

# Protected Contact Information Overview

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# Overview

## Manage protected addresses

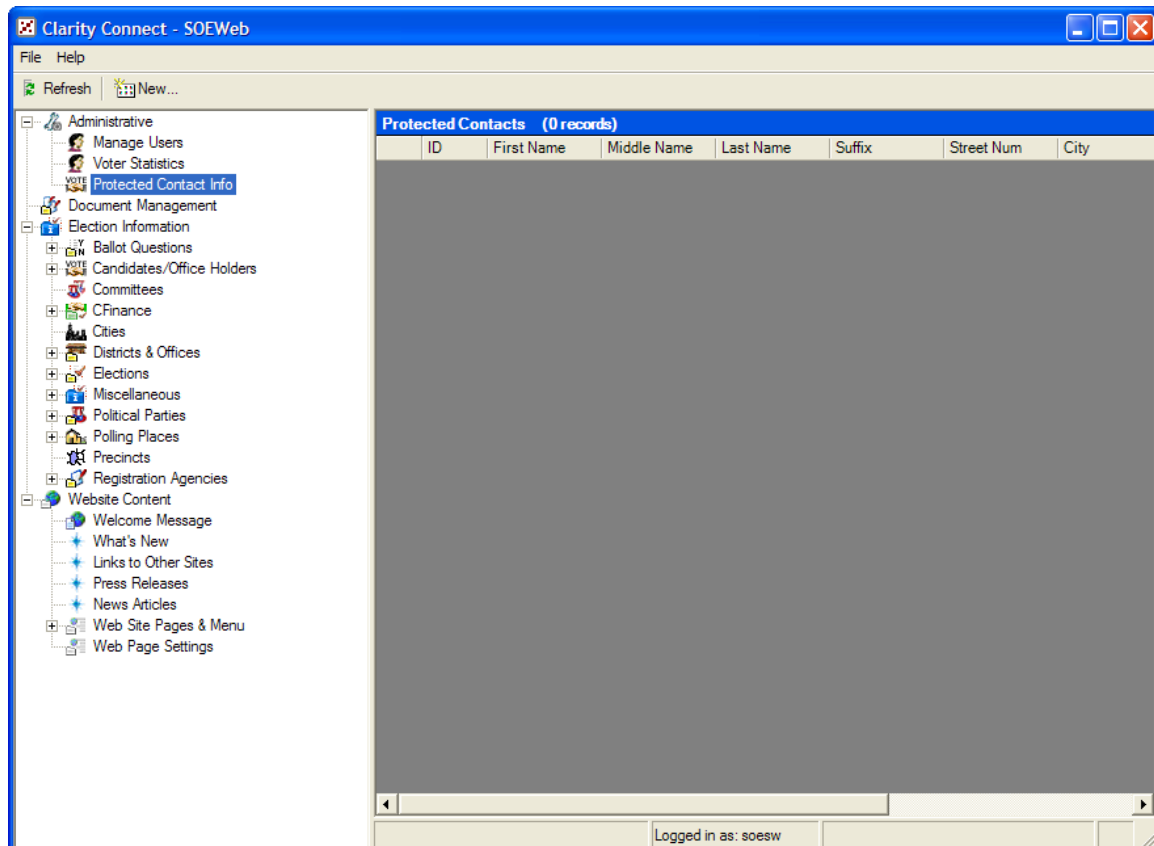
Protected addresses are managed in the **Administrative** section of the Clarity Connect application in the **Protected Contact Info** category.

With the high exposure the internet provides to the general public, it is often necessary to protect certain sensitive and confidential information. SOE Software understands this and takes its customers needs very seriously.

As a result of our continuing commitment, we have implemented a new feature in our software suite that provides our users with the ability to hide an address that would normally be displayed through our Clarity Connect Website product. This feature specifically pertains to individual contributors, candidates, and elected office candidates.

Upon examining individual requirements, we have provided our users with the ability to hide addresses by allowing a high degree of flexibility to meet individual needs.

We have also incorporated the ability to preview the affects that a change will have so that our users will know exactly who will be affected by the data entered.



