

# VistaSG Campaign Finance User Guide

Vista<sup>SG</sup>

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# Copyright

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Welcome to the VistaSG Campaign Finance for *dms3*!

## Overview

### Expectations:

The following document is to be used as an informative guideline for the use of VistaSG Campaign Finance.

For technical issues and support with The VistaSG Campaign Finance and *dms3* please contact Vista Solutions Group at 1-512-986-7650 or visit us online at [www.vistasg.com](http://www.vistasg.com) and one of our knowledgeable Client Services Representatives will assist you.

### Objectives:

The following documentation will assist in the use of the VistaSG Campaign Finance.

VistaSG Campaign Finance for *dms3* is intended to aid Elections offices in keeping up with candidate finance documents. The automation eliminates saves time and keeps elections offices and candidates in compliance.

## Using the VistaSG Campaign Finance Tool

Using VSG Campaign Finance makes it easy for Election Officials and Candidates to stay in compliance with candidate finance documents.

Candidates can easily create and maintain their own login, submit documents with fillable forms or by uploading. Email notifications are sent to both the candidates and elections officials to notify of new documents and status changes.

Elections Officials with administrative access are then able to Reject or Publish the documents. The published documents are then viewable by the public online.

# Candidates Account Set-Up:

Candidates will be able to set up their own account by following the steps below.

1. Select “Click Here to Register”

Vista SG Candidate Filings Login

User Account Login

Email Address\*

Password\*

Login

Forgot Password?

Don't have an account? [Click Here to Register!](#)

How to register? Click Here to See Video!

2. Fill in the requested information, then select “Next”

Vista SG Candidate Filings Login

User Account Info

First Name\*

Last Name\*

Address1\*

Address2

City\*

State\*

Alaska

Phone\*

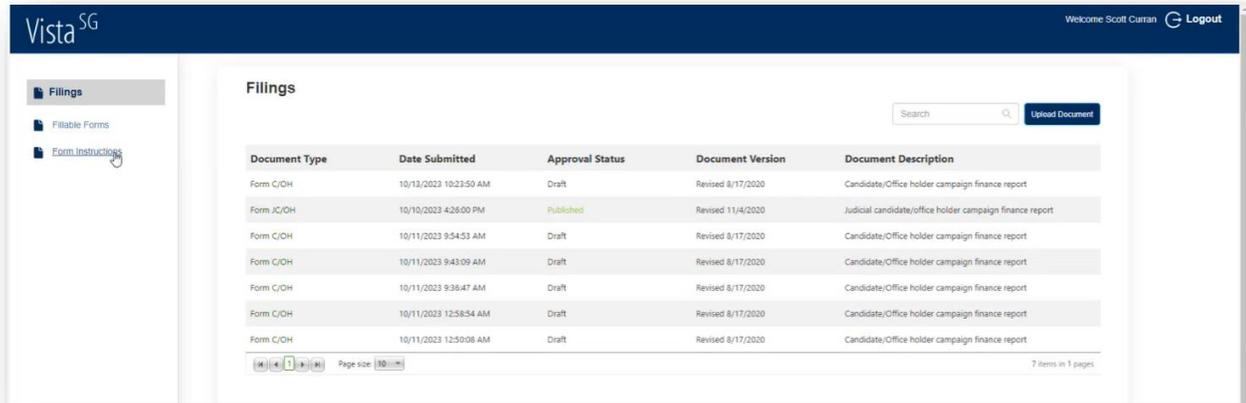
Zip Code\*

Select an Office\*

County Judge

Next

3. Candidates will see all of their filings under “Filings”
  - a. This will show the Document Type, Date Submitted, Approval Status, Document Version, and Document Description.

