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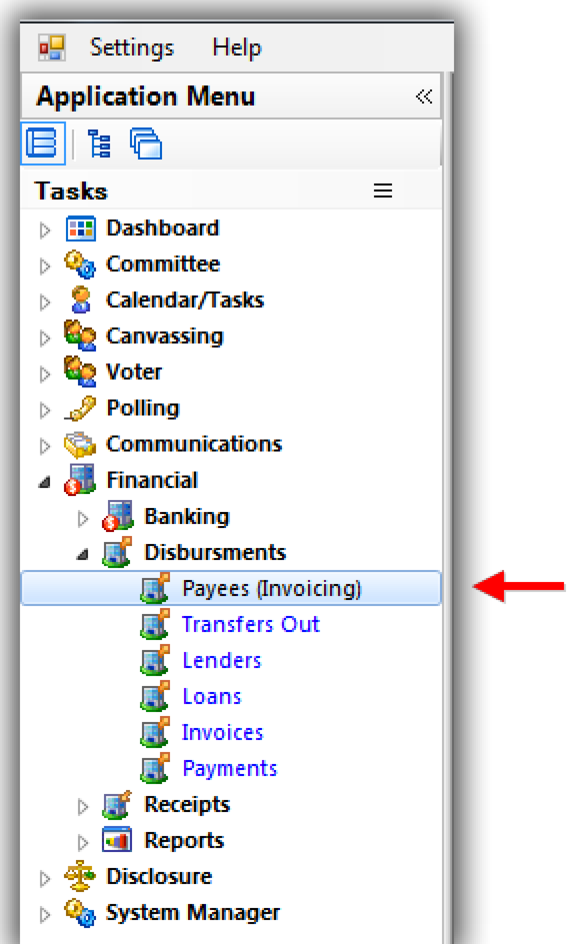
Overview

This article will teach you how to create an **invoice** for a **payee**. It also covers how to search for unpaid invoices. The article *requires* you already know how to create a payee record.

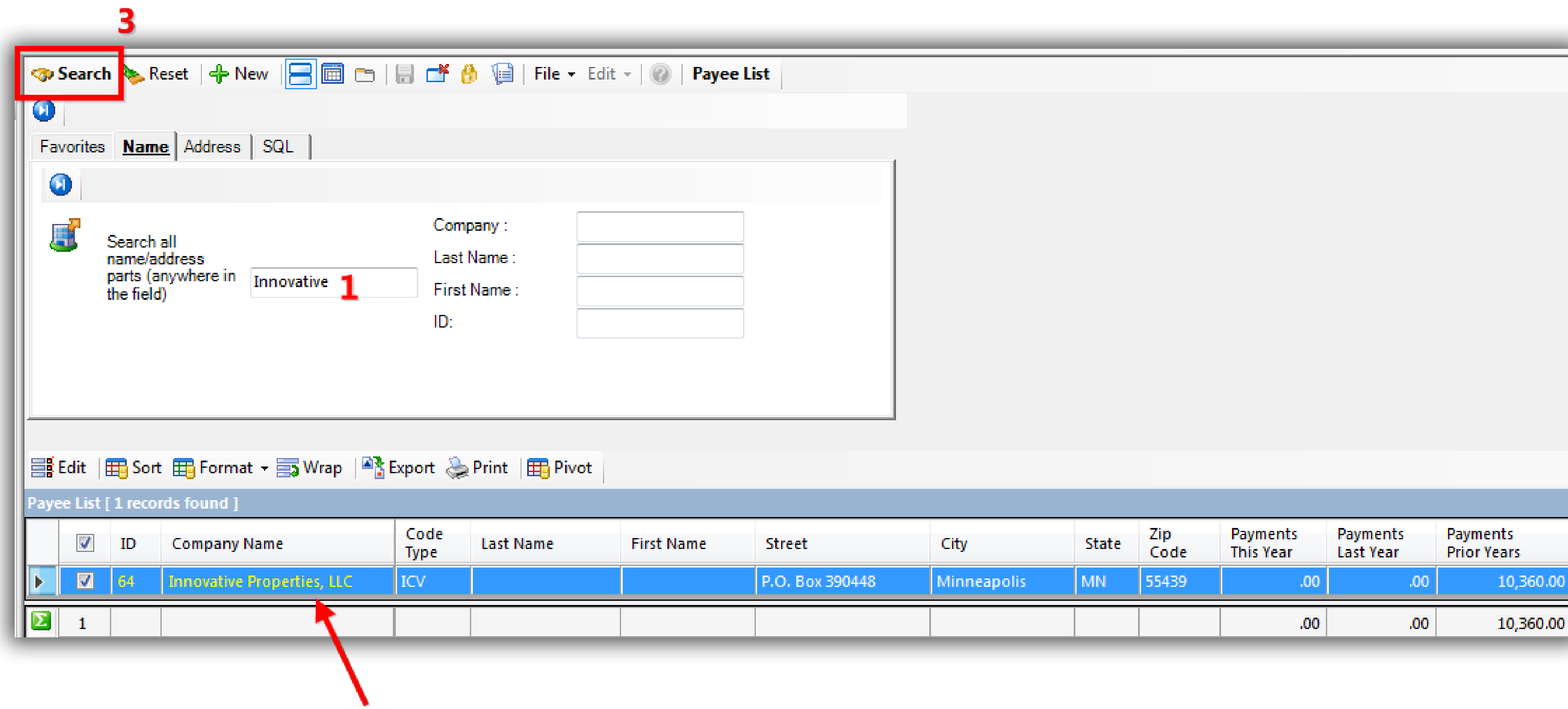
Tip: This 2 minute video shows how to **create an invoice** and **make a payment**.

