F. SPECIAL FEATURES

Search Feature

Where there are a large number of transactions in the All Transactions window, the Search feature in FECFile can be used to limit the number of transactions you need to look through. To use this feature:

		Transactions]									7 >
Fik	Edit Vi	iew Window Help								-	8 :
7	9	Individuals/Organizations Election Cycles]	🎁 🗴 🎸	(1)	🛟 🥔				
ine#	Name	Reports		Date	Amount Id						
1(a)	Abrams	AI Transactions		25/2002	150.00 716						
1(a)	Ackerm -			30/2002	250.00 027						
1(a)	Ackmai	Summary Page		25/2002	500.00 611						- 1
1(a)	Agarwa	Receipts		07/2001	50.00 809						
1(a)	Ajamy,	Disbursements		17/2001	250.00 988						
1(a)	Ajamy,	Loans and other Obligations		25/2002	250.00 603						
1(a)	Akel, G			07/2001	100.00 932						
1(a)	Albert,	Recycle bin		25/2002	100.00 697						
1(a) 1(a)	Alberta Alcee, [Sort	Ctrl+r	24/2002	250.00 346 100.00 961						
1(a) 1(a)	Alcee, L	Search	Ctrl+F	15/2002	100.00 847						
1(a) 1(a)	Aldrich, Ro	onald P		20/2001	1000.00 043						
1(a)	Alese, Don			15/2002	100.00 837						
1(a)	Alpern, Ha			17/2001	50.00 307						
1(a)	Alpern, Ha			28/2002	50.00 164						
1(a)	Andrew, R			17/2001	750.00 356						
1(a)	Andrew, R	talph	10/	07/2002	1000.00 396						
	Anglim, Ca			30/2002	50.00 949						
1(a)	Appel, Rich	hard W.	12/	05/2001	25.00 727						
1(a)	Archer, Kir			17/2001	20.00 401						
	Arkins, Ca			05/2001	100.00 192						
1(a)	Arndt, Joh		10/	05/2001	25.00 170						
1(a)	Arnold, Th			02/2002	100.00 223						
1(a)	Augustine,			19/2002	100.00 328						
	Ayer, Lois			25/2002	25.00 491						
1(a)	Bailey, Ang			17/2001	25.00 269						
1(a)	Baker-Stor			25/2002	75.00 637						
1(a)	Balantine,			02/2002	50.00 225 100.00 598						
1(a)	Barbash, M Barden, Le			29/2001	150.00 769						
1(a) 1(a)	Barnard, C			05/2001	50.00 393						
1(a) 1(a)	Barton, Al			29/2001	25.00 650						
1(a)	Baum, Joh			15/2001	50.00 541						
1(a)	Beal, Kenn			07/2001	50.00 924						
1(a)	Beal, Patri			15/2002	50.00 802						
1(a)	Beaulieu, S			19/2002	75.00 266						
1(a)		nder, Patricia		25/2002	50.00 503						
1(a)	Beeman, L		10/	05/2001	25.00 227						
1(a)	Beling, Ce	line	10/	19/2001	25.00 490						
1(a)	Belmont, H		10/	25/2002	150.00 710						
1(a)	Belonga, F			05/2001	50.00 184						
1(a)	Benander,			25/2002	50.00 489						
1(a)	Benazzi, R			07/2001	50.00 920						
1(a)	Benjamin,			25/2002	30.00 629						
1(a)	Bennett, A			30/2002	50.00 928						
1(a)	Bentham,			27/2002	50.00 080						
1(a)	Bergstedt,			29/2001	250.00 591						
1(a) 1(a)	Berinstein, Bernstein,			30/2002	50.00 982 1000.00 060						
	the transac		1/1	/1/001	1000.00-060					YE:07/01/2001 - 12/31	_

✓ From the all transactions window click on the View Menu and select Search…or simply press the Control and F keys at the same time. This will open the Search interface.