## Adding a new protected contact

1. Click **Administrative** in the navigation tree
2. Click the category **Protected Contact Info**
3. Click **New...** located on the tool bar or right-click on **Protected Contact Info** and select **New protected contact...** to add a new record
4. Input ANY of the following information in the **Protected Contact Information** window
  - a. Input **First Name**
  - b. Input **Middle Name**
  - c. Input **Last Name**
  - d. Input **Street Number**
  - e. Input **City**
  - f. Input **State**
  - g. Input **Zip**
5. Click the **Preview My Changes** button to view a list of all records within the Candidate, Election Candidates, and Contributions tab address will be protected upon clicking the **Save and Close** button
  - a. To determine how many records will have their address be protected upon clicking the **Save and Close** button and exactly who will have their address protected, please note the following information:
    - a. **Total:** is the number located at the right of the **Protected Contact Information** window and represents the total number of records that will be protected (The number may reflect duplicate entries)
    - b. Under the **Candidates** tab, **Election Candidates** tab, and **Contributions** tab a list will appear of all the names that will be protected (There may be duplicate entries - suggesting a candidate may appear in all three tabs)
6. Click the **Save and Close** button or click **File, Save...** in the top menu of the window when finished
7. Click **Refresh** located in the main window of the Clarity Connect application for all changes to appear on the main screen (User must click Refresh in the web browser window to notice the changes on the Web site)

Clarity Connect

File Edit

**Protected Contact Information**

First Name

Middle Name

Last Name

Suffix  (Jr., Sr., III)

Street Number

City

State  Zip

Preview My Changes

Candidates | Election Candidates | Contributions

Contact information that matches the data entered in the fields above will be hidden from the web site. The more information entered, the more precise the match. An asterisk(\*) may be used as a wildcard. Anything up to or after the asterisk will be considered as a potential match.

Save Save and Close Close

Clarity Connect

File Edit

**Protected Contact Information**

First Name

Middle Name

Last Name

Suffix  (Jr., Sr., III)

Street Number

City

State  Zip

Preview My Changes Total: 9 Records

Candidates | Election Candidates | Contributions

First Name	Middle Name	Last Name	Suffix	Street Num	City	State
Timothy		Smith				FL
Brent		Smith				FL
Tom		Smith				
Joan		Smith				
Bill		Smith				
John	L	Smith		123	Tampa	FL

Contact information that matches the data entered in the fields above will be hidden from the web site. The more information entered, the more precise the match. An asterisk(\*) may be used as a wildcard. Anything up to or after the asterisk will be considered as a potential match.

Save Save and Close Close

Clarity Connect

File Edit

**Protected Contact Information**

First Name   
 Middle Name   
 Last Name   
 Suffix   
 Street Number   
 City   
 State  Zip

Contact information that matches the data entered in the fields above will be hidden from the web site. The more information entered, the more precise the match. An asterisk(\*) may be used as a wildcard. Anything up to or after the asterisk will be considered as a potential match.

Preview My Changes Total: 9 Records

Candidates | Election Candidates | Contributions

First Name	Middle Name	Last Name	Suffix	Street Num	City	State	
Timothy		Smith				FL	
Brent		Smith				FL	
Tom		Smith					
Joan		Smith					
Bill		Smith					
John	L	Smith		123	Tampa	FL	3

Save Save and Close Close

Candidates | Election Candidates | Contributions

First Name	Middle Name	Last Name	Suffix	Street Num	City	State	
Timothy		Smith				FL	
Brent		Smith				FL	
Tom		Smith					
Joan		Smith					
Bill		Smith					
John	L	Smith		123	Tampa	FL	3

