

Electronic Financial Return (EFR)

Version 1.4

User Guide for
Registered Parties

Electronic Financial Return (EFR)

Version 1.4

User Guide for Registered Parties

CONTENTS

EFR USER GUIDE – POLITICAL PARTIES	4
POLITICAL PARTIES	4
<i>Getting Organized</i>	4
<i>Before Entering Information</i>	5
1.1.1.1 Import Text File of Contributions	5
<i>Viewing Political Parties</i>	8
1.1.1.2 Personnel Tab Page.....	8
<i>Viewing Profiles of a Political Party</i>	10
1.1.1.3 Profile Tab Page.....	10
<i>Adding A New Political Party (Fiscal Year End)</i>	11
1.1.1.4 New Parties	11
<i>Entering Financial Information (Fiscal Year End Method)</i>	21
1.1.1.5 Contributions – Post C24	21
1.1.1.5.1 The Add Contribution Returns Button.....	25
1.1.1.5.2 The Print Preview Button	29
1.1.1.6 Directed Contributions	30
1.1.1.6.1 The Print Preview Button	36
1.1.1.7 Loans.....	37
1.1.1.7.1 The Print Preview Button	42
1.1.1.8 Transfers In.....	43
1.1.1.8.1 The Print Preview Button	46
1.1.1.9 By-election Expenses	47
1.1.1.9.1 The Print Preview Button	50
1.1.1.10 Transfers Out.....	51
1.1.1.10.1 The Print Preview Button	55
1.1.1.11 Unpaid Claims	56
1.1.1.11.1 The Print Preview Button	59
1.1.1.12 Optional Expenses	60
1.1.1.12.1 The Print Preview Button	62
1.1.1.13 Budget Tool.....	63
1.1.1.13.1 The Print Preview Button	64
<i>Adding a New Political Party (Event Based)</i>	65
1.1.1.14 New Parties.....	65
<i>Entering Financial Information (Event Based Method)</i>	75
1.1.1.15 Limitation of Election Expenses	75
1.1.1.15.1 The Print Preview Button	76
1.1.1.16 General Election Expenses	77
1.1.1.16.1 The Print Preview Button	79
1.1.1.17 Unpaid Claims	80
1.1.1.17.1 The Print Preview Button	83
1.1.1.18 Budget Tool.....	84
1.1.1.18.1 The Print Preview Button	85

Index

EFR User Guide – Political Parties

Political Parties

Getting Organized

The Electronic Financial Returns (EFR) application allows political parties to electronically report on their financial transactions.

The EFR application also provides the ability to produce reports based on the information entered, as well as certain business forms.

Before you enter information into the Electronic Financial Returns (EFR) application, you must:

- familiarize yourself with the EFR application (refer to the **Getting Started with EFR** section in the **EFR – Overview** document)
- change the date settings within your desktop (refer to the **Setting the Date Before Using the EFR Application** section in the **EFR – Overview** document)
- specify a date for the political event (refer to the **Setting the Event Date and Details** section in the **EFR – Overview** document).

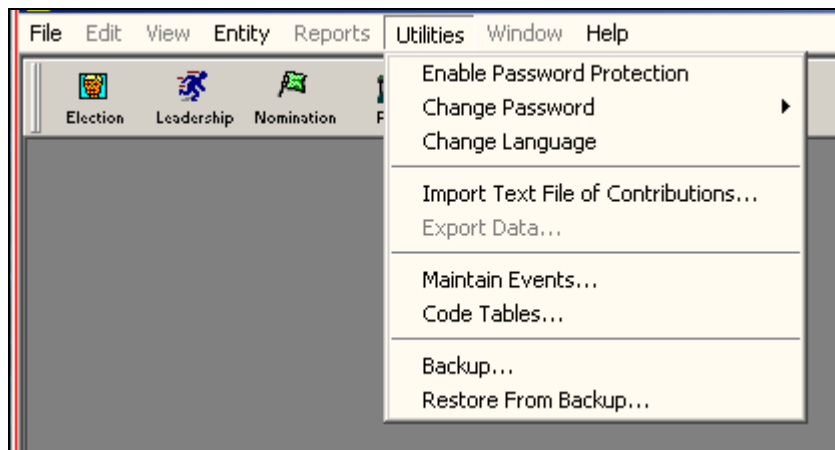
Before Entering Information

Before entering financial information into the EFR application, political parties must perform a specific import of the **Contributions** text file.

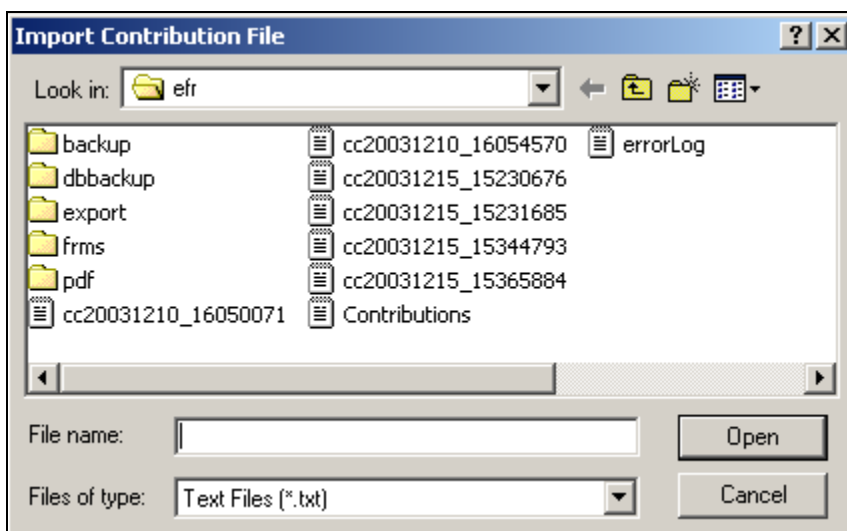
In the EFR application, you must perform the following steps prior to entering EFR data:

1.1.1.1 Import Text File of Contributions

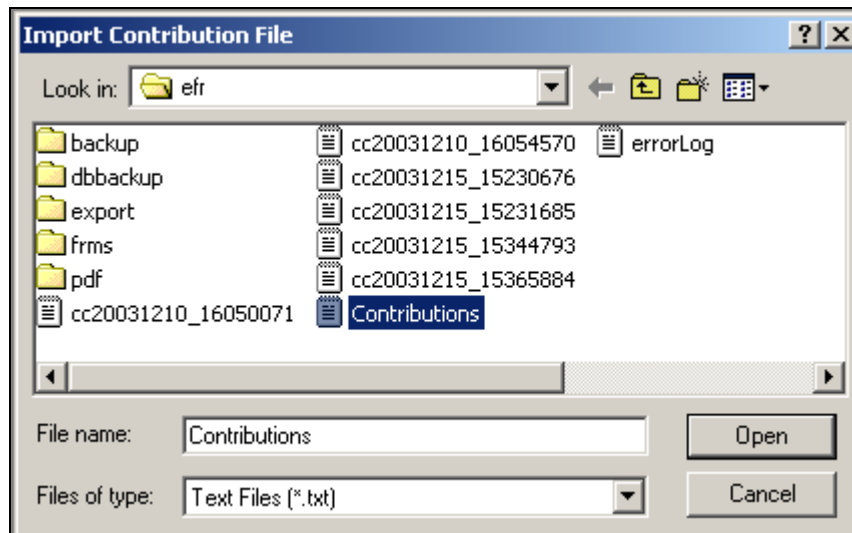
1. Click on the **Utilities** drop-down menu (as shown below).



2. Select **Import Text File of Contributions**. This **Import Contribution File** window will appear:



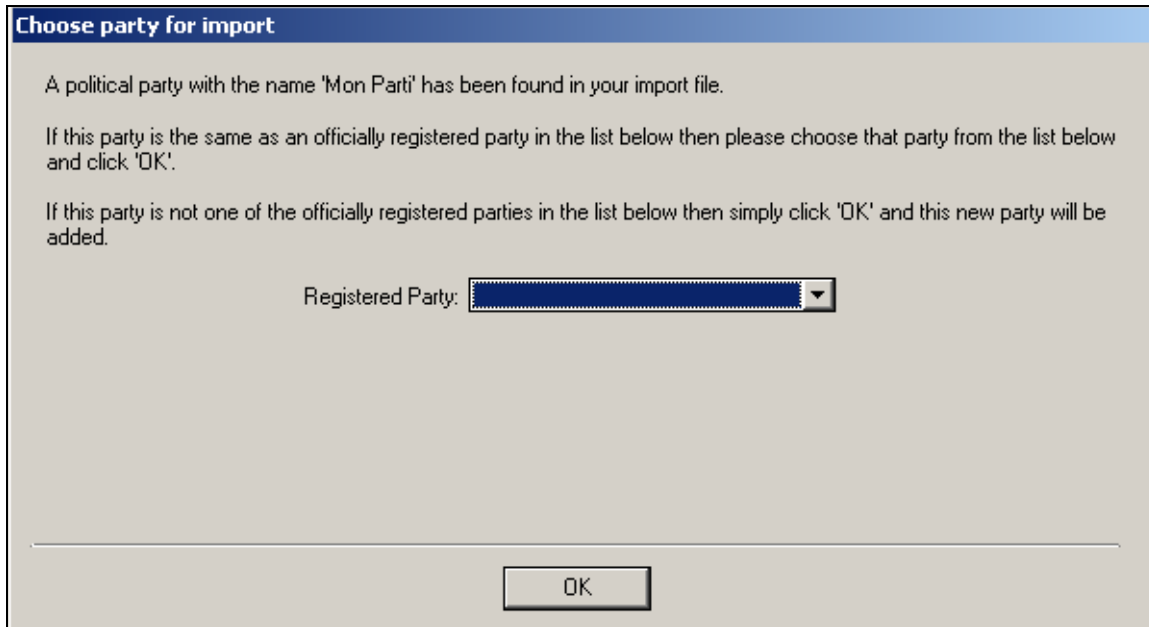
3. Select the **Contributions** text file and ensure that it is listed in the **File name** field (as illustrated below).



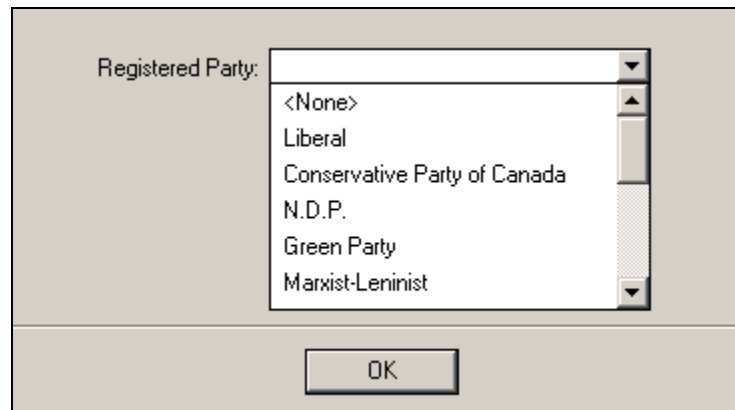
4. Click on the **Open** button. A new **Contribution Import** window will appear (as shown below).

Date	Amount	Name	Address	Other
2004-04-26	1	Bell	Peter	G DEF Corp 3567 Jameso
2004-04-26	1	Bell	Peter	A Anonymous/anonyme
2004-04-26	1	Bell	Peter	A Anonymous/anonyme
2004-04-26	1	Bell	Peter	A Anonymous/anonyme
2004-04-26	1	Bell	Peter	E Best Business 45 Bell St.
2004-04-26	1	Bell	Peter	A Kecheval Peter 89 Maple C
2004-04-26	1	Bell	Peter	A Cantley Jack 56 Lewisto
2004-04-26	1	Bell	Peter	A Coleman Cathy S 465 Maple C
2004-04-26	1	Bell	Peter	A Cooper Sharon 56 Katimav
2004-04-26	1	Bell	Peter	A Degras Estelle W 3 Terry Fc
2004-04-26	1	Bell	Peter	A Dranie Fred
2004-04-26	1	Bell	Peter	H HJ Platman Inc. 5 Katimav
2004-04-26	1	Bell	Peter	A Jameson Joe 57 Portmar
2004-04-26	1	Bell	Peter	A Jameson Katrina 57 Portmar
2004-04-26	1	Bell	Peter	A Jones Shari 78 Maple C
2004-04-26	1	Bell	Peter	A Jones Nancy 78 Tailor W
2004-04-26	1	Bell	Peter	A Laporte Jacques 456 Katimav
2004-04-26	1	Bell	Peter	A Lewis Larry 8 Montros
2004-04-26	1	Bell	Peter	A Lewis Lise 8 Montros

- Click on the **Import** button. A new **Choose party for import** window will appear (as illustrated below).



- Review the details in the **Choose party for import** window. If necessary, select an official registered party from the drop-down list, then click on the **OK** button (as shown below).



Note: You will return to the main EFR window after clicking on the **OK** button.

Viewing Political Parties

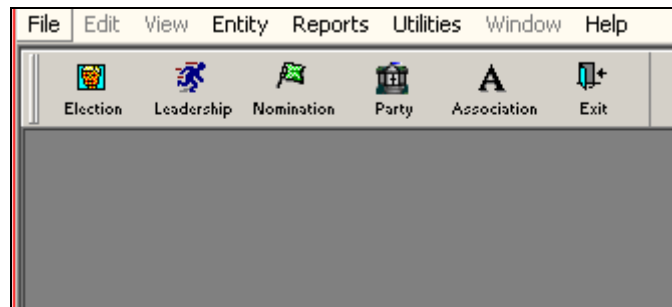
1.1.1.2 Personnel Tab Page

There are two (2) ways you can view political parties.

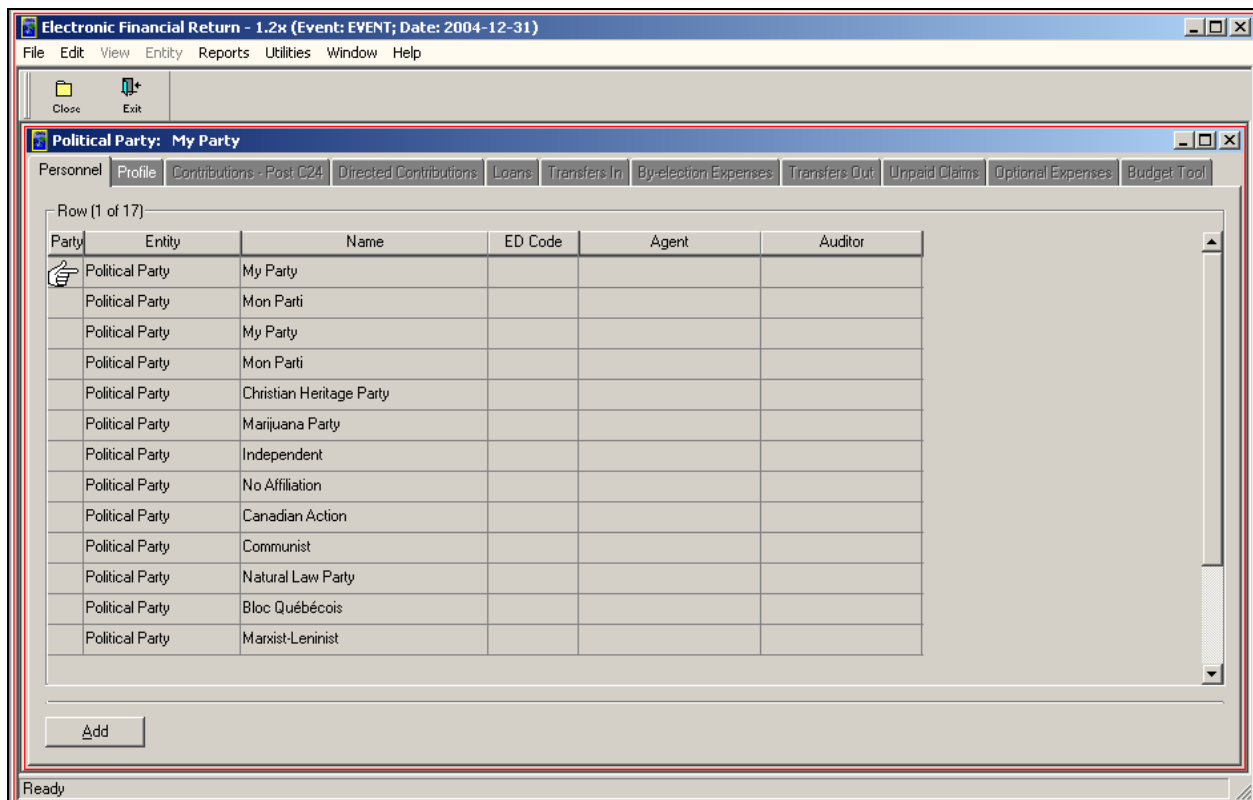
Start the EFR application (refer to **Starting the EFR Application** in the **EFR – Overview** document for additional details).

While in the EFR application, perform the following actions:

1. Click on the **Party** icon near the top centre of the EFR main window (as illustrated below).




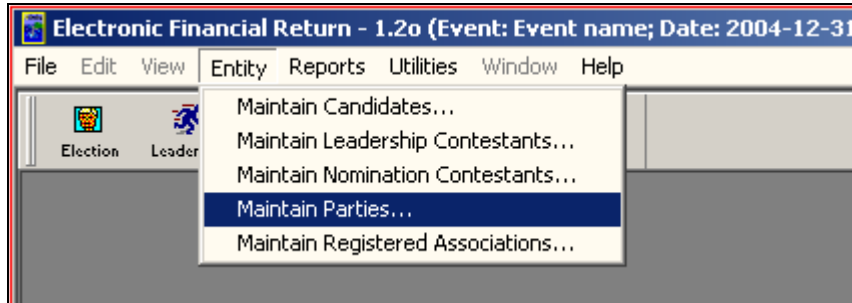
2. Another window will appear, listing all the political parties (see below).



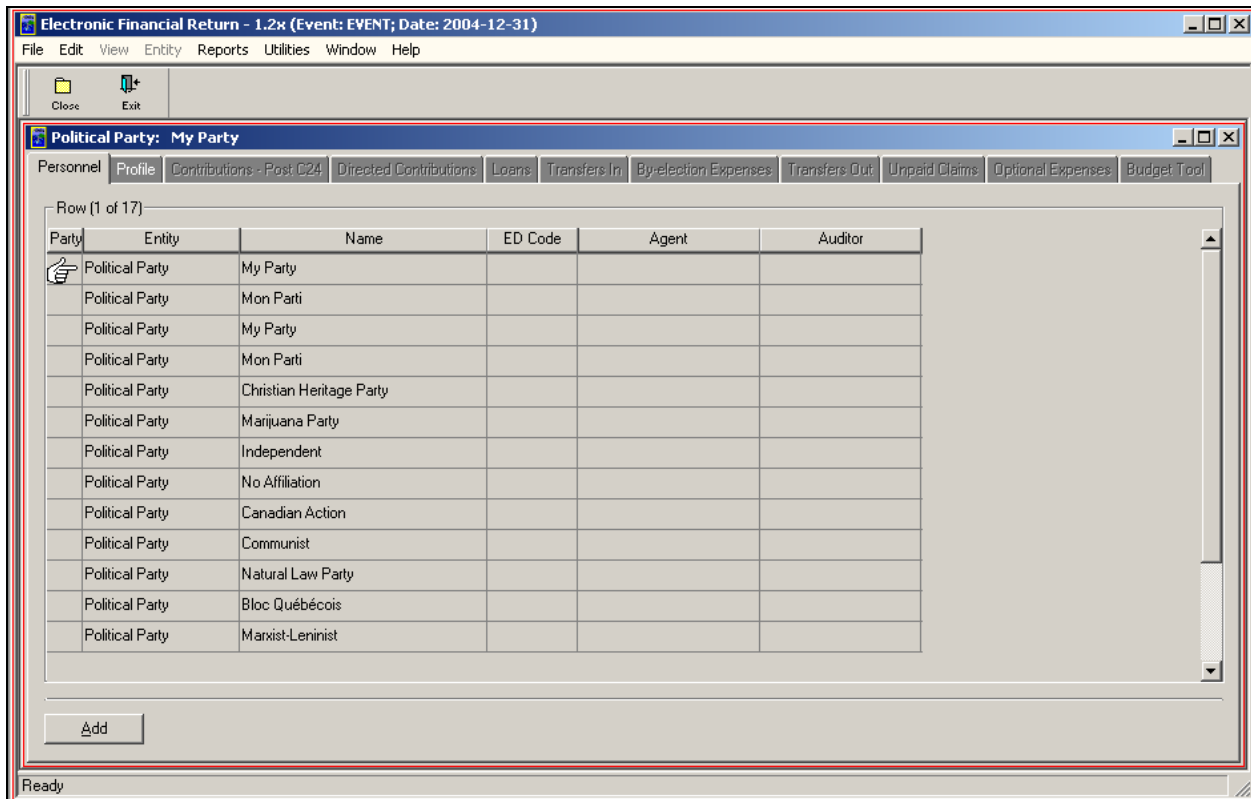
Note: The **Personnel** tab page is selected. A hand pointer indicates a political entity.



