## crimson

## **PAC Dashboard**

The Crimson **PAC Dashboard** provides an overview of PAC related data by displaying budget summaries, details about contributions made to other committees, and Independent Expenditure information.

- There is a **Dashboard Navigation Bar** at the top right corner of the page where you can access the:
  - Payee Search
  - Expenditures Search
  - Congress Member Search
  - Payment Approval
  - Treasury Import
  - Treasury Settings

To learn more about the **Congress Member Search** and/or the **Payment Approval** features, see the <u>Crimson – Congress Member Search</u> guide, the <u>Crimson Treasury – My Payment Requests</u> guide, and the <u>Crimson Treasury – Payment Requests – Treasury Staff</u> guide on the HelpDesk.

- There are Dashboard Action Buttons on the dashboard such as:
  - New Payee
  - New Expenditure

These allow you to complete tasks related to PAC data without leaving the dashboard.

PAC	Dashboard	-	Q	Q	Q≞		1	\$
	<b>\$10,000</b> Overall Budget	<b>\$1,000</b> Budget Spent (YTD)		New	Payee Total E	New Ex Sy Party	<b>penditure</b>	
	<b>3</b> Undesignated Contributions	<b>114</b> Committees Missing FEC ID						
					Other			

Click the green Overall Budget card to edit the Annual Spending Budget for the PAC and view a list of all existing allocated budgets towards payees or other committees. In that list, you can add a New Budget, add a New Payee, Edit or Delete an existing allocated budget, or create a new Disbursement based on the budget's details.

udget Setting							
Annual Spending Budget	idit						• New Budget
10000							🗄 New Payee
Search By Payee							
	ld	Name	Expected Date	Allocated Amount	YTDContribution	Created At	Created By
🖌 🗙 Ş	6	CMDI	5/1/21	\$10,000	\$1,000	3/9/21	Joseph Carothers
🖊 🗙 Ş	6	CMDI	3/9/21	\$1,000	\$1,000	3/9/21	Joseph Carothers
🖌 🗙 Ş	230	Lincoln for Congress	4/15/19	\$10,000	\$0	3/4/19	Sofia Amaya

- Click the green **Budget Spent (YTD)** card to view a list of all expenditures or contributions to other committees that are counting towards your overall annual budget that has already been spent. In that list, you can create a **New Expenditure**, **Edit/View** the disbursement's details, or **Delete** the expenditure.

Budget Spent									)
This Year	<ul> <li>✓ Search</li> </ul>	n By Payee						•New Expenditure	
	TXNID	Payeeld	Payee Name	Amount	Date	Election Code	Election Year	Election Other	
<ul> <li>×</li> </ul>	10901	6	CMDI	\$1,000	6/30/22				•
×	10902	6	CMDI	\$0	6/30/22				
« < 1	> > 10 ×	items per page						1-2 of 2 items	

- Click the red **Undesignated Contributions card** to view a list of contributions to other committees that do not have an **Election Code** or an **Election Year** assigned.
- Click the red **Committees Missing FEC ID** card to view a list of payees with missing FEC ID numbers.
- The top 5 lists provide summary information on the Most Recent Contributions to other committees, Unspent Budget, Excessive Contributions to Candidate Committees/PACs/Parties, and year-to-date Totals by Election for Independent Expenditures (by Dissemination Date and Transaction Date).
- Click a record in any of the **top 5 lists** that display transactions to view the payee record's details or the expenditure's details.

Top 5 1 2	Most Recent Contribution           CMDI           06/30/2022 -           CMDI           06/30/2022 -	s 1,000 \$0	Top 5 Unspent Budget None found	 Top 5 Excessive Contributions toCandidate Committees1FRIENDS OF PAT T Total Contribution: 25000.002Dave Reed for Congr Total Contribution: 7500.003Candidate for Senate Total Contribution: 14600.00\$9,600
Top 5 PAC/ None	Excessive Contributions to PTY found	,	Total IE \$ per Election By Dissemination Date (YTD) None found	 Total IE \$ per Election By Transaction Date (YTD) None found

- A list of Crimson PAC Reports are available at the bottom of the PAC Dashboard. You can run these reports by clicking the report's title. Click the button to display a list of all reports.