Steps

Navigate to the **Payees (Invoicing)** list. *Requires appropriate security clearance.*

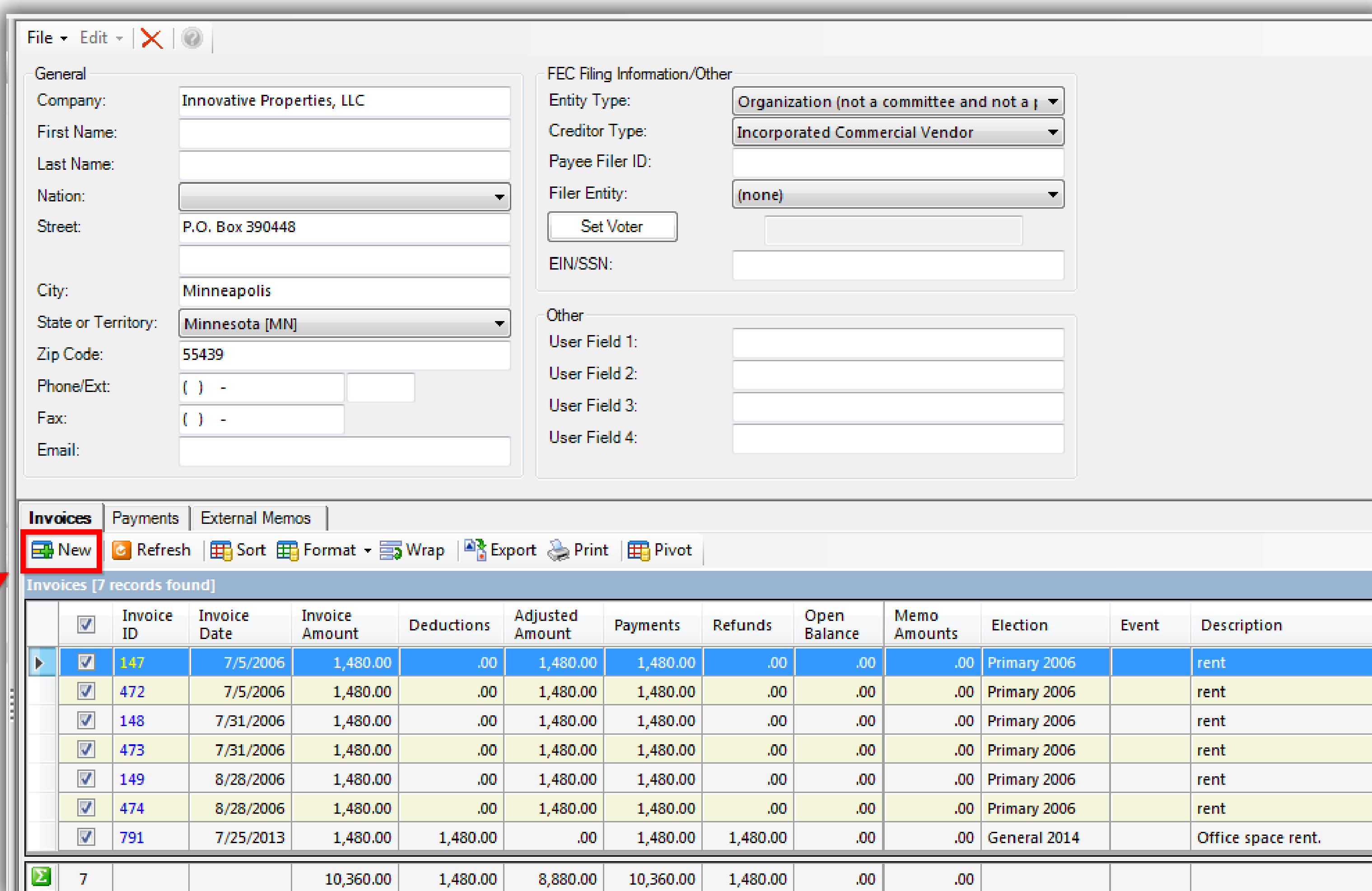


Run a search query for the payee you need to add an invoice for, and