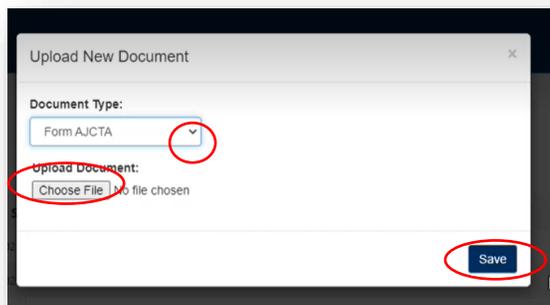
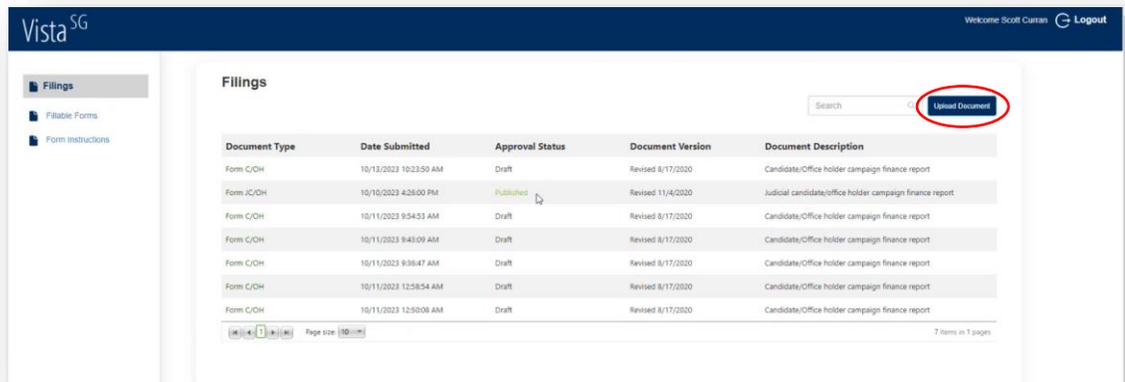


4. To add additional files, the candidates have two options. They can upload OR fill in a fillable form.

\*\* Candidates can also view “Form Instructions” from the Texas Ethics Commission website, by selecting the link on the Filings page.

## Candidates: To Upload a document

5. To upload, click “Upload Document”

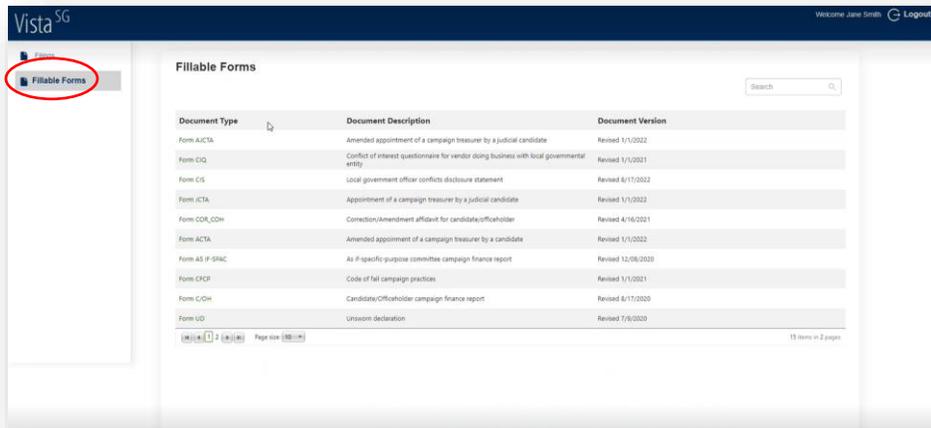


6. Select the document Type
7. Choose the file to upload
8. Select “Save”

\*\* If a candidate does not know how to fill out a particular form, there is a link to the form instructions on the left hand side of the filings page until “Form Instructions”

## Candidates: To use fillable forms

9. Select “Fillable forms” on the left hand side of the screen.



10. Select the hyperlink of the “Document Type” this will take you to the fillable form.

11. Fill in the information on the forms.

## Candidates: Fillable Form Buttons Explained from left to right:

CANDIDATE / OFFICEHOLDER CAMPAIGN FINANCE REPORT		FORM C/OH COVER SHEET PG 1	
The C/OH Instruction Guide explains how to complete this form.		1 Filer ID (Ethics Commission Filers)	2 Total pages filed:
3 CANDIDATE / OFFICEHOLDER NAME	MS / MRS / MR FIRST MI Test 2	OFFICE USE ONLY	
4 CANDIDATE / OFFICEHOLDER MAILING ADDRESS	NICKNAME LAST SUFFIX 2	Date Received	
5 CANDIDATE / OFFICEHOLDER PHONE	ADDRESS / PO BOX; APT / SUITE #; CITY; STATE; ZIP CODE <input type="checkbox"/> Change of Address	Date Hand-delivered or Date Postmarked	
6 CAMPAIGN TREASURER NAME	AREA CODE PHONE NUMBER EXTENSION ( )	Receipt #	Amount \$
	MS / MRS / MR FIRST MI	Date Processed	
	NICKNAME LAST SUFFIX	Date Imaged	

- “Back to Documents”: This will take the candidate back to the document list
- “Save Draft”: This will allow the candidate to save the progress on the PDF at any point and come back later to complete.

