CampaignClerk

Quick Start Guide

CampaignClerk prepares and organizes your Indiana campaign-finance and candidacy paperwork. It fills print-ready forms from the data you enter - it does not file for you. You sign and submit on paper (or through the state portal) yourself.

Getting in the first time

CampaignClerk is a website - there is nothing to download or install to use it. Open the link you were sent in any browser and sign in. If you were **invited**, sign up (or sign in) with the **same email address** the invitation was sent to, and you'll automatically join the committee.

Quick start (5 steps)

1. **Set up your committee.** On first sign-in the setup wizard collects your committee, candidate, office, and where you file. You can change any of it later on Dashboard → Profile.
2. **Add your people.** Go to Contacts and add your donors and payees. You can also add someone on the spot while recording a contribution.
3. **Record money in and out.** Use Contributions for donations received and Expenditures for money spent. Itemization is applied automatically based on the amount thresholds.
4. **Check your deadlines.** The Dashboard shows your filing calendar, computed from your office and election year. Confirm each date against the official Indiana schedule and save it.
5. **Generate your forms.** Open Documents, pick a form, and it fills a print-ready PDF from your saved data. Sign and date on paper, then file it.

Dashboard & deadlines

The dashboard summarizes your contribution and expenditure totals, shows **where you file**, and lists your **upcoming filings & deadlines**. Dates marked with ~ are estimates - click Confirm / edit to set the exact date from the official schedule (it then shows a check). You'll get reminder emails before each deadline; marking a report filed on the Reports page stops its reminders.

Contacts

Your donors and payees live in Contacts. Add individuals or organizations; the type controls how they're itemized on reports. You can flag someone to **recognize at events** (candidate, elected official, public figure) - they show up on the who-to-thank list. Contacts belong to the current committee only.

Contributions & expenditures

Contributions records donations received; itemization is automatic. Two extras: **Event Entry** for entering a batch of donors quickly, and the **Kiosk** - a full-screen page you can hand a donor on a tablet to enter their own gift. You can also import a CSV (duplicates are skipped).

Expenditures records money spent, and its Debts tab tracks outstanding obligations. Both export to CSV.

Reports & documents

Documents lists the forms for your office - the CFA-4 report of receipts & expenditures, the CFA-1 statement of organization, large-contribution and public-question reports, the CAN candidacy forms, and the legislative SEI. Each generates a filled, print-ready PDF; signatures, initials, and notary blocks are left blank for ink. Started mid-year with a prior handwritten report? Use Backfill. The Reports page keeps a history so you can mark a report **filed**.

Thank-you letters

Who to thank (from Contacts) batches donor thank-you letters from an editable template - one page per donor, laid out for a window envelope, with an ink signature line - and marks who's been thanked. It also shows a speech shout-out list of donors you flagged.

Committees & team members

If you manage more than one committee, a **committee switcher** appears in a bar under the top menu - pick a committee and the whole app shows that committee's data. Manage a committee's team on the **Committee** tab: **invite** someone by email and pick their role. Roles: **owner** (everything, incl. members), **treasurer / manager** (full books & forms), **data entry** (add contributions/expenditures only), **viewer** (read-only). Only owners and managers can invite, change roles, or create another committee.

Account & security

Open the **Account** menu (top-right) to change your password, turn on **two-factor authentication** (an authenticator app, with one-time backup codes in case you lose your phone), switch between light and dark mode, or sign out.

Install it on your phone or computer

- **iPhone / iPad:** open the site in Safari → tap Share → Add to Home Screen.
- **Android:** Chrome menu → Add to Home screen / Install app.
- **Windows / Mac:** in Chrome or Edge, click the install icon in the address bar, or the menu → Install CampaignClerk.

It opens full-screen with its own icon; it's the same app either way.