Author: Kristenson, Joel
Last Updated: 2017-05-17

Overview

This article will teach you how to enter a **payment** for an **invoice**. *The article assumes you already know how to create a* [payee](#) *and an invoice.*

💡 **Tip:** New to **tracking finances** in **Trail Blazer**? Take our *free* [financial training classes](#) which will get your campaign treasurer(s) up to speed on how to accurately track all of the incoming and outgoing money for your campaign so that you can file your [FEC reports](#) without a hitch.

Steps

Open the payee record that has the invoice you need to make a payment against. You can search for the payee from the **Payees (Invoicing)** list or search for **unpaid invoices** from the **Invoices** list. *The two screenshots below show the different ways to do this.*

Img 1 of 2 – Search for a **Payee** from the **Payees (Invoicing List)** List

Img 2 of 2 – Search for **Unpaid Invoices** from the **Invoices** List

Accessing an invoice via the Invoices list.

Once you've opened the **Payee** record, click on the **Invoice ID** under the **Invoice** tab for the one you need to make a payment for. *In my example it was ID 781.*

Click on the 'Invoice ID' for the unpaid invoice.

In the **Invoice Card** click the **[+ New]** button under the **Payments** tab.
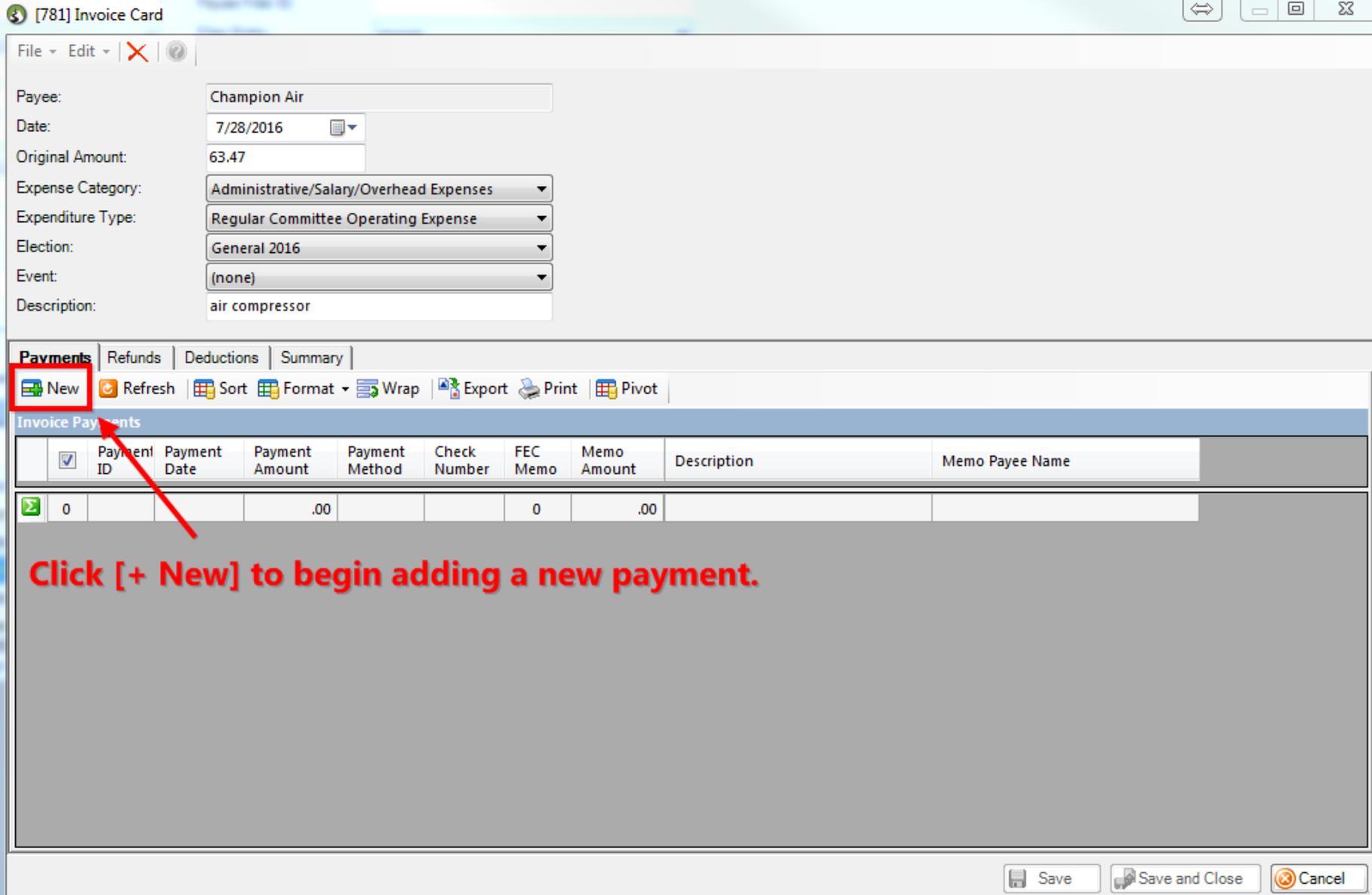
Click [+ New] to begin adding a new payment.