then **click** on their **name** to **open** the record.



3. Click on their name to open their payee record card.

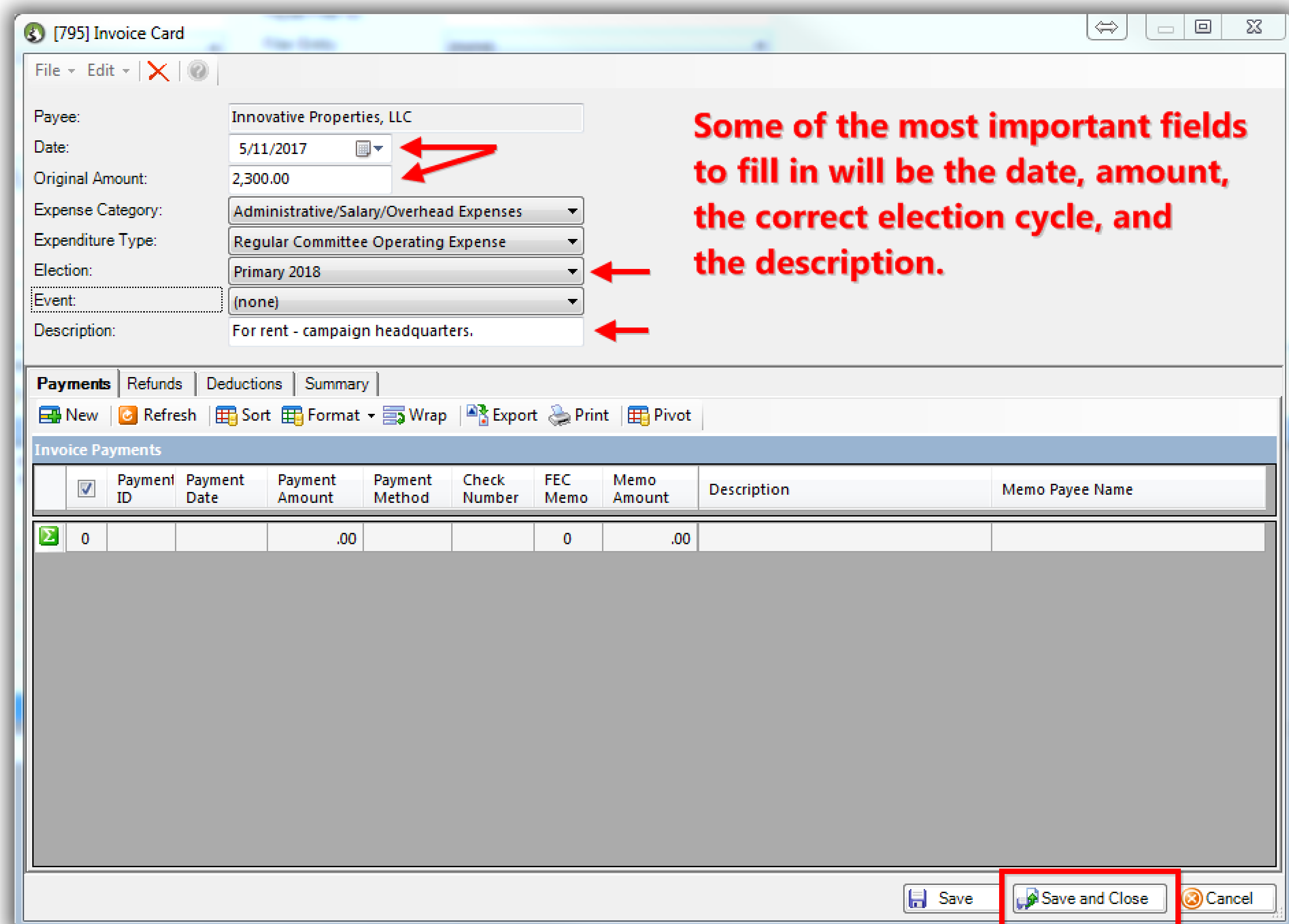
Click **[+ New]** under the **Invoices** tab.