Search		
Te <u>x</u> t		ОК
richard		Cancel
Date <u>F</u> rom	Date <u>T</u> hru	

✓ Enter a text word or phrase and/or a date range. Then click on OK

		h Results]							
Fik	e Edit View								- 6
7	💻 🔝 ,	🔊 🗈	71 🗉 🖬	1 🕅 🗎	🛍 č) 🕙 🍘 🧐	🛟 🧶		
ne#		Description		Amount Id					
(a)	Appel, Richard		12/05/2001	25.00 727	,				
			12/27/2001	1000.00 060					
	Braun, Richard		10/30/2002	500.00 024					
	Hoffman, Rich		10/25/2002	25.00 584					
(a)	Hogg, Richard	i	09/19/2002	100.00 274	+				
			10/05/2001	500.00 162	2				
	Lagnese, Richa	ar	10/21/2002	50.00 (419	•				
(a)	Laurenzo, Rich	12	10/05/2001	25.00 217	,				
	Lippe, Richard		09/19/2002	50.00 304					
			11/15/2001	100.00 565					
	Mathews, Rich		12/07/2001	100.00 831					
	O'Kane, Richar		10/25/2002	100.00 495					
	Park, Richard		10/19/2001	50.00 455					
	Petrilio, Richard		10/25/2002	100.00 541					
	Pierle, Richard		10/05/2001	100.00 207					
	Richards, Elen		10/25/2002	25.00 571				G €	
	Schulz, Gregor		10/19/2001	25.00 461				»/ <u>C</u>	
(a)	Speisman, Rich	1 K	10/25/2002	50.00 787					

✓ The results of the search are displayed in the Search Results window. Note, the search looks for the text you seek in the Name, description, address, and memo text. As an example: Greg Schultz, above…lives on Richards Road.

NOTE: Use the resulting transactions as if they were in the all transactions window. Also, only one search results is displayed at a time.

Sort Feature

In a window, the user can sort the transactions in a useful order by using the Sort Function a Follows.

	file - [All Transactions]						
ie	Edit View Window Help						
a É	Individuals/Organizations	2 🛄 🗯 🤇	S 🛃	â 🙉	💦 🥔		
_	Election Cycles		-		** - ~		
	Name Reports - Al Transactions	Date		nt Id			
	Abrams	01/01/2		.89 111			
	Ackern Summary Page	10/25/2		.00 027			
	Ackmai Receipts	10/25/2		.00 611			
	Agarwa Disbursements	12/07/2		.00 809			
	Ajamy, Loans and other Obligations	12/17/2		.00 988			
	Aiamy.	10/25/2		.00 603			
	Akel, G Recycle bin	12/07/2	001 100	.00 932			
	Albert, Sort Ctrl+r	10/25/2	002 100	.00 697			
	Alberta Search Ctrl+F	09/24/2	002 250	.00 346			
	Alcee, E	12/17/2		.00 961			
	Alcee, Donna	11/15/2		.00 847			
	Aldrich, Ronald R.	12/20/2		.00 043			
	Alese, Dominick	11/15/2		.00 837			
	Alpern, Harlan	10/17/2		.00 307			
	Alpern, Harlan	06/28/2		.00 164			
	American Hospital Association F Transfer to Affiliat			.00 124			
	American Hospital Association F Transfer to Affiliat			.00 131			
	American Hospital Association F Transfer to Affiliat		001 10000				
	American Hospital Association F Transfer to Affiliat American Hospital Association F Transfer to Affiliat		001 20000	.00 411			
	American Hospital Association F Transfer to Affiliat American Hospital Association F Transfer to Affiliat			.00 536			
	American Hospital Association F Transfer to Affiliat			.00 706			
	American Hospital Association F Transfer to Affiliat		001 15000				
	American Hospital Association F Transfer to Affiliat			.00 712			
	American Hospital Association F Transfer to Affiliat		002 10000				
	American Hospital Association F Transfer to Affiliat		002 10000				
	American Hospital Association F Transfer to Affiliat		002 10000				
	American Hospital Association F Transfer to Affiliat	d SSF 09/20/2	002 10000	.00 351			
	American Hospital Association F Transfer to Affiliat		002 10000				
	American Hospital Association F Transfer to Affiliat	d SSF 10/28/2	002 5000	.00 859			
	American Hospital Association F Transfer to Affiliat	d SSF 11/08/2	002 5000	.00 860			
	American Hospital Association F Transfer to Affiliat			.00 861			
	American Hospital Association F Transfer to Affiliat		002 10000				
	American Hospital Association F Transfer to Affiliat			.00 063			
	Andrew, Ralph	10/17/2		.00 356			
	Andrew, Ralph	10/07/2		.00 396			
	Anglim, Carmela	10/30/2		.00 949			
	Appel, Richard W.	12/05/2		.00 727			
	Archer, Kimi J. Arkins, Carole	10/17/2		.00 401			
	Andr. John	10/05/2 10/05/2		.00 192			
	Arnold, John Arnold, Thomas	08/02/2		.00 223			
	Augustine, Joseph	09/19/2		.00 328			
	Augustine, Joseph Aver, Lois	10/25/2		.00 491			
	Baley, Angela	10/25/2		.00 269			
	Baker-Stone, Lori	10/25/2		.00 637			
	Balantine, Fave	08/02/2		.00 225			
. 1							

