the system, not using the template Excel.

Select one of the four reporting schedules from the list on the left side.

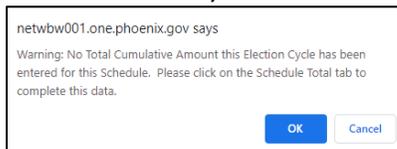


DOWNLOAD THE EXCEL TEMPLATE:

Click on **Excel Upload Template** to download and save the Excel template:



Click **OK** on the pop-up warning: “No total cumulative amount this election cycle has been entered for this schedule. The cumulative amount will need to be entered manually.” **NOTE:** The cumulative amount for this Election Cycle must be entered manually on each of the reporting schedules after the data is uploaded using the Excel template.



The Excel template will download. Open the file, go to FILE and SAVE AS, rename the file and save it to your PC.



The templates cannot be modified other than entering the required data. Fields in red, are required fields and must contain information prior to uploading. The fields highlighted in blue are format specific, the information entered into these fields must have the specific format requested. To assist with formatting, there is a 'Format Checker' in the last column to alert the user on whether the data entered is in the correct format or if there is a formatting issue that needs to be fixed prior to uploading.

Example: Schedule A(1)(a) Template

Schedule A(1)(a) Bulk Upload Template													
Complete this schedule, save it, and upload it to the Phoenix Campaign Finance database online at https://apps-secure.phoenix.gov/CampaignFinance/													
Fields in RED are REQUIRED Fields.							Fields highlighted in BLUE are format-specific. Incorrect formatting will cause the upload to be unsuccessful.						
First Name	Last Name	Address Line 1	Address Line 2	City	State	Zip Code	Occupation	Employer	Amount Received	Date Contribution	Cumulative Amount this	Cumulative Amount this	Format Checker
No Formatting Requirements	No Formatting Requirements	No Formatting Requirements	No Formatting Requirements	No Formatting Requirements	Format: Two-letter Uppercase Code	Format: Five-Digit Number	No Formatting Requirements	No Formatting Requirements	Format: Dollar Amount	Format: mm/dd/yyyy	Format: Dollar Amount	Format: Dollar Amount	(Please note: This tool only checks the FORMAT of your data, not the data itself.)
Karen	Candidate	123 E. Main St.	Apt 123	Phoenix	AZ	85003	Manager	Business Inc.	\$500.00	1/1/2020	\$500.00	\$500.00	Looks Good

Example of template formatting checker: Sample schedule with data entered in Excel template with correct and incorrect formatting. For the data to upload successfully all formatting issues need to be corrected prior to uploading. Example Issue: G13, incomplete zip code.

Schedule A(1)(a) Bulk Upload Template													
Complete this schedule, save it, and upload it to the Phoenix Campaign Finance database online at https://apps-secure.phoenix.gov/CampaignFinance/													
Fields in RED are REQUIRED Fields.							Fields highlighted in BLUE are format-specific. Incorrect formatting will cause the upload to be unsuccessful.						
First Name	Last Name	Address Line 1	Address Line 2	City	State	Zip Code	Occupation	Employer	Amount Received	Date Contribution	Cumulative Amount this	Cumulative Amount this	Format Checker
No Formatting Requirements	No Formatting Requirements	No Formatting Requirements	No Formatting Requirements	No Formatting Requirements	Format: Two-letter Uppercase Code	Format: Five-Digit Number	No Formatting Requirements	No Formatting Requirements	Format: Dollar Amount	Format: mm/dd/yyyy	Format: Dollar Amount	Format: Dollar Amount	(Please note: This tool only checks the FORMAT of your data, not the data itself.)
Karen	Candidate	123 E. Main St.	Apt 123	Phoenix	AZ	85003	Manager	Business Inc.	\$500.00	1/1/2020	\$500.00	\$500.00	Looks Good
ACIDJDF	CASDFSD	123 E JONES	23	PHOENIX	AZ	85021	MANG	ASDFC	\$800.00	2/8/2020	\$800.00	\$800.00	Looks Good
POMADLF	UVEJNN	2654	25	PHOEN	AZ	85025	OWNER	ASUJNPLKA	\$523.00	1/9/2020	\$523.00	\$523.00	Looks Good
ASDFAD	JASDKLFM	8800 N CENTRAL		phoenix	AZ	8521	JASDMFK	MASDFM	\$100.00	1/2/2020	\$100.00	\$100.00	Check your formatting in cell(s) G13

