


Author: Kristenson, Joel

Last Updated: 2017-04-28

Overview

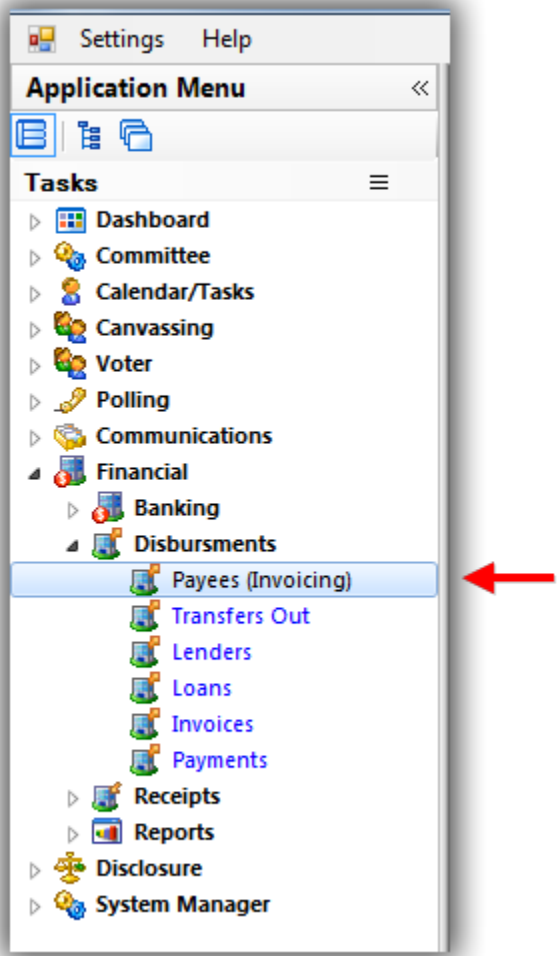
This article will teach you how to create a new **payee** record that you can record [invoices](#) and [payments](#) for. *This article requires you have [security access](#) to the **Financial lists**.*

 **Tip:** Watch this [2 minute video](#) to quickly learn how to create an **invoice** and make an **immediate payment**. If you haven't already, you can have your campaign treasurer sign-up for our **free** political **financial [training classes](#)** which will teach you about this topic along with all the others you'll need to learn to accurately track the finances for your campaign.

Steps

Navigate to the **Payees (Invoicing)** list.

How to Create a New Payee for Invoicing and Payments (Primarily for Political Campaigns)



Your current list of payees will populate (if any exist). *In my example there were 197.*

How to Create a New Payee for Invoicing and Payments (Primarily for Political Campaigns)

Click **[+ New]** on the search tool strip.

How to Create a New Payee for Invoicing and Payments (Primarily for Political Campaigns)

Search Reset **New** [Icons] File Edit Payee List

Favorites Name Address SQL

Search all name/address parts (anywhere in the field) [Input] Company: [Input] Last Name: [Input] First Name: [Input] ID: [Input]

Edit Sort Format Wrap Export Print Pivot

Payee List [197 records found]