Candidates | Election Candidates | Contributions

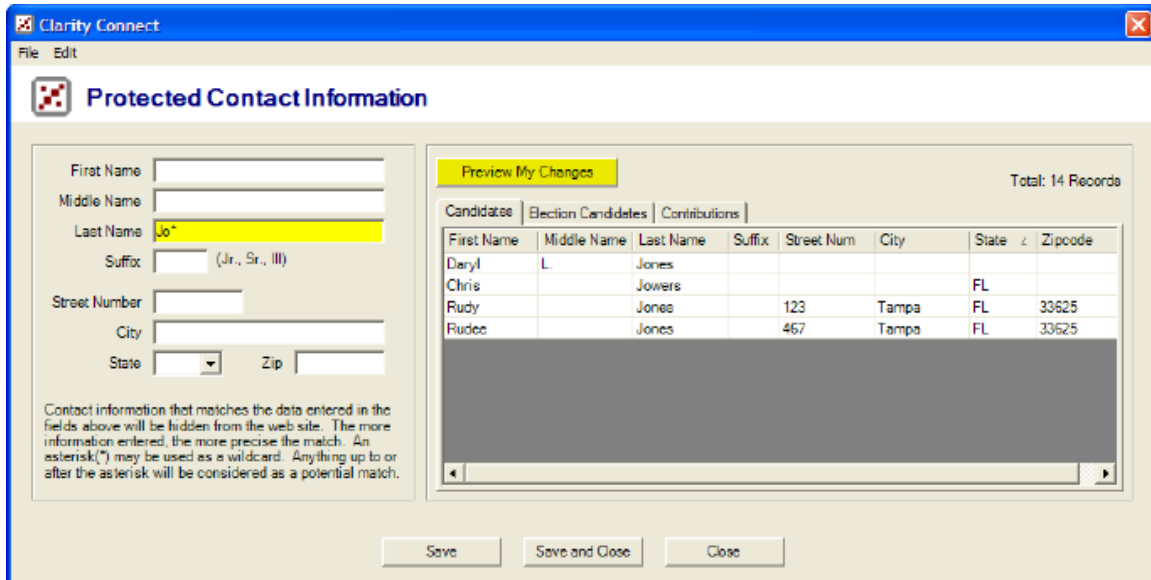
First Name	Middle Name	Last Name	Suffix	Street Num	City	State	
Brent		Smith		143	Valparaiso	FL	3
Brent		Smith				FL	

Candidates   Election Candidates   Contributions						
Candidate	Report	First Name	Middle Name	Last Name	Suffix	Street Num
Craig Barker	2006 M2	Glorida	J.	Smith		1411

### Note

- Clicking on **Protected Contact Info** category under the Administrative section of the navigation tree will cause the **Protected Contacts** table to populate with all protected address information manually entered into the system. NOTE: Not every column in the list has to have data to be considered valid.
- If you want to protect the address of one candidate in which you know the exact spelling of their name, input the candidates' information in the **Protected Contact Information** window. If more than one candidate appears when clicking the **Preview My Changes** button and you are only interested in protecting one candidates information, search for the candidate in the table and enter as much of the candidates information listed in the table to narrow the results to the one candidate required to have a protected address.
- When entering a protected address, the use of an asterisk (\*) in a particular field indicates that when finding a potential match, any data containing the information before the asterisk will appear. For example, if you were looking for Rudee Jones and typed in jo\* in the last name field, every last name beginning with jo would appear in the **Protected Contact Information** form. To protect only Rudy Jones, input as much information in the form to narrow your results to only show Rudy Jones.
- Using the asterisk helps you narrow the results if you are not sure of the candidates correct information.
- An asterisk may be used in any field EXCEPT the **Street Number** field and the **State** field.
- If you wish to see all addresses that will be hidden, click the **Preview My Changes** button on the right. All matching records will be displayed, split out by Candidate, Election Candidate, and Contributor.
- When you are satisfied with the results, you may save the record. Once the record is saved, all addresses affected will immediately be hidden.
- Business Addresses and P.O. Boxes are excluded from being hidden because the intent is to hide the address of individual contributors and not their businesses.

## Protected Contact Information Overview



Clarity Connect  
File Edit

### Protected Contact Information

First Name   
Middle Name   
Last Name   
Suffix   
Street Number   
City   
State   
Zip

