

Author: Joel Kristenson Last Updated: 2015-05-27

Overview

This KB is intended for **Political** customers and in the rare circumstance for those nonprofit customers who track their accounting inside of **Trail Blazer**. (*Most of our nonprofit customers use <u>QuickBooks Online for Nonprofits</u> to manage their deposits, expenses, etc.)*

The article first walks through the steps to find a contribution that has already been deposited in a voter's contact record, how to find the deposit date. Next it shows how to find the deposit record, how to find the specific contribution that was deposited, and how to un-deposit it out of the database.

Steps



Navigate to your Voters list, run a <u>search query</u> for the contributor who has a contribution record you need to un-deposit. *In this example I queried* for all donors who gave **last quarter** and selected a contact named "**Meriam Abraham**".



Run your search query from the voters list, and open the contributor's record card.

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	V 8 Aalgaard Heather Allison 🥎 6600 32nd Ave N Crystal MN 55427 1/1/1977	7 F Hennepi	n 005	45	45B	3457082
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Click the **Financial** tab, and highlight the contribution record so that the related information displays to the right. *In this example I used the contribution record from* **2/5/2015** *for* \$5,000.00.





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This will provide the pertinent information to track down the deposit record, specifically the **Deposit Date**. In my example the deposit date was on **2/21/2015** as shown in the detailed image below.



Title: First N: Middle Last Na Prior La Nickna Voter T Candid	Nam ame / ast N me: ype:	e: 'Suffix: ame:	Meriam Abrahan				No Photo Email No Email A		Home Add 6569 158 Apt 204 Apple Va Work Add No Addre	th St W lley, MN 5512 ress	4		
		FEC Id:	(none)				Any Compa	/Occupation any Name 101 / n occupation 501					
Contri VIII Contr	butio clud	n Refu e V E ion ID E 6		Amount After Refunds 1,570.00 1,570.00	Delete Expo Election General 2012 General 2012 General 2014	Deposited	Applied	artner/Earmark Co FEC Type: Event: Election: Type: Date Received:	Levin	Event 2013	A PM (CT) - 10:00	PM (C Sent Called	d Check Earr
	3		Sho	8,140.00	ich record	3	.00	Amount: Recurrence: Memo: I Incoming Earn F3I Bundle Batch Code: Check Number: Date deposited:			nds: 5,000.00		



Now that you know the **Date deposited** for the contribution, jot that down or take a <u>screenshot</u>, and **close** out of the current contact record card.



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Application Menu «	File 👻 Edit 👻 🔀 🕼 🖓 👫 🛛 Meriam Abraham [128528]
Image: System Manager	Title: Image: Meriam Home Address First Name: Meriam 6569 158th St W Apt 204 Middle Name: Image: No Photo Apple Valley, MN 55124 Last Name / Suffix: Abraham Image: No Photo Image: No Photo Prior Last Name: Image: No Email Address Mork Address Nickname: Image: No Email Address No Address Voter Type: Individual Image: No Address Candidate FEC: (none) Image: No Address Committee FEC Id: More Period Any Company Name 101 / This person occupation 501
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Jot this date down, or take a screenshot.



Next, navigate to your **Deposits** list and query by the date the contribution was deposited.

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Open the deposit record by clicking on the **blue ID** hyperlink. *In my example it was ID #55*.



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Click on the Deposit ID hyperlink to open the record.

Uncheck the box in the upper-left for 'Deposited'.





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Click [Save] in the lower-right, and click [OK] when prompted with a warning.



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Bank Account:	First National Bank		2	2247	Aabel, Jenifer	1/24/2015	2434	\$50.00
Comment:			3	2248	Aalgaard, Heather			\$2,800.00
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This effectively marks all contributions that are included in the deposit slip as **un-deposited**.

The **Date** field in the upper-left will now be reactivated, and the column '**Include in Deposit**' turns green allowing you make changes:



Date field is now reactivated. (Normally you would not modify this unless the initial entry was made incorrectly.)

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Uncheck the box in the 'Include in Deposit' column for the contribution record you need to un-deposit, and click [Save].



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At this point you're finished with the un-depositing of a contribution.

Reopen the original contact record that contained the deposited contribution. *In my example I continued to use Meriam Abraham* who had the \$5,000.00 donation from 2/5/2015.

You'll notice that the **deposited** checkbox is no longer checked.



File 👻 Edit 👻 🖉 🖉 😓 🥎 💸 Meriam Abraham [128528	31	
Title: First Name: Meriam Middle Name:	Home Address 6569 158th St W Apt 204 Apple Valley, MN 55124	
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Nickname: Voter Type: Individual 🗸	No Address	
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longer checked.	F3I Bundle 🔲 (none)	
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<	Check Number: 3366	
Logon = <u>Joel Kristenson</u>	Email Save Save and Close OCancel	



Once you're done making your changes, **save-and-close**.

You'll need to return the deposit record, and mark it as deposited again.

Open the deposit record, re-check the box for 'Include in Deposit', and click [Yes].