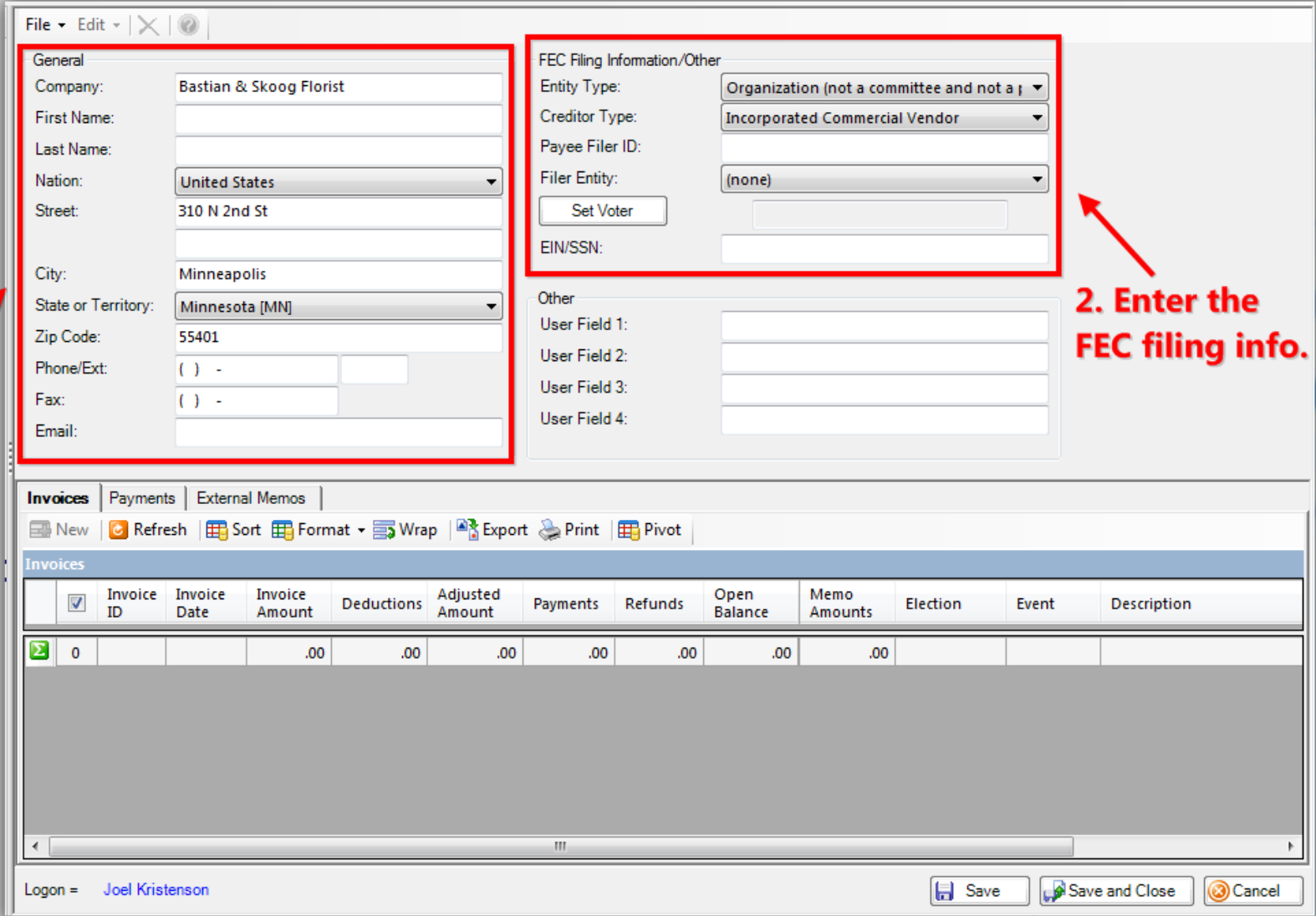
<input checked="" type="checkbox"/>	ID	Company Name	Code Type	Last Name	First Name	Street	City	State	Zip Code	Payments This Year	Payments Last Year	Payments Prior Years
<input checked="" type="checkbox"/>	1	Bank of America	ICV							.00	.00	.00
<input checked="" type="checkbox"/>	2	Committee to reelect vito fossella	UCV						10001	.00	.00	600.00
<input checked="" type="checkbox"/>	3	Trail Blazer Campaign Services	ICV	Hanf	Brian	5115 Excelsior Blvd	Golden Valley	MN	55416	.00	500.00	214,465.00
<input checked="" type="checkbox"/>	4	Burger King	ICV						55416	.00	.00	1,433.25
<input checked="" type="checkbox"/>	5	McDoanlds	ICV			1111 1st St	Mpls	MN	55426	.00	.00	126.00
<input checked="" type="checkbox"/>	6	d for congress	UCV		d				80526	.00	.00	260.00
<input checked="" type="checkbox"/>	7	Mike's Lemonaid	UCV							.00	.00	1,000.00
<input checked="" type="checkbox"/>	8	Brian's tech support inc	ICV							.00	.00	200.00
<input checked="" type="checkbox"/>	9	Pat's Kitch supply	UCV							.00	.00	.00
<input checked="" type="checkbox"/>	10	Williams party Rental	ICV							.00	.00	71.00
<input checked="" type="checkbox"/>	11	john murtha for congress	UCV						55426	.00	.00	100.00
<input checked="" type="checkbox"/>	12	TutHill	ICV			1250 Henn Ave			55407	.00	.00	1,200.00
<input checked="" type="checkbox"/>	13	test payee	ICV							.00	.00	.00
<input checked="" type="checkbox"/>	14	test payee 2	UCV							.00	.00	.00
<input checked="" type="checkbox"/>	15	Office Max	ICV			12435 66th Pl			55369	.00	.00	53.25
<input checked="" type="checkbox"/>	16	First National Bank	ICV							.00	.00	.00
<input checked="" type="checkbox"/>	17	Hanf For Congress	UCV						55429	.00	.00	.00
<input checked="" type="checkbox"/>	20	25 Kino Film & Video	ICV	25 Kino Film & Video		1500 N.e. Jackson St. #402	Minneapolis	MN	55413	.00	.00	3,180.86
<input checked="" type="checkbox"/>	21	West Coast Web Design	ICV			18961 East Arenth Ave.	City of Industry	CA	91748	.00	.00	1,784.27
<input checked="" type="checkbox"/>	22	Affiliated Insurance Company	ICV	Affiliated Insurance		P.O. Box 27643	Golden Valley	MN	55427	.00	.00	1,894.00

Fill out all of the information you have for the payee (**name, address, contact info**, etc.).