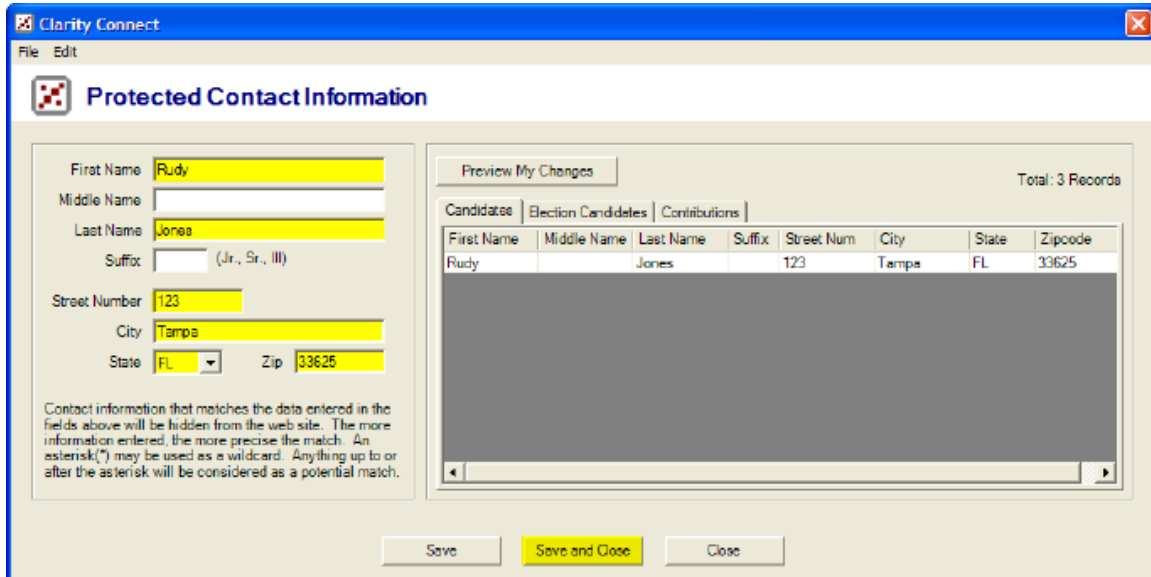
Contact information that matches the data entered in the fields above will be hidden from the web site. The more information entered, the more precise the match. An asterisk(\*) may be used as a wildcard. Anything up to or after the asterisk will be considered as a potential match.

Preview My Changes Total: 14 Records

Candidates | Election Candidates | Contributions

First Name	Middle Name	Last Name	Suffix	Street Num	City	State	Zipcode
Daryl	L.	Jones				FL	
Chris		Jowers				FL	
Rudy		Jones		123	Tampa	FL	33625
Rudee		Jones		467	Tampa	FL	33625

Save Save and Close Close



Clarity Connect  
File Edit

### Protected Contact Information

First Name   
Middle Name   
Last Name   
Suffix   
Street Number   
City   
State   
Zip

Contact information that matches the data entered in the fields above will be hidden from the web site. The more information entered, the more precise the match. An asterisk(\*) may be used as a wildcard. Anything up to or after the asterisk will be considered as a potential match.

Preview My Changes Total: 3 Records

Candidates | Election Candidates | Contributions

First Name	Middle Name	Last Name	Suffix	Street Num	City	State	Zipcode
Rudy		Jones		123	Tampa	FL	33625

Save Save and Close Close

## Searching for a protected contact

1. Click **Administrative** in the navigation tree
2. Click the category **Protected Contact Info**
3. To search for a **Protected Contact** by name, click either the **First Name**, **Last Name** or **Middle Name** field in the table for the list in ascending order
  - a. Double-click the field for the list in descending order
  - b. Scroll through the list with your mouse until the record is located
4. To search for a **Protected Contact** by name, click either the **First Name**, **Last Name** or **Middle Name** field in the table for the list in ascending order
  - a. Double-click the field for the list in descending order
  - b. Scroll through the list with your mouse until the record is located
5. To search for a **Protected Contact** by address, click the **Street Number** field in the table for the list in ascending order