- Click on the **Close** () button to leave the **Personnel** tab page and return to the main EFR window.
- You can also view political parties by clicking on the **Entity** drop-down menu (refer to diagram below).



- Click on **Maintain Parties**. A list of all the political parties will appear (as described in step 2), as follows:



Note: The **Personnel** tab page is selected. A hand pointer indicates a political entity.

- Click on the **Close** button to leave the **Personnel** tab page and return to the EFR main window.

Viewing Profiles of a Political Party

1.1.1.3 Profile Tab Page

To view a political party's profile, carry out the following steps:

1. Click on the **Party** button or select the **Entity** drop-down menu, and select **Maintain Parties**.
The political party window will appear as follows:

The screenshot shows a window titled "Political Party: Natural Law Party" with a tabbed interface. The "Personnel" tab is selected, and the "Profile" sub-tab is active. Below the tabs is a table with 17 rows. A hand pointer icon is positioned over the 14th row, which is highlighted. The table columns are Party, Entity, Name, ED Code, Agent, and Auditor.

Party	Entity	Name	ED Code	Agent	Auditor
Political Party	My Party				
Political Party	Mon Parti				
Political Party	My Party				
Political Party	Mon Parti				
Political Party	Christian Heritage Party				
Political Party	Marijuana Party				
Political Party	Independent				
Political Party	No Affiliation				
Political Party	Canadian Action				
Political Party	Communist				
Political Party	Natural Law Party				
Political Party	Bloc Québécois				
Political Party	Marxist-Leninist				

An "Add" button is located at the bottom left of the window.

Note: The **Personnel** tab page is selected. A hand pointer indicates a political party. For this illustration, the selected party is the **Natural Law Party**.

2. Click on the **Profile** tab page to view the profile of the **Natural Law Party**.
The following window will appear:

The screenshot shows a window titled "Political Party: Parti de la loi naturelle: Natural Law Party" with a tabbed interface. The "Profile" tab is selected. The window contains several sections for data entry:

- Type:** Political Entity Type: [Political Party] (dropdown), Confirmation Date: []
- Relationships:** Agent <F2>: [<None>] (dropdown), Auditor <F3>: [<None>] (dropdown)
- Identification:** Name: [Natural Law Party]
- Information:** Street no.: [], Suite: [], Prov.: [] (dropdown), Street name: [], City: [], Postal Code: [], Home Tel.: [], Business Tel.: [], Business Tel Ext.: [], E-mail: []

Buttons for "Save", "Add", "Delete", and a printer icon are located at the bottom.

Note: The **Profile** tab page contains the following areas for the **Natural Law Party**:

- Type
- Identification
- **Information.**
- **Relationships.**

These areas are common to all the political parties listed on the **Personnel** tab page.

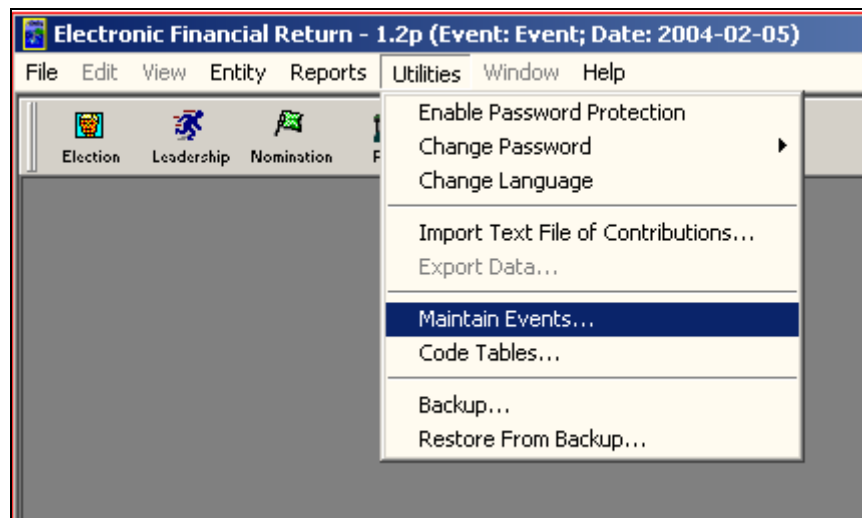
3. Click on the **Personnel** tab again. This will return you to the list of political parties.

Adding a New Political Party (Fiscal Year End)

1.1.1.4 New Parties

To add a new political party (based on a fiscal year end) within the EFR application, complete the following steps:

1. Click on the **Utilities** drop-down menu and select **Maintain Events** (as shown below).



2. Review the new **Maintain Events** window (as illustrated below).

Maintain Events

General

Row (0 of 0)

English Event Name	French Event Name	Event End Date	Event Type
--------------------	-------------------	----------------	------------

Save Add Delete

3. Click on the **Add** button. A new row will appear as follows:

Maintain Events

General

Row (1 of 1)

English Event Name	French Event Name	Event End Date	Event Type
<Event Name>	<Nom de l'événement>	2004-02-05	Election

Save Add Delete

4. Enter the name of the event in the **English Event Name** field (as shown below).

The screenshot shows a window titled "Maintain Events" with a "General" tab selected. Below the tab is a "Row (1 of 1)" label. The main area contains a table with one row. The first column is a pointer icon (a hand with the index finger pointing), and the second column is labeled "English Event Name" and contains the text "EVENT".

Note: For this illustration, **EVENT** is entered in the **English Event Name** field. You can also enter a description for the **French Event Name** field, if required.

5. Enter your fiscal year-end date (calendar) in the **Event End Date** field (as illustrated below).

The screenshot shows a close-up of a date field. The label "Event End Date" is above the field, and the date "2004-12-31" is entered in the field.

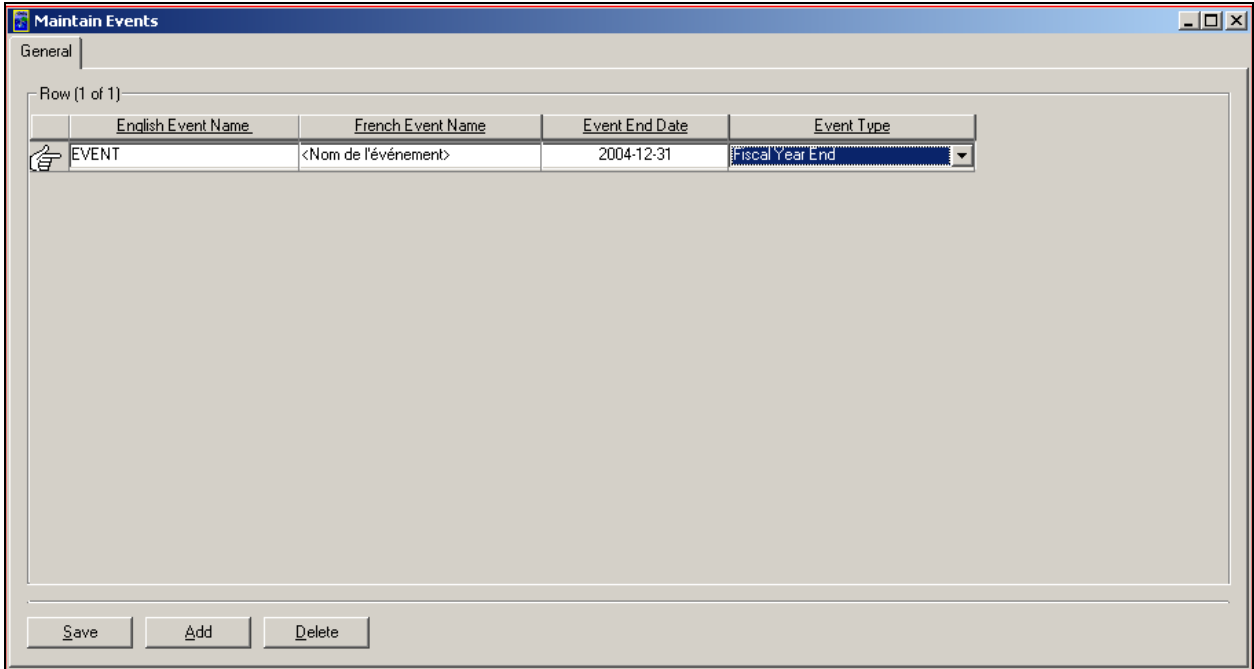
Note: You can enter a date manually, or you can use the built-in **Calendar** or the **Insert Today's Date** feature (by right-clicking on the date field). In this illustration, the date entered is **2004-12-31**

6. Select the event type by clicking on the down arrow next to the **Event Type** field (as shown below).

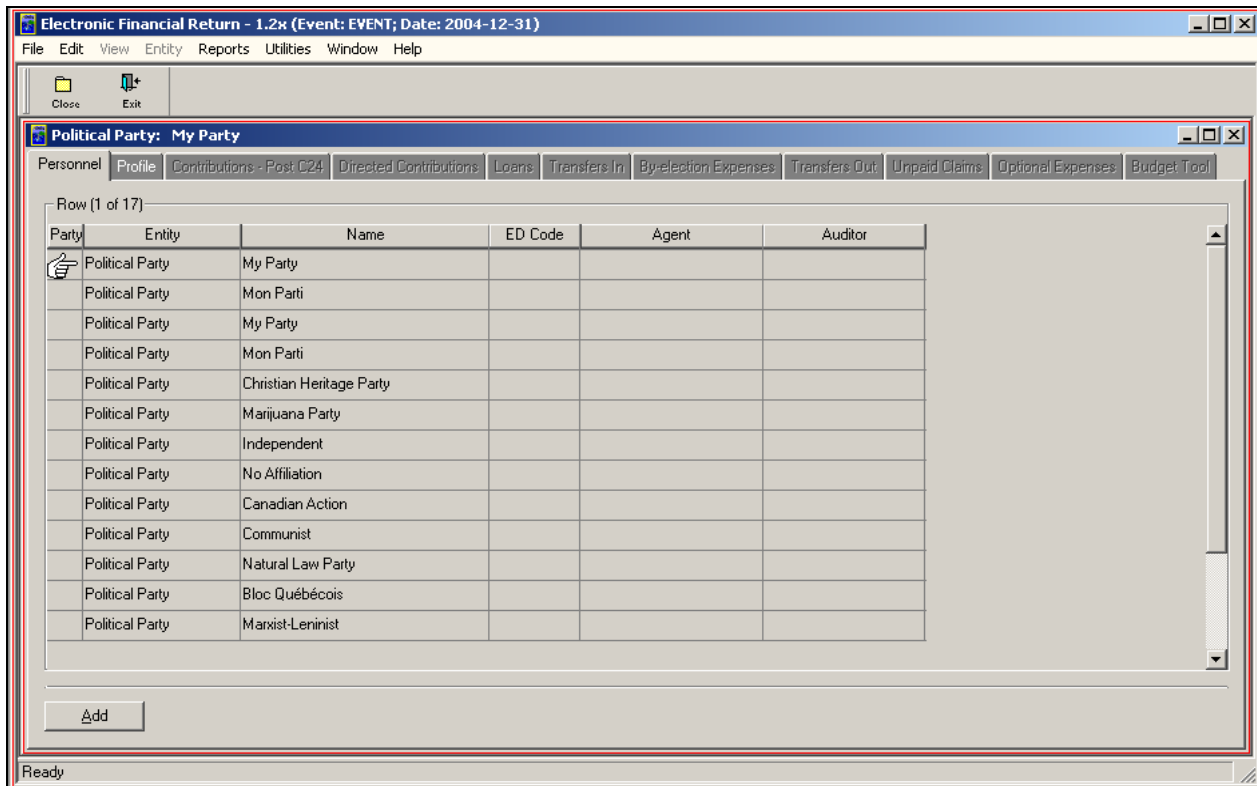
The screenshot shows a dropdown menu for the "Event Type" field. The menu is open, showing a list of options: "Fiscal Year End", "Election", "Fiscal Year End", "Contestant Leadership Contest", and "Contestant Nomination Contest". The "Fiscal Year End" option is highlighted in blue.

Note: For this illustration, the **Event Type** selected is **Fiscal Year End**.

7. Click on the **Save** button to save the entered information in the **General** tab page.



8. Click on the **Close** button to return to the EFR main window.
9. View the list of political parties on the **Personnel** tab page (refer to **Viewing Political Parties – Personnel Tab Page** on page 11 for details), as shown below.



10. Click on the **Add** button. A **New political entity** window will appear (as illustrated below).

Notes: Enter the political party's profile information (that is, complete the **Type**, **Identification**, **Information** and **Relationships** areas) in this window.

For this illustration, a new party by the name of **Canadian Blue Party** will be entered.

11. Ensure that the **Political Entity Type** field contains **Political Party** (as indicated below).

Note: You will not be able to edit or enter data in the **Type** area. Also, the **Confirmation Date** field will be blank.

12. Enter the **Name** of the political party in the **Identification** area (as indicated below).

Note: Only the underscored items in each section area are mandatory.

13. Enter the political party's **Street name**, **City**, **Prov**, **Postal Code**, etc., into the **Information** area, as illustrated below.

The screenshot shows a form titled "Information" with the following fields and values:

Street no.:	1	Street name:	Blue St.
Suite:		City:	Ottawa
Prov:	ON	Postal Code:	K2E 6J3
		Home Tel.:	
		Business Tel.:	
		Business Tel Ext.:	
		E-mail:	

Note: You can use your mouse or the **Tab** key on your keyboard to enter each field in the **Information** area.

You can obtain a list of provinces and territories by clicking on the down arrow located to the right of the **Prov** field. Select the appropriate province for your political party.

14. Enter the name of the **Agent** and **Auditor** of the political party in the **Relationships** area, as illustrated below.


The screenshot shows a form titled "Relationships" with the following fields and values:

Agent <F2>:	Torrence Louise	...
Auditor <F3>:	Whinsom Lisa	...

Notes: You can select a list of potential agents by clicking on the down arrow located to the right of the **Agent** field, or by pressing the **F2** key on your keyboard.

You can select a list of potential auditors by clicking on the down arrow located to the right of the **Auditor** field, or by pressing the **F3** key on your keyboard.


For this illustration, the agent and auditor selected are **Louise Torrence** and **Lisa Whinsom**.

If a certain agent is not contained in the list, you can create an agent or auditor by selecting **None** and by clicking on the **Details** () button. This new window will appear:

The 'New' dialog box contains the following fields:

- Type:** Contributor Type (dropdown menu)
- Identification:** Family Name, Given Name, Initials (text boxes)
- Information:** Street no., Suite, Prov. (dropdown), Street name, City, Postal Code, Home Tel., Business Tel., Business Tel Ext., E-mail (text boxes)

Enter the **Type**, **Identification** and **Information** of the agent, then click on the **OK** button.

If a certain auditor is not contained in the list, you can create an auditor by selecting **None** and by clicking on the **Details** () button. This new window will appear:

This is an identical screenshot of the 'New' dialog box described above, showing the same fields and layout.

Enter the **Type**, **Identification** and **Information** of the auditor, then click on the **OK** button.

15. Once you have entered all the information for the political party, click on the **Save** button (as illustrated).

Note: You can add another political party profile or delete the current political party's profile by clicking on the **Add** or **Delete** button.

16. Notice that the **New political entity** window has changed to **Canadian Blue Party**, and all the other tab pages have become “highlighted” in white (as shown below).

17. Click on the **Personnel** tab to the left of the current **Profile** tab page.

18. The **Personnel** tab page will indicate the new political party (in this case, the **Canadian Blue Party**) as having been created (as shown below).

Party	Entity	Name	ED Code	Agent	Auditor
Political Party	Political Party	Candian Blue Party		Louise Torrence	Lisa KL Whinson
Political Party	Political Party	My Party			
Political Party	Political Party	Mon Parti			
Political Party	Political Party	My Party			

Note: The hand pointer is to the left of the newly created political party. Also notice the name of the new political party and of its agent and auditor.

19. Click on the **Profile** tab page to return to the newly created political party (in this case, the **Canadian Blue Party**), as shown below.

Political Party: Candian Blue Party

Personnel Profile Contributions - Post C24 Directed Contributions Loans Transfers In By-election Expenses Transfers Out Unpaid Claims Optional Expenses Budget Tool

Type
Political Entity Type: Political Party
Confirmation Date:

Relationships
Agent <F2>: Torrence Louise
Auditor <F3>: Whinsom Lisa

Identification
Name: Candian Blue Party

Information
Street no.: 1 Street name: Blue St.
Suite: City: Ottawa
Prov: ON Postal Code: K2E 6J3
Home Tel.:
Business Tel.:
Business Tel Ext.:
E-mail:

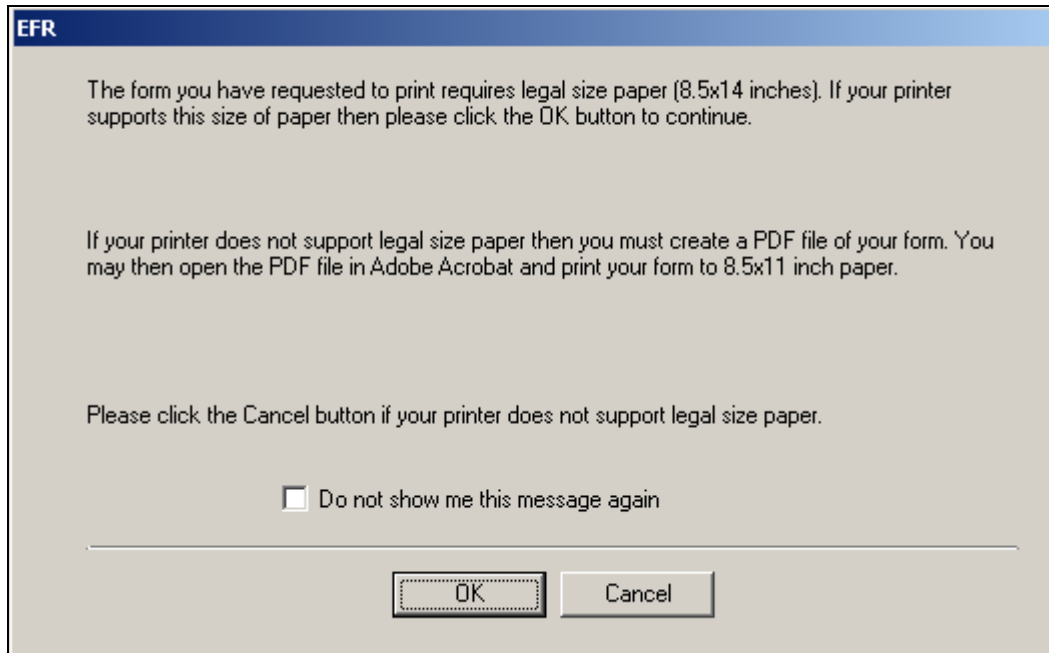
Save Add Delete

20. Click on the **Print Preview** () button.

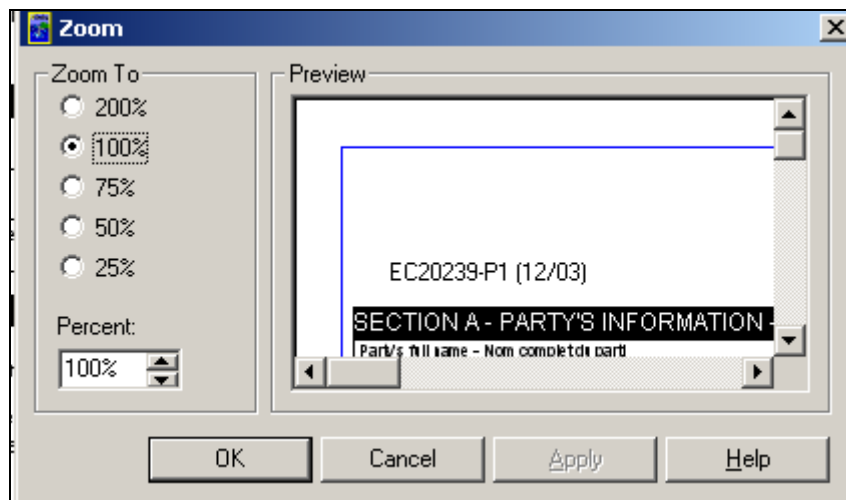
21. Review the EC 20239-P1 (**Registered Party Financial Transactions Return – Declaration**) form for the newly created political party.

22. Click on the **Print** button () to print the EC 20239-P1 form.

23. A new window will appear, prompting you about the paper size for your printer (as illustrated).



24. Click on the **OK** button to start the print job on your computer.
25. You can enlarge the view of the form by clicking on the **Zoom** button (as illustrated below).



26. Select the appropriate magnification to enlarge the view of the form.
27. Once you have selected the appropriate magnification, click on the **Apply** button, then the **OK** button, to examine the re-sized view of the EC 20239-P1 form.
28. Click on the **Close** button to return to the **Profile** tab page.
29. To close the EFR application entirely, click on the **Exit** button.