- c. “Revert to Last Saved”: This will allow the candidate to revert to the last version of the saved draft in the event the new information entered needs to be removed and start over.
- d. “Add”: This is a drop down with the following options: Add Contributor, Add Expenditures, Add Investments.
  - i. Select either Add Contributor, Add Expenditures, or Add Investments
  - ii. Fill in all the information and select “Save”

- e. “Manage: This is a drop down with the following options: Manage Contributor, Manage Expenditures, Manage Investments.
  - i. In order to edit any Contributor, Expenditure, or Investment that have been added, you will select the Manage drop down and select either: Manage Contributor, Manage Expenditures, or Manage Investments.
  - ii. In order to make an edit, locate the Contributor, Expenditure, or Investment that needs to be edited and select the blue pen and paper icon.
  - iii. Update the information that needs to be modified, then select the blue pen and paper icon again to save the changes.
    - \*To delete the Contributor, Expenditure, or Investment click the red “X” icon under the Delete Column.*

**Manage Contributor**

Select schedule : Search by name :  
 All Enter contributor name

Delete	Action	Schedule	Name	Out of State	Fac ID#	Address	City	State	Zip Code	Job Title	Employer	Created Date	Amount	Description
		Schedule A1	lythe stornr	False		9020 N. Capiti of Texas Hwy.	Austin	Texas	78759			10/18/2023	9020.00	

Page size: 10 1 items in 1 pages

**Done**

- f. "Load PDF": This allows the candidate to apply eSignatures automatically in all the areas where signature is required and allows all the added contributors, expenditures, and investments that have been added to automatically be added to the documents.
- i. Select the check box that says, "Check if you want to add the automated filter signature"
  - ii. Candidate needs to enter in their name for the signature in the Filer Name box.
  - iii. Select "Submit"

**Append other schedules**

Check if you want to add the automated filer signature Filer Name:

---

Select the following schedules that are applicable:

Schedule K (INTEREST, CREDITS, GAINS, REFUNDS, AND CONTRIBUTIONS RETURNED TO FILER)

Schedule T (In-Kind Contribution and Political Exapanditure for travle outside texas)

Schedule E (Loans Judicial)

**Submit** **Cancel**

- g. "Submit": Once the form is filled out completely, the candidate can select submit which will then trigger email notifications. This will also automatically stamp the document with the date and time once received on the admin side!

## Email Notifications for Candidates Submitting

Candidates will receive the email below when they successfully upload.

Your Document has been saved as draft successfully:

Document Name: Form CIQ

Uploaded By: Jane Smith

Thanks,  
Team VistaSG

## Email Notifications for Elections Admins

**Subject:** [External]:Document Submitted successfully

Your Document has been submitted successfully:

Document Name: Form CIQ

Document Type: Form CIQ

Document Description: Conflict of interest questionnaire for vendor doing business with local governmental entity