✓ From any transactions window click on the View Menu and select Sort. ...or simply press the Control and R keys at the same time. This will open the Sort interface.

NOTE: Each transaction window can have its sort preferences set independently. Set up your sour preferences for each window.

Sort priority	Sort priority
Amount (None> (None> (None> OK	Amount None> Line# Name Date Amount Aggregate Id Parent

- ✓ .There are four levels of sorting available. The top box sorts first, then the second box and so forth
- ✓ The options for sorting are shown above, and are from low to high.

Merge Feature

When there are multiple entries for a single unique contributor, you can use the Merge Function to merge multiple entries into one entry for a unique contributor. This helps improve tracking and reporting of aggregate totals for contributors.

FE	Cfile - [Receipts]								_ 7 2
E Fi	e Edit View Windo	w Help							- 0
E	New	Ctrl+n		R 🕅) 😚 👗 /	🕙 🍘 🧐	🔨 🥔		
	Open	Ctrl+o				S 🖬 👁	** . ~		
Lin	Close	Ctrl+w	e	Amount /	ggreg I P.				
1(Save	Ctrl+s	2001	5.00	5.00 66				
1(Save As		2001	5.00	5.00 01				
1(—			2001	15.00	15.00 25				
1(Import		2001	20.00	20.00 46				
1(Import Names		2001	20.00	20.00 68 20.00 23				
10	Export Names		2001	20.00 20.00	20.00 23				
10	Merge Names		2001	20.00	20.00 43				
10	Backup	v	2001	20.00	20.00 19				
10	Check Limits		2001	20.00	20.00 05				
10-			2001	20.00	20.00 17				
1	Validate	Ctrl+v	2001	20.00	20.00 65				
1	Print Report	Ctrl+shift+p	2001	25.00	25.00 03				
1	Upload		2001	25.00	25.00 52				
1(Update Committee List		2001	25.00	25.00 64				
.1(—			2001	25.00	25.00 70				
1(Print	Ctrl+p	2001	25.00	25.00 72				
1(Print Setup		2001	25.00	25.00 74				
1(Print Preview		2001	25.00	25.00 76				
1(2001	25.00	25.00 15				
1(1 DCf11 Version5 .DCf		2001	25.00	25.00 17				
1(2 TESTCCM2.DCf		2001	25.00 25.00	25.00 19 25.00 21				
1(3 AUTH.DCf		2001	25.00	25.00 21 25.00 27				
10	4 AUTH1.DCf		2001	25.00	25.00 27				
10-			-2001	25.00	25.00 69				
1	Exit		2001	25.00	25.00 01				
	Roche, Mary Ann	10/1	7/2001	25.00	25.00 85				
	Dimon, Leonard		7/2001	25.00	25.00 97				
	Eberly, James		9/2001	25.00	25.00 45				
	Messineo, Hedy	10/1	9/2001	25.00	25.00 49				
1(a)u	i Salo, Jack	10/1	9/2001	25.00	25.00 59				
	 Schulz, Gregory M. 		9/2001	25.00	25.00 61				
	McLeod, Christine		9/2001	25.00	25.00 77				
	Murray, Kevin		9/2001	25.00	25.00 86				
	Beling, Ceine		9/2001	25.00	25.00 90				
	Santos, Lee		9/2001	25.00	25.00 99				
	McNamara, Sharon A.		5/2001	25.00	25.00 55				
	Tanney, Karen Hendel, Sharyl		5/2001 5/2001	25.00 25.00	25.00 61 25.00 67				
	i Senn, Larry		5/2001	25.00	25.00 67				
	Pollard, Amy		9/2001	25.00	25.00 32				
	Miler, Victoria		9/2001	25.00	25.00 32				
	Ward, Marguerite		9/2001	25.00	25.00 36				
	McCabe, Rita		9/2001	25.00	25.00 40				
	Shafer, David		9/2001	25.00	25.00 42				
1(a)u	Stoddard, Ruth		9/2001	25.00	25.00 44				
	Tryon, Clara		9/2001	25.00	25.00 46				
1(a)u	Barton, Alan	11/2	9/2001	25.00	25.00 50				

