# Creating an FEC Report

After you have confirmed your contribution totals for a reporting period and are ready to create your report, you will need to open **CrimsonFiler** to create your report.

## Accessing CrimsonFiler

On the left sidebar of Crimson, click on **CrimsonFiler,** under the **Compliance** tab, to be automatically logged in, or go to https://crimsonfiler.cmdi.com and use your Crimson Username and Password to login.

If you have access to more than one Crimson Filer account, please note the 

icon in the top right hand corner of the screen which you can use to toggle between client accounts.

## Creating a Report in CrimsonFiler

1. Along the left side of the screen click on the **Reports** menu option and then click on **Create New**.

2. You will be prompted to choose the report you wish to create, select the appropriate report, and then click **Create Now**.

**Note: Form 3 Reports require you to select the type of report and date range for it. Be sure to confirm these dates are accurate (keep in mind that some report types such as pre-election reports will not automatically select the appropriate dates).**

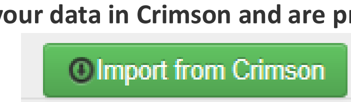
3. A window for that form will open for editing. It will default to the committee's profile info.

4. Fill in any missing data and click the 

button before moving on to any other steps.

## Adding Receipts & Expenditures (Schedules A & B)

There are three methods available for adding receipts and expenditures to a report:

**Importing from Crimson**
**1. If you have already reviewed your data in Crimson and are prepared to import it without any additional editing, you can click on the green** 

**button available in the top right hand corner of the Main** tab of your report.

2. You will be prompted to choose the appropriate fund codes, check all that apply.

**NOTE**: If you are selecting Fund Codes for more than one cycle, please use the Advanced Aggregate feature to separate your Fund Code aggregates. To learn more about the Advanced Aggregate feature, see Crimson 3 - Advanced Aggregates.

3. Click **Import Now** when funds have been selected.

4. You will receive this prompt, "Are you sure to import now?" select

5. Next prompt will be, "How do you want to import records?" with options **Append**, **Replace** or **Cancel**.

- Select **Append** if you wish to add to existing data already in the report (such as if you are adding a new set of data for a different period).

- OR select **Replace** if you want any existing data to be overwritten.
- If there is no data currently in the report, either option will operate in the same way.

6. You will then get a prompt with how many records have been imported, click **OK** to move on.

**Importing from Crimson by Schedule**
**If you prefer to import receipts and expenditures separately, the same process applies. However, rather than clicking the Import from Crimson** button on the **Main** tab, instead select the schedule at the top that you wish to edit. Then click the **Import from Crimson** button located within the schedule's tab and proceed as directed above.

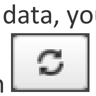
**Exporting from Crimson First**
**The original method of exporting receipts and expenditures from Crimson and importing them schedule by schedule into CrimsonFiler is still an option. To access the FEC Export in Crimson, select the Compliance** menu on the left hand side, then select the **FEC Export** option. Be sure to save the exported files as EXCEL rather than CSV. Then, use the **Import** button within the appropriate schedule tab of your report.

# Entering Loans and Debts (Schedules C & D)

If you had loans recorded in your previous Schedule C and that report is already in CrimsonFiler, then the appropriate schedule entries for this report will be filled in automatically upon creation. However, please note that debts DO NOT automatically copy over. You will need to add or import debts manually.

You can import templates of Loans and/or Debts by using the **Import** button within each schedule or you may add entries one at a time manually by clicking on the **Add** button instead.

# Calculating Report

Once you have entered all of your data, you can confirm your numbers back in the **Main** tab of the report. Be sure to click the recalculate button  along the left side of the screen under the **CASH SUMMARY** section to confirm all changes have been calculated into your totals.

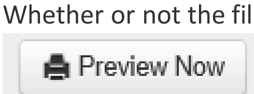
# Generate Report

Take the following steps to generate your final report for review:

1. When ready, click on **Step 2: Generate** along the left side of the screen.

2. This prompt will appear, “Sure to generate report now?”. Click **Yes** and determine if you want to sort by name or sort by date.

If there are any errors in your file, the FEC’s validator will output details about those errors. If you have any questions about what they mean, please contact [Support](#).

Whether or not the file passes validation, you can always preview the report in FEC format by clicking on the 

button in the top right hand corner. (Please note that all errors must be resolved before actually submitting the report electronically to the FEC)

You can also download a PDF version of the report using the Download button, or the Download csv button to download a CSV spreadsheet.

# File Report

Finally, when you are satisfied with your report:

1. Click on **Step 3: File** on the left.

2. Fill in the email address where you'd like to receive confirmation.

3. Enter the FEC password.

4. Then click Upload Now.

5. A confirmation will appear on the screen and you'll receive email notification from the FEC.