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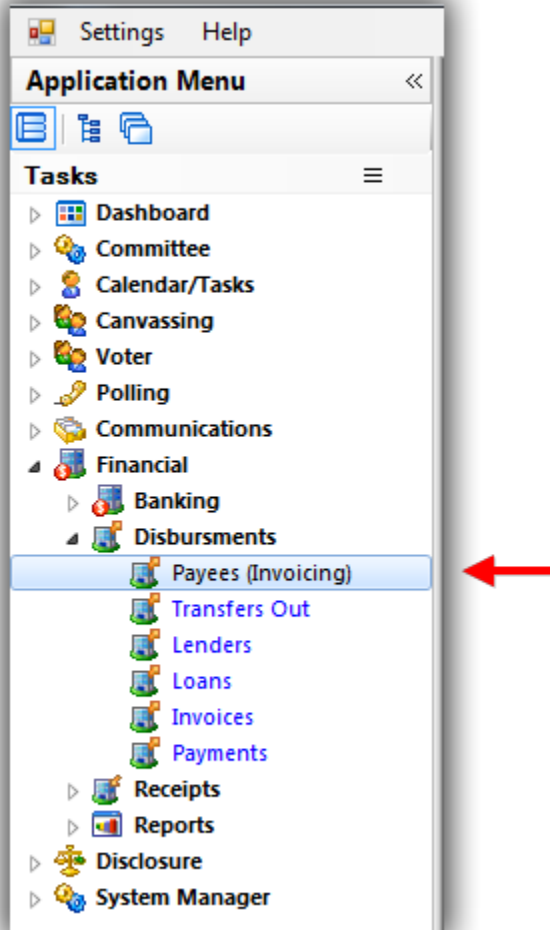
Overview

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**.