Fill out the **Payment** form and click **[Save and Close]**. *My example is below for a payment that pays the full invoice amount. If you're concerned or have questions about how to categorize or input any of the data you should contact your FEC analyist or our support team.*

Fill out the payment form and click [Save and Close].

Contact your FEC analyst or Trail Blazer tech support if you have any questions/concerns on how to fill it out so it prints out accurately on your FEC reports.
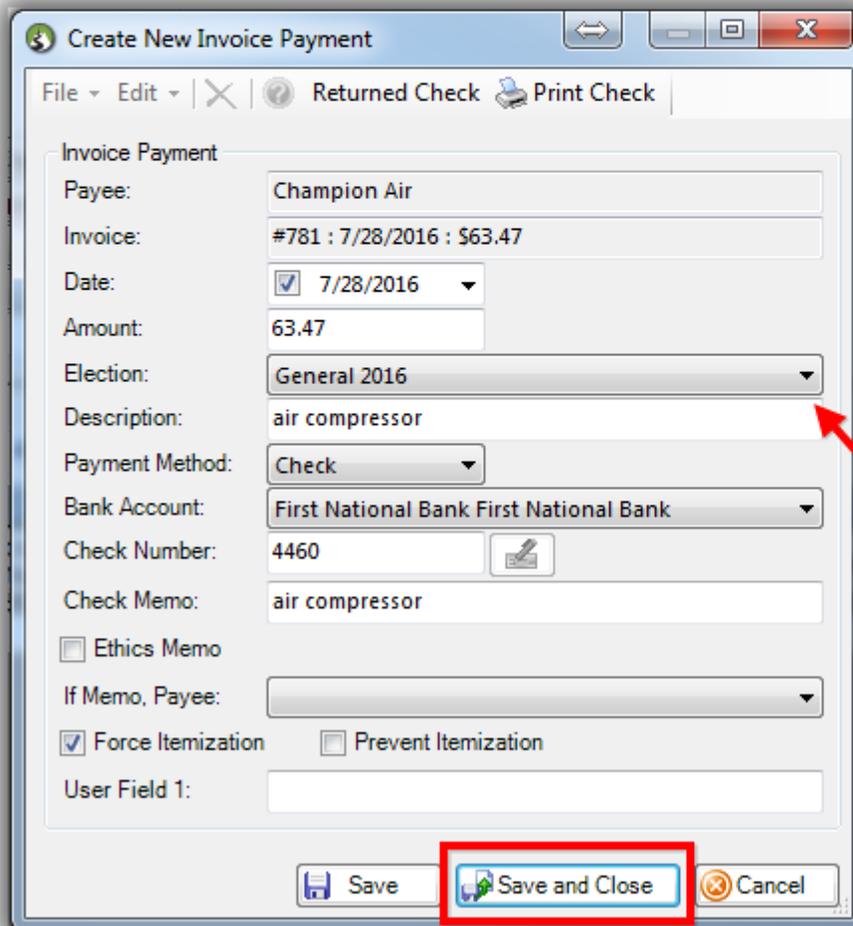
Make *sure* the date and election are entered correctly.