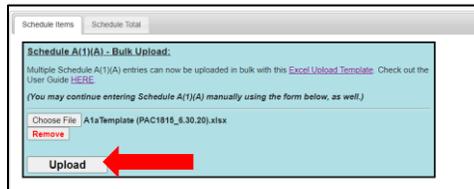
← CORRECT
← INCORRECT

BEGIN ENTERING DATA:

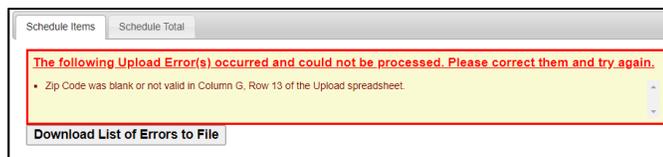
Open the saved template and begin inputting data. Once finished entering data, ensure all items on the 'Format Checker' look good (are shaded green). Save the completed Excel file.

UPLOAD BULK DATA:

Go back to the Campaign Finance eFiling System page for that schedule online. Click on **Choose File**, select the File Name for the Excel template you completed, then **Click Open**. The file name selected now appears next to the **Choose File**. Click on **Upload**.



Formatting Issue: If there is an issue with the data upload, an Upload Error message will appear along with a list of the issues identifying the Column and Row number needed to be fixed in the Excel file you completed. Return to the Excel file you completed and correct the formatting issue(s). Re-save the file. And click on **Upload** again.



No Formatting Issues: If the data formatting is correct, a list of all the records to be uploaded will display and you will have the option to **Cancel** or **Submit** the data. To view the **Cancel** or **Submit** options, scroll to the bottom of the table.

Are you ready to add the following data to your Financial Report?

Any changes to these records will need to be processed manually after submission.

First Name	Last Name	Address	Occupation	Employer	Amount Received	Reporting Period Total	Election Cycle Total	Received Date	Entry Date
AOIDDFD,	CASDFSDF	125P E JONES	MANG	ASDFC	850	850	850	02/08/2020	7/1/2020 3:29:58 PM
OKPOMADLFA.,	UYEJNN	25594	OWNER	ASIJWMFLKA	523	523	523	01/09/2020	7/1/2020 3:29:58 PM
ASDFAD	JIASDKLFM	9800 N CENTRAL	IJASDMFK	MASDFM	100	100	100	01/02/2020	7/1/2020 3:29:58 PM

Large data uploads may take several minutes.

phoenix.gov Accessibility Security and Privacy Statement Shop Phoenix
© Copyright 2020 City of Phoenix, all rights reserved

If you select to **Cancel**: you will go back to the Schedule currently being worked on and the uploaded data will not be uploaded.

If you select **Submit**: the data displayed on the table will be added to the schedule selected in a bulk upload. A message will display the number of records added successfully.

NOTE: Large data uploads may take several minutes. **Please do not double click the submit button**, that will duplicate the data upload. All **duplicated** uploaded records will need to be individually and manually removed by the user within the application.

Once a successful upload is completed, the user will see the following screen with this green header message.

Schedule Items | Schedule Total

3 Entries were successfully added to Schedule A(1)(A)!

Schedule A(1)(A) - Bulk Upload:
Multiple Schedule A(1)(A) entries can now be uploaded in bulk with this [Excel Upload Template](#). Check out the User Guide [HERE](#).
(You may continue entering Schedule A(1)(A) manually using the form below, as well.)

Choose File | No file chosen

The user may add manual entries, edit or remove records for any of the uploadable schedules within the application:

ADD NEW ENTRY

	First Name	Last Name	Address	Amount Received	Reporting Period Total	Election Cycle Total	Received Date	Entry Date	Edit
<input type="checkbox"/>	ASDFAD	JIASDKLFM	9800 N CENTRAL, phoenix AZ 85001	\$100.00	\$100.00	\$100.00	01/02/2020	07/01/2020	<input type="button" value="Edit"/>
<input type="checkbox"/>	OKPOMADLFA.,	UYEJNN	25594 25, PHX AZ 85525	\$523.00	\$523.00	\$523.00	01/09/2020	07/01/2020	<input type="button" value="Edit"/>
<input type="checkbox"/>	AOIDDFD,	CASDFSDF	125P E JONES 23, PHOENIX AZ 85021	\$850.00	\$850.00	\$850.00	02/08/2020	07/01/2020	<input type="button" value="Edit"/>
				Total: \$1,473.00	Total: \$1,473.00	Total: \$1,473.00			

1 | Display

Repeat for any other of the four template schedules with the bulk upload function. Remember to preview and file each report.

More information about other functionality and/or additional instructions can be found online in the [Campaign Finance eFiling User Manual](#).