		_							_			_		
Fil	e 👻 Edit	- 0												
D	eposit Det	ails					Dep	osit Tic	ket					
C	ommittee	:	Ramsey	y for Office				Sequ				Item		
D	ate:		2/21/2	2015				ence	Ref ID	Name		Date	Check#	Amount
D	eposit An	nount:	3,700.0	00			►	1	2246	Alfred, 1		1/25/20		\$500.00
В	ank Acco	unt:	First Na	itional Bank				2	2247	Aabel, J			15 2434	\$50.00
C	omment:							3	2248	-	d, Heather		15 1654	\$2,800.00
D	eposited							4	2249	Aaron, E	seveny	1/13/20	15 2211	\$350.00
							Σ							\$3,700.00
	ntributions ntributio	Louns			ture Refunds	Transfe	ers In							
	ID	Fec Use		.ast Name	First Name	MI	Date		Check #	СС Туре	Amount	Include in Deposit	Memo	
	2246	Levin	<u>A</u>	<u>Vfred</u>	Tyrone	<u>C</u>	1/25	/2015			\$500.00	V		
	2247	Levin	A	<u>abel</u>	<u>Jenifer</u>	<u>D</u>	1/24	/2015	2434		\$50.00	V		for kb on depositing
	2248	Levin		algaard	<u>Heather</u>	<u>A</u>		/2015			\$2,800.00	V		for kb on making d
	2249	Levin		<u>aron</u>	Beverly			/2015			\$350.00			making deposits
Þ	2250	Levin		<u>braham</u>	Meriam		2/5	/2015	3366		\$5,000.00		Test for KD on	making deposit.
Σ										_	\$8,700.00	4		
ſ	Change	Contrib	ution Us	e					E	×			1	
									/ou like to	, ,				



Check the box in the upper-left for **Deposited**, and click **Save-and-Close**.



Deposit Details Committee: Ramsey for Office			Deposit Ti										
Date: Deposit Amount: Bank Account: Comment: Deposited		2/21/2015		Sequ	Ref ID	Name Alfred, Tyrone Aabel, Jenifer Aalgaard, Heather Aaron, Beverly			Item Date 1/25/2015 1/24/2015 2/24/2015	2434 1654 2211	Amount \$500.00 \$50.00 \$2,800.00 \$350.00		
				1				1/					
		First National Bank			2			2247					
					3			2248					
					4			2249				13/2015	
		k			▶ <u>6</u>	2250	Abral	nam, Meriam	2	/5/2015	3366	\$5,000.00	
		1			Σ							\$8,700.00	
10	Fec Use	Last Name	First Name	М	Date	Check #	CC Type	Amount	Include in	Memo			Clear All
ID	Use	Name	- Marino						Deposit				
ID 2246	Levin	Alfred	Tyrone	<u>C</u>	1/25/2015			\$500.00	Deposit				Date Range
			Tyrone Jenifer	<u>C</u> <u>D</u>	1/25/2015 1/24/2015	2434		\$500.00 \$50.00	✓ ✓	Test dor	nation for kt	on depositing do	From:
2246 2247 2248	Levin Levin Levin	Alfred Aabel Aalgaard	Tyrone Jenifer Heather		1/24/2015 2/24/2015	1654		\$50.00 \$2,800.00	✓ ✓ ✓	Test dor	nation for kt	on making depo	From:
2246 2247 2248 2249	Levin Levin Levin Levin	Alfred Aabel Aalgaard Aaron	Tyrone Jenifer Heather Beverly	<u>D</u>	1/24/2015 2/24/2015 1/13/2015	1654 2211		\$50.00 \$2,800.00 \$350.00	✓ ✓ ✓ ✓	Test dor Test for	nation for kt kb on maki	on making deposits	From: 5/27/201 To:
2246 2247 2248 2249 2250	Levin Levin Levin	Alfred Aabel Aalgaard	Tyrone Jenifer Heather	<u>D</u>	1/24/2015 2/24/2015	1654 2211		\$50.00 \$2,800.00 \$350.00 \$5,000.00	V V V V V V	Test dor Test for	nation for kt	on making deposits	From:
2246 2247 2248 2249	Levin Levin Levin Levin	Alfred Aabel Aalgaard Aaron	Tyrone Jenifer Heather Beverly	<u>D</u>	1/24/2015 2/24/2015 1/13/2015	1654 2211		\$50.00 \$2,800.00 \$350.00	✓ ✓ ✓ ✓	Test dor Test for	nation for kt kb on maki	on making deposits	From: 5/27/201 To:
2246 2247 2248 2249 2250	Levin Levin Levin Levin	Alfred Aabel Aalgaard Aaron	Tyrone Jenifer Heather Beverly	<u>D</u>	1/24/2015 2/24/2015 1/13/2015	1654 2211		\$50.00 \$2,800.00 \$350.00 \$5,000.00	V V V V V V	Test dor Test for	nation for kt kb on maki	on making deposits	From: 5/27/201 To: 5/27/201
2246 2247 2248 2249 2250	Levin Levin Levin Levin	Alfred Aabel Aalgaard Aaron	Tyrone Jenifer Heather Beverly	<u>D</u>	1/24/2015 2/24/2015 1/13/2015	1654 2211		\$50.00 \$2,800.00 \$350.00 \$5,000.00	V V V V V V	Test dor Test for	nation for kt kb on maki	on making deposits	From: 5/27/201 To: 5/27/201



You're now finished with all the steps.

Tip: Contact your FEC analyst if there's anything in question regarding amendments and the manipulation of your contribution records (**800-424-9530** or <u>info@fec.gov</u>).





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

Related Resources

Article: How to Deposit a Contribution
Article: Delete a Contribution
Article: Enter Contributions
Article: Importing Contributions
Video: Deposits – Setup Bank Account – Set Bank as Default – Create Deposit



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

<u>*Click here*</u> 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 <u>GoToMeeting</u> session where we host our live interactive trainings.

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