# Welcome to CrimsonFiler

CrimsonFiler is the web-based FEC filing software that comes as a companion product to Crimson. You will find an overview of CrimsonFiler's layout and functions in this guide.

CrimsonFiler Access

You can access CrimsonFiler under the **Compliance** menu located on the left hand side of Crimson, or visit and bookmark https://crimsonfiler.cmdi.com.
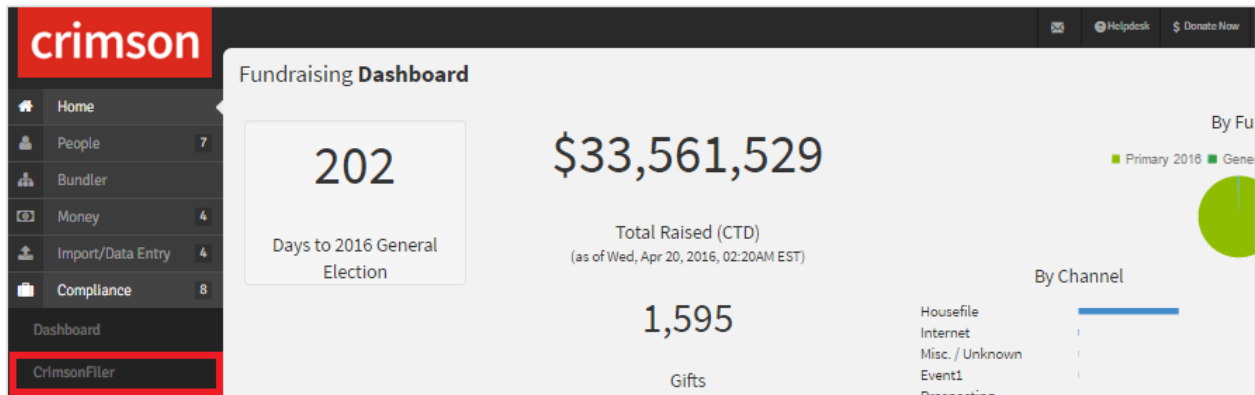
Login

CrimsonFiler uses the same username and password combination as Crimson, allowing for single login for both systems (the user must be granted access).

Home Screen

CrimsonFiler's home screen includes the following elements:

Committee Profile – Upon logging in, users can immediately view the committee's profile information. They can also edit this profile when updates are required. This profile is used to pre-fill the cover pages of the reports created.

COMMITTEE PROFILE							✎ Edit
Committee Name	Washington for Congress			FEC ID	C00252478		
Address	123 Main Street Suite 400			Election Cycle	11/5/2008 to 11/30/2012		
City	Anytown			Committee Code	Campaign Committee		
State	VA			Committee Type	Principal Campaign Committee		
Zip	22043 - 9899			Multi-Candidate?	☐		
Candidate Profile							
Name	Rep. George S. Washington						
Candidate ID	H2OH17158	Office	House	State	VA	District	01
Treasurer Signature							
Name	Mr. Thomas R. Holmes Jr.						

Unfiled Reports – Along the left side of the screen all "unfiled" (or open for edit) reports are listed. The list is clickable, so a user can easily open a report from the home screen and continue working on their current project.
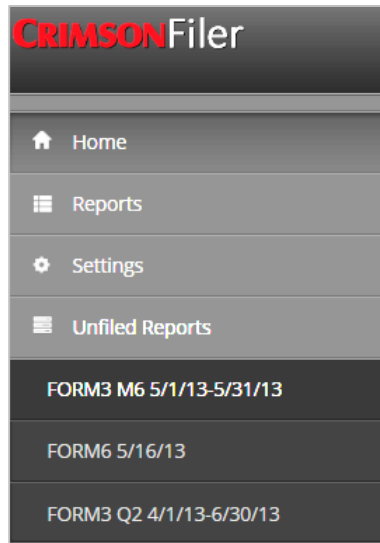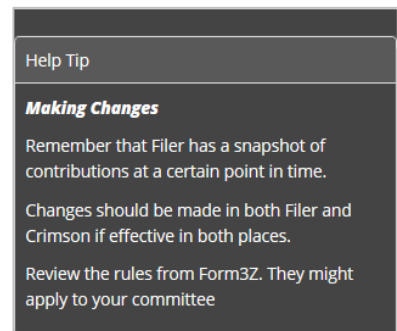

Helpful Links – Links to various FEC pages that may assist in the filing process.
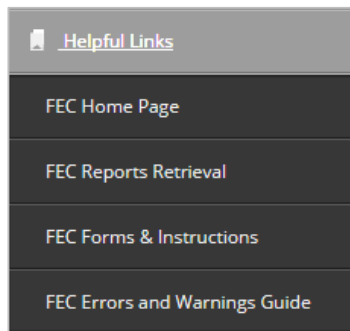
Help Tips – Updates from CMDI on new CrimsonFiler features and improvements.

Reports

While the **Unfiled Reports** link is very helpful for immediate access to current projects, clicking on the Reports option along the left menu panel will bring users to a listing of all reports, both filed and unfiled. From here, users can also choose to start a new report by clicking the **Create New** option.

Search – The search box along the top of the screen greatly improves a user's ability to target a specific report. It searches all the listed fields on the screen, allowing for much greater flexibility.

Edit, Delete, and Amend Reports – The icons along the left side of the report list allows users to easily open and work on reports:
- ✏️ Use this button to edit an existing report. A report cannot be edited once marked as filed.
- ❌ Use this button to delete a drafted, but not yet filed, report.
- ➕ Use this button to create an amendment of a filed report.

Settings

Itemization – Depending on the method a committee uses for tracking expenditures, as well itemization preferences on some line numbers, admin client users can now adjust which line number itemize based on aggregate and which itemize regardless of (or in the absence of) the aggregate.

Schedule	Line	Description	Itemized when aggregate over $200	
A	SA11A	Contributions from Individuals	☑	✏️ Edit
A	SA11B	Contributions from Political Party Committees	☑	✏️ Edit
A	SA11C	Contributions from Other Political Committees	☐	✏️ Edit
A	SA11D	Contributions from the Candidate	☑	✏️ Edit

Calculation – Some clients prefer to push the "recalculate" button in order for the summary numbers to calculate any changes, whereas others prefer the system automatically recalculate as they apply changes. This feature allows users to choose the setting that they prefer.

CALCULATION
☑ Automatically Calculate Report after Import and Save
✔ Save

Reindex – Occasionally the filer may seem slower than normal and may benefit from being reindexed. Admin client users now have the ability to reindex without the assistance of CMDI staff.

QuickBooks Merge Tool – Easily merge your QuickBooks vendor file with your transaction file. You will need to make minor adjustments to the merged QuickBooks file to include FEC info such as line numbers, etc.

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