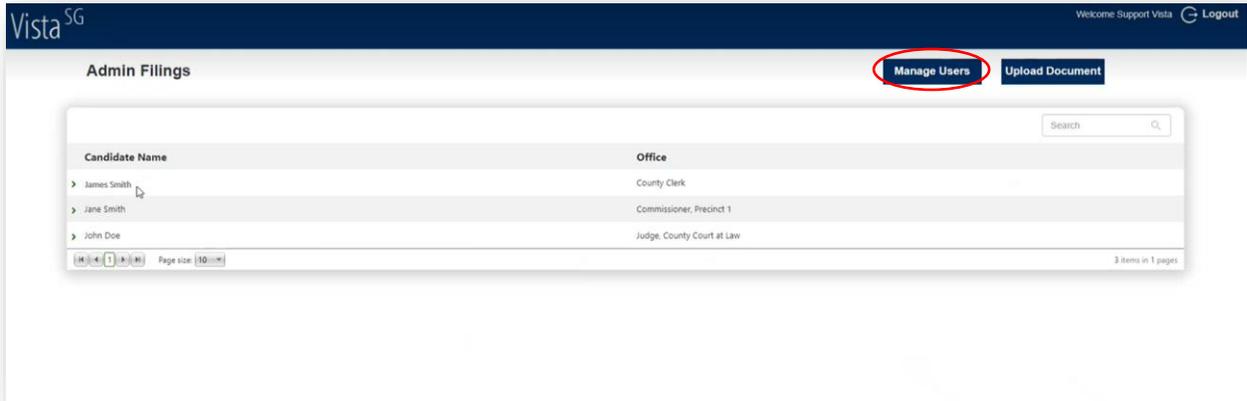
Uploaded on: 2/8/2023 1:39:46 AM

Uploaded By: saurabh Deore

Thanks,  
Team VistaSG

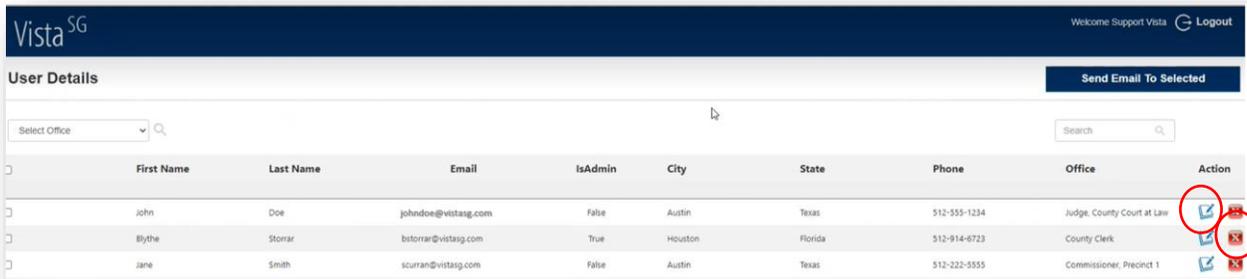
# Elections Office Admin Filings View

To manage candidate filings, Elections Admins will have their own view when they log in. (different from the candidates view) Admins can reject/publish, manage users, and even upload documents on a candidates behalf.



## Managing Users

1. Select "manage users."
2. Select the pen and paper icon under "Action" if the user's information needs to be updated



3. Update the necessary information and select “Save”

Update User

First Name: \* John  
Last Name: \* Doe  
Address1: \* 123 Main St  
Address2:  
City: \* Austin  
State: \* Texas  
ZipCode: \* 78759  
Phone: \* 512-555-1234  
Office: \* Judge, County Cour

Save Cancel

4. Select the red “X” to remove a user

## Send Email's to Users

Vista<sup>SG</sup> Welcome Support Vista Logout

User Details

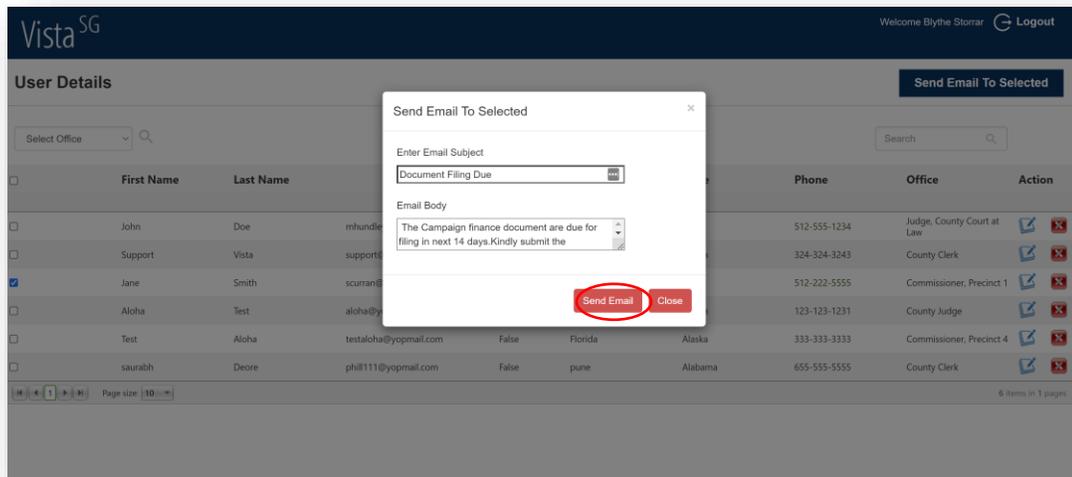
Select Office [v] Search [q]

	First Name	Last Name	Email	IsAdmin	City	State	Phone	Office	Action
<input type="checkbox"/>	John	Doe	johndoe@vistaag.com	False	Austin	Texas	512-555-1234	Judge, County Court at Law	
<input type="checkbox"/>	Blythe	Storarr	bstorarr@vistaag.com	True	Houston	Florida	512-914-6723	County Clerk	
<input type="checkbox"/>	Jane	Smith	scurran@vistaag.com	False	Austin	Texas	512-222-5555	Commissioner, Precinct 1	

Send Email To Selected

In the event Admins need to email users of an update or specific reminder, Admins can choose to select specific users by individually clicking the check box to the left of their names OR clicking the check box and the top of the list which will automatically select all users.