Under the **FEC Filing Information/Other** section in the top-right make sure you select the appropriate options from the drop-downs, and enter the data into the input fields (if applicable).

Feel free to contact our support team if you have questions on what information is required or contact your FEC analyst. *My finished example is below for a Incorporated Commercial Vendor company called Bastian & Skoog Florist.*

How to Create a New Payee for Invoicing and Payments (Primarily for Political Campaigns)



1. Fill in the name and contact info.

2. Enter the FEC filing info.

3

Logon = Joel Kristenson

Save Save and Close Cancel

	Invoice ID	Invoice Date	Invoice Amount	Deductions	Adjusted Amount	Payments	Refunds	Open Balance	Memo Amounts	Election	Event	Description
Σ	0		.00	.00	.00	.00	.00	.00	.00			

The descriptions below layout the different options you have and what they mean when entering the **FEC Filing** Information for a **Payee** (*Political/PAC only*).

FEC Filing Information

HINT: Contact the FEC for all of your filing related questions for the most accurate and up-to-date information: Toll Free (800) 424-9530 or info@fec.gov

Entity Type

Entities are defined in 3 main categories (individual, organization and business). The definitions below describe the different entity types available in Trail Blazer when entering a new payee.

Candidate: A person who seeks or is nominated for an office. This type is to be used **ONLY** for the candidate of your database. There will be **ONLY** one payee in your list with this designation.

Candidate Committee: aka (Personal campaign committee) is a committee designated by a single candidate to raise money for his or her campaign for public office.

Committee: Such a body appointed by legislature to consider the details of proposed legislation (a.k.a Commission – Board – Trust – Panel - Council).

Individual: A single human being as distinct from a group, class or family.

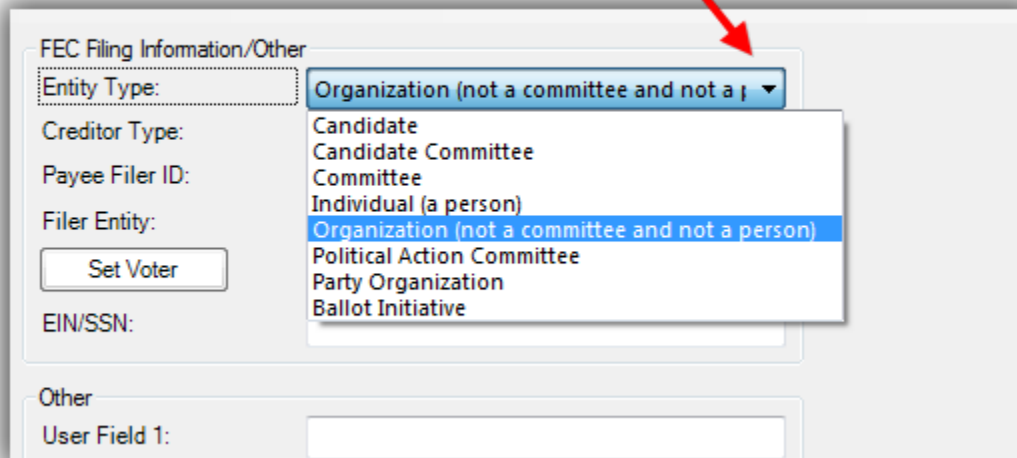
How to Create a New Payee for Invoicing and Payments (Primarily for Political Campaigns)

Organization (not a committee and not a person): A political organization is any organization that involves itself in the political process, including political parties, non-governmental organizations, advocacy groups, and special interest groups.

Political Action Committee: A type of organization that pools campaign contributions from members and donates those funds to campaign for or against candidates, ballot initiatives or legislation. At the federal level, an organization becomes a PAC when it receives or spends more than \$1,000 for the purpose of influencing a federal election.

Party Organization: A party organization is a political organization that typically seeks to influence, or entirely control, government policy, usually nominating their own candidates and trying to seat them in political office.

Ballot Initiative: A public question decided by a vote of the people. The placement of the question on the ballot is initiated by the people.