Click the [+ New] button to begin creating a new invoice.

Fill out all the details of invoice and then click **[Save and Close]**. Some of the more important information will be the **date**, **amount**, the correct election cycle, and the **description**. *My finished example is below for a $2,300 invoice on 5/11/17 for the Primary 2018 election cycle.*

Fill out all the details for the invoice. If you have any questions/concerns about how to categorize it you should contact your FEC analyst (if a federal campaign).



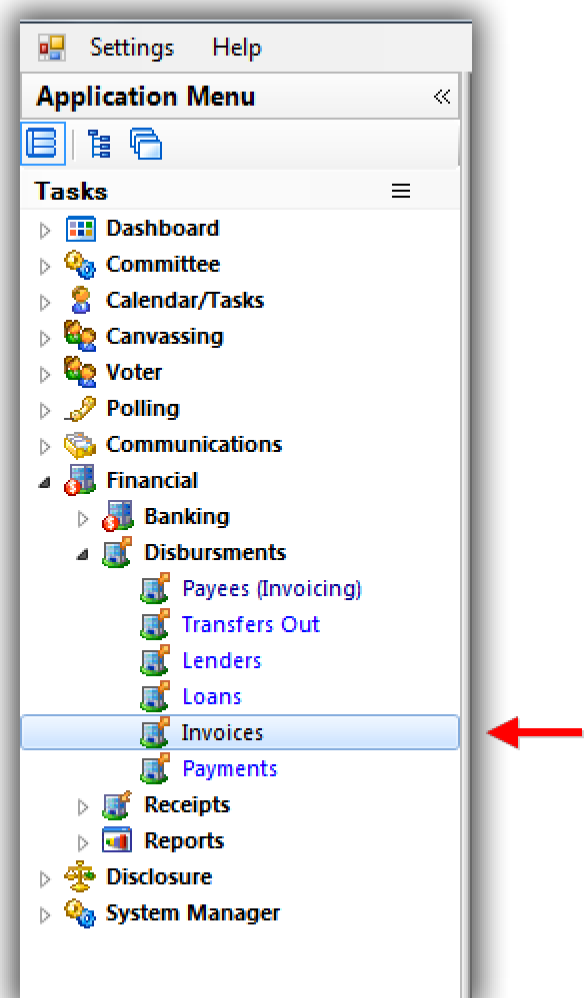
Some of the most important fields to fill in will be the date, amount, the correct election cycle, and the description.