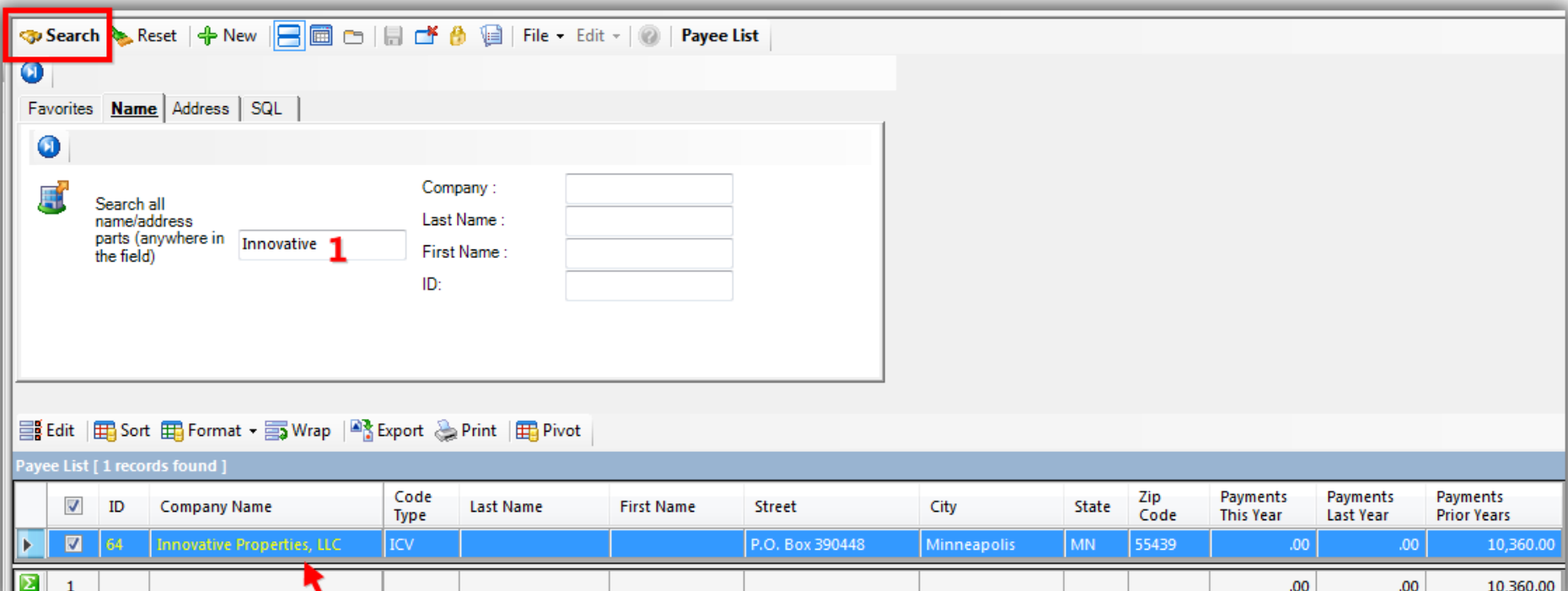
Steps

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



Search Reset + New [Icons] File Edit Payee List

Favorites Name Address SQL

Search all name/address parts (anywhere in the field) **1**

Company :
Last Name :
First Name :
ID:

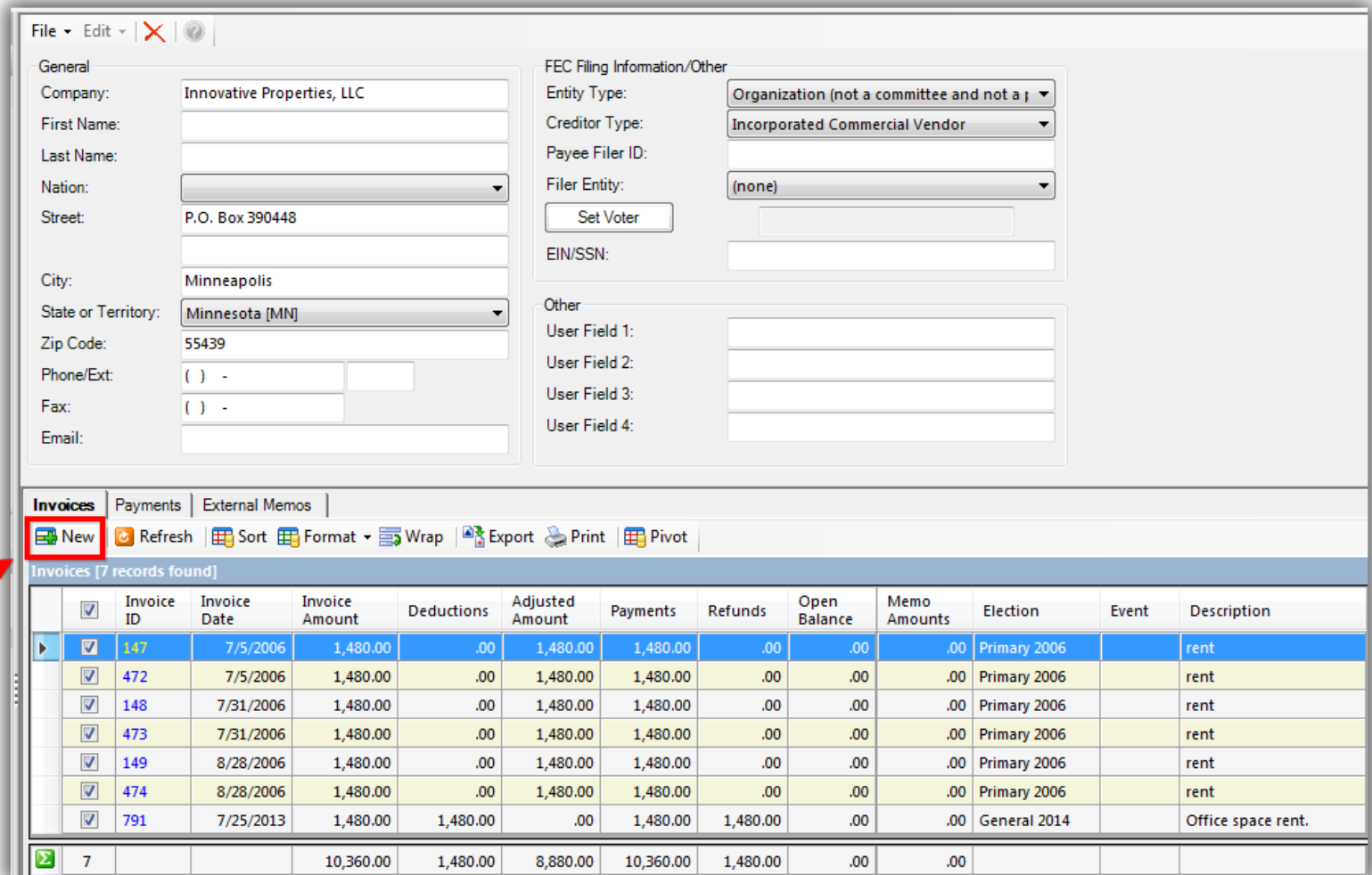
Edit Sort Format Wrap Export Print Pivot