Entering Financial Information (Fiscal Year End Method)

1.1.1.5 Contributions – Post C24

To enter financial information within the **Contributions – Post C24** tab page, complete the following steps:

1. Select the **Contributions – Post C24** tab page for the political party (as illustrated below).

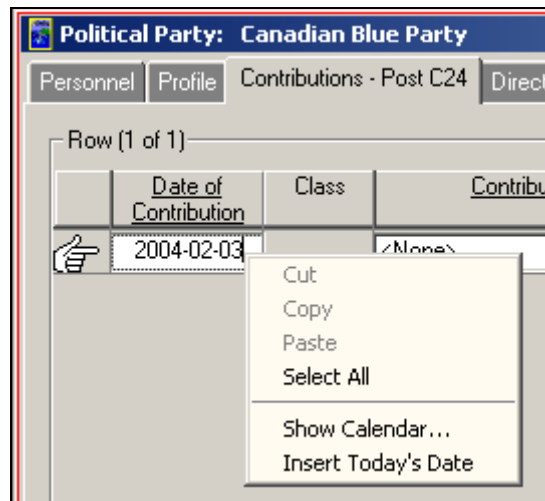
Date of Contribution	Class	Contributor	Details <F4>	Type	Amount	Est No Cont.	Print Receipt	Receipt Printed?
----------------------	-------	-------------	--------------	------	--------	--------------	---------------	------------------

Note: For this illustration, the selected political party is the **Canadian Blue Party**.

2. Click on the **Add** button. A new row will appear on the **Contributions – Post C24** tab page, as follows:

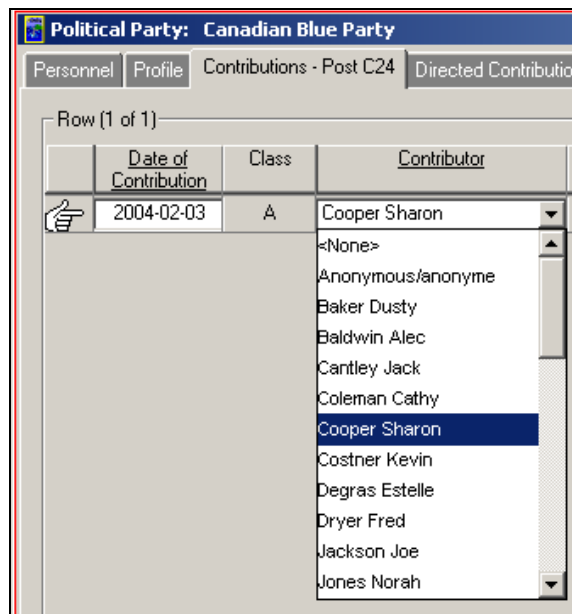
Date of Contribution	Class	Contributor	Details <F4>	Type	Amount	Est No Cont.	Print Receipt	Receipt Printed?
0000-00-00		<None>	...	Monetary	\$0.00		<input type="checkbox"/>	No

3. Enter a date in the **Date of Contribution** field. You can do this manually, or by using the built-in **Calendar**, or the **Insert Today's Date** feature (by right-clicking on the date field), as shown below.




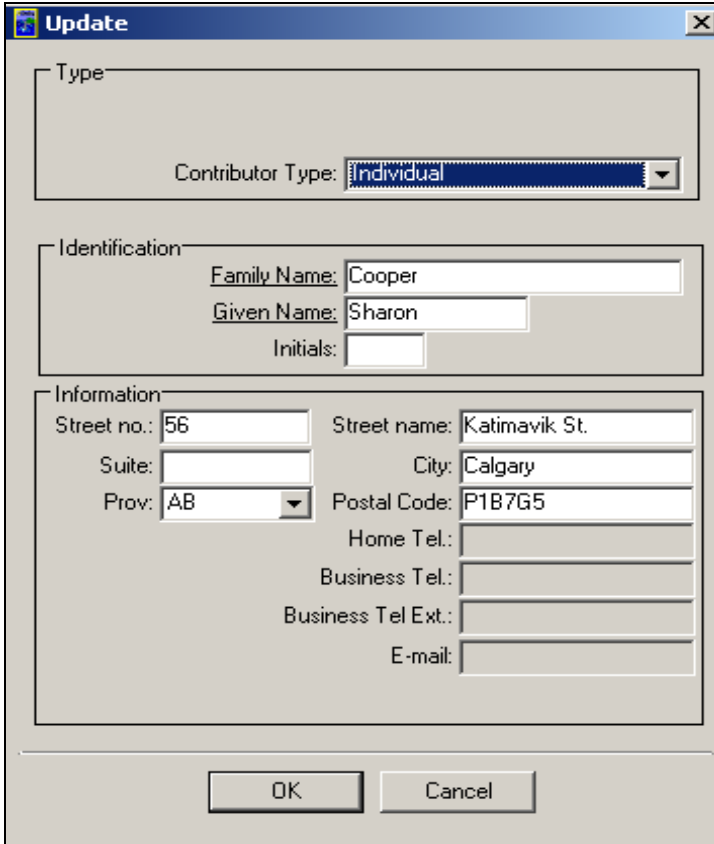
Note: Entering a date is mandatory. The **Date of Contribution** must be later than December 31, 2003.

4. Click on the drop-down arrow and select the appropriate **Contributor**.



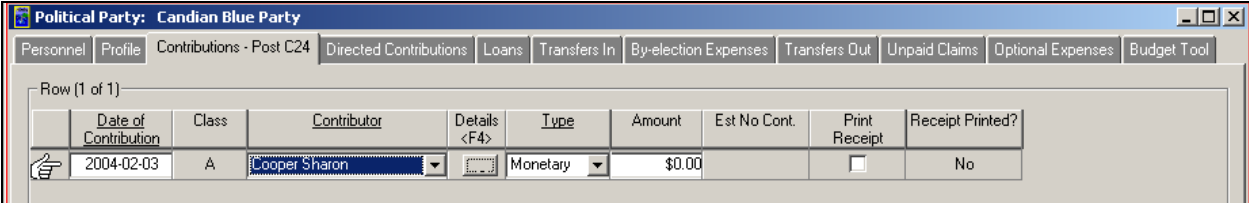
Notes: For this illustration, the selected **Contributor** is **Sharon Cooper**. You can create new contributors by selecting **None** using the drop-down arrow and by clicking on the **Details** button or pressing the **F4** key on your keyboard. A new window will appear, in which you can enter the contributor information (see step 5).

5. Click on the **Details** () button or press the **F4** key on your keyboard to view the **Type**, **Identification** and **Information** areas specific to the contributor (in this case, **Sharon Cooper**), as illustrated below.



Note: In this new window, three areas must be completed: **Type**, **Identification** and **Information**. Depending on the **Contributor Type** selected, mandatory fields in the **Identification** area will change. Mandatory fields are those marked with an underscore.

6. Click on the **OK** button to return to the **Contributions – Post C24** tab page (as shown below).



Date of Contribution	Class	Contributor	Details <F4>	Type	Amount	Est No Cont.	Print Receipt	Receipt Printed?
2004-02-03	A	Cooper Sharon		Monetary	\$0.00		<input type="checkbox"/>	No

Note: The newly created contributor (in this case, **Sharon Cooper**) is listed in the **Contributor** column.

7. In the **Type** field, select whether the contribution is monetary or non-monetary (as shown below).

A screenshot of a dropdown menu titled "Type". The menu is open, showing two options: "Monetary" and "Non-monetary". The "Monetary" option is highlighted in blue, indicating it is the selected value.

Note: For this illustration, the **Type** field selected is **Monetary**.

8. Enter an amount in the **Amount** field (as illustrated below).

A screenshot of a text input field labeled "Amount". The field contains the text "\$4,000.00".

9. Click on the **Save** button to save the information for the political party.
10. Place a check mark into the **Print Receipt** box (as illustrated below), then click on the **Save** button.

A screenshot of a software window titled "Political Party: Candian Blue Party". The window has several tabs: "Personnel", "Profile", "Contributions - Post C24", "Directed Contributions", "Loans", "Transfers In", "By-election Expenses", "Transfers Out", "Unpaid Claims", "Optional Expenses", and "Budget Tool". The "Contributions - Post C24" tab is active. Below the tabs, there is a table with the following data:

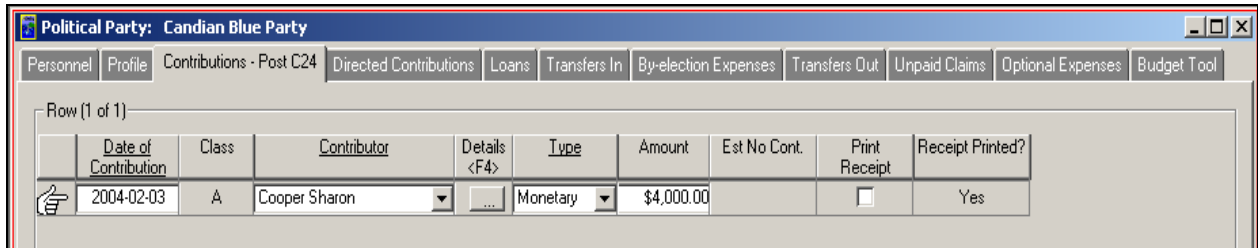
Row (1 of 1)									
	Date of Contribution	Class	Contributor	Details <F4>	Type	Amount	Est No Cont.	Print Receipt	Receipt Printed?
	2004-02-03	A	Cooper Sharon	...	Monetary	\$0.00		<input checked="" type="checkbox"/>	No

Note: This will allow you to print an official receipt using the **Print Contribution Receipt** button.

11. Click on the **Print Contribution Receipt** button.
12. You may be prompted to enter a password (as shown below).

A screenshot of a small dialog box titled "EFR". It contains a label "Password:" followed by a text input field. Below the input field are two buttons: "OK" and "Cancel".

13. Click on the **OK** button after entering the password.
14. The official receipt will be printed. You will notice that the **Print Receipt** check mark has disappeared and the **Receipt Printed?** column shows **Yes** (as shown below).

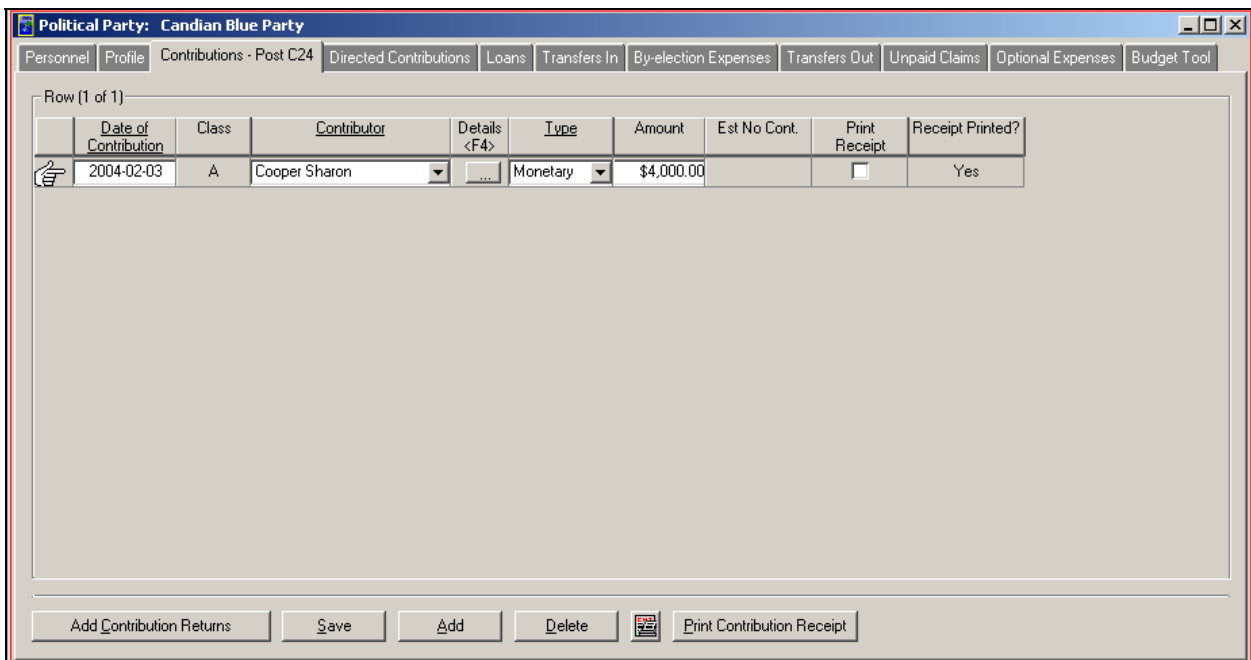


	Date of Contribution	Class	Contributor	Details <F4>	Type	Amount	Est No Cont.	Print Receipt	Receipt Printed?
	2004-02-03	A	Cooper Sharon	...	Monetary	\$4,000.00		<input type="checkbox"/>	Yes

1.1.1.5.1 The Add Contribution Returns Button

The **Add Contribution Returns** button provides for the return of a portion of the contribution to the original contributor or the Chief Electoral Officer.

1. Click on the **Add Contribution Returns** button (as illustrated below).



	Date of Contribution	Class	Contributor	Details <F4>	Type	Amount	Est No Cont.	Print Receipt	Receipt Printed?
	2004-02-03	A	Cooper Sharon	...	Monetary	\$4,000.00		<input type="checkbox"/>	Yes

Buttons: Add Contribution Returns, Save, Add, Delete, Print Contribution Receipt

2. Review the **Returned contributions from** window for the contributor (see below).

The screenshot shows a window titled "Returned contributions from: Cooper, Sharon". Inside the window is a table with three columns: "Date", "Amount", and "Returned to". The table is currently empty. Below the table are four buttons: "Save", "Add", "Delete", and "Close".

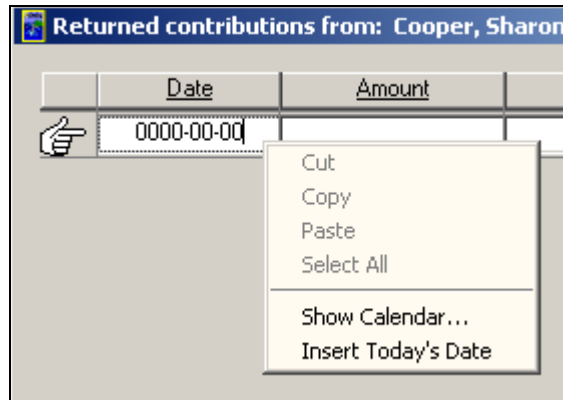
	Date	Amount	Returned to
--	------	--------	-------------

3. Click on the **Add** button. A new row will appear (as shown below).

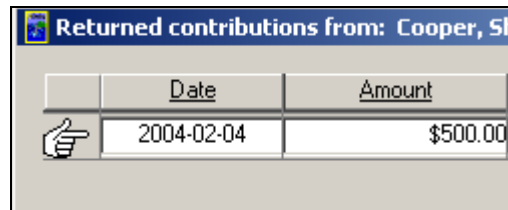
The screenshot shows the same window as above, but now a new row has been added to the table. The "Date" field contains "0000-00-00", the "Amount" field is empty, and the "Returned to" field is empty. A hand cursor is pointing to the "Date" field. Below the table are the same four buttons: "Save", "Add", "Delete", and "Close".

	Date	Amount	Returned to
Hand cursor	0000-00-00		

4. Enter a date in the **Date** field. You can do this manually, or by using the built-in **Calendar**, or by selecting **Insert Today's Date** feature (by right-clicking on the date field), as illustrated below.

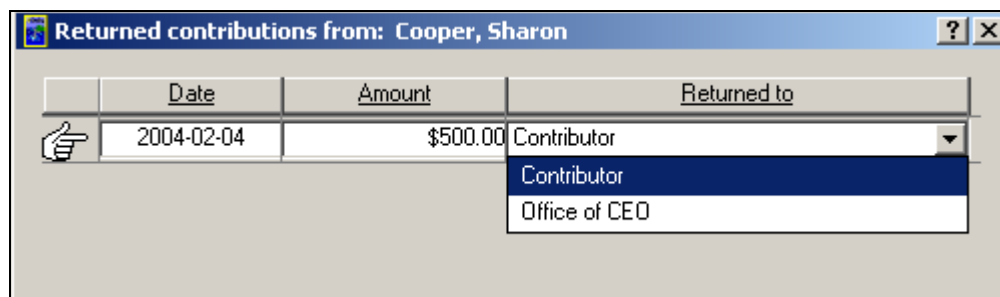


5. Enter the value of the returned contribution in the **Amount** field (as shown below).

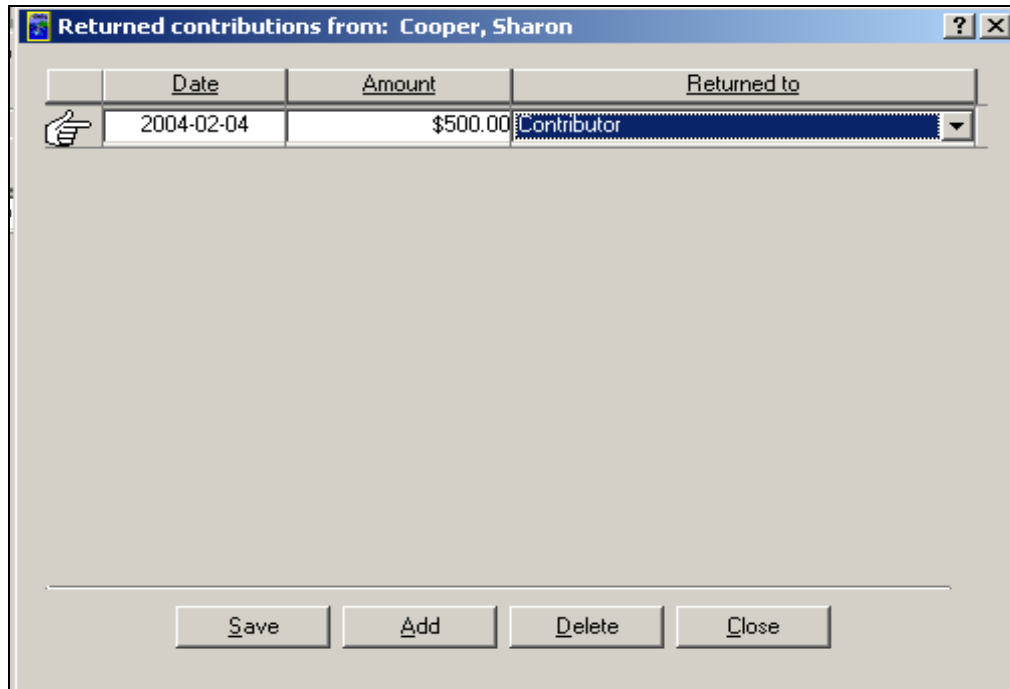


Note: The amount entered here cannot be greater than the original amount entered for the contributor.

6. Select either the **Contributor** or the **Office of CEO** for the **Returned to** field by clicking on the drop-down arrow (as illustrated below).