Save and close after creating the invoice.

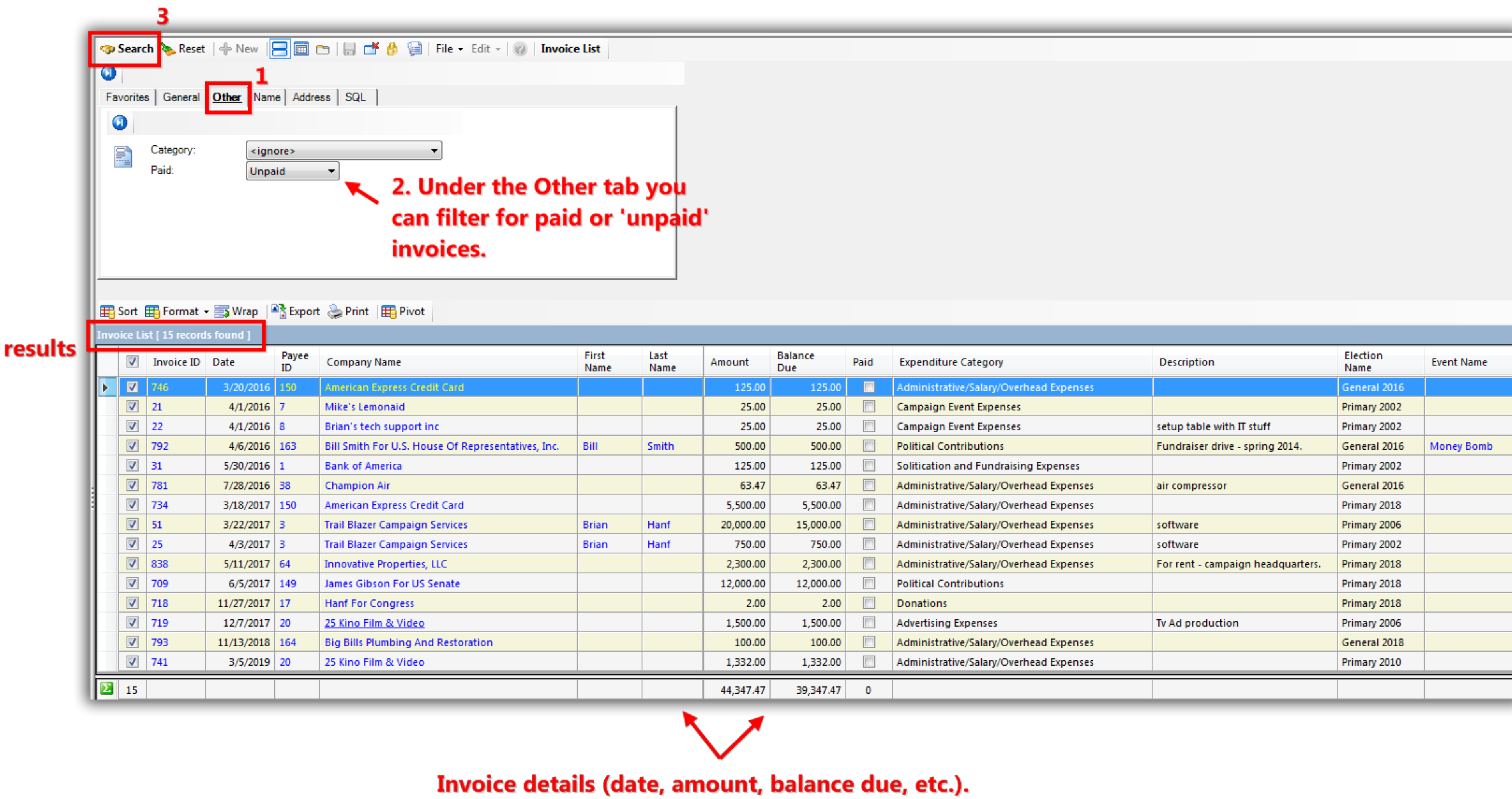
***if you're going to enter a payment immediately you can just click [Save] and keep the record**