Payee List [1 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
▶	64	Innovative Properties, LLC	ICV			P.O. Box 390448	Minneapolis	MN	55439	.00	.00	10,360.00
1										.00	.00	10,360.00

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

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



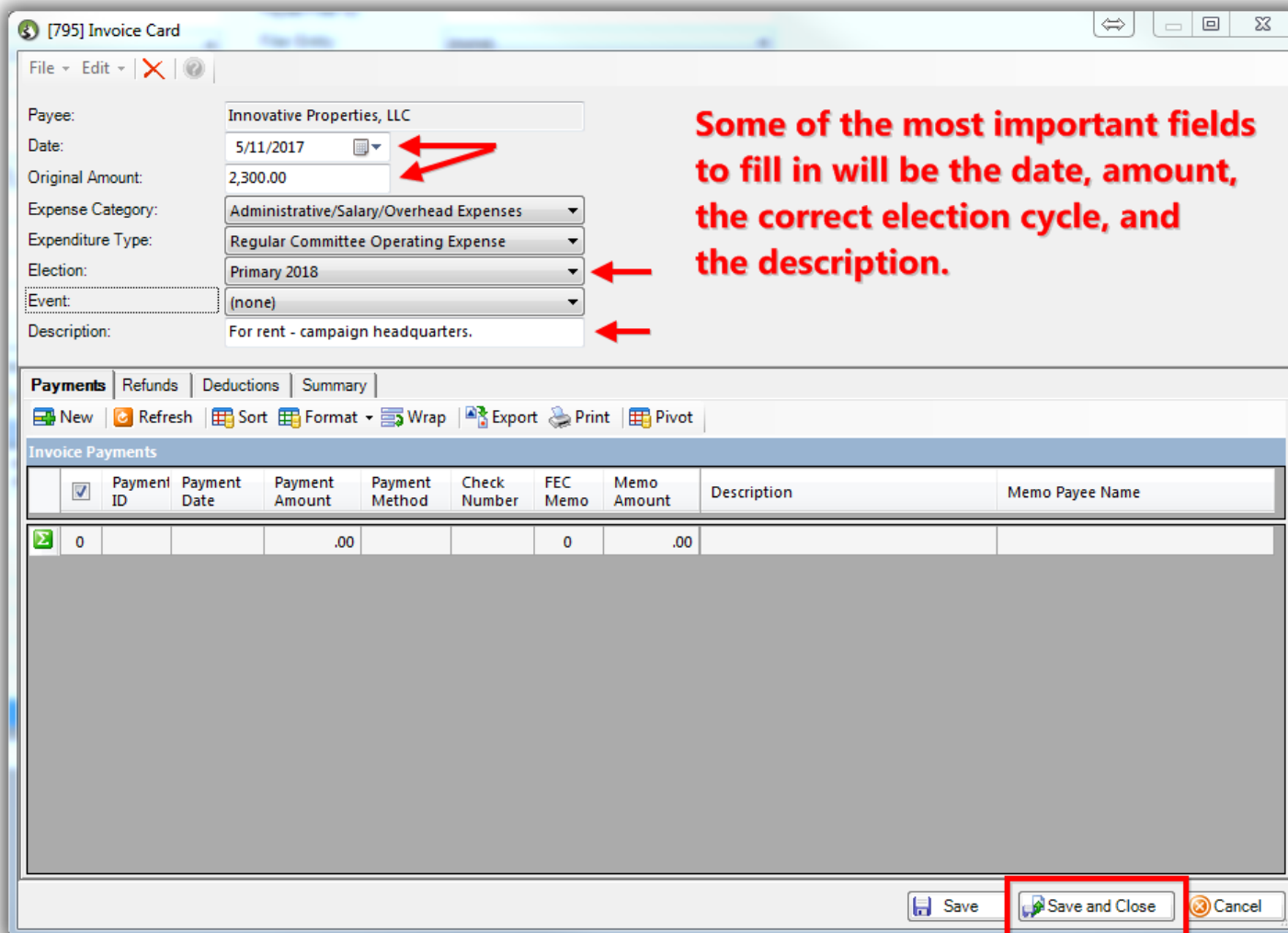
The screenshot shows the TrailBlazer software interface. At the top, there are tabs for 'Invoices', 'Payments', and 'External Memos'. The 'Invoices' tab is active, and a red arrow points to the '+ New' button. Below the tabs is a toolbar with icons for Refresh, Sort, Format, Wrap, Export, Print, and Pivot. The main area displays a table of invoices with 7 records found. The table has columns for Invoice ID, Invoice Date, Invoice Amount, Deductions, Adjusted Amount, Payments, Refunds, Open Balance, Memo Amounts, Election, Event, and Description. The first six rows are highlighted in blue, and the seventh row is highlighted in yellow. Below the table, there is a summary row with a green plus icon in the first column.