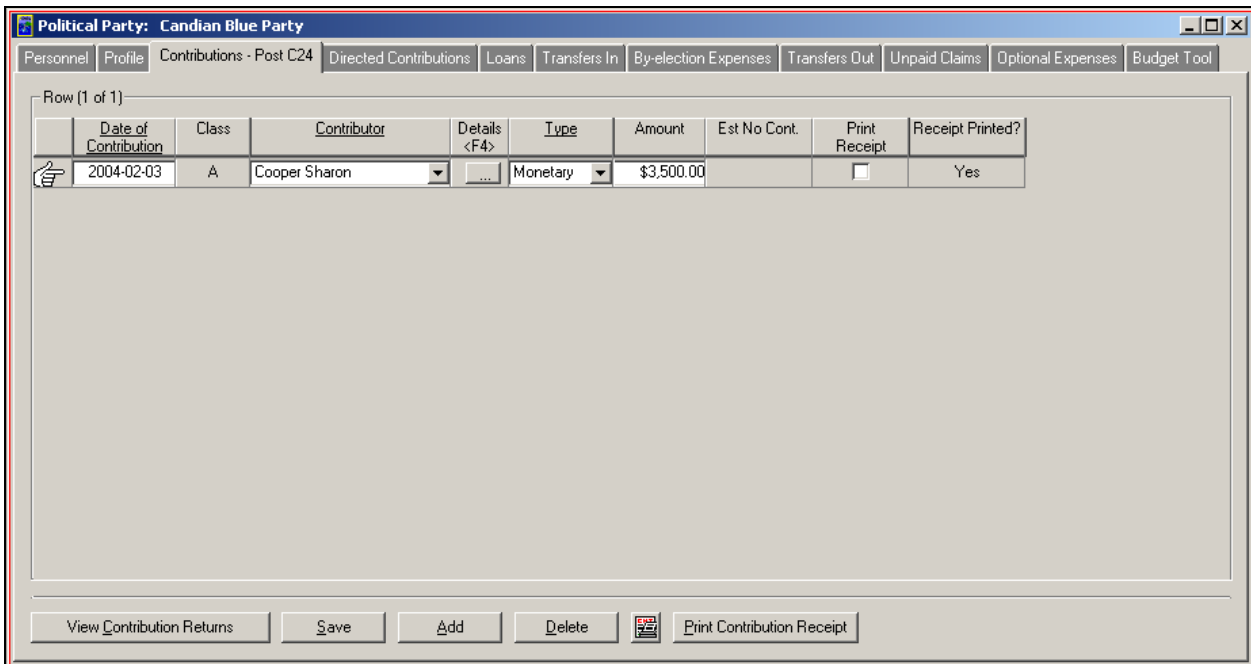


7. Review the information in the row, then click on the **Save** button (as shown below).



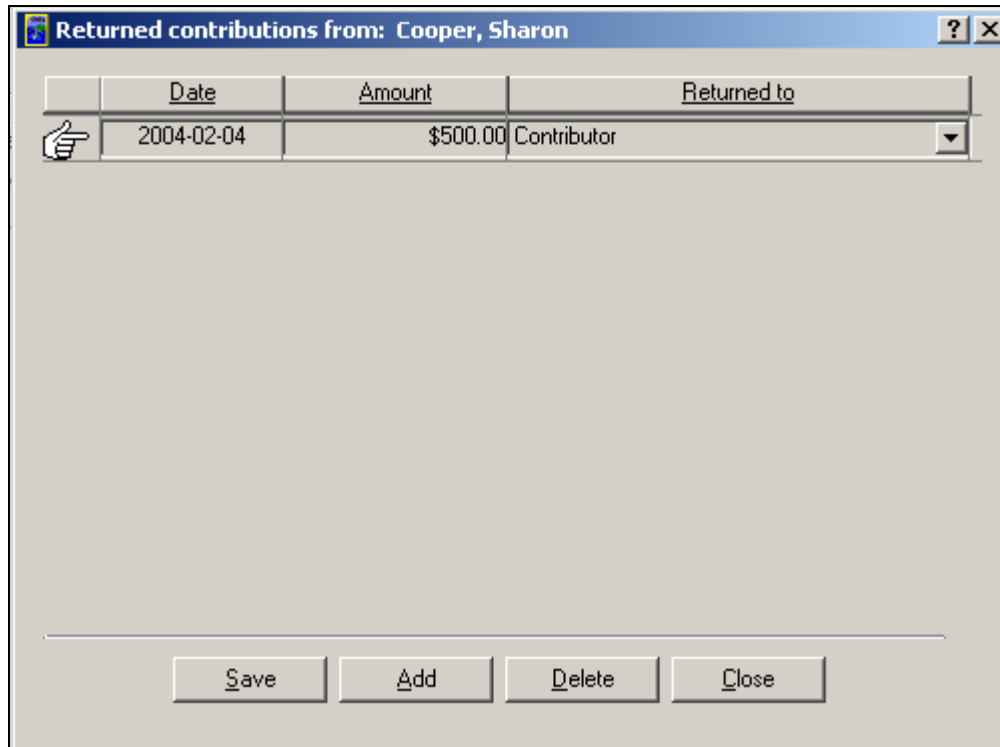
Note: The **Date** field of the returned contribution must not be earlier than the date of the original contribution.

- Click on the **Close** button to return to the **Contributions – Post C24** tab page (see below).



Note: The **Amount** column has been adjusted for the returned contributions.


- Click on the **View Contributions Returns** button to view the contributions returned to the contributor.

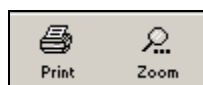



Note: Returned contributions can be added and deleted by using the **Add** and **Delete** buttons.

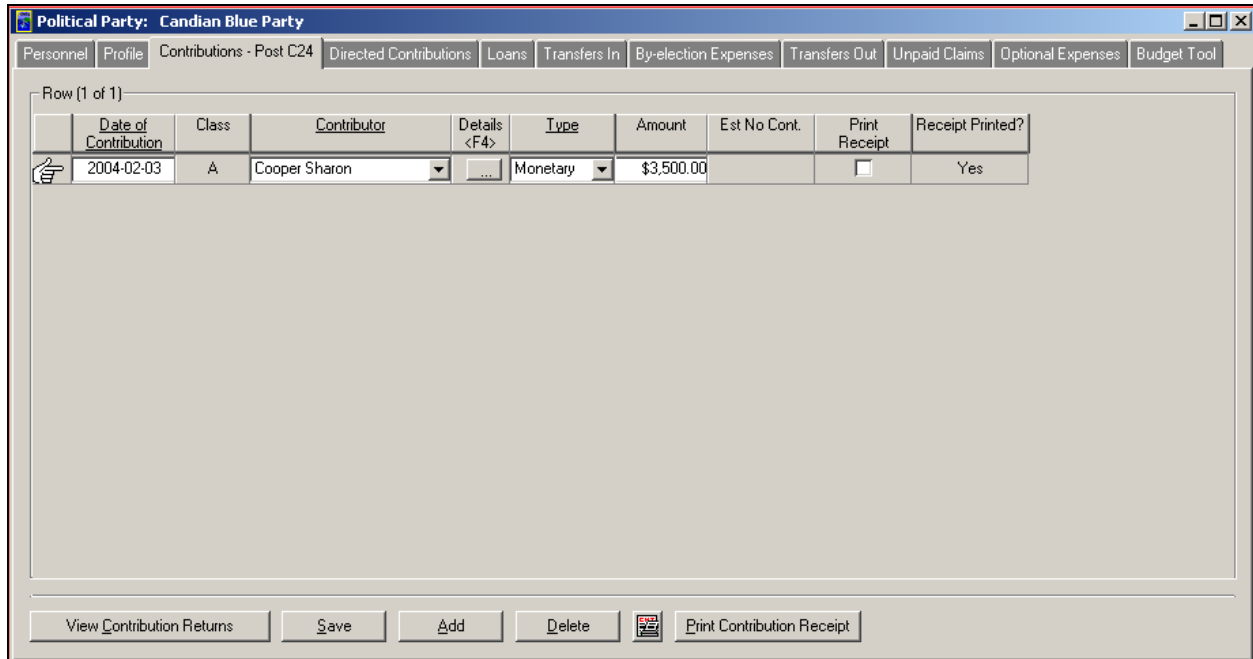
- Click on the **Close** button to return to the **Contributions – Post C24** tab page.

1.1.1.5.2 The Print Preview Button

- Click on the **Print Preview** () button.
- You will be able to view the EC 20239-P2a form, indicating the details of the **Statement of Contributions Received**.
- You can magnify and print this form by using the **Zoom** and **Print** buttons (as shown below).



4. Click on the **Close** button () to return to the **Contributions – Post C24** tab page (as shown below).



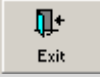
Political Party: Candian Blue Party

Personnel Profile Contributions - Post C24 Directed Contributions Loans Transfers In By-election Expenses Transfers Out Unpaid Claims Optional Expenses Budget Tool

Row (1 of 1)

	Date of Contribution	Class	Contributor	Details <F4>	Type	Amount	Est No Cont.	Print Receipt	Receipt Printed?
	2004-02-03	A	Cooper Sharon	...	Monetary	\$3,500.00		<input type="checkbox"/>	Yes

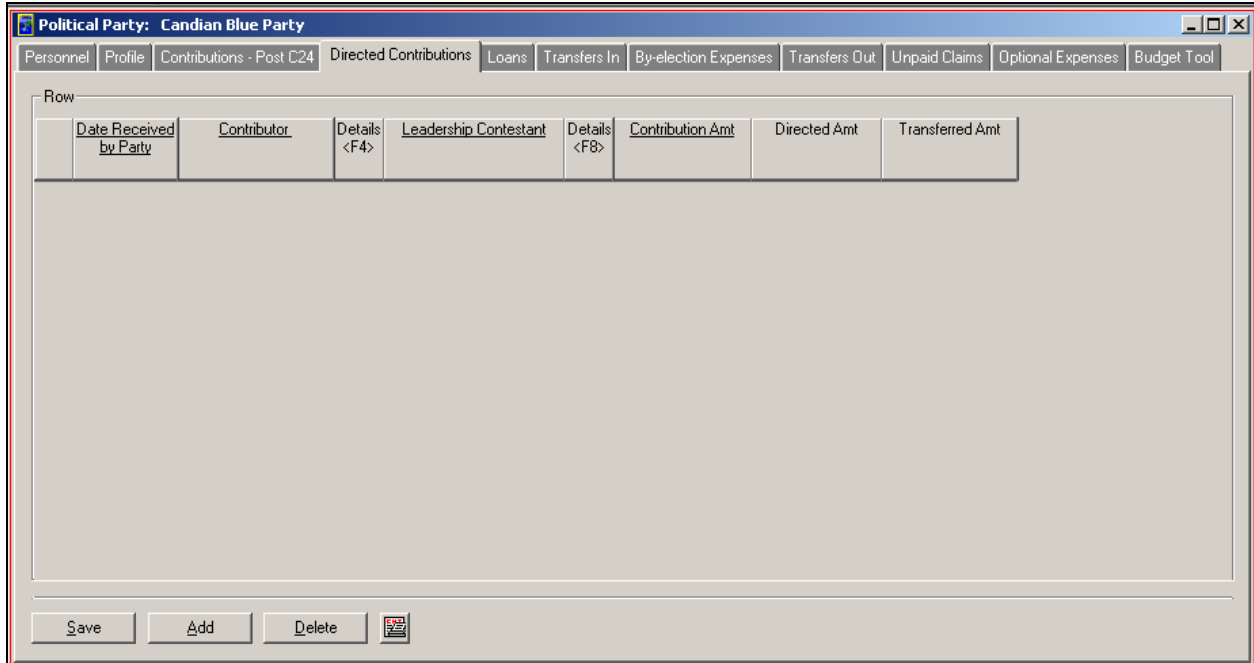
View Contribution Returns Save Add Delete Print Contribution Receipt

Note: Clicking on the **Exit** button () closes the EFR application entirely.

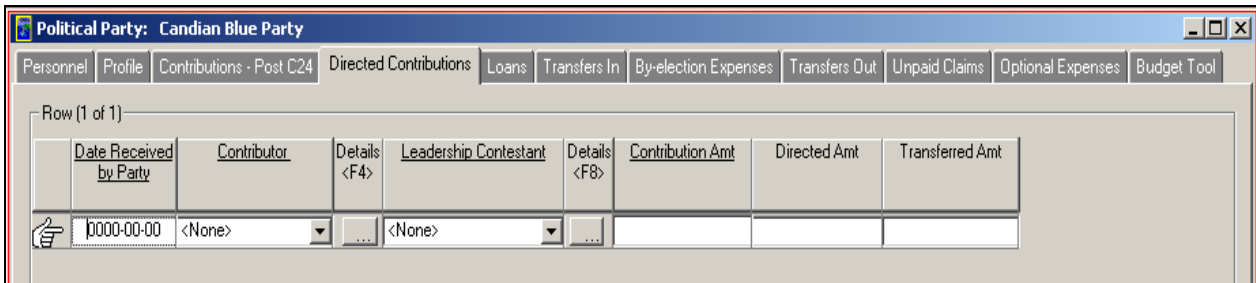
1.1.1.6 Directed Contributions

To enter financial information within the **Directed Contributions** tab page, complete the following steps:

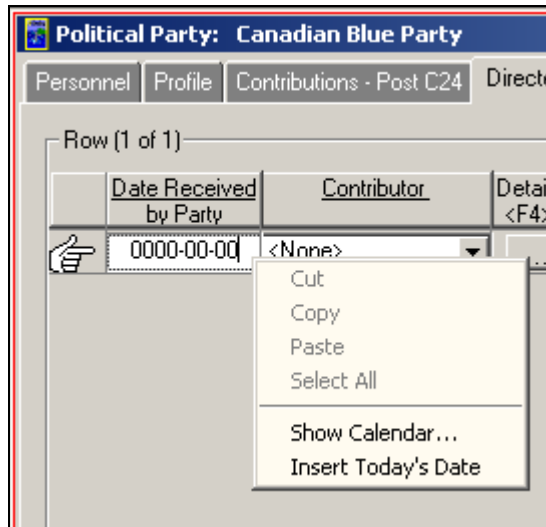
1. Select the **Directed Contributions** tab page for the political party (as illustrated below).



2. Click on the **Add** button. A new row will appear (as illustrated below).




3. Enter a date into the **Date Received by Party** field (as illustrated).



Note: You can enter the date in one of three ways: manually, or by using the built-in **Calendar**, or by selecting the **Insert Today's Date** feature (by right-clicking on the date field).

4. Ensure that **None** is selected in the **Contributor** field (as shown below).



5. Click on the **Details** () button or press the **F4** key on your keyboard. This new window will appear:



6. In the new window, enter the details for the contributor (as illustrated below).

The 'Update' dialog box contains the following fields:

- Type:** Contributor Type: Individual (dropdown menu)
- Identification:**
 - Family Name: Woodburn
 - Given Name: Janet
 - Initials: H
- Information:**
 - Street no.: 46
 - Street name: Elm St.
 - Suite: (empty)
 - City: Calgary
 - Prov.: AB (dropdown menu)
 - Postal Code: P1B7G5
 - Home Tel: (empty)
 - Business Tel: (empty)
 - Business Tel Ext.: (empty)
 - E-mail: (empty)

Buttons: OK, Cancel

Note: For this illustration, a contributor by the name of **Janet Woodburn** was created. The mandatory fields in this window are marked with an underscore.


7. Click on the **OK** button to save the information for the contributor. You will return to the **Directed Contributions** tab page, and the newly created contributor will be illustrated (as shown below).

The 'Political Party: Canadian Blue Party' window shows the 'Directed Contributions' tab. The table below displays the contribution data:

Row (1 of 1)			
	Date Received by Party	Contributor	Details <F4>
	2004-02-04	Woodburn, Janet	

8. Ensure that **None** is selected in the **Leadership Contestant** field (see below).

Political Party: Canadian Blue Party						
Personnel		Profile	Contributions - Post C24	Directed Contributions	Loans	Transfers In
Row (1 of 1)						
	Date Received by Party	Contributor	Details <F4>	Leadership Contestant	Details <F8>	
	2004-02-04	Woodburn Janet	...	<None>	...	

9. Click on the **Details** () button or press the **F8** key on your keyboard. This new window will appear:

Update

Type

Political Entity Type: Leadership Contestant

Contributor Type: Individual

Identification

Family Name: Potvin

Given Name: Jacques

Initials:

Information

Street no.: Suite: Prov: Street name: City: Postal Code: Home Tel.: Business Tel.: Business Tel Ext.: E-mail: Electoral District:

OK Cancel

Note: The **Political Entity Type** field has automatically defaulted to **Leadership Contestant**. For this illustration, an individual selected is **Jacques Potvin**. The mandatory fields in this window are marked with an underscore.

10. Click on the **OK** button to return to the **Directed Contributions** tab page.

Date Received by Party	Contributor	Details <F4>	Leadership Contestant	Details <F8>	Contribution Amt	Directed Amt	Transferred Amt
2004-02-04	Woodburn Janet		Polvin Jacques				


11. Enter a contribution amount in the **Contribution Amt** field (as shown below).

12. Enter a directed amount in the **Directed Amt** field (see below).

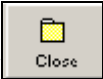
13. Enter a transferred amount in the **Transferred Amt** field (as illustrated below).

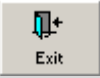
14. Click on the **Save** button to save the directed contributions information.

1.1.1.6.1 The Print Preview Button

1. Click on the **Print Preview** () button.
2. You will be able to view the EC 20239-P2b form (**Statement of Directed Contributions Received and Transferred to a Leadership Contestant**).
3. You can magnify and print this form by using the **Zoom** and **Print** buttons, as shown below.



4. Click on the **Close** () button to return to the **Directed Contributions** tab page.

Note: Clicking on the **Exit** button () closes the EFR application entirely.

1.1.1.7 Loans

To enter financial information within the **Loans** tab page, complete the following steps:

1. Select the **Loans** tab page for the political party (as illustrated below).

Political Party: Candian Blue Party

Personnel Profile Contributions - Post C24 Directed Contributions **Loans** Transfers In By-election Expenses Transfers Out Unpaid Claims Optional Expenses Budget Tool

Row

	Date Received	Lender	Details <F6>	Guarantor	Details <F7>	Rate	Principal of Loan
--	---------------	--------	--------------	-----------	--------------	------	-------------------

Save Add Delete

2. Click on the **Add** button. A new row will appear, as follows:

Political Party: Candian Blue Party

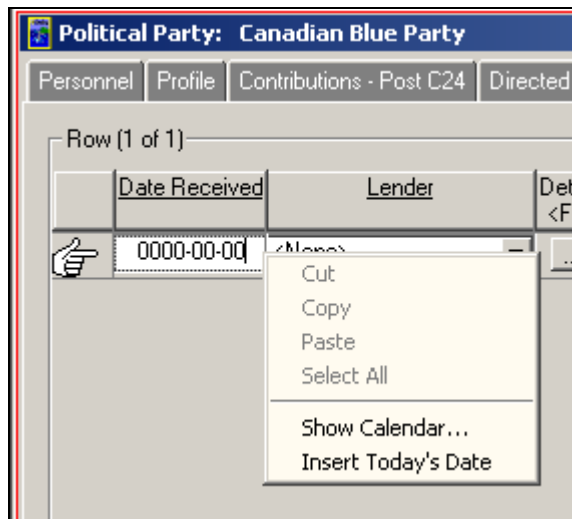
Personnel Profile Contributions - Post C24 Directed Contributions **Loans** Transfers In By-election Expenses Transfers Out Unpaid Claims Optional Expenses Budget Tool

Row (1 of 1)

	Date Received	Lender	Details <F6>	Guarantor	Details <F7>	Rate	Principal of Loan
	0000-00-00	<None>	...	<None>00	

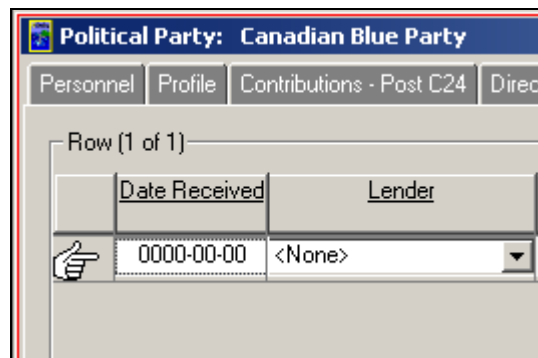
Save Add Delete


3. Enter a date in the **Date Received** field (as shown below).



Note: You can enter the date in one of three ways: manually, or by using the built-in **Calendar**, or by selecting the **Insert Today's Date** (by right clicking on the date field).

4. Ensure that **None** is selected in in the **Lender** field (as illustrated below).



5. Click on the **Details** () button or press the **F6** key on your keyboard. This new window will appear:

The screenshot shows a 'New' dialog box with three main sections: 'Type', 'Identification', and 'Information'. The 'Type' section contains a 'Contributor Type' dropdown menu. The 'Identification' section has fields for 'Family Name', 'Given Name', and 'Initials'. The 'Information' section has fields for 'Street no.', 'Suite', 'Prov.', 'Street name', 'City', 'Postal Code', 'Home Tel.', 'Business Tel.', 'Business Tel Ext.', and 'E-mail'. 'OK' and 'Cancel' buttons are at the bottom.

6. Click on the drop-down arrow next to the **Contributor Type** field. A list of contributor types will appear (as shown below).

This screenshot shows the same 'New' dialog box as above, but with the 'Contributor Type' dropdown menu open. The menu lists the following options: Individual, Corporation, Trade union, Association, and Other.

7. Select the appropriate contributor type (as illustrated below).

The screenshot shows a window titled "New" with a close button in the top right corner. Inside the window, there is a section labeled "Type" which contains a dropdown menu labeled "Contributor Type:" with "Individual" selected.

Note: For this illustration, the **Contributor Type** selected is **Individual**.

8. Complete the contributor's **Identification** and **Information** areas (as shown below).

The screenshot shows the "New" dialog box with the "Contributor Type" dropdown set to "Individual". Below this, there are two sections: "Identification" and "Information".

Identification section:

- Family Name: Anderson
- Given Name: Greg
- Initials: (empty)

Information section:

- Street no.: 1200
- Suite: 101
- Prov: ON
- Street name: Bank Street
- City: Ottawa
- Postal Code: K1S 4V4
- Home Tel.: (empty)
- Business Tel.: (empty)
- Business Tel Ext.: (empty)
- E-mail: (empty)

At the bottom of the dialog box are "OK" and "Cancel" buttons.

Note: For this illustration, an **Individual** named **Greg Anderson** was created. Only the fields marked with an underscore are mandatory. Mandatory fields will change based on the **Contributor Type** selected.

9. Click on the **OK** button to return to the **Loans** tab page.

10. Select a guarantor by clicking on the down arrow next to the **Guarantor** field (as shown below).

Guarantor

- Sullivan Jim
- Smithson Patti
- Stewart Bettina
- Sullivan Jim
- Syndicats #1
- Taylor James
- Torre Denis
- Torrence Louise
- Whinsom Lisa
- Williams Billy
- Williams Wendy
- Woodburn Janet
- XYZ Inc.

Note: For this illustration, the guarantor selected is **Jim Sullivan**.