If you have any questions or concerns on what data is **required** and how to categorize it correctly so it prints accurately on your FEC reports, you should contact your **FEC analyst**, or the **Trail Blazer** tech support team. *If you're going to record a payment against the invoice right away you can click [Save] to keep the invoice open, and continue on to that step.*

To **view invoices** (both paid and unpaid) open the **Invoices** list.

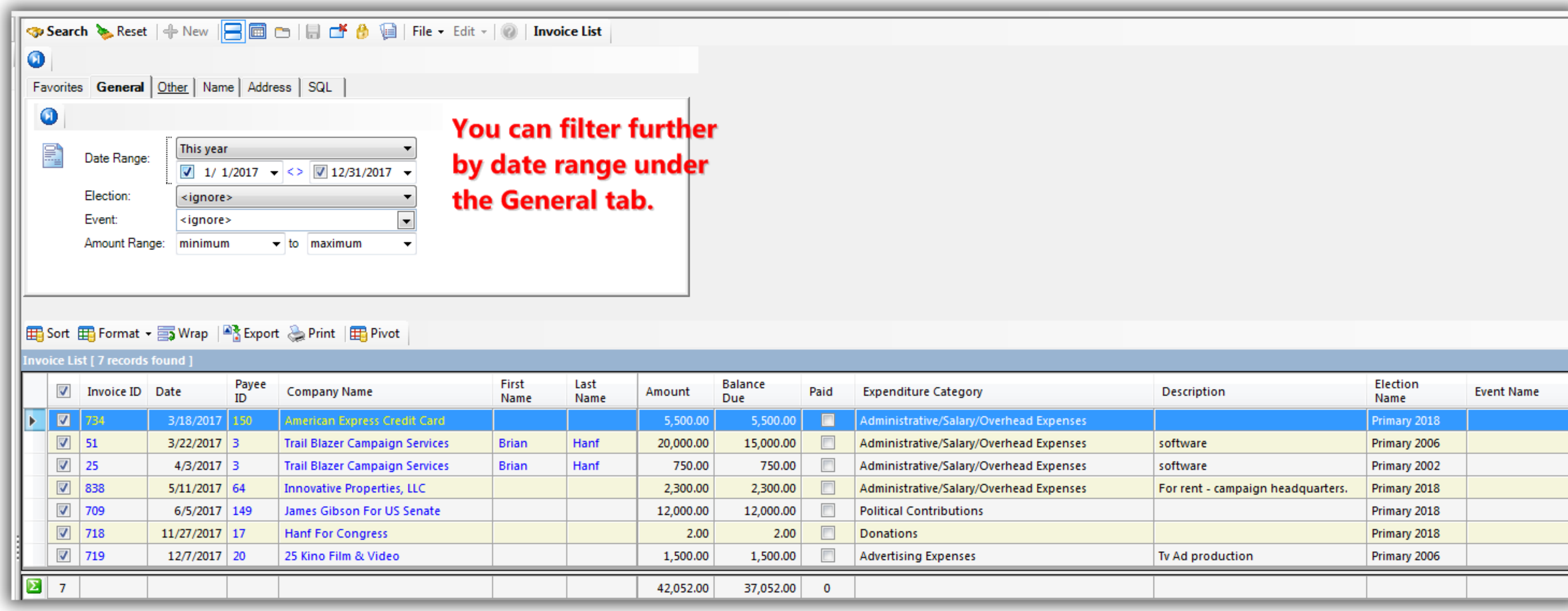


You can filter for **unpaid** invoices under the **Other** tab. *My example is below where there were 15 unpaid invoices.*