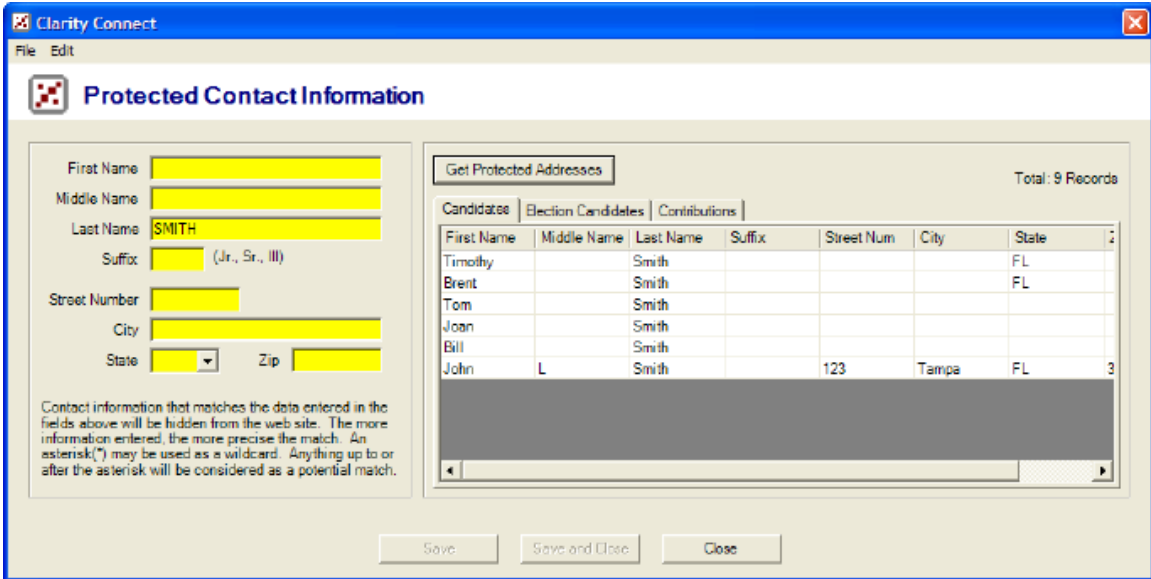
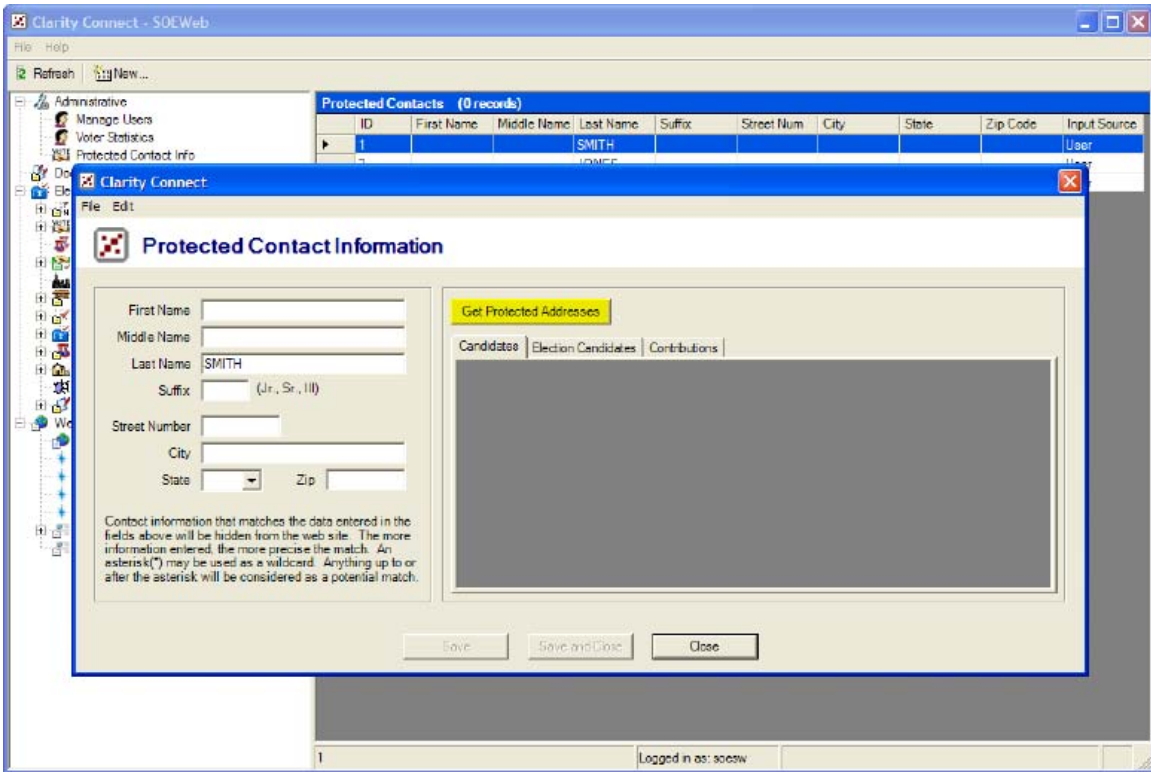
- a. Double-click the field for the list in descending order
  - b. Scroll through the list with your mouse until the record is located
6. To search for a **Protected Contact** by city, click the **City** field in the table for the list in ascending order
  - a. Double-click the field for the list in descending order
  - b. Scroll through the list with your mouse until the record is located
7. To search for a **Protected Contact** by state, click the **State** field in the table for the list in ascending order
  - a. Double-click the field for the list in descending order
  - b. Scroll through the list with your mouse until the record is located
8. To search for a **Protected Contact** by zip, click the **Zip** field in the table for the list in ascending order
  - a. Double-click the field for the list in descending order
  - b. Scroll through the list with your mouse until the record is located
9. To search for a **Protected Contact** by who created the record, click the **Input Source** field in the table for the list in ascending order
  - a. Double-click the field for the list in descending order
  - b. Scroll through the list with your mouse until the record is located