11. Enter the amount of the loan in the **Principal of Loan** field (as illustrated below).

Principal of Loan

\$5,000.00

12. Click on the **Save** button to save the information in the **Loans** tab page (as shown below).

Political Party: Candian Blue Party


Personnel Profile Contributions - Post C24 Directed Contributions **Loans** Transfers In By-election Expenses Transfers Out Unpaid Claims Optional Expenses Budget Tool

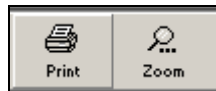
Row (1 of 1)

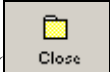
Date Received	Lender	Details <F6>	Guarantor	Details <F7>	Rate	Principal of Loan
2004-02-05	Anderson Greg	...	Sullivan Jim00	\$5,000.00

Save Add Delete

1.1.1.7.1 The Print Preview Button

1. Click on the **Print Preview** () button.
2. You will be able to view the EC 20239 –P2c form (**Statement of Contributions Received**).
3. You can magnify and print this form by using the **Zoom** and **Print** buttons, as shown below.





4. Click on the **Close** () button to return to the **Loans** tab page (as shown below).


Political Party: Candian Blue Party

Personnel Profile Contributions - Post C24 Directed Contributions **Loans** Transfers In By-election Expenses Transfers Out Unpaid Claims Optional Expenses Budget Tool

Row (1 of 1)

	Date Received	Lender	Details <F6>	Guarantor	Details <F7>	Rate	Principal of Loan
	2004-02-05	Anderson Greg	...	Sullivan Jim00	\$5,000.00

Save Add Delete 

Note: Clicking on the **Exit** button () closes the EFR application entirely.

1.1.1.8 Transfers In

To enter information into the **Transfers In** tab page, complete the following steps:

1. Click on the **Transfers In** tab page (as shown below).

2. Click on the **Add** button. This new row will appear:


Note: The date entered in the **Date** field must be after December 31, 2003.

3. Enter the date of the transfer in the **Date** field.

- Click on the drop-down menu and select the appropriate political entity from the list (as shown below).

The screenshot shows a window titled "Political Party: Canadian Blue Party" with tabs for "Personnel", "Profile", "Contributions - Post C24", and "Directed Contributions". Below the tabs, it says "Row (1 of 1)". A table has two columns: "Date" and "Political Entities". The date "2004-02-06" is entered in the "Date" column. A hand cursor points to the "Political Entities" dropdown menu, which is open and shows a list of names: "<None>", "Baker Dusty", "Friends of Larry Peterson", "Lepage Lucille", "Les amies de Sylvain Leroux", "Levesque Robert", "Potvin Jacques", "Stewart Bettina", and "Sullivan Jim".

Note: For this illustration, the **Political Entity** selected is **Bettina Stewart**.

- Click on the **Details** () button or press the **F8** key on your keyboard to review the details of the political entity (as shown below).

The screenshot shows an "Update" dialog box with the following fields:

- Type:** Political Entity Type: **Nomination Contestant** (dropdown menu)
- Identification:**
 - Family Name: **Stewart**
 - Given Name: **Bettina**
 - Initials:
- Information:**
 - Street no.:
 - Suite:
 - Prov.:
 - Street name:
 - City:
 - Postal Code:
 - Home Tel.:
 - Business Tel.:
 - Business Tel Ext.:
 - E-mail:
 - Electoral District:

Buttons: **OK** and **Cancel**

- Ensure that the **Type**, **Identification** and **Information** areas have been completed with the appropriate information.

Note: The fields marked with an underscore are mandatory.

7. Click on the **OK** button. You will return to the main **Transfers In** tab page.
8. In the **Type** field, select whether the transfer is monetary or non-monetary (as shown below).

A screenshot of a dropdown menu titled 'Type'. The menu is open, showing two options: 'Monetary' and 'Non-monetary'. The 'Monetary' option is highlighted in blue, indicating it is the selected value.

Note: For this illustration, the **Type** selected is **Monetary**.

9. Enter an amount in the **Amount** field (as shown below).

A screenshot of an input field titled 'Amount'. The field contains the text '\$8,000.00'.


10. Click on the **Save** button to save the information (as illustrated below).

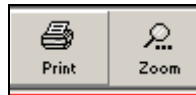
A screenshot of the 'Political Party: Candian Blue Party' software interface. The 'Transfers In' tab is active. Below the tab is a table with one row of data. The table has columns for Date, Political Entities, Details <F8>, Type, and Amount. The data in the row is: Date: 2004-02-06, Political Entities: Stewart Bettina, Details <F8>: ..., Type: Monetary, Amount: 8000.00. Below the table are buttons for Save, Add, Delete, and a printer icon.

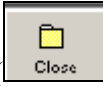
	Date	Political Entities	Details <F8>	Type	Amount
	2004-02-06	Stewart Bettina	...	Monetary	8000.00

Note: An error message will appear if the date of the transfer was entered as being prior to January 1, 2004. Any transfer that occurred prior to January 1, 2004, must be reported as a contribution. You can add or delete additional rows by using the **Add** and **Delete** buttons.

1.1.1.8.1 The Print Preview Button

1. Click on the **Print Preview** () button.
2. You will be able to view the EC 20239-2e form(**Statement of Transfers Received**).
3. You can magnify and print this form by using the **Zoom** and **Print** buttons, as shown below.





4. Click on the **Close** () button to return to the **Transfers In** tab page (see below).


Political Party: Candian Blue Party

Personnel Profile Contributions - Post C24 Directed Contributions Loans Transfers In By-election Expenses Transfers Out Unpaid Claims Optional Expenses Budget Tool

Row (1 of 1)

	Date	Political Entities	Details <F8>	Type	Amount
	2004-02-06	Stewart Bettina	...	Monetary	8000.00

Save Add Delete 

Note: Clicking on the **Exit** button () closes the EFR application entirely.

1.1.1.9 By-election Expenses

To enter information into the **By-election Expenses** tab page, complete the following steps:

1. Click on the **By-election Expenses** tab page (as shown below).

Political Party: Candian Blue Party

Personnel Profile Contributions - Post C24 Directed Contributions Loans Transfers In **By-election Expenses** Transfers Out Unpaid Claims Optional Expenses Budget Tool

Row	Date	Electoral District	Category	Sub-category	Amount Paid	Discount	Agreed Unpaid Claim	Disputed Unpaid Claim
-----	------	--------------------	----------	--------------	-------------	----------	---------------------	-----------------------

Save Add Delete

2. Click on the **Add** button. This new row will appear:

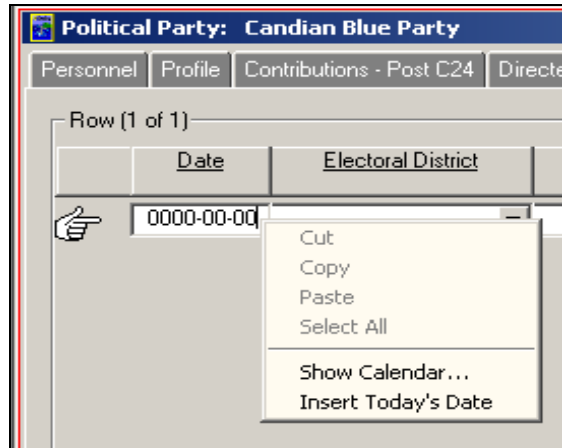
Political Party: Candian Blue Party

Personnel Profile Contributions - Post C24 Directed Contributions Loans Transfers In **By-election Expenses** Transfers Out Unpaid Claims Optional Expenses Budget Tool

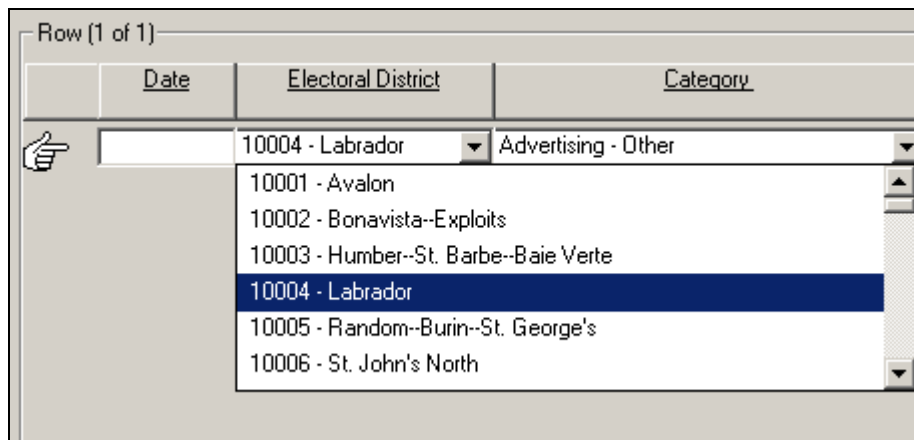
Row (1 of 1)	Date	Electoral District	Category	Sub-category	Amount Paid	Discount	Agreed Unpaid Claim	Disputed Unpaid Claim
	0000-00-00							

Save Add Delete

- Enter a date into the **Date** field. You can do this manually, or by using the built-in **Calendar** or the **Insert Today's Date** feature (by right-clicking on the date field), as shown below.

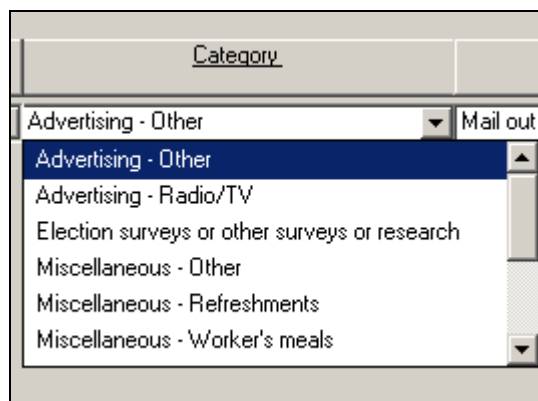


- Select an electoral district by clicking on the down arrow next to the **Electoral District** field (as illustrated below).



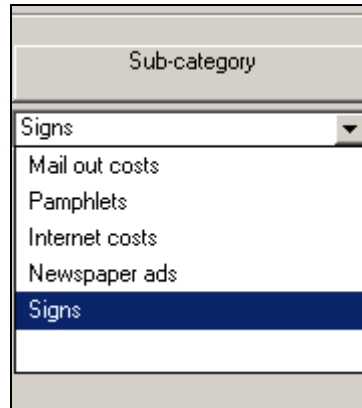
Note: For this illustration, the electoral district selected is **10004 – Labrador**.

- Select a category by clicking on the down arrow next to the **Category** field (as shown below).



Note: For this illustration, the category selected is **Advertising – Other**.

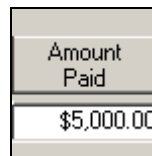
6. Select a sub-category by clicking on the down arrow next to the **Sub-category** field (as shown below).



The image shows a dropdown menu titled "Sub-category". The menu is open, displaying a list of options: "Signs", "Mail out costs", "Pamphlets", "Internet costs", "Newspaper ads", and "Signs". The "Signs" option at the bottom of the list is highlighted in blue.


Note: For this illustration, the sub-category selected is **Signs**.

7. Enter an amount in the **Amount Paid** field (see below).



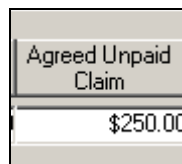
The image shows a text input field labeled "Amount Paid" containing the value "\$5,000.00".

8. Enter a discount amount in the **Discount** field (as shown below).



The image shows a text input field labeled "Discount" containing the value "\$100.00".

9. Enter the agreed unpaid claim amount in the **Agreed Unpaid Claim** field (as illustrated below).



The image shows a text input field labeled "Agreed Unpaid Claim" containing the value "\$250.00".

10. Enter the disputed unpaid claim amount in the **Disputed Unpaid Claim** field (see below).



The image shows a text input field labeled "Disputed Unpaid Claim" containing the value "\$300.00".


- Click on the **Save** button to save all the values entered in the **By-election Expenses** tab page (as shown below).

Date	Electoral District	Category	Sub-category	Amount Paid	Discount	Agreed Unpaid Claim	Disputed Unpaid Claim
2004-02-06	10004 - Labrador	Advertising - Other	Signs	\$5,000.00	\$100.00	\$250.00	\$300.00

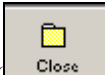
Buttons: Save, Add, Delete, Exit


Note: You can add and delete by-election expenses by clicking on the **Add** and **Delete** buttons.

1.1.1.9.1 The Print Preview Button

- Click on the **Print Preview** () button.
- You will be able to view the EC 20239-P3a form (**Statement of Election Expenses**).
- You can magnify and print this form by using the **Zoom** and **Print** buttons (as shown below).



- Click on the **Close** () button to return to the **By-election Expenses** tab page.

Note: Clicking on the **Exit** button () closes the EFR application entirely.

1.1.1.10 Transfers Out


To enter information into the **Transfers Out** tab page, complete the following steps:

1. Click on the **Transfers Out** tab page (as shown below).

2. Click on the **Add** button. This new row will appear:


3. Enter the date of the transfer into the **Date** field (as shown below).

4. Click on the drop-down menu and select the appropriate **Electoral District** (as shown below).


Row (1 of 1)			
	Date	Electoral District	Political Entities
	2004-02-06	<None>	
		10001 - Avalon 10002 - Bonavista-Exploits 10003 - Humber-St. Barbe-Baie Verte 10004 - Labrador 10005 - Random-Burin-St. George's 10006 - St. John's North	

Note: For this illustration, the electoral district selected was **10001 – Avalon**.

5. Click on the drop-down menu and select the appropriate political entity from the list (as illustrated below).

Row (1 of 1)			
	Date	Electoral District	Political Entities
	2004-02-06	10001 - Avalon	Lepage Lucille

Note: For this illustration, the political entity selected was **Lucille Lepage**.

6. Click on the **Details** () button or press the **F8** key on your keyboard to review the details of the political entity (as shown below).

7. Ensure that the **Type**, **Identification** and **Information** areas have been completed with appropriate information.

Note: For this illustration, the political entity type for **Lucille Lepage** was changed to **Candidate**. Registered political parties cannot make transfers out to leadership or nomination contestants. The fields marked with an underscore are mandatory.

8. Click on the **OK** button. You will return to the main **Transfers Out** tab page.
9. Select the **Type** of transfer out (**Monetary** or **Non-monetary**), as indicated below.

10. Enter an amount in the **Amount** field (as shown below).

A screenshot of a form field labeled "Amount". The field contains the text "\$500.00".


11. Click on the **Save** button to save the information (as illustrated below).

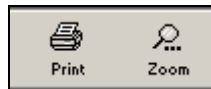
The screenshot shows a software window titled "Political Party: Candian Blue Party". The window has a menu bar with the following items: Personnel, Profile, Contributions - Post C24, Directed Contributions, Loans, Transfers In, By-election Expenses, Transfers Out, Unpaid Claims, Optional Expenses, and Budget Tool. Below the menu bar, there is a table with the following columns: Date, Electoral District, Political Entities, Details <F8>, Type, and Amount. The table contains one row of data: 2004-02-06, 10001 - Avalon, Lepage Lucille, ..., Monetary, and 500.00. At the bottom of the window, there are buttons for Save, Add, Delete, and a printer icon.

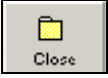
Date	Electoral District	Political Entities	Details <F8>	Type	Amount
2004-02-06	10001 - Avalon	Lepage Lucille	...	Monetary	500.00

Note: An error message will appear if the **Date** of the transfer was entered as being prior to January 1, 2004. You can add or delete additional rows by using the **Add** and **Delete** buttons.

1.1.1.10.1 The Print Preview Button

1. Click on the **Print Preview** () button.
2. You will be able to view the EC 20239-P3b form (**Statement of Transfers to a Candidate, a Registered Association, a Leadership Contestant or a Nomination Contestant**).
3. You can magnify and print this form by using the **Zoom** and **Print** buttons (as shown below).

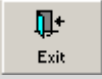


4. Click on the **Close** () button to return to the **Transfers Out** tab page (see below).

The screenshot shows a software window titled "Political Party: Candian Blue Party". The "Transfers Out" tab is selected. The window displays a table with the following data:

Date	Electoral District	Political Entities	Details <FB>	Type	Amount
2004-02-06	10001 - Avalon	Lepage Lucille		Monetary	\$500.00

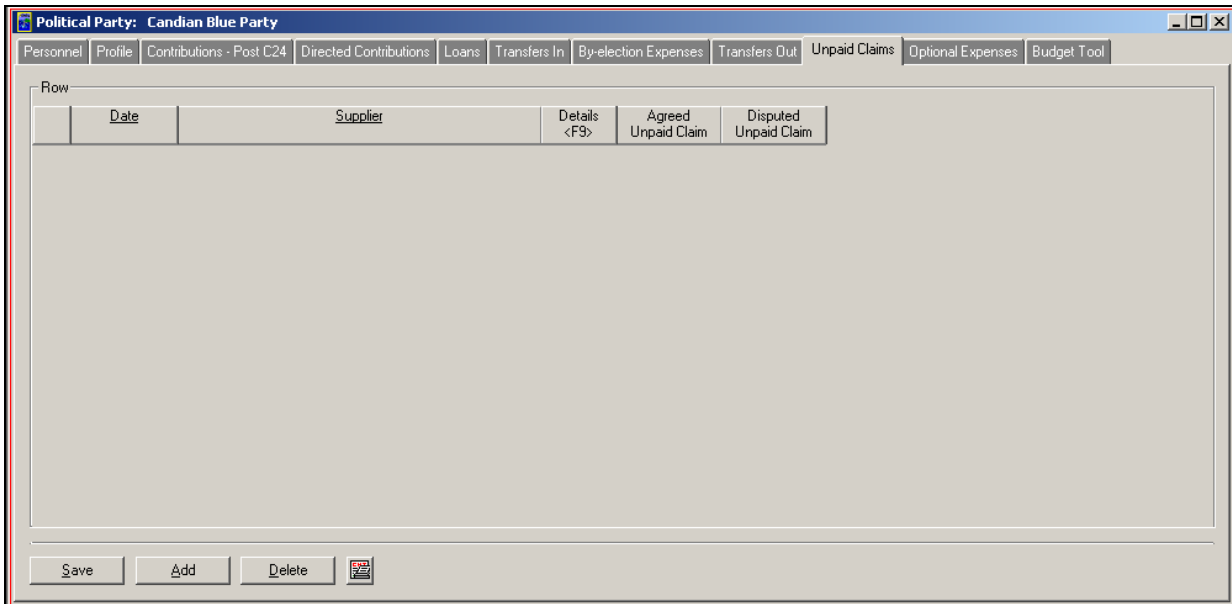
At the bottom of the window, there are buttons for "Save", "Add", "Delete", and an "Exit" button with a red X icon.

Note: Clicking on the **Exit** button () closes the EFR application entirely.

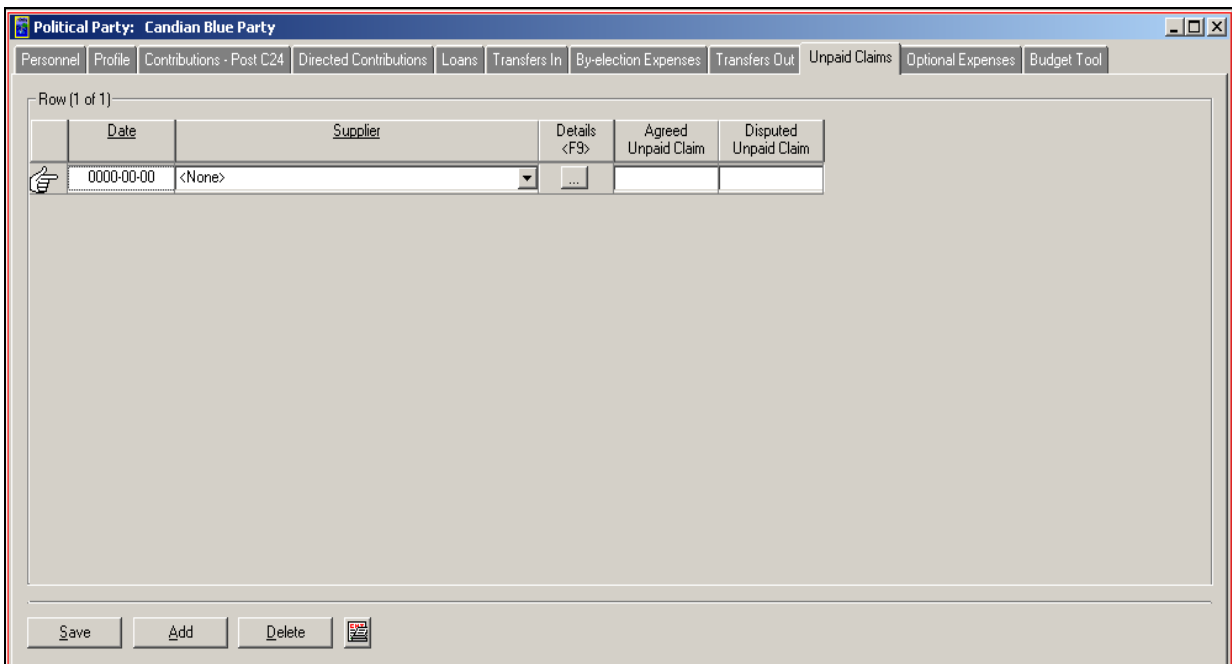
1.1.1.11 Unpaid Claims

To enter information into the **Unpaid Claims** tab page, complete the following steps:

1. Click on the **Unpaid Claims** tab page (as shown below).



2. Click on the **Add** button. This new row will appear:




3. Enter the date of the invoice in the **Date** field.
4. Click on the drop-down menu and select the appropriate **Supplier** from the list (as shown below).