Invoice ID	Date	Payee ID	Company Name	First Name	Last Name	Amount	Balance Due	Paid	Expenditure Category	Description	Election Name	Event Name
746	3/20/2016	150	American Express Credit Card			125.00	125.00		Administrative/Salary/Overhead Expenses		General 2016	
21	4/1/2016	7	Mike's Lemonaid			25.00	25.00		Campaign Event Expenses		Primary 2002	
22	4/1/2016	8	Brian's tech support inc			25.00	25.00		Campaign Event Expenses	setup table with IT stuff	Primary 2002	
792	4/6/2016	163	Bill Smith For U.S. House Of Representatives, Inc.	Bill	Smith	500.00	500.00		Political Contributions	Fundraiser drive - spring 2014.	General 2016	Money Bomb
31	5/30/2016	1	Bank of America			125.00	125.00		Solitication and Fundraising Expenses		Primary 2002	
781	7/28/2016	38	Champion Air			63.47	63.47		Administrative/Salary/Overhead Expenses	air compressor	General 2016	
734	3/18/2017	150	American Express Credit Card			5,500.00	5,500.00		Administrative/Salary/Overhead Expenses		Primary 2018	
51	3/22/2017	3	Trail Blazer Campaign Services	Brian	Hanf	20,000.00	15,000.00		Administrative/Salary/Overhead Expenses	software	Primary 2006	
25	4/3/2017	3	Trail Blazer Campaign Services	Brian	Hanf	750.00	750.00		Administrative/Salary/Overhead Expenses	software	Primary 2002	
838	5/11/2017	64	Innovative Properties, LLC			2,300.00	2,300.00		Administrative/Salary/Overhead Expenses	For rent - campaign headquarters.	Primary 2018	
709	6/5/2017	149	James Gibson For US Senate			12,000.00	12,000.00		Political Contributions		Primary 2018	
718	11/27/2017	17	Hanf For Congress			2.00	2.00		Donations		Primary 2018	
719	12/7/2017	20	25 Kino Film & Video			1,500.00	1,500.00		Advertising Expenses	Tv Ad production	Primary 2006	
793	11/13/2018	164	Big Bills Plumbing And Restoration			100.00	100.00		Administrative/Salary/Overhead Expenses		General 2018	
741	3/5/2019	20	25 Kino Film & Video			1,332.00	1,332.00		Administrative/Salary/Overhead Expenses		Primary 2010	
15						44,347.47	39,347.47	0				

You can filter by things like **date range** under the **General** tab. *In this example I filtered for unpaid invoices in 2017 which produced 7 results.*



IMPORTANT: All **unpaid** invoices will show up as a **debt** on the campaign finance reports.

Take a look at the **related resources** below for other articles and videos related to this topic.

Related Resources

Article: How to Enter a Payment for an Invoice
Article: How to Create a New Payee for Invoicing and Payments (Primarily for Political Customers)
Article: Do I have to Create an Invoice Before I Create a Payment?
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: Delete an Invoice/Payment

Article: Entering Credit Card Memo Details for a Credit Card Invoice that was Paid – Political Only (Required for Federal FEC Reports)
Article: How to Delete Payments, and an Invoice (also covered: how to record a refund, and a deduction)
Article: How to Add an Election to Your Trail Blazer Database (Political Only)
Article Folder: Filing FEC Reports
Video: Invoices – enter payment on an unpaid invoice
Video: Add Invoice and Make Immediate Payment
Video: Enter an Expenditure Refund
Video: Deposits – Setup Bank Account – Set Bank as Default – Create Deposit
Video: Credit Card Memo Entry (using 2015 version of Financial)
Video: Add New Loans Received
Video: Make a Loan Payment (Interest Bearing and Non Interest Bearing)
Video: Getting Started 106b – Entering Contributions (POLITICAL ONLY)
Video: Contribution Refund

Trail Blazer Live Support

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- **Email:** support@trailblz.com
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