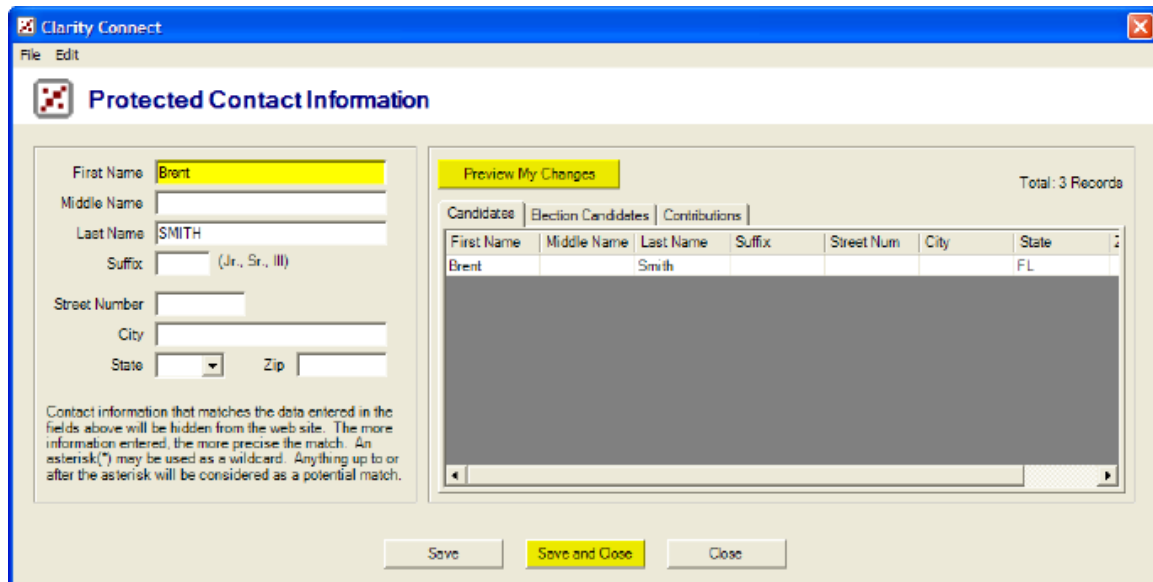
#### Note

To search for the last record created, search using the **ID** field. The last record created will have the highest **ID** assigned.

## Editing an existing protected contact

1. Click **Administrative** in the navigation tree
2. Click the category **Protected Contact Info**
3. Search for the **Protected Contact Info** rule to update (see also Searching for a protected contact)
4. Select the **Protected Contact Info** to be updated
5. Click the **Get Protected Addresses** button in order to display the currently affected addresses
6. Update the necessary information (see also Adding a new protected contact)
7. Click the **Preview My Changes** button in order to refresh the table with the new results
8. Click the **Save and Close** button or click **File, Save...** in the top menu of the window when finished
9. Click **Refresh** located in the main window of the Clarity Connect application for all changes to appear on the main screen and Web site if applicable





### Note

- To undo all edits to the form, click **Edit, Undo** and notice all edits currently made disappear. You can also click the **X** (close) located in the upper right corner of the window to close the window without saving the changes. Confirm that you want to ignore all changes made by clicking the **Yes** button and the window will close.
- The **Preview My Changes** button now shows **Get Protected Addresses**.
- If you modify the existing record, you must once again click **Get Protected Addresses** button to see the results of your changes.
- When you are satisfied with the results, you may save the record.
- **IMPORTANT:** If an existing record had been modified, then the addresses that were affected before the change, will no longer be hidden unless they still fall with the new address specifications.

## Removing a protected contact from the list

1. Click **Administrative** in the navigation tree
2. Click the category **Protected Contact Info**
3. Search for the **Protected Contact Info** rule to update (see also Searching for a protected contact)
4. Select the **Protected Contact Info** to be removed from the list of protected addresses
5. Click the **Get Protected Addresses** button in order to display the currently affected addresses that will be removed from the list
6. Click **File**, then **Delete...** located in the top menu of the window
7. Confirm deletion and click the **Yes** button to permanently remove the record from the protected contact list
8. Click **Refresh** located in the main window of the Clarity Connect application for all changes to appear on the main screen and Web site if applicable