	Invoice ID	Invoice Date	Invoice Amount	Deductions	Adjusted Amount	Payments	Refunds	Open Balance	Memo Amounts	Election	Event	Description
<input checked="" type="checkbox"/>	147	7/5/2006	1,480.00	.00	1,480.00	1,480.00	.00	.00	.00	Primary 2006		rent
<input checked="" type="checkbox"/>	472	7/5/2006	1,480.00	.00	1,480.00	1,480.00	.00	.00	.00	Primary 2006		rent
<input checked="" type="checkbox"/>	148	7/31/2006	1,480.00	.00	1,480.00	1,480.00	.00	.00	.00	Primary 2006		rent
<input checked="" type="checkbox"/>	473	7/31/2006	1,480.00	.00	1,480.00	1,480.00	.00	.00	.00	Primary 2006		rent
<input checked="" type="checkbox"/>	149	8/28/2006	1,480.00	.00	1,480.00	1,480.00	.00	.00	.00	Primary 2006		rent
<input checked="" type="checkbox"/>	474	8/28/2006	1,480.00	.00	1,480.00	1,480.00	.00	.00	.00	Primary 2006		rent
<input checked="" type="checkbox"/>	791	7/25/2013	1,480.00	1,480.00	.00	1,480.00	1,480.00	.00	.00	General 2014		Office space rent.
<input checked="" type="checkbox"/>	7		10,360.00	1,480.00	8,880.00	10,360.00	1,480.00	.00	.00			

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).



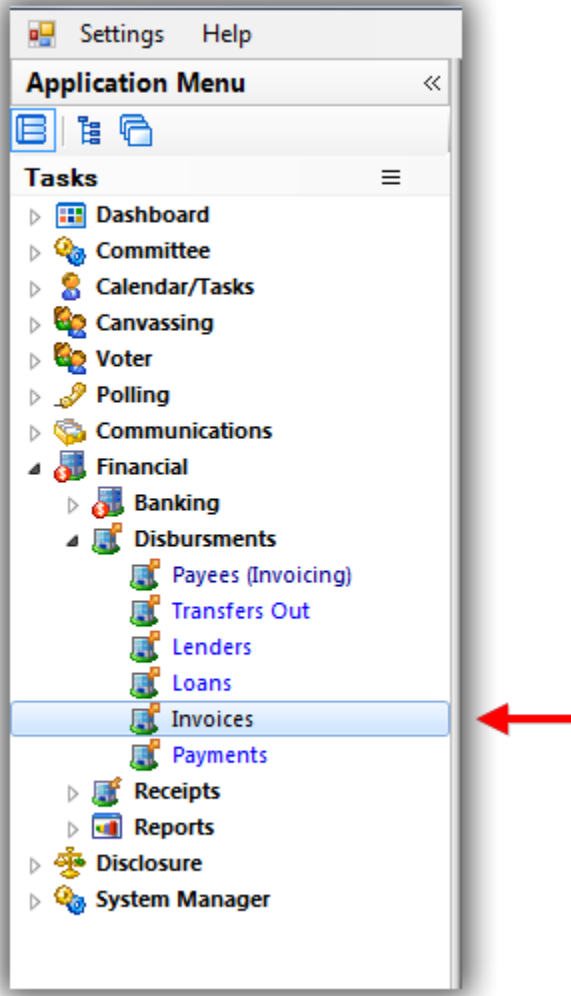
Some of the most important fields to fill in will be the date, amount, the correct election cycle, and the description.