Row (1 of 1)

Date	Supplier	Details <F9>	Agreed Unpaid Claim	Ur
2004-02-06	<None> ABC Corp Anderson Greg Anonymous/anonyme Baker Dusty Baldwin Alec Best Business Cantley Jack Coleman Cathy Cooper Sharon Costner Kevin Degras Estelle	...		

Note: For this illustration, the supplier selected is **ABC Corp**.

5. Click on the **Details** button () or press the **F9** key on your keyboard to review the details of the supplier (as shown below).

Update

Type

Contributor Type: G

This is a numbered company:

Identification

Corporation Name: ABC Corp

Name of CEO:

Initials:

Information

Street no.: 345 Street name: Jackson St.

Suite: City: Calgary

Prov: AB Postal Code: P1B7G5

Home Tel.:

Business Tel.:

Business Tel Ext.:

E-mail:

OK Cancel

6. Ensure that the **Type, Identification and Information** areas have been completed with appropriate information.
7. Click on the **OK** button. You will return to the main **Unpaid Claims** tab page.
8. Enter an amount in the **Agreed Unpaid Claim** field (as shown below).

Agreed Unpaid Claim
\$200.00

9. Enter an amount in the **Disputed Unpaid Claim** field (as illustrated below).

Disputed Unpaid Claim
\$300.00

10. Click on the **Save** button to save the information in the **Unpaid Claims** tab page (as illustrated below).

Political Party: Candian Blue Party


Personnel Profile Contributions - Post C24 Directed Contributions Loans Transfers In By-election Expenses Transfers Out **Unpaid Claims** Optional Expenses Budget Tool

Row (1 of 1)

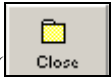
	Date	Supplier	Details <F9>	Agreed Unpaid Claim	Disputed Unpaid Claim
	2004-02-06	ABC Corp		\$200.00	\$300.00

Save Add Delete

1.1.1.11.1 The Print Preview Button

1. Click on the **Print Preview** () button.
2. You will be able to view the EC 20239-P3c form (**Statement of Unpaid Claims**).
3. You can magnify and print this form by using the **Zoom** and **Print** buttons (as shown below).






4. Click on the **Close** () button to return to the **Unpaid Claims** tab page (see below).


Political Party: Candian Blue Party

Personnel Profile Contributions - Post C24 Directed Contributions Loans Transfers In By-election Expenses Transfers Out Unpaid Claims Optional Expenses Budget Tool

Row (1 of 1)

	Date	Supplier	Details <F9>	Agreed Unpaid Claim	Disputed Unpaid Claim
	2004-02-06	ABC Corp		\$200.00	\$300.00

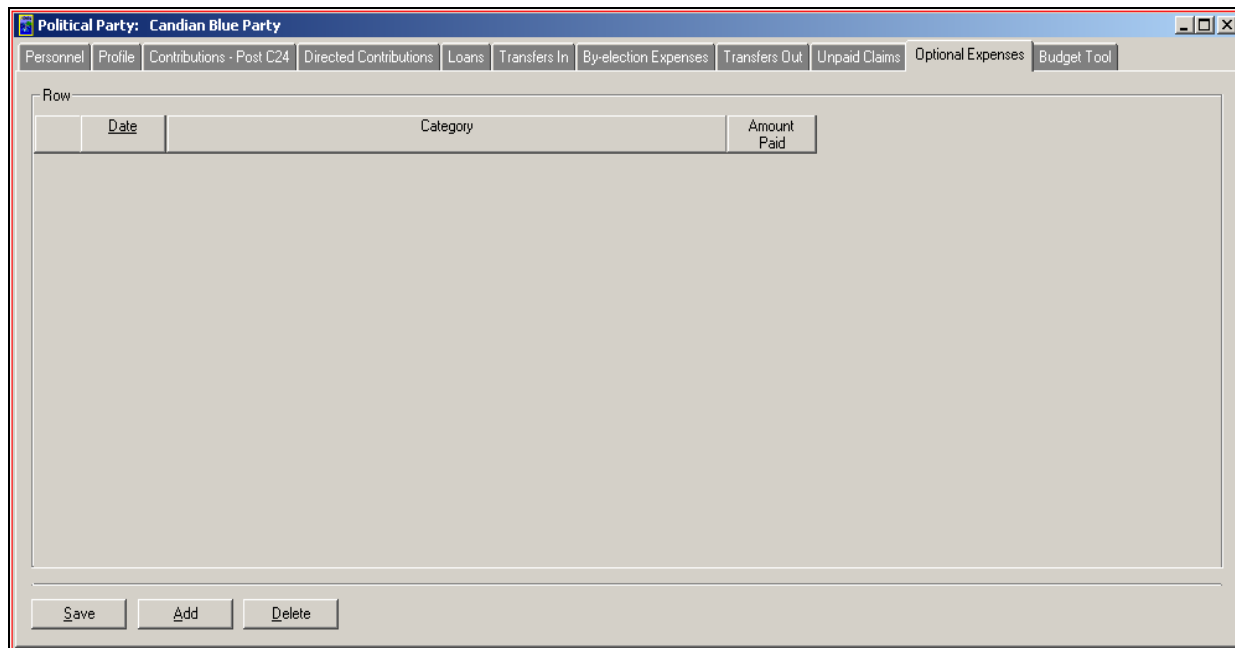
Save Add Delete 

Note: Clicking on the **Exit** button () closes the EFR application entirely.

1.1.1.12 Optional Expenses

To enter information into the **Optional Expenses** tab page, complete the following steps:

1. Click on the **Optional Expenses** tab page (as shown below).



Political Party: Candian Blue Party

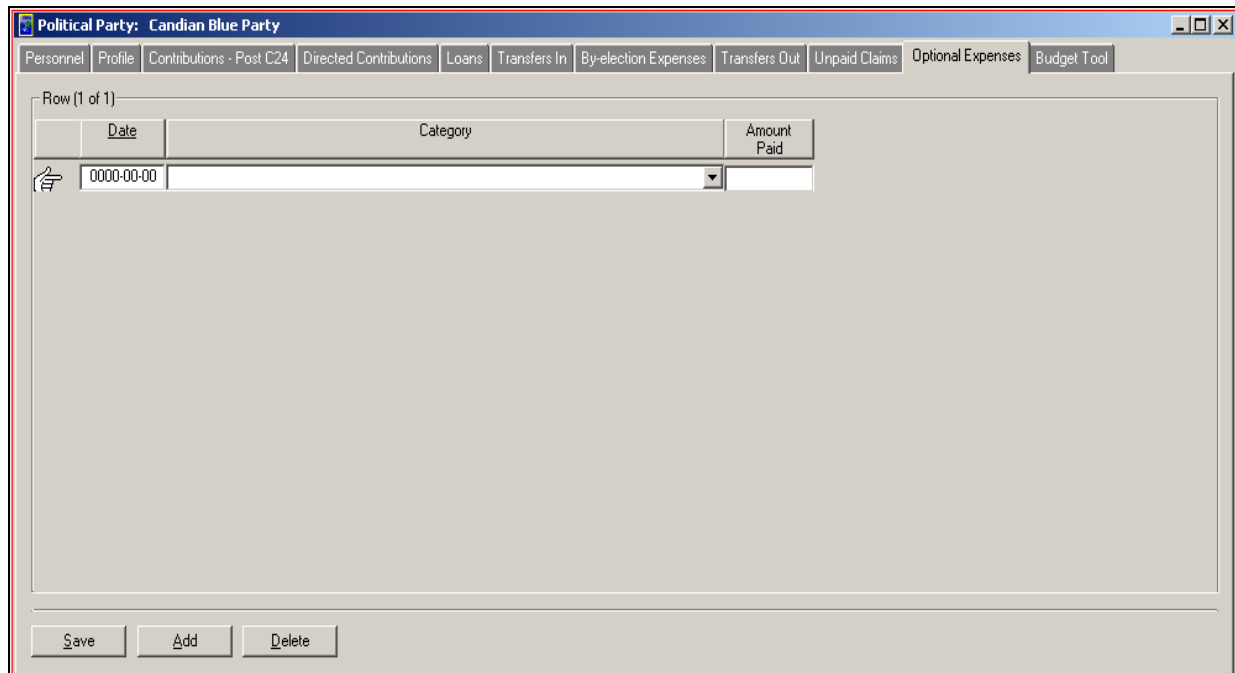
Personnel | Profile | Contributions - Post C24 | Directed Contributions | Loans | Transfers In | By-election Expenses | Transfers Out | Unpaid Claims | **Optional Expenses** | Budget Tool

Row

	Date	Category	Amount Paid
--	------	----------	-------------

Save Add Delete

2. Click on the **Add** button. This new row will appear:



Political Party: Candian Blue Party

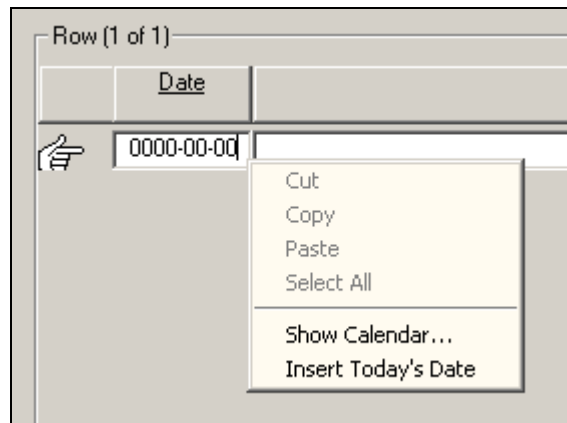
Personnel | Profile | Contributions - Post C24 | Directed Contributions | Loans | Transfers In | By-election Expenses | Transfers Out | Unpaid Claims | **Optional Expenses** | Budget Tool

Row (1 of 1)

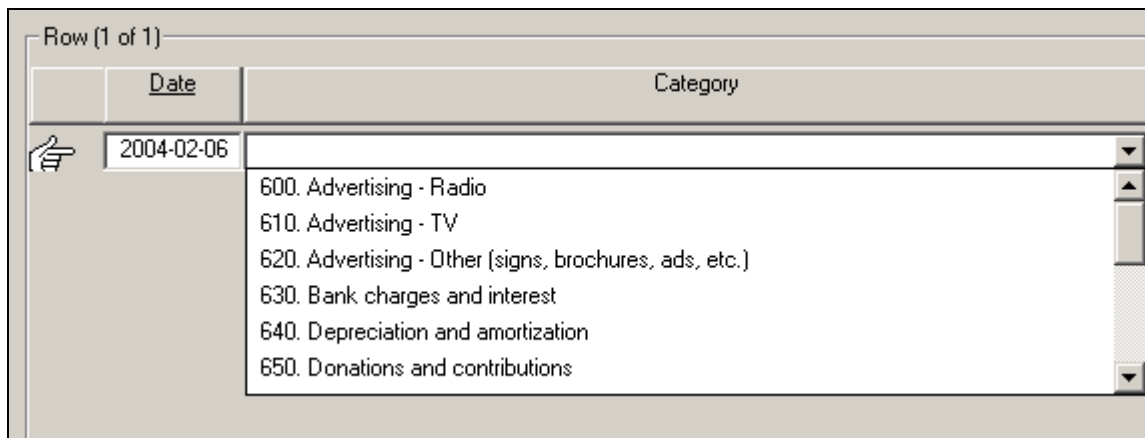
	Date	Category	Amount Paid
👉	0000-00-00		

Save Add Delete

3. Enter a date into the **Date** field. You can do this manually, or by using the built-in **Calendar** or the **Insert Today's Date** feature (by right-clicking on the date field), as shown below.



4. Select a category by clicking on the down arrow next to the **Category** field (as illustrated below).



Note: For this illustration, the category selected is **Advertising – Radio**.

5. Enter an amount in the **Amount Paid** field (see below).

Amount Paid
\$1,500.00

- Click on the **Save** button to save all the entered values in the **Optional Expenses** tab page (as shown below).

Political Party: Candian Blue Party

Personnel Profile Contributions - Post C24 Directed Contributions Loans Transfers In By-election Expenses Transfers Out Unpaid Claims **Optional Expenses** Budget Tool


Row (1 of 1)

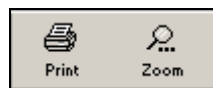
Date	Category	Amount Paid
2004-02-06	600. Advertising - Radio	1500.00

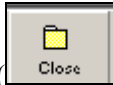
Save Add Delete


Note: You can add and delete optional expenses by clicking on the **Add** and **Delete** buttons.

1.1.1.12.1 The Print Preview Button

- Click on the **Print Preview** () button.
- You will be able to view the EC 20239-P3a form (**Statement of Election Expenses for a By-election**).
- You can magnify and print this form by using the **Zoom** and **Print** buttons (as shown below).



- Click on the **Close** () button to return to the **Optional Expenses** tab page.

Note: Clicking on the **Exit** button () closes the EFR application entirely.

1.1.1.13 Budget Tool

To enter information into the **Budget Tool** tab page, complete the following steps:

1. Click on the **Budget Tool** tab page (as shown below).

Category	Amount Spent	Budget	Variance
600. Advertising - Radio	\$1,500.00	.00	(\$1,500.00)
610. Advertising - TV			
620. Advertising - Other (signs, brochures, ads, etc.)			
630. Bank charges and interest			
640. Depreciation and amortization			
650. Donations and contributions			
660. Fundraising activities			
670. Office expenses (insurance, supplies, subscriptions, dues, rent, utilities, maintenance etc.)			
680. Polling			
690. Professional services			
700. Research			
710. Salaries and benefits			
720. Travel and hospitality			
730. Transfers			


2. Enter the budget amounts into the **Budget** column (as illustrated below).

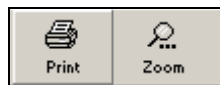
Category	Amount Spent	Budget	Variance
600. Advertising - Radio	\$1,500.00	\$15,000.00	\$13,500.00
610. Advertising - TV		\$14,000.00	\$14,000.00
620. Advertising - Other (signs, brochures, ads, etc.)		\$13,000.00	\$13,000.00
630. Bank charges and interest		\$12,000.00	\$12,000.00
640. Depreciation and amortization		\$11,000.00	\$11,000.00
650. Donations and contributions		\$10,000.00	\$10,000.00
660. Fundraising activities		\$9,000.00	\$9,000.00
670. Office expenses (insurance, supplies, subscriptions, dues, rent, utilities, maintenance etc.)		\$8,000.00	\$8,000.00
680. Polling		\$7,000.00	\$7,000.00
690. Professional services		\$6,000.00	\$6,000.00
700. Research		\$5,000.00	\$5,000.00
710. Salaries and benefits		\$4,000.00	\$4,000.00
720. Travel and hospitality		\$3,000.00	\$3,000.00
730. Transfers		\$2,000.00	\$2,000.00

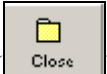
- Click on the **Save** button to save the values entered in the **Budget Tool** tab page (as shown below).

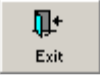
Category	Amount Spent	Budget	Variance
600. Advertising - Radio	\$1,500.00	\$15,000.00	\$13,500.00
610. Advertising - TV		\$14,000.00	\$14,000.00
620. Advertising - Other (signs, brochures, ads, etc.)		\$13,000.00	\$13,000.00
630. Bank charges and interest		\$12,000.00	\$12,000.00
640. Depreciation and amortization		\$11,000.00	\$11,000.00
650. Donations and contributions		\$10,000.00	\$10,000.00
660. Fundraising activities		\$9,000.00	\$9,000.00
670. Office expenses (insurance, supplies, subscriptions, dues, rent, utilities, maintenance etc.)		\$8,000.00	\$8,000.00
680. Polling		\$7,000.00	\$7,000.00
690. Professional services		\$6,000.00	\$6,000.00
700. Research		\$5,000.00	\$5,000.00
710. Salaries and benefits		\$4,000.00	\$4,000.00
720. Travel and hospitality		\$3,000.00	\$3,000.00
730. Transfers		\$2,000.00	\$2,000.00

1.1.1.13.1 The Print Preview Button

- Click on the **Print Preview** () button.
- You will be able to view the **Budget Report**.
- You can magnify and print this form by using the **Zoom** and **Print** buttons, as shown below.



- Click on the **Close** () button to return to the **Budget Tool** tab page.

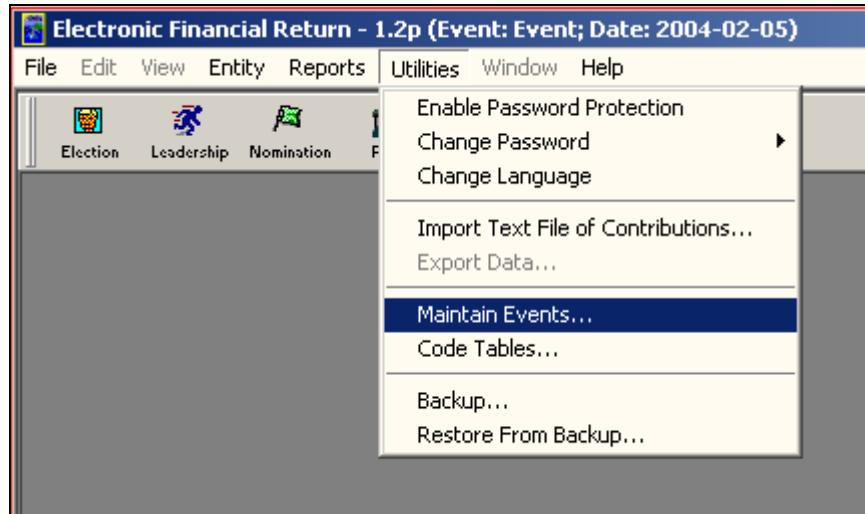
Note: Clicking on the **Exit** button () closes the EFR application entirely.

Adding a New Political Party (Event Based)

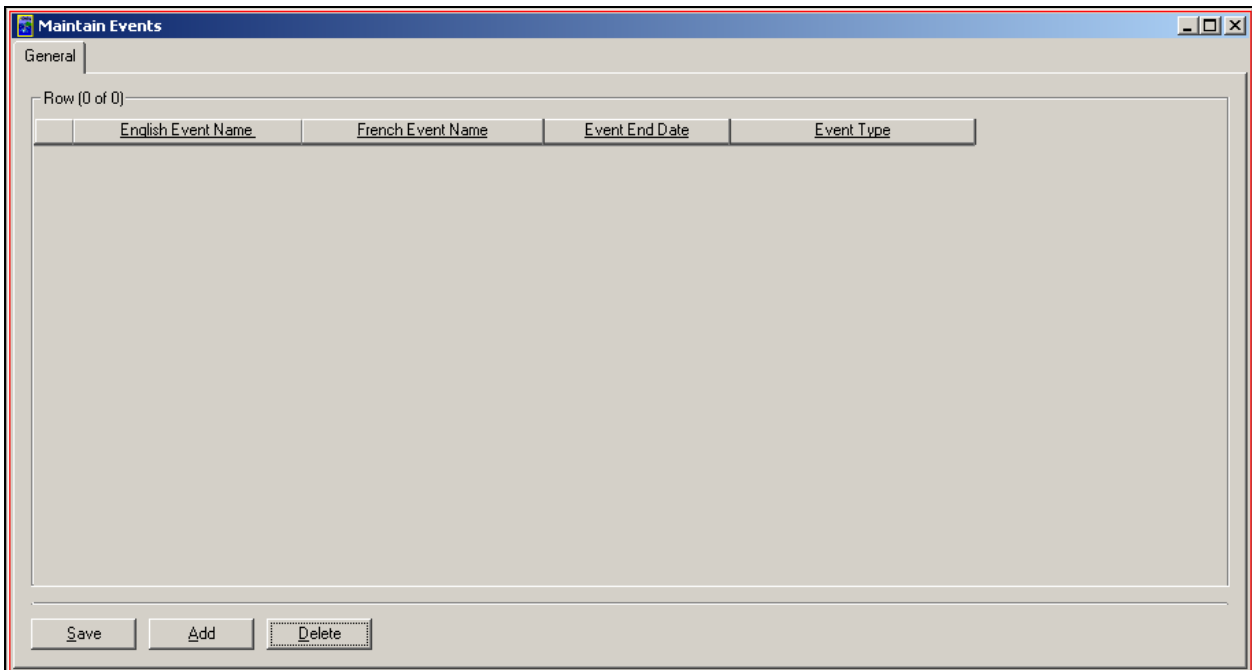
1.1.1.14 New Parties

To add a new political party (based on a specific event) within the EFR application, complete the following steps:

1. Click on the **Utilities** drop-down menu and select **Maintain Events** (as illustrated below).



2. Review the **Maintain Events** window (as shown below).



- Click on the **Add** button. This new row will appear:

The screenshot shows the 'Maintain Events' window with the 'General' tab selected. A table displays one row of data:

English Event Name	French Event Name	Event End Date	Event Type
<Event Name>	<Nom de l'événement>	2004-02-05	Election

At the bottom of the window, there are three buttons: 'Save', 'Add', and 'Delete'.