1. Once users are selected, select “Send Email to Selected.”
2. Update the subject and body as you wish.
3. Select “Send Email”



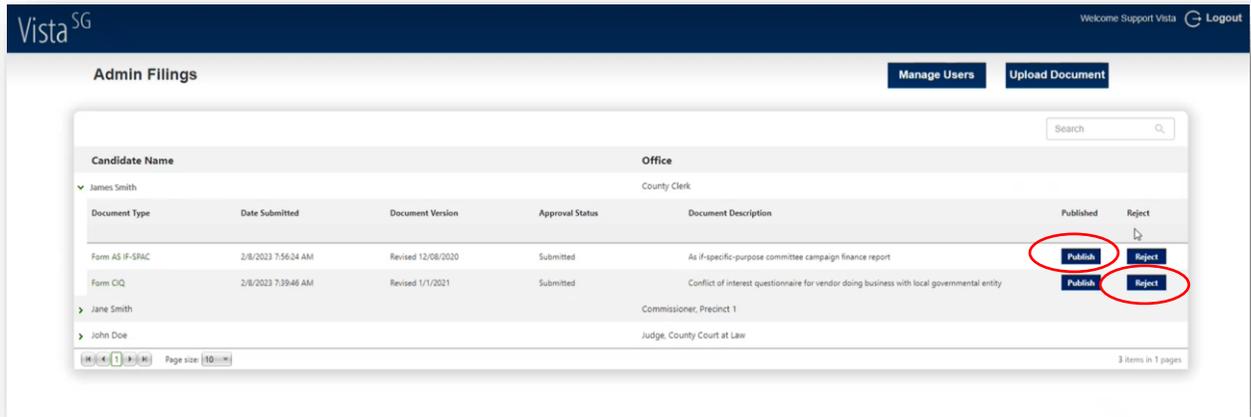
## Upload Documents manually received from Candidates

The 'Upload Document' dialog box contains the following elements:
 

- Select Users:** A dropdown menu showing 'Michele Carew , mcarew@vistasg.com' with a downward arrow icon circled in red.
- Document Type:** A dropdown menu showing 'Form C/OH' with a downward arrow icon circled in red.
- Date Submitted:** A text field showing '10/13/2023 01:43 PM' with a calendar icon circled in red.
- Upload Document:** A 'Choose File' button and a text area showing 'No file chosen'.
- Buttons:** 'Close' and 'Upload' buttons at the bottom right.

1. Select "Upload Document"
2. Select from the drop-down menu which user you are uploading for.
3. Select from the drop-down menu which document type you are uploading.
4. Select the little calendar icon inside "Date Submitted" and update the date and time submitted.
5. Select "Choose File" and select the file from the computer.
6. Select "Upload"

## Review to Publish/Reject



1. Select the drop down arrow next to the candidate you would like to view.
2. To View the submitted documents, select the hyperlink of the Document Type
3. To publish the filing, select "Publish"
4. To Reject the filing, select "Reject"

## Email Notifications for Document Status Updates

The following document status is updated:

Document Name: Form C/OH20221205102312  
Document Type: Form C/OH  
Document Description: Candidate/Officeholder campaign finance report  
Status: Published  
Status Updated on: 12/8/2022 2:08:59 PM  
Updated By: Support Vista  
Candidate Name: Scott Curran

Thanks,  
Team VistaSG

## Navigated from Public View to Admin Filings

To return to the public view as an admin, select the VistaSG icon in the top right. Then from there you will see the Admin Filings button on the right to return to view the candidates' uploaded documents.

The screenshot shows a web interface for "Vista 5G" with a dark blue header. The "Admin Filings" link is in the top right. The main content area is titled "Campaign Finance Candidate Filings" and contains a search bar and a table. The table has two columns: "Candidate Name" and "Office". It lists two candidates: John Doe (Judge, County Court at Law) and Jane Smith (Commissioner, Precinct 1). At the bottom, there are pagination controls showing "Page size: 10" and "2 items in 1 pages".

Candidate Name	Office
> John Doe	Judge, County Court at Law
> Jane Smith	Commissioner, Precinct 1

## Public View

Public viewers without a login (candidate or Election Admin) will still be able to view the published documents from the link posted on the Election’s Office website.