

Executive Summary

Abstract

Campaign ToolBox™ is a political campaign finance reporting program that produces both electronic filing and hard copy reports meeting the statutory requirements of the state for which it is written. Versions are currently available for FL, KY, and PA; it is officially approved for filing in those states. IRS Form 8872 (paper reports only) is available as an option for the FL program. It is designed to be used by candidates on the state or local level, political committees, and lobbyists. Report accuracy is enhanced by a thorough record checking procedure that scans for missing or invalid data and data that appears to contradict statutory requirements.

Design philosophy

The primary design objective is simplicity and ease of use. When adding flexibility and extra “bells and whistles” conflicts with simplicity, simplicity wins. The program is designed around the idea that data is entered one time and used for multiple purposes. Once a contribution record has been entered, that data can then be used for creating mail merge “thank you” letters and labels, internal staff reports, and other campaign management functions. Expense records can be used to generate laser-printed checks.

Features

Other features include bank statement reconciliation, recording “secondary contributors” who are not included on the statutory reports but should receive a “thank you” letter, supporter information (volunteer info.), extensive filter and sort capabilities, a wide variety of internal staff reports, file exporting for use with spreadsheet and database programs, efficient keyboard-only data entry, open database format, user-definable fields, pre-report data checking, sortable spreadsheet views, and cumulative amount checking.

Licensing and price

The program is licensed for a specific period of time; records with a date later than the expiration date cannot be saved. The program is licensed for a minimum of a one year period and can be extended for additional 90-day periods. The program license specifically allows the program to be installed on multiple computers for the licensed reporting entity (applies only to single reporting entities). The single license is for a single reporting entity - see Multiple Reporting Entity order form for information on using the program for more than one reporting entity. Please refer to the current order form for the price.

Trial Mode

The program can be downloaded by anyone at anytime. The program loads in Trial Mode with usage-restrictions; all features can be used and tested to determine if it meets your needs. When payment has been received, a registration code is issued which removes the Trial Mode restrictions

Support and program updates

Licensed customers are entitled to free updates via Internet download. Technical support via phone or email is included. Support is for the current version being used by the primary contact person specified on the order form. Support is on an as-available basis during regular business hours, evenings, and weekends.

About Adjutant Software, Inc.

Campaign ToolBox, first released in January 1996, is the most widely used campaign reporting software in Florida. In FL, KY, and PA, it was the first software package approved for use in those states. Adjutant Software, Inc. has a contract with Kentucky Registry of Election Finance as the sole-source provider of reporting software for that state. Adjutant Software, Inc. is basically a one-man operation - when you call with a question, you speak to the programmer. Campaign ToolBox is written and supported by Stephen McGehee, a former candidate and campaign treasurer for several major campaigns with a background and education in industrial engineering and computer programming.

Program Topics

(Not all features are available for all states)

Import / Export

Campaign ToolBox includes a powerful file exporting feature that allows you to create a tab or comma delimited file with the fields you select, in the order you select, filtered and sorted to your needs. This file can be used with spreadsheet, database, or word processor programs.

An Export/Import option is available at an additional charge. This allows multiple users of CTB to enter Contribution records and then merge those records into another CTB database file. This allows a large campaign to spread the data-entry work load out among a number of people rather than just one person. Some campaigns have used this feature to import Contribution records from their Excel spreadsheet file.

Also available is CTB Importer: a semi-custom program specifically written to work with your existing record-keeping system (see web site for details).

Mail merge

The program works with Microsoft Word or other word processor by creating a data file with the records you request. The actual mail merge operation is done by your word processor, giving you all the benefits of a full-featured word processor. Campaign ToolBox creates the mail merge data file in both MDB and TXT formats, giving you maximum flexibility in how you use your data.

User-definable fields

Campaign ToolBox includes standard fields to meet the needs of almost any campaign. However, you may have some very specific needs that were not anticipated. In that case, you can create additional fields as needed and use them as you would any other field in a record.

Check printing

The program can be used to print checks on your laser printer. It uses the standard Quicken® "Check on top" voucher checks (can be ordered through the adjutant.com web site). Whether you use Campaign ToolBox to print your checks or you write them manually, the program can track check numbers with expense records.

Database format

Campaign ToolBox uses the standard Microsoft Access® database format. It does not require you to have the Access program on your computer - it merely utilizes that standard file format. This allows you to directly use your data file outside of Campaign ToolBox if you wish. There is nothing proprietary about the way the database file is constructed so you are not "locked into" Campaign ToolBox to use your data.

Multiple bank accounts

If you have more than one bank account for your campaign, the program can link records to a specific account and create any required reports (not available in all states).

Repeating groups of contributors

If you have a group of contributors that gives on a regular basis, you can set up the program to repeat that entire group with just a couple of steps. This is particularly useful for some committees.

Search, filter, and sort

If you need to find a specific record or group of records, the program includes a spreadsheet view that can be sorted by column, and a very flexible search form. When creating a report or mail merge letter, you can filter and sort to get exactly the records you want in exactly the order you want.

Campaign ToolBox

Product Description

System requirements

Campaign ToolBox requires Windows 95 or higher to operate. Any modern Pentium-class system should be able to run the program with no problem. If you have any concerns about this, please test using Trial Mode before ordering. The program can easily be used on a network; however, there is no file-locking or other network-specific code built into the program. *Adobe Acrobat Reader* is required for tech support documents (it is a free download and is included on the CD). Internet access is required for free program updates.

Ordering Campaign ToolBox

For Price and Ordering information, please download a current order form from www.adjutant.com.

Expiration Date

The program is licensed in 90-day increments, with a minimum of 4 quarters (one year). The license term begins on the date of purchase (or renewal date) and ends on the same date the following year (or later if additional quarters are purchased). The license may be extended in 90-day increments.

FedEx Info

Saturday delivery or pickup or other special charges are extra. Physical street address is required.

Payment Options

Check, Visa, MasterCard, or Discover

Most orders are processed and shipped within 24 hours.

Please refer to a current order form for further information.

Contact Information

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