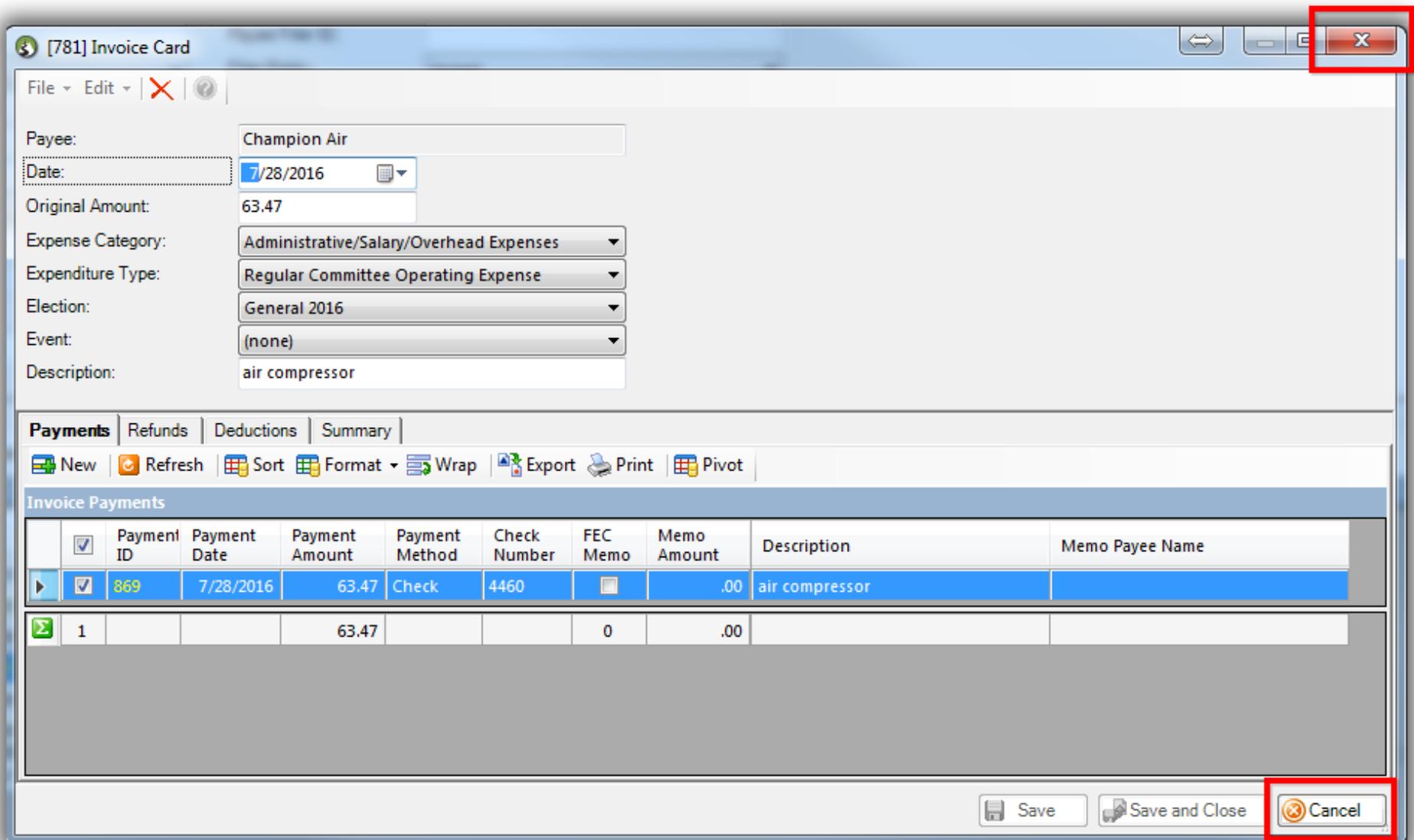After saving your payment, click **[Cancel]** or the red **[X]** to **close** the **Invoice Card**.

How to Enter a Payment for an Invoice (Primarily for Political Campaigns)

Click [Cancel] or the red x to close out of the invoice card after entering your payment(s).

Back in the **payee** record the payment amount and open balance will reflect the change. *My example is below for the invoice that was paid off in full.*

How to Enter a Payment for an Invoice (Primarily for Political Campaigns)

After saving the payment, the values in the payee record for the invoice will update. In this case it was paid off in

You can search for **payments** and view details in the **Payments** list. *Some common examples of doing this would be by date range or by election.*

You can run search queries for payments in the 'Payments' list. Some common examples include filtering by date or election.

Take a look at the **related resources** below to learn a lot more about the financial tools in your database.

Trail Blazer

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

Related Resources

Article: [How to Create a New Payee for Invoicing and Payments (Primarily for Political Customers)](#)

Article: [How to Create an Invoice for a Payee (Primarily for Political Customers)](#)

Article: [Unlocking Contacts (Voters/Donors), and Payee Records – Notes on How to Records get Locked and How to Avoid it](#)

Article: [Steps to Import Expenditures – with an Example Spreadsheet Template – Political Only (2016 Upgrade)](#)

Article: [How to Enter an Invoice and Payment with the New Payment System, and How to Add a Refund and Deduction](#)

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

Training: [Free Financial Training Part I and II](#)

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

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

Video: [Credit Card Memo Entry (using 2015 version of Financial)](#)

Video: [Add New Loans Received](#)

Video: [Deposits – Setup Bank Account – Set Bank as Default – Create Deposit](#)

Trail Blazer Live Support

- Ⓒ **Phone:** 1-866-909-8700
- ✉ **Email:** support@trailblz.com
- f **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