The screenshot shows a software interface for creating a new payee. The main section is titled "FEC Filing Information/Other". It contains several fields: "Entity Type:", "Creditor Type:", "Payee Filer ID:", "Filer Entity:", "EIN/SSN:", and "Other" (with a sub-field "User Field 1:"). The "Entity Type:" dropdown menu is open, showing a list of options: "Candidate", "Candidate Committee", "Committee", "Individual (a person)", "Organization (not a committee and not a person)", "Political Action Committee", "Party Organization", and "Ballot Initiative". A red arrow points to the "Organization (not a committee and not a person)" option, which is currently selected. A "Set Voter" button is located below the "Filer Entity:" field.

Creditor Type

A creditor is an entity (person or institution) that extends credit by giving another entity permission to borrow money if it is paid back at a later date.

Incorporated Commercial Vendor: Corporation providing goods or services to a candidate or political committee whose usual and normal business involves the sale, rental, lease or provision of those goods or services.

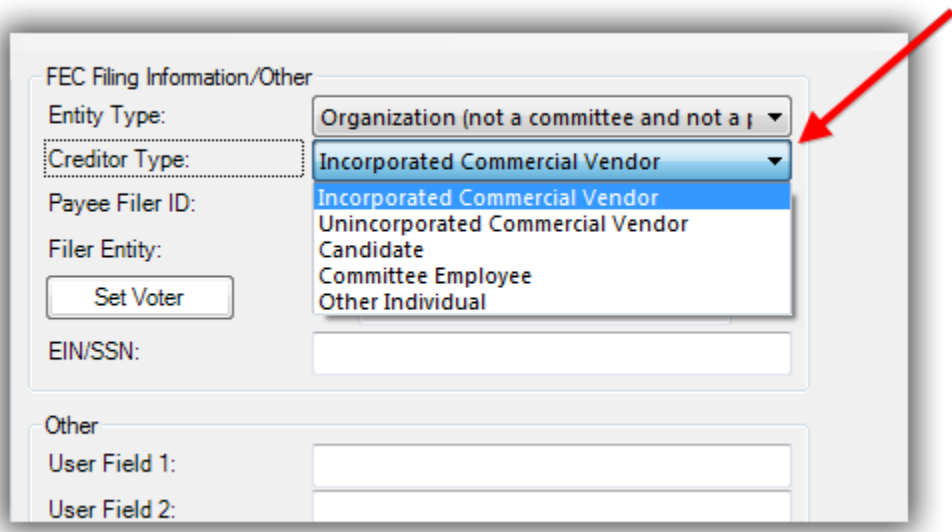
Unincorporated Commercial Vendor: Unincorporated commercial vendor providing goods or services to a candidate or political committee whose usual and normal business involves the sale, rental, lease or provision of those goods or services.

Note: This distinction is only necessary at the end of the campaign and if you have outstanding debt to them. If you are unsure if an organization is incorporated or unincorporated, make your best guess.

Candidate: A person who seeks or is nominated for an office. This type is to be used ONLY for the candidate of your database. There will be ONLY one payee in your list with this designation.

Committee Employee: Employee of YOUR committee. See description above for **committee**.

Other Individual: This option is used to select an individual who isn't affiliated with any of the above options.



FEC Filing Information/Other

Entity Type: Organization (not a committee and not a p

Creditor Type: Incorporated Commercial Vendor

Payee Filer ID: Incorporated Commercial Vendor

Filer Entity: Unincorporated Commercial Vendor
Candidate
Committee Employee
Other Individual

Set Voter

EIN/SSN:

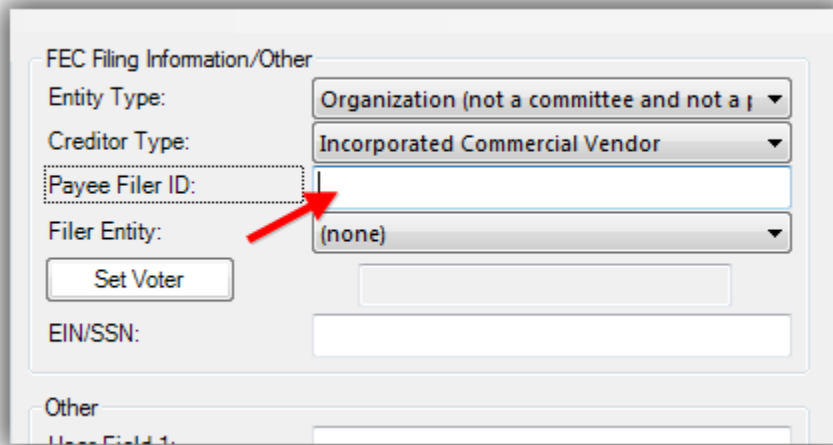
Other

User Field 1:

User Field 2:

Payee Filer ID

This is the text box you will enter the Filer ID number of a payee. Usually used for FEC filing purposes and will typically be the H (house) or S (senate) filer number.