- Enter the name of the event in the **English Event Name** field (see below).

This close-up shows the 'English Event Name' field in the 'Maintain Events' window. The text 'EVENT' is entered into the field.

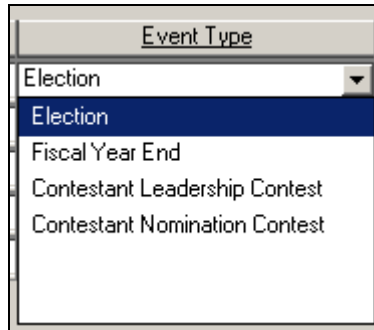
Note: For this illustration, the **English Event Name** entered is **EVENT**. You can also enter a description in the **French Event Name** field, if required.

- Enter a date in the **Event End Date** field (as shown below).

This close-up shows the 'Event End Date' field with the date '2004-04-26' entered.

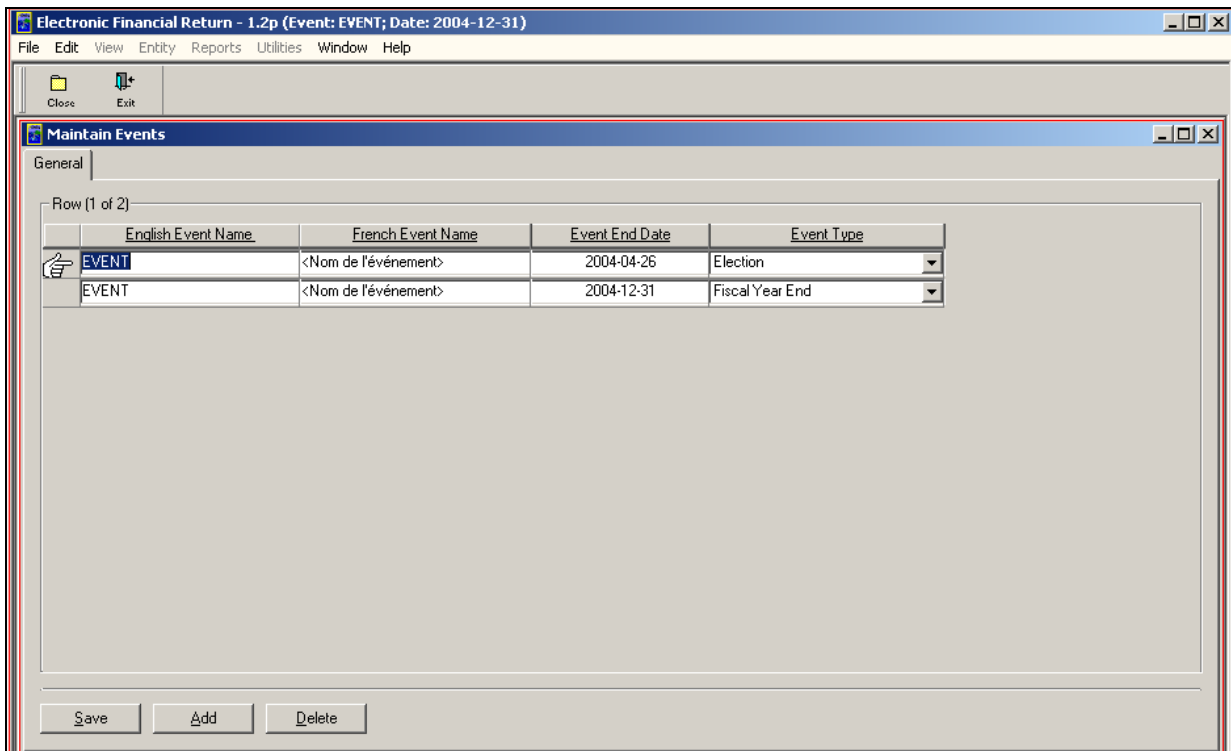
Note: You can enter a date manually, or by using the built-in **Calendar** or the **Insert Today's Date** feature (by right-clicking on the date field). For this illustration, the date entered is **2004-04-26**.


6. Select the event type by clicking on the down arrow next to the **Event Type** field (as shown below).



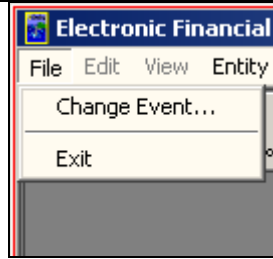
Note: For this illustration, the **Event Type** selected is **Election**.

7. Click on the **Save** button to save all the information on the **General** tab page (as illustrated below).

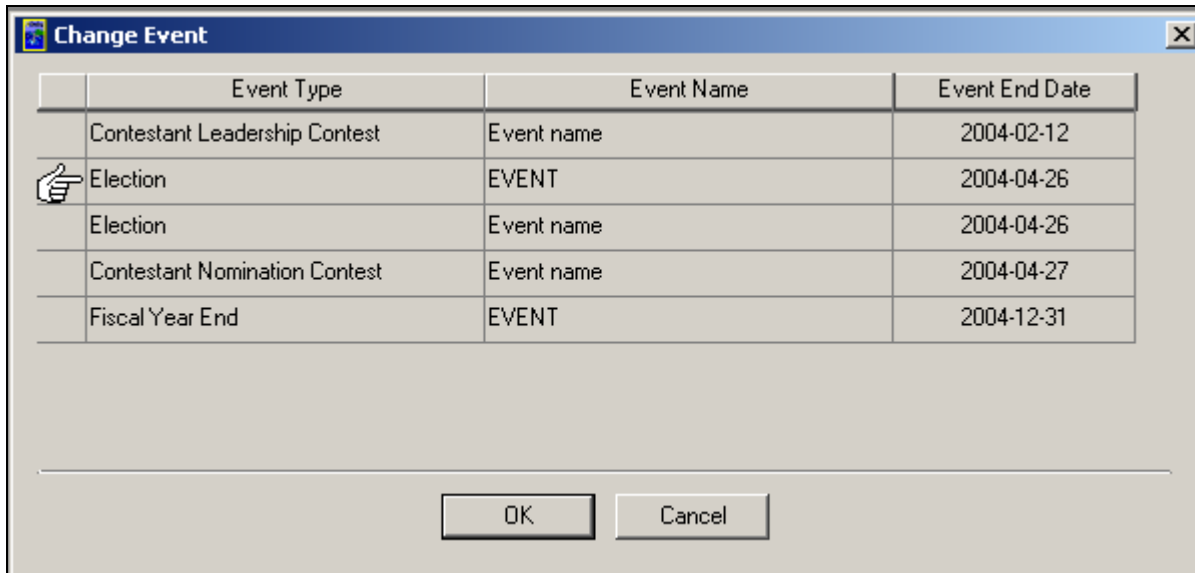


8. Click on the **Close** () button to return to the EFR main window.

9. Click on the **File** drop-down menu and select **Change Event** (as illustrated below).

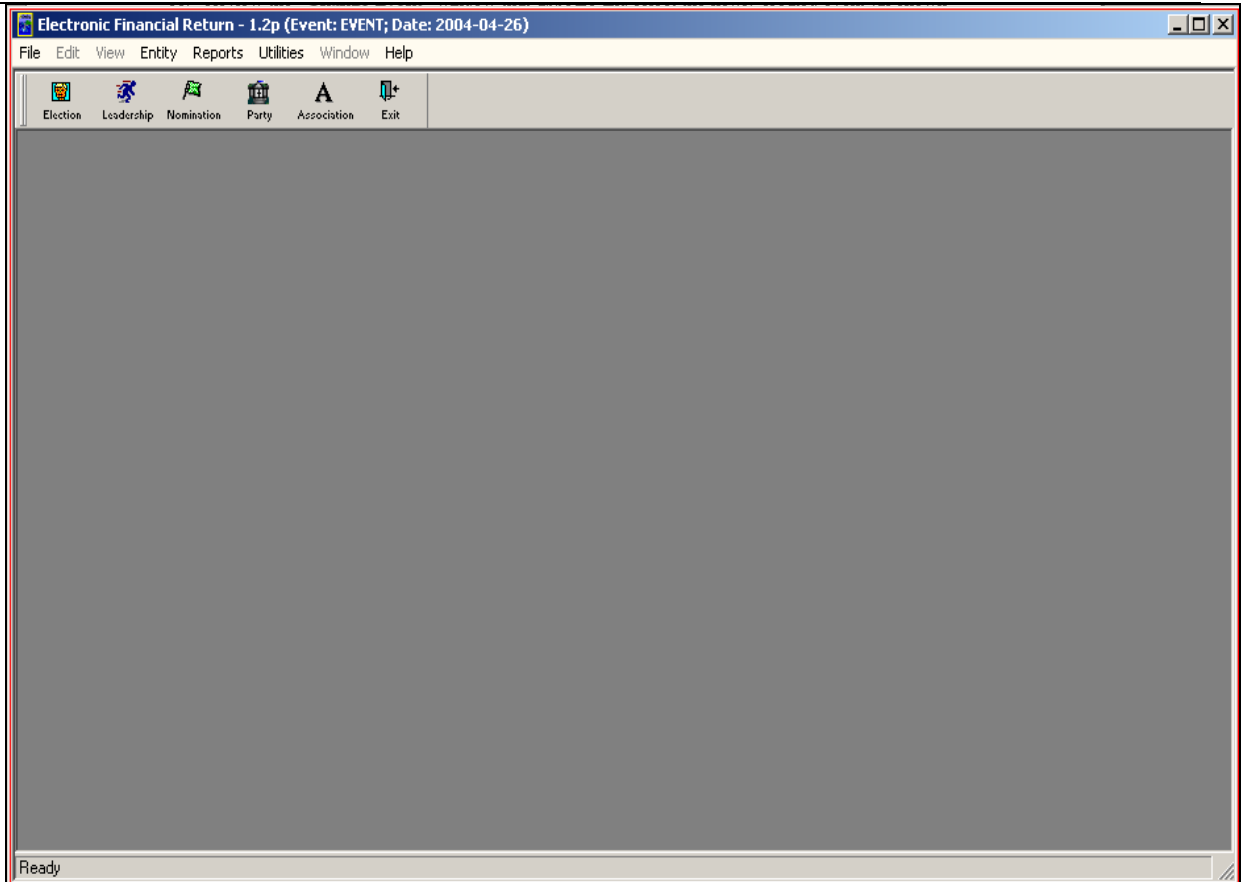


10. Review the **Change Event** window that appears, and select the newly created event (as shown below).



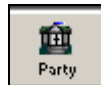
Note: For this illustration, the **Election – EVENT** with a date of **2004-04-26** (as described in steps 1 through 6) was selected.

11. Click on the **OK** button. You will return to the EFR main window (as illustrated on the following page).

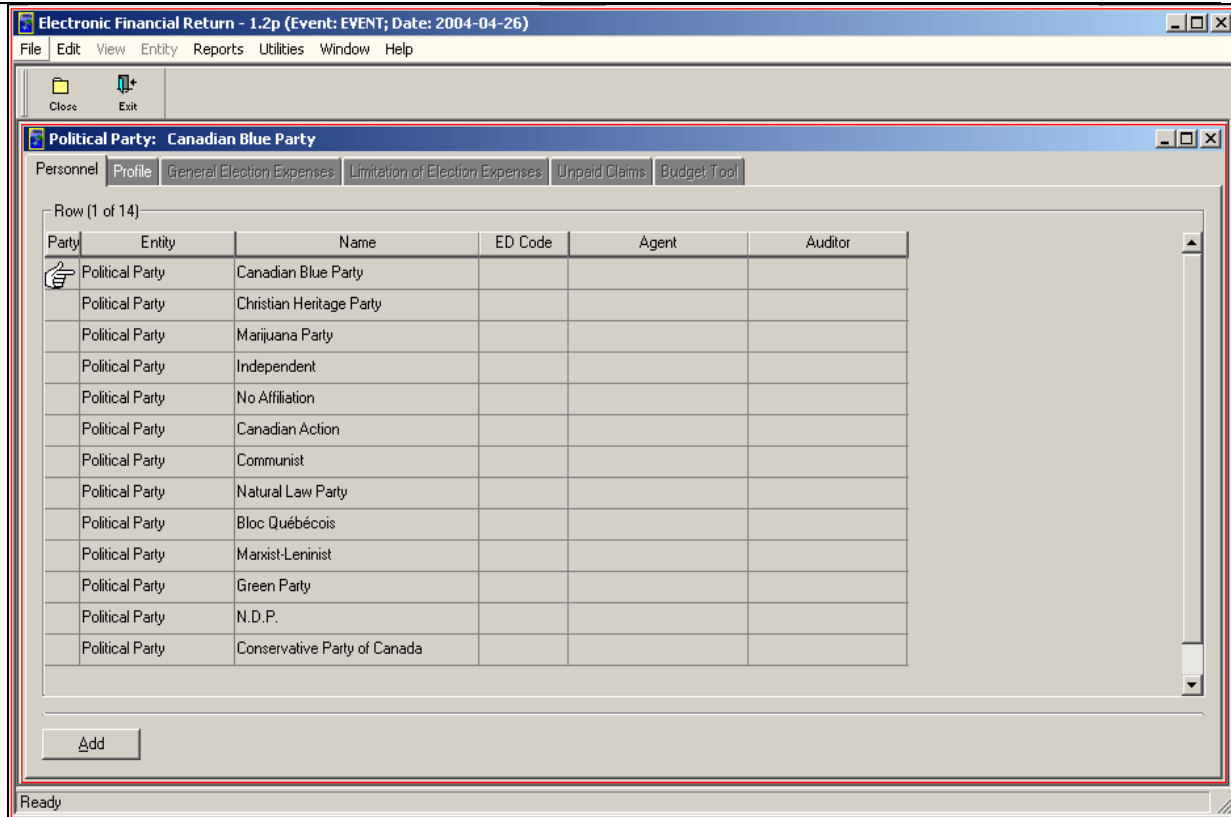


Note: The newly created **Event** and **Event Date** (in this case, **EVENT** and **2004-04-26**) are listed at the top of the EFR window.

12. Click on the **Party** icon located near the top of the EFR main window (as shown below).



13. Review the list of political parties on the **Personnel** tab page (as illustrated below).



14. Select the newly created political party (in this case, the **Canadian Blue Party**), and click on the **Profile** tab page.

Note: The **Canadian Blue Party** was already created. Refer to the section on **Adding A New Political Party (Fiscal Year End)** on page 13.

15. Review the **Profile** tab page (as shown below).

The screenshot shows the 'Profile' tab page for the 'Canadian Blue Party'. The page is divided into several sections: 'Type', 'Identification', 'Information', and 'Relationships'. The 'Type' section shows 'Political Entity Type' set to 'Political Party'. The 'Identification' section shows 'Name' set to 'Canadian Blue Party'. The 'Information' section shows 'Street no.' as '1', 'Street name' as 'Blue St.', 'City' as 'Ottawa', and 'Postal Code' as 'K2E 6J3'. The 'Relationships' section shows 'Agent <F2>' and 'Auditor <F3>' dropdown menus.

Type

Political Entity Type:

Confirmation Date:

Identification

Name:

Information

Street no.: Street name:

Suite: City:

Prov: Postal Code:

Home Tel.:

Business Tel.:

Business Tel Ext.:

E-mail:

Relationships

Agent <F2>:

Auditor <F3>:

Buttons:

Note: The **Type** area contains a **Political Entity Type** and **Confirmation Date** fields. You cannot edit these fields.

16. Ensure that the **Identification**, **Information** and **Relationships** areas have been completed.

Note: For this illustration, a new agent and auditor will be created.

17. Click on the details button next to the **Agent** field, or press the **F2** key on your keyboard.
18. Review the new window (as illustrated below).

The screenshot shows a 'New' dialog box with the following fields:

- Type:** Contributor Type (dropdown menu)
- Identification:** Family Name, Given Name, Initials (text boxes)
- Information:** Street no., Suite, Prov. (dropdown), Street name, City, Postal Code, Home Tel., Business Tel., Business Tel Ext., E-mail (text boxes)

Buttons: OK, Cancel

19. Complete the **Type**, **Identification** and **Information** areas in this window (see following illustration).

Note: For this illustration, a new agent by the name of **John Smith** was created.

New

Type

Contributor Type: Individual

Identification

Family Name: Smith

Given Name: John

Initials:

Information

Street no.: 1 Street name: Albert Street

Suite: City: Ottawa

Prov.: ON Postal Code: K1X 4B8

Home Tel.:

Business Tel.:

Business Tel Ext.:

E-mail:

OK Cancel

20. Click on the **OK** button to return to the **Profile** tab page.
21. Click on the details button next to the **Auditor** field, or press the **F3** key on your keyboard.
22. Review the new window (as shown below).

New

Type

Contributor Type:

Identification

Family Name:

Given Name:

Initials:

Information

Street no.: Street name:

Suite: City:

Prov.: Postal Code:

Home Tel.:

Business Tel.:

Business Tel Ext.:

E-mail:

OK Cancel

23. Complete the **Type**, **Identification** and **Information** areas in this window.

Note: For this illustration, a new auditor by the name of **Jane Smithson** was created.

The 'New' dialog box is titled 'New' and contains three main sections:

- Type:** A dropdown menu labeled 'Contributor Type' with 'Individual' selected.
- Identification:** Text input fields for 'Family Name' (Smithson), 'Given Name' (Jane), and 'Initials' (empty).
- Information:** Text input fields for 'Street no.' (45), 'Street name' (Albert Street), 'Suite' (empty), 'City' (Ottawa), 'Prov.' (ON), and 'Postal Code' (K1X 4B8). Below these are empty fields for 'Home Tel.', 'Business Tel.', 'Business Tel Ext.', and 'E-mail'.

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

24. Click on the **OK** button to return to the **Profile** tab page (as shown below).

The 'Political Party: Canadian Blue Party' profile page has several tabs: 'Personnel', 'Profile', 'General Election Expenses', 'Limitation of Election Expenses', 'Unpaid Claims', and 'Budget Tool'. The 'Profile' tab is active.

The 'Type' section shows 'Political Entity Type' as 'Political Party' and 'Confirmation Date' as empty.

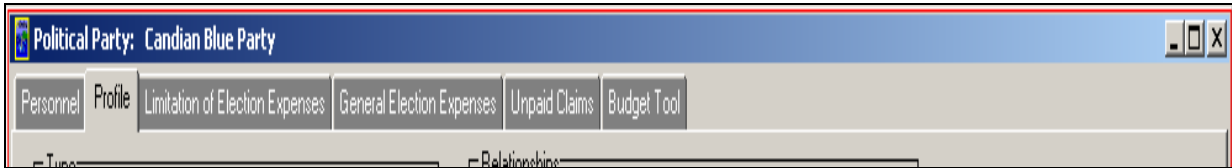
The 'Identification' section shows 'Name' as 'Canadian Blue Party'.


The 'Information' section shows 'Street no.' as '1', 'Street name' as 'Blue St.', 'Suite' as empty, 'City' as 'Ottawa', 'Prov.' as 'ON', and 'Postal Code' as 'K2E 6J3'. Below these are empty fields for 'Home Tel.', 'Business Tel.', 'Business Tel Ext.', and 'E-mail'.


The 'Relationships' section shows 'Agent <F2>' as 'Smith John' and 'Auditor <F3>' as 'Smithson Jane'.

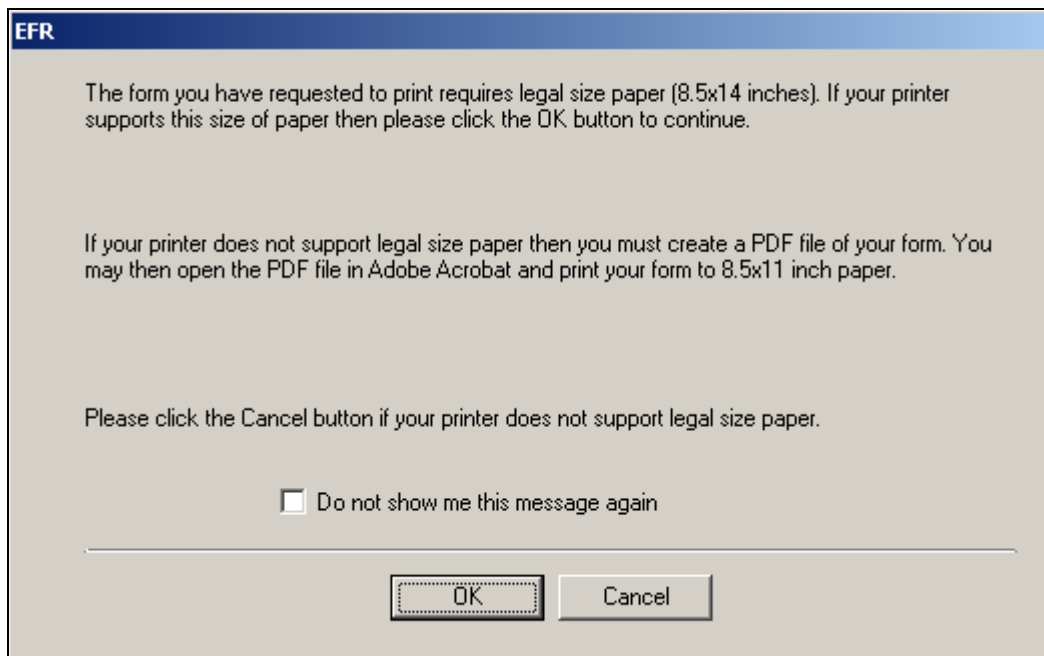
At the bottom are 'Save', 'Add', and 'Delete' buttons, along with a small icon.