Payment ID	Payment Date	Payment Amount	Payment Method	Check Number	FEC Memo	Memo Amount	Description	Memo Payee Name
0		.00			0	.00		

Save and close after creating the invoice.

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.*

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2. Under the Other tab you can filter for paid or 'unpaid' invoices.

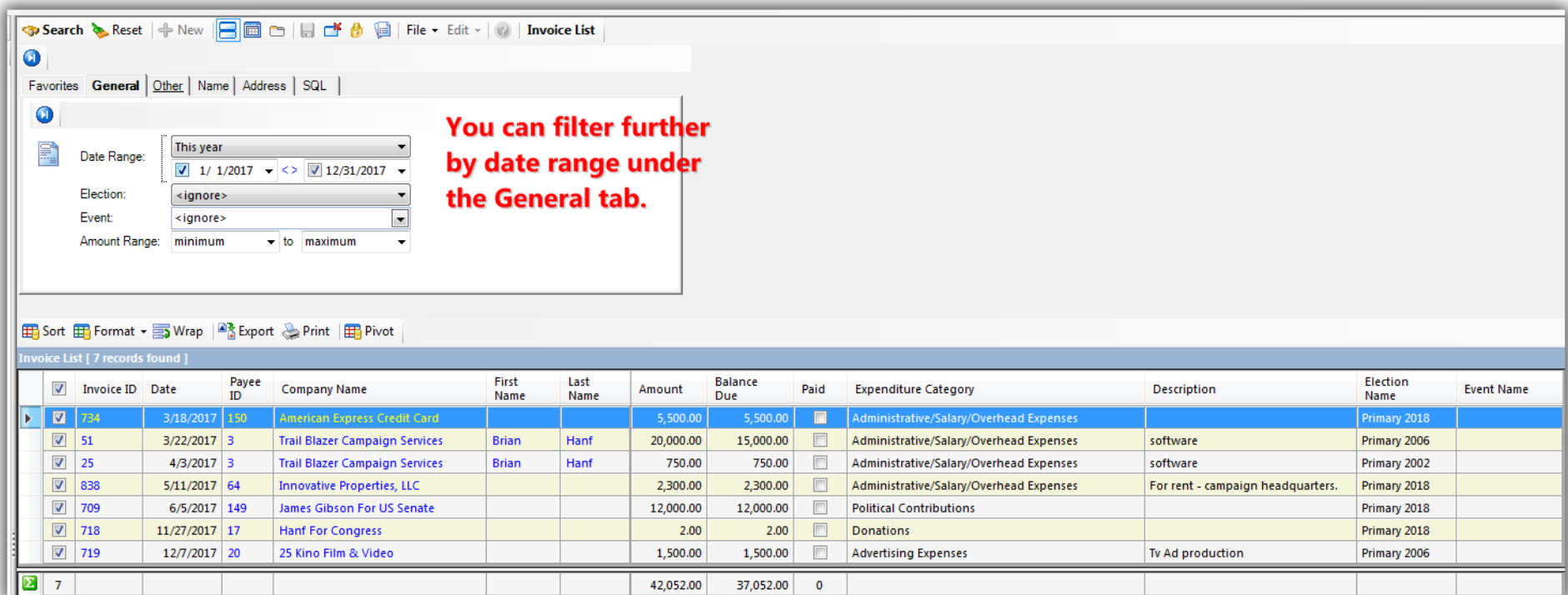
results

Invoice List [15 records found]