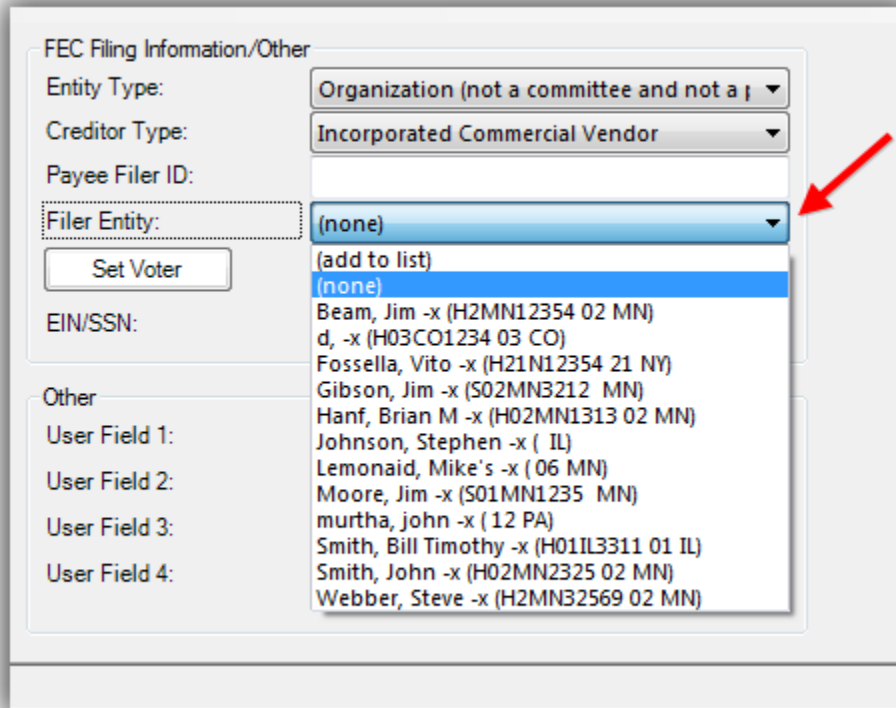


The screenshot shows a web form titled "FEC Filing Information/Other". It contains several fields and a button:

- Entity Type:** Organization (not a committee and not a p) [dropdown]
- Creditor Type:** Incorporated Commercial Vendor [dropdown]
- Payee Filer ID:** [text input field, highlighted with a red arrow]
- Filer Entity:** (none) [dropdown]
- Set Voter:** [button]
- EIN/SSN:** [text input field]
- Other:** [text input field]
- User Field 1:** [text input field]

Filer Entity

The Filer Entity is a drop down where you can select a candidate from your database or add a new one to the list. These come from your Candidate list in System Manager -> Lists.



The screenshot shows a software interface for creating a new payee. The 'FEC Filing Information/Other' section contains several dropdown menus and a text field. The 'Filer Entity' dropdown is currently open, showing a list of names and IDs. A red arrow points to the dropdown menu.

Field	Value
Entity Type	Organization (not a committee and not a p
Creditor Type	Incorporated Commercial Vendor
Payee Filer ID	
Filer Entity	(none)
Set Voter	Set Voter
EIN/SSN	
Other	
User Field 1	
User Field 2	
User Field 3	
User Field 4	

The dropdown menu for 'Filer Entity' contains the following items:

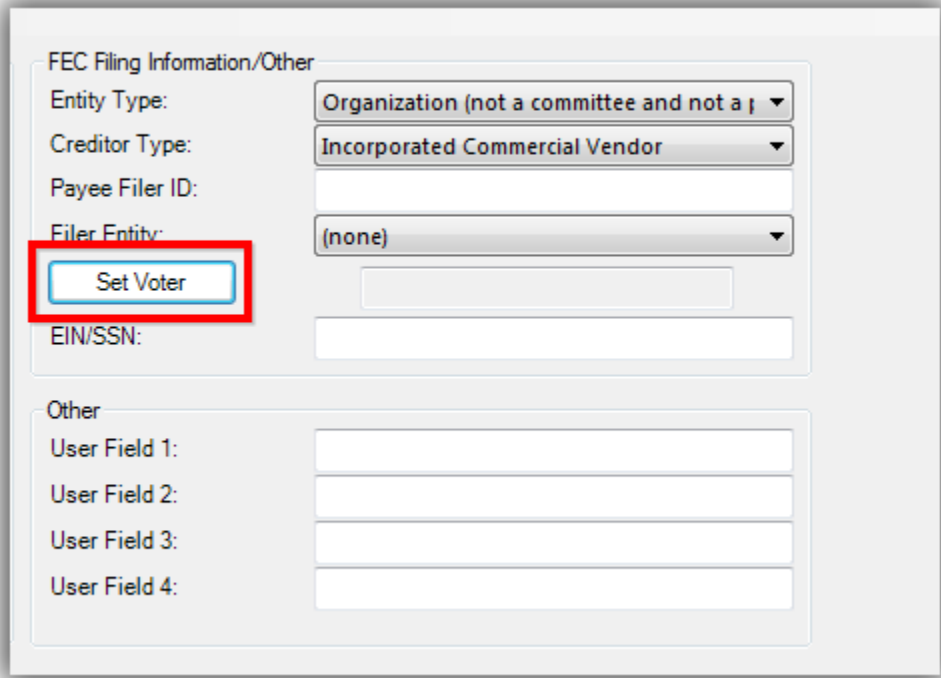
- (none)
- (add to list)
- (none)
- Beam, Jim -x (H2MN12354 02 MN)
- d, -x (H03CO1234 03 CO)
- Fossella, Vito -x (H21N12354 21 NY)
- Gibson, Jim -x (S02MN3212 MN)
- Hanf, Brian M -x (H02MN1313 02 MN)
- Johnson, Stephen -x (IL)
- Lemonaid, Mike's -x (06 MN)
- Moore, Jim -x (S01MN1235 MN)
- murtha, john -x (12 PA)
- Smith, Bill Timothy -x (H01IL3311 01 IL)
- Smith, John -x (H02MN2325 02 MN)
- Webber, Steve -x (H2MN32569 02 MN)

Set Voter ID

To set the voter ID you can click the **[Set Voter ID]** button and select the voter by searching or enter a new one if they don't yet exist in your database. Three images below describe this process.

The Voter ID is needed if you are reimbursing your employees for expenses they are paying on behalf of the committee.

Img 1 of 3



FEC Filing Information/Other

Entity Type: Organization (not a committee and not a p) ▼

Creditor Type: Incorporated Commercial Vendor ▼

Payee Filer ID:

Filer Entity: (none) ▼

Set Voter

EIN/SSN:

Other

User Field 1:

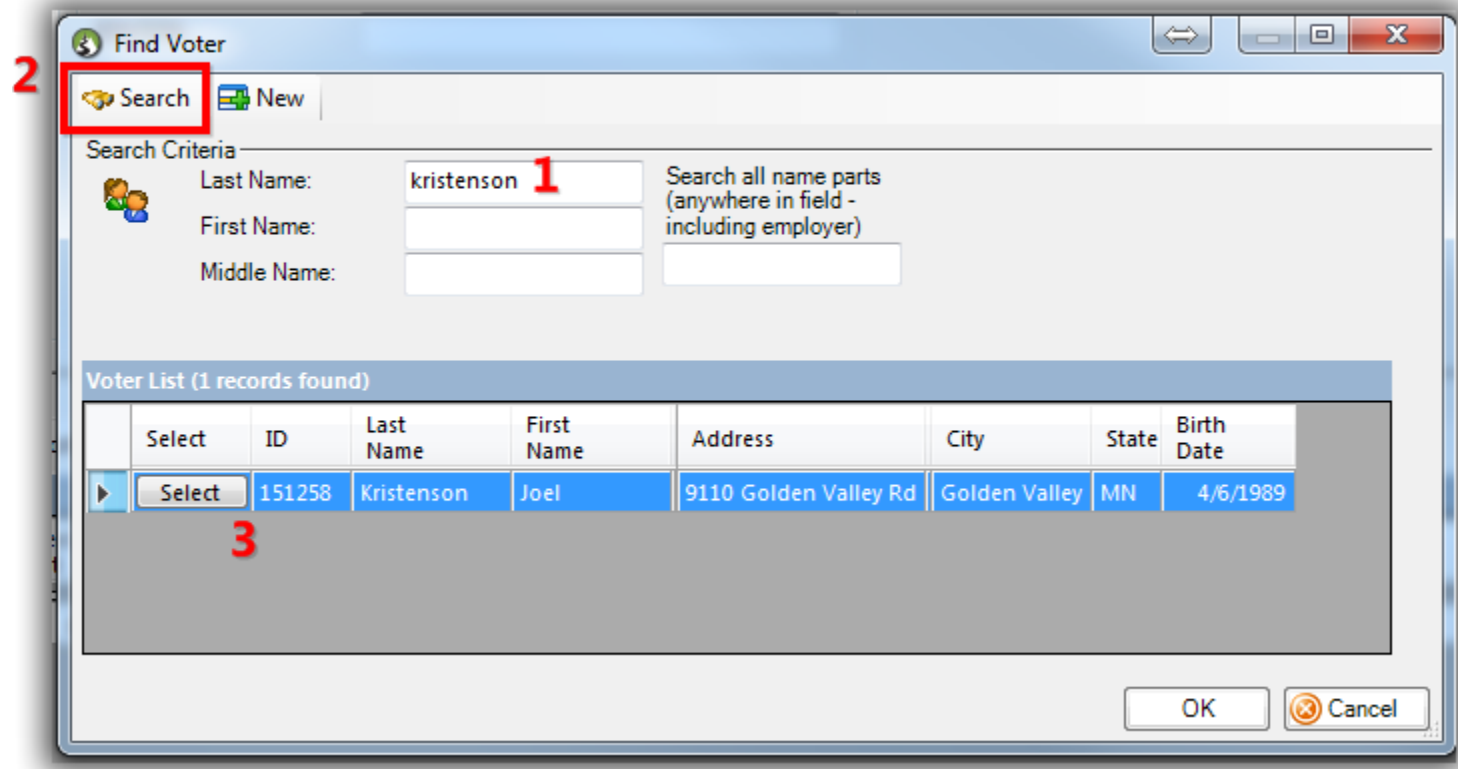
User Field 2:

User Field 3:

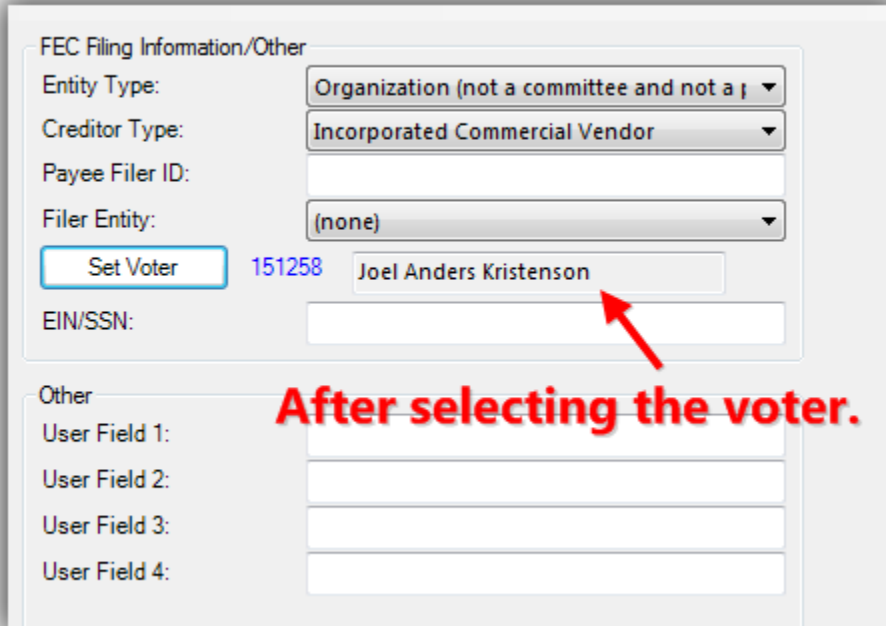
User Field 4:

Img 2 of 3

Searching for and selecting a voter.



Img 3 of 3



FEC Filing Information/Other

Entity Type: Organization (not a committee and not a p ▾

Creditor Type: Incorporated Commercial Vendor ▾

Payee Filer ID:

Filer Entity: (none) ▾

151258 Joel Anders Kristenson

EIN/SSN:

Other

User Field 1:

User Field 2:

User Field 3:

User Field 4:

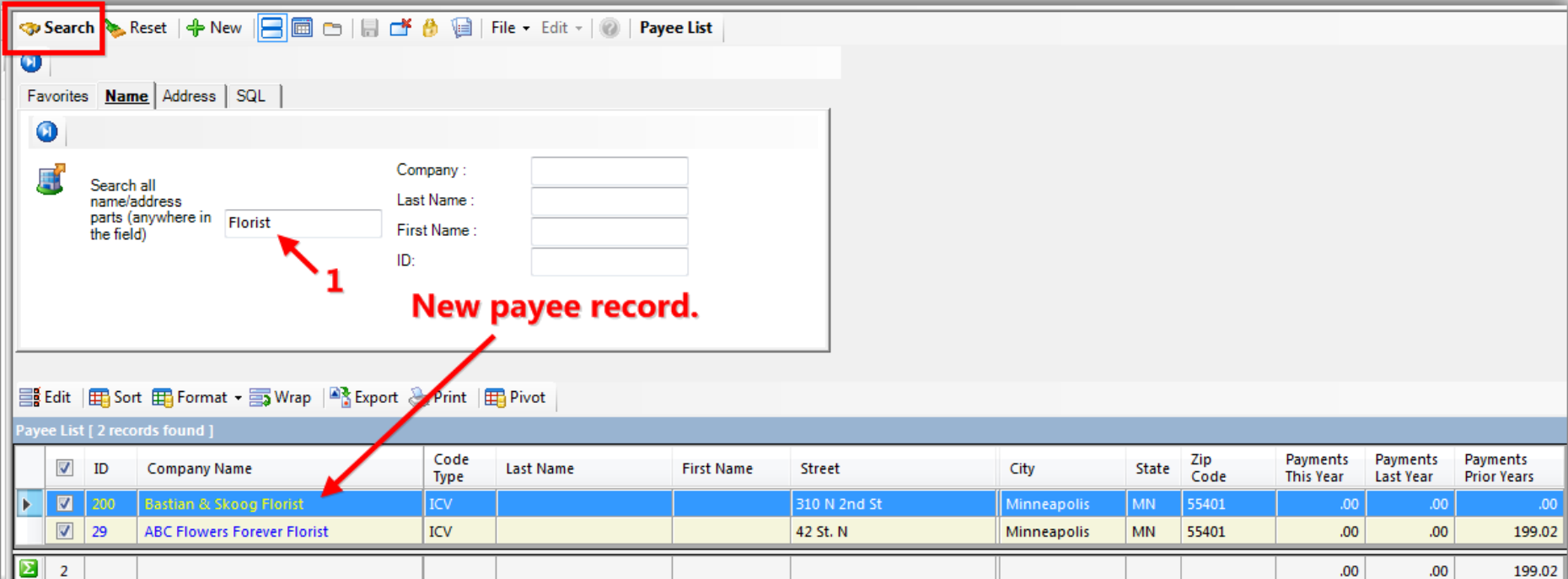
After selecting the voter.

Click **[Save and Close]** to finish adding the new **payee** to your database.

You can now search for the payee in the list. *My example is below.*

How to Create a New Payee for Invoicing and Payments (Primarily for Political Campaigns)

2



Search Reset + New [Icons] File Edit Payee List

Favorites Name Address SQL

Search all name/address parts (anywhere in the field) Company: Last Name: First Name: ID:

New payee record.

Edit Sort Format Wrap Export Print Pivot

Payee List [2 records found]

ID	Company Name	Code Type	Last Name	First Name	Street	City	State	Zip Code	Payments This Year	Payments Last Year	Payments Prior Years
200	Bastian & Skoog Florist	ICV			310 N 2nd St	Minneapolis	MN	55401	.00	.00	.00
29	ABC Flowers Forever Florist	ICV			42 St. N	Minneapolis	MN	55401	.00	.00	199.02

The **related resources** below will teach many other things related to this topic such as how to enter invoice, and make payments against invoices.



Trail Blazer™

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

Related Resources

Article: [Unlocking Voters/Donors](#)

Article: [Delete an Invoice/Payment](#)

Article: [How to Enter an Invoice for a Payee](#)

Article: [How to Enter a Payment for an Invoice](#)

Article: [Adding a New Database User and Setting their Security Settings](#)

Article: [How to Print Checks through Trail Blazer for Recorded Payments](#)

3rd Party Article: [FEC - Best Practices to Avoid Pitfalls](#)

Trail Blazer Curriculums: [Financial Training – Political Part I and II](#)

Video: [Add Invoice and Make Immediate Payment](#)

Video: [Invoices – enter payment on an unpaid invoice](#)

Video: [Credit Card Memo Entry](#)

Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

✉ **Email:** support@trailblz.com

📘 **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

🐦 **Twitter:** <https://twitter.com/trailblazersoft>

** As a policy we require that you have taken our intro training class before calling or emailing our live support team.*

[Click here](#) to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

** After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive trainings.*

** This service is included in your contract.*

How to Create a New Payee for Invoicing and Payments (Primarily for Political Campaigns)