✓ From any transactions window click on the File Menu and select Merge Names. ...This will open the Merge interface.

Merging possible dup	licate name en ies	
	-First occurence	Possible duplicate
Last / Business Name	ENGEL FOR CONG	EL FOR CONGRESS
First Name		<<
Name Prefix		<<
Name Suffix		<<
Address, line 1	462 CALIFORNIA RD	462 CALIFORNIA RD
Address, line 2		<<
City	BRONXVILLE	< BRONXVILLE
State	New York 💌	<
Zip	10708	<< 10708
Employer		<<
Occupation		~
Save so far & Quit	Merge	<<< Don't merge
Cancel All Merge	Reset to As it Was	

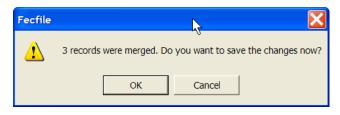
- The system shows the first occurrence of a possible duplicate name in the left column. In the right column it shows the next occurrence of a possible duplicate.
- ✓ If the right column information is correct you can update the left column by clicking on the arrowed buttons. The << buttons will update individual data items. The <<< button replaces all left column data with all the right column field values.</p>
- ✓ When the left column data is correct, selecting the Merge Button uses the left column information for the Merge of both.
- ✓ If the records are not duplicate, select the Don't Merge button
- ✓ When you select the Merge button, the following message is shown.

Fecfile	
1	لح You are about to merge the two occurences of ENGEL FOR CONGRESS - 462 CALIFORNIA RD Once you complete the operation and save the file, the change cannot be undone. Are you sure? If you cancel, you will be taken to the names window. If you select No, merge will ignore this record and continue to search for other duplicates!
	Yes No Cancel

- ✓ When you select the Merge Button the system provides a notice to confirm the action. Select Yes, and you are returned to Merge interface, and the next comparison is shown.
- ✓ If you become confused for a given merge transaction, press the reset button

to return to the start of that transaction. If you desire to stop the whole merge process select the Cancel All Merge button.

✓ When all merges have been processed, the following is shown. It shows the number of merged names and provides the option to save the changes done.



NOTE: If you select Cancel...All the merge selections are deselected, and you will have to start over again.

✓ If, in the middle of the work (you are not completed with the merge process) but want to save the work so far, press the Save so far and Quit button. You will keep the merged items. The function can be run again at a later time to address the additional duplicate names.