25. Click on the **Save** button to save the entered information in the **Profile** tab page. All the other tab pages will become highlighted in white (as shown below).

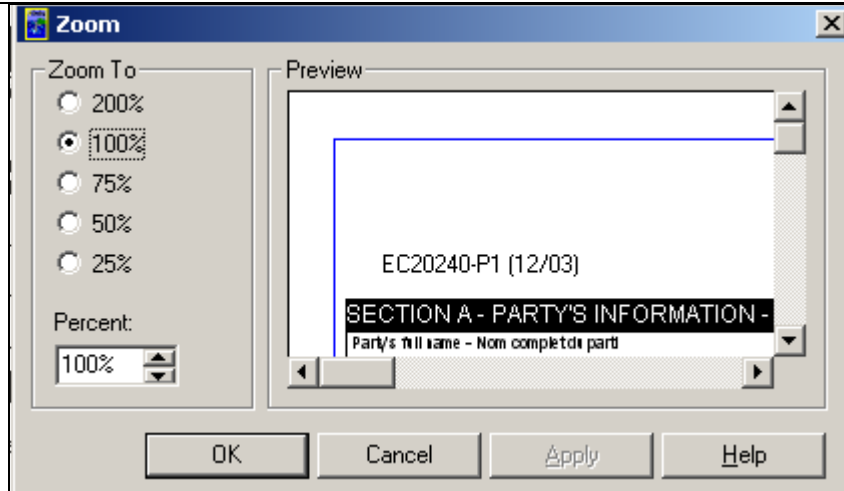


26. Click on the **Print Preview** () button.
27. Review the EC 20240-P1 form for the newly created political party.

28. Click on the **Print** () button to print the EC 20240-P1 form.
29. This new window will appear, prompting you about the paper size for your printer.



30. Click on the **OK** button to start the print job on your computer.
31. You can enlarge the view of the form by clicking on the **Zoom** button (as illustrated below).



32. Select the appropriate magnification to enlarge the view of the form.
33. Once you have selected the appropriate magnification, click on the **Apply** button, then on the **OK** button, to examine the re-sized view of the EC 20240-P1 form.
34. Click on the **Close** button to return to the **Profile** tab page.
35. To close the EFR application entirely, click on the **Exit** button.

Entering Financial Information (Event Based Method)


1.1.1.15 Limitation of Election Expenses

To enter financial information within the **Limitation of Election Expenses** tab page, complete the following steps:


1. Click on the **Limitation of Election Expenses** tab page (as shown below).

Row	Description	Amount
1	Number of electoral districts in which there was an official candidate endorsed by the registered party	.00
2	Number of names on the preliminary list of electors in the electoral districts included in item 1 above	0.00
3	Number of names on the revised list of electors in the electoral districts in item 1 above	0.00
4	Number of names in item 2 or 3, whichever is greater, multiplied by \$0.70	
5	Inflation adjustment factor published by the Chief Electoral Officer	0.04
6	Indexed limit of election expenses; item 4 multiplied by item 5	


- For the **Number of electoral districts in which there was an official candidate endorsed by the registered pa**, enter an amount in the **Amount** field (as illustrated below).

Row (1 of 6)			
		Description	Amount
	1	Number of electoral districts in which there was an official candidate endorsed by the registered pa	20.00


- For the **Number of names on the preliminary list of electors in the electoral districts included in item 1 above**, enter an amount in the **Amount** field (as shown below).


	2	Number of names on the preliminary list of electors in the electoral districts included in item 1 ab	500.00
---	---	--	--------

- For the **Number of names on the revised list of electors in the electoral districts in item 1 above**, enter an amount in the **Amount** field (as shown below).

	3	Number of names on the revised list of electors in the electoral districts in item 1 above	15.00
---	---	--	-------

- Click on the **Save** button to save the entered information on the **Limitation of Election Expenses** tab page. The remaining rows will automatically be calculated (as shown below).

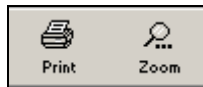
Row (3 of 6)			
		Description	Amount
	1	Number of electoral districts in which there was an official candidate endorsed by the registered party	20.00
	2	Number of names on the preliminary list of electors in the electoral districts included in item 1 above	500.00
	3	Number of names on the revised list of electors in the electoral districts in item 1 above	15.00
	4	Number of names in item 2 or 3, whichever is greater, multiplied by \$0.70	\$350.00
	5	Inflation adjustment factor published by the Chief Electoral Officer	0.04
	6	Indexed limit of election expenses; item 4 multiplied by item 5	\$14.00

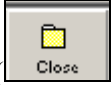
Save 


1.1.1.15.1 The Print Preview Button

- Click on the **Print Preview** () button.

- You will be able to view the EC 20240-P2 form (**Statement of General Election Expenses**).
- You can magnify and print this form using the **Zoom** and **Print** buttons (as shown below).



- Click on the **Close** () button to return to the **Limitation of Election Expenses** tab page.

Note: Clicking on the **Exit** button () closes the EFR application entirely.

1.1.1.16 General Election Expenses

To enter financial information within the **General Election Expenses** tab page, complete the following steps:

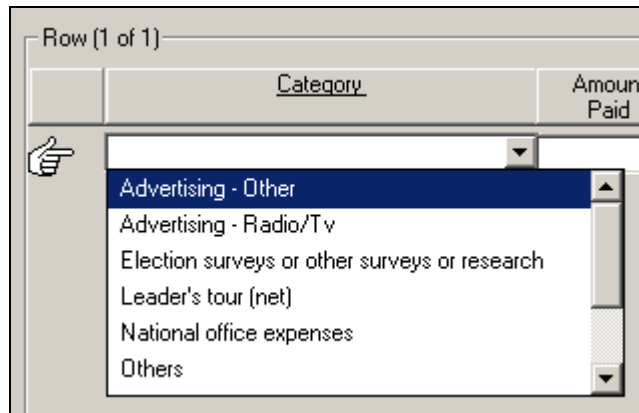
- Click on the **General Election Expenses** tab page (as illustrated below).

 A screenshot of a software window titled 'Political Party: Candian Blue Party'. The window has several tabs: 'Personnel', 'Profile', 'Limitation of Election Expenses', 'General Election Expenses' (which is selected), 'Unpaid Claims', and 'Budget Tool'. Below the tabs, it says 'Row (0 of 0)'. A table with the following columns is visible: 'Category', 'Amount Paid', 'Discount', 'Agreed Unpaid Claim', and 'Disputed Unpaid Claim'. At the bottom of the window, there are buttons for 'Save', 'Add', 'Delete', and a small icon.

- Click on the **Add** button. This new row will appear:

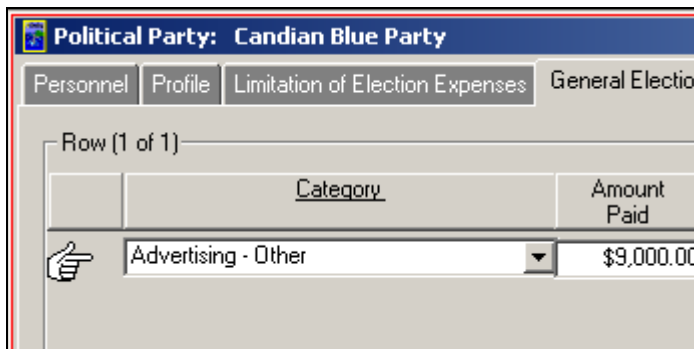
 A screenshot of the same software window as above, but now showing 'Row (1 of 1)'. A new row has been added to the table, with a mouse cursor pointing to the 'Category' cell. The other cells in the row are empty.

- Select a category by clicking on the down arrow next to the **Category** field (as shown below).

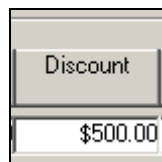


Note: For this illustration, the **Category** selected is **Advertising – Other**.

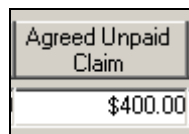
- Enter an amount in the **Amount Paid** field (as shown below).



- Enter a discount amount in the **Discount** field (see below).



- Enter an amount in the **Agreed Unpaid Claim** field (as shown below).




- Enter an amount in the **Disputed Unpaid Claim** field (as illustrated below).

Disputed Unpaid Claim
\$300.00

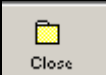
- Click on the **Save** button to save the entered information on the **General Election Expenses** tab page (refer to the following illustration).


Category	Amount Paid	Discount	Agreed Unpaid Claim	Disputed Unpaid Claim
Advertising - Other	\$9,000.00	\$500.00	\$400.00	\$300.00

1.1.1.16.1 The Print Preview Button

- Click on the **Print Preview** () button.
- You will be able to view the EC 20240-P2 form (**Statement of General Election Expenses**).
- You can magnify and print this form by using the **Zoom** and **Print** buttons, as shown below.



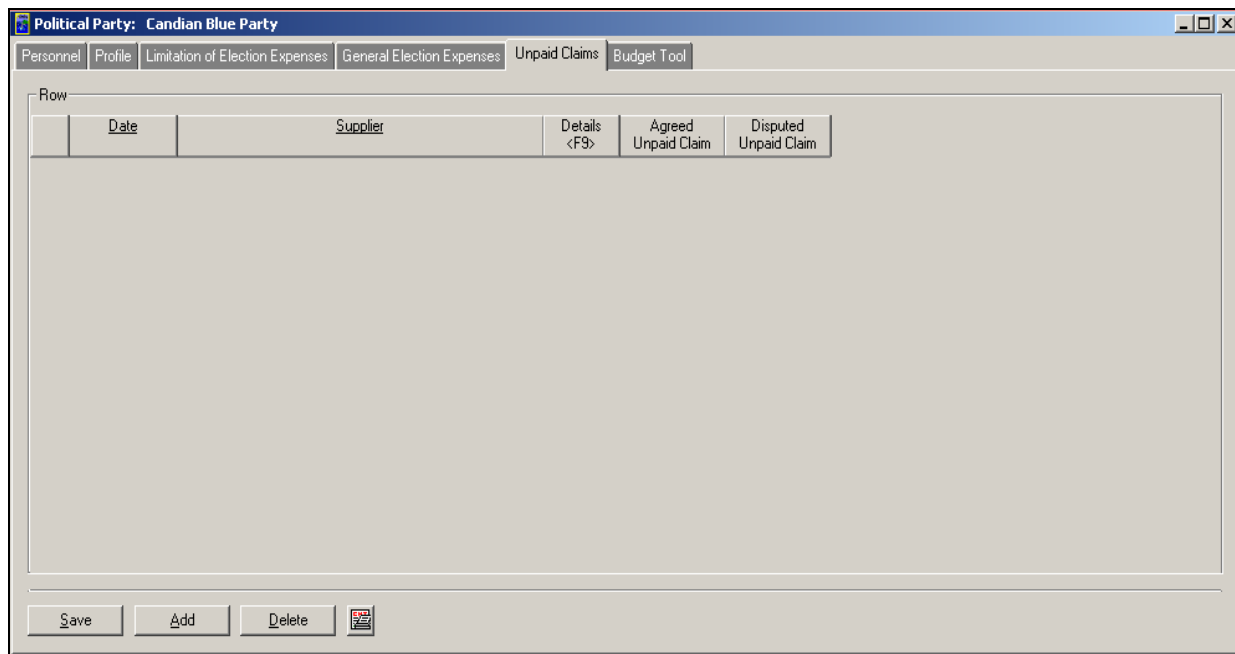
- Click on the **Close** button () to return to the **General Election Expenses** tab page.

Note: Clicking on the **Exit** button () closes the EFR application entirely.

1.1.1.17 Unpaid Claims

To enter financial information in the **Unpaid Claims** tab page, complete the following steps:

1. Click on the **Unpaid Claims** tab page (as illustrated below).



The screenshot shows a software window titled "Political Party: Candian Blue Party". The window has several tabs: "Personnel", "Profile", "Limitation of Election Expenses", "General Election Expenses", "Unpaid Claims", and "Budget Tool". The "Unpaid Claims" tab is selected. Below the tabs is a table with the following columns: "Date", "Supplier", "Details <F9>", "Agreed Unpaid Claim", and "Disputed Unpaid Claim". The table is currently empty. At the bottom of the window, there are buttons for "Save", "Add", "Delete", and a small icon.

2. Click on the **Add** button. This new row will appear:

Political Party: Candian Blue Party

Personnel Profile Limitation of Election Expenses General Election Expenses Unpaid Claims Budget Tool

Row (1 of 1)

	Date	Supplier	Details <F9>	Agreed Unpaid Claim	Disputed Unpaid Claim
☞	0000-00-00	<None>	...		

Save Add Delete


3. Enter a date in the **Date** field. You can do this manually, or by using the built-in **Calendar** or the **Insert Today's Date** feature (by right-clicking on the date field), as illustrated below.

Row (1 of 1)


	Date	Supplier
☞	0000-00-00	<None>

- Cut
- Copy
- Paste
- Select All
- Show Calendar...
- Insert Today's Date

4. Click on the drop-down arrow next to the **Supplier** field, and select the appropriate supplier from the list (as shown below).

Row (1 of 1)				
	Date	Supplier	Details <F9>	Agreed Unpaid Claim
	2004-02-09	<div style="border: 1px solid black; padding: 5px;"> <None> ABC Corp Anderson Greg Anonymous/anonyme Baker Dusty Baldwin Alec Best Business Cantley Jack Coleman Cathy Cooper Sharon Costner Kevin Degras Estelle </div>	...	

Note: For this illustration, the **Supplier** selected is **ABC Corp**.

5. Click on the **Details** () button, or press the **F9** key on your keyboard, to review the details of the supplier (as shown on the following page).

Type

Contributor Type: G

This is a numbered company:

Identification

Corporation Name: ABC Corp

Name of CEO:

Initials:

Information

Street no.: 345 Street name: Jackson St.

Suite: City: Calgary

Prov: AB Postal Code: T1B7G5

Home Tel.:

Business Tel.:

Business Tel Ext.:

E-mail:

6. Ensure that the **Type**, **Identification** and **Information** areas have been completed with appropriate information.
7. Click on the **OK** button. You will return to the main **Unpaid Claims** tab page.
8. Enter an amount in the **Agreed Unpaid Claim** field (as shown below).

Agreed Unpaid Claim
\$200.00

9. Enter an amount in the **Disputed Unpaid Claim** field (as illustrated below).

Disputed Unpaid Claim
\$300.00


10. Click on the **Save** button to save the information on the **Unpaid Claims** tab page (as shown below).

Political Party: Candian Blue Party					
Unpaid Claims					
Row (1 of 1)					
	Date	Supplier	Details <F9>	Agreed Unpaid Claim	Disputed Unpaid Claim
	2004-02-09	ABC Corp	...	\$200.00	\$300.00

Save Add Delete


Note: You can add and delete unpaid claim expenses by clicking on the **Add** and **Delete** buttons

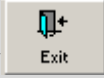
1.1.1.17.1 The Print Preview Button

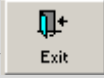
1. Click on the **Print Preview** () button.
2. You will be able to view the EC 20240-P3 form (**Statement of Unpaid Claims**).
3. You can magnify and print this form using the **Zoom** and **Print** buttons (as shown below).

Print	Zoom



- Click on the **Close** () button to return to the **Unpaid Claims** tab page.



Note: Clicking on the **Exit** button () closes the EFR application entirely.

1.1.1.18 Budget Tool

To enter financial information within the **Budget Tool** tab page, complete the following steps:

- Click on the **Budget Tool** tab page (as illustrated below).

The screenshot shows a software window titled "Political Party: Candian Blue Party" with several tabs: "Personnel", "Profile", "Limitation of Election Expenses", "General Election Expenses", "Unpaid Claims", and "Budget Tool". The "Budget Tool" tab is active, displaying a table with the following data:

Category	Amount Spent	Budget	Variance
Advertising - Radio/TV		00	
Advertising - Other	\$9,000.00		(\$9,000.00)
Election surveys or other surveys or research			
National office expenses			
Professional services			
Leader's tour (net)			
Travel (other than leader's tour)			
Salaries and wages			
Others			

At the bottom of the window, there is a "Save" button and a small icon.


- Enter the budget amounts in the **Budget** column (as illustrated below).

Political Party: Candian Blue Party

Personnel Profile Limitation of Election Expenses General Election Expenses Unpaid Claims Budget Tool

Row (9 of 9)

Category	Amount Spent	Budget	Variance
Advertising - Radio/TV		\$20,000.00	\$20,000.00
Advertising - Other	\$9,000.00	\$19,000.00	\$10,000.00
Election surveys or other surveys or research		\$18,000.00	\$18,000.00
National office expenses		\$17,000.00	\$17,000.00
Professional services		\$16,000.00	\$16,000.00
Leader's tour (net)		\$15,000.00	\$15,000.00
Travel (other than leader's tour)		\$14,000.00	\$14,000.00
Salaries and wages		\$13,000.00	\$13,000.00
Others		\$12,000.00	\$12,000.00

Save 


3. Click on the **Save** button to save the values entered on the **Budget Tool** tab page (as shown below).

Political Party: Candian Blue Party


Personnel Profile Limitation of Election Expenses General Election Expenses Unpaid Claims Budget Tool

Row (9 of 9)

Category	Amount Spent	Budget	Variance
Advertising - Radio/TV		\$20,000.00	\$20,000.00
Advertising - Other	\$9,000.00	\$19,000.00	\$10,000.00
Election surveys or other surveys or research		\$18,000.00	\$18,000.00
National office expenses		\$17,000.00	\$17,000.00
Professional services		\$16,000.00	\$16,000.00
Leader's tour (net)		\$15,000.00	\$15,000.00
Travel (other than leader's tour)		\$14,000.00	\$14,000.00
Salaries and wages		\$13,000.00	\$13,000.00
Others		\$12,000.00	\$12,000.00

Save 


1.1.1.18.1 The Print Preview Button

1. Click on the **Print Preview** () button.
2. You will be able to view the **Budget Report**.

3. You can magnify and print this form by using the **Zoom** and **Print** buttons, as shown below.



4. Click on the **Close** () button to return to the **Budget Tool** tab page.

Note: Clicking on the **Exit** button () closes the EFR application entirely.

Index

Exit button 22, 32, 38, 44, 48, 57, 79, 82

A

Add Contribution Returns 27
Amount 26

B

Budget 65, 66, 87, 88
Budget Tool 65, 66, 87, 88

C

Category 80
Change Event 70

Confirmation Date 17
Contributions – Post C24 23, 30, 31
Contributions – Pre C24 23
Contributor 29, 34, 41

D

Date of Contribution 24
Date Received by Party 33
Details 18, 19, 24, 25
Directed Contributions 33, 35, 37, 38

E

EFR. 1, 2, 5, 9, 10, 13, 22, 32, 38, 44, 48, 57,
67, 79, 82
Election... 5, 9, 11, 64, 69, 70, 78, 79, 80, 81,
82
Electronic Financial Returns 1, 2, 5
English Event Name 14, 68
Entity 10, 11, 16
Event Type 15, 69

F

Financial Summary 38

G

Guarantor 43

H

I

Identification 12, 17, 18, 19, 25
Invoice 25
Items 32

L

Leadership Contestant 36, 38
Loans 39, 42, 43, 44

M

Maintain Events 13, 67
Maintain Political Parties 10, 11
26

N

New entity 20
New Parties 13
Nomination Contestant 11

O

Office of CEO 29
Optional Expenses 62, 64

P

paper size for your printer21
 party17
 Personal Information 12, 17, 18, 19, 25
 Personnel 9, 10, 11, 12, 20
 Personnel tab page.....9,10, 12

Political Parties.....2, 5, 9, 12
 Political Party 11, 13, 17, 18, 19, 20, 21
 Principal of Loan43
 Print21, 32, 38
 Print Contribution Receipt.....26
 print job22
 Print Preview21, 32, 38
 Print Receipt26, 27
 Profile 11, 12, 17, 20, 21
 Profile Tab Page 11

R

Relationships 12, 17, 18
 Returned contributions from.....28

S

Sub-category 63
 Supplier.....24, 25, 59, 84

T

Transfers In.....45, 47, 48
 Transfers Out 49, 52
 26
 Type12, 17, 18, 25

U

Unpaid Claims57, 58, 60, 61, 83, 85, 86
 Utilities 13, 67

V

View Contributions Returns 31

Z

Zoom..... 22, 32