	Invoice ID	Date	Payee ID	Company Name	First Name	Last Name	Amount	Balance Due	Paid	Expenditure Category	Description	Election Name	Event Name
<input checked="" type="checkbox"/>	746	3/20/2016	190	American Express Credit Card			125.00	125.00	<input type="checkbox"/>	Administrative/Salary/Overhead Expenses		General 2016	
<input checked="" type="checkbox"/>	21	4/1/2016	7	Mike's Lemonaid			25.00	25.00	<input type="checkbox"/>	Campaign Event Expenses		Primary 2002	
<input checked="" type="checkbox"/>	22	4/1/2016	8	Brian's tech support inc			25.00	25.00	<input type="checkbox"/>	Campaign Event Expenses	setup table with IT stuff	Primary 2002	
<input checked="" type="checkbox"/>	792	4/6/2016	163	Bill Smith For U.S. House Of Representatives, Inc.	Bill	Smith	500.00	500.00	<input type="checkbox"/>	Political Contributions	Fundraiser drive - spring 2014.	General 2016	Money Bomb
<input checked="" type="checkbox"/>	31	5/30/2016	1	Bank of America			125.00	125.00	<input type="checkbox"/>	Sollicitation and Fundraising Expenses		Primary 2002	
<input checked="" type="checkbox"/>	781	7/28/2016	38	Champion Air			63.47	63.47	<input type="checkbox"/>	Administrative/Salary/Overhead Expenses	air compressor	General 2016	
<input checked="" type="checkbox"/>	734	3/18/2017	150	American Express Credit Card			5,500.00	5,500.00	<input type="checkbox"/>	Administrative/Salary/Overhead Expenses		Primary 2018	
<input checked="" type="checkbox"/>	51	3/22/2017	3	Trail Blazer Campaign Services	Brian	Hanf	20,000.00	15,000.00	<input type="checkbox"/>	Administrative/Salary/Overhead Expenses	software	Primary 2006	
<input checked="" type="checkbox"/>	25	4/3/2017	3	Trail Blazer Campaign Services	Brian	Hanf	750.00	750.00	<input type="checkbox"/>	Administrative/Salary/Overhead Expenses	software	Primary 2002	
<input checked="" type="checkbox"/>	838	5/11/2017	64	Innovative Properties, LLC			2,300.00	2,300.00	<input type="checkbox"/>	Administrative/Salary/Overhead Expenses	For rent - campaign headquarters.	Primary 2018	
<input checked="" type="checkbox"/>	709	6/5/2017	149	James Gibson For US Senate			12,000.00	12,000.00	<input type="checkbox"/>	Political Contributions		Primary 2018	
<input checked="" type="checkbox"/>	718	11/27/2017	17	Hanf For Congress			2.00	2.00	<input type="checkbox"/>	Donations		Primary 2018	
<input checked="" type="checkbox"/>	719	12/7/2017	20	25 Kino Film & Video			1,500.00	1,500.00	<input type="checkbox"/>	Advertising Expenses	Tv Ad production	Primary 2006	
<input checked="" type="checkbox"/>	793	11/13/2018	164	Big Bills Plumbing And Restoration			100.00	100.00	<input type="checkbox"/>	Administrative/Salary/Overhead Expenses		General 2018	
<input checked="" type="checkbox"/>	741	3/5/2019	20	25 Kino Film & Video			1,332.00	1,332.00	<input type="checkbox"/>	Administrative/Salary/Overhead Expenses		Primary 2010	
	15						44,347.47	39,347.47	0				

Invoice details (date, amount, balance due, etc.).

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.*



You can filter further by date range under the General tab.

Invoice ID	Date	Payee ID	Company Name	First Name	Last Name	Amount	Balance Due	Paid	Expenditure Category	Description	Election Name	Event Name
734	3/18/2017	190	American Express Credit Card			5,500.00	5,500.00	<input type="checkbox"/>	Administrative/Salary/Overhead Expenses		Primary 2018	
51	3/22/2017	3	Trail Blazer Campaign Services	Brian	Hanf	20,000.00	15,000.00	<input type="checkbox"/>	Administrative/Salary/Overhead Expenses	software	Primary 2006	
25	4/3/2017	3	Trail Blazer Campaign Services	Brian	Hanf	750.00	750.00	<input type="checkbox"/>	Administrative/Salary/Overhead Expenses	software	Primary 2002	
838	5/11/2017	64	Innovative Properties, LLC			2,300.00	2,300.00	<input type="checkbox"/>	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	<input type="checkbox"/>	Political Contributions		Primary 2018	
718	11/27/2017	17	Hanf For Congress			2.00	2.00	<input type="checkbox"/>	Donations		Primary 2018	
719	12/7/2017	20	25 Kino Film & Video			1,500.00	1,500.00	<input type="checkbox"/>	Advertising Expenses	Tv Ad production	Primary 2006	
7						42,052.00	37,052.00	0				

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.



Trail Blazer™

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

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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🐦 **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.