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Overview

This article is for **political customers** (campaigns, PACs and political parties). It goes through the steps to record a **'transfer in'** contribution from a **Joint Fundraising Committee**, and how to record the **individual contributor's** gifts that make up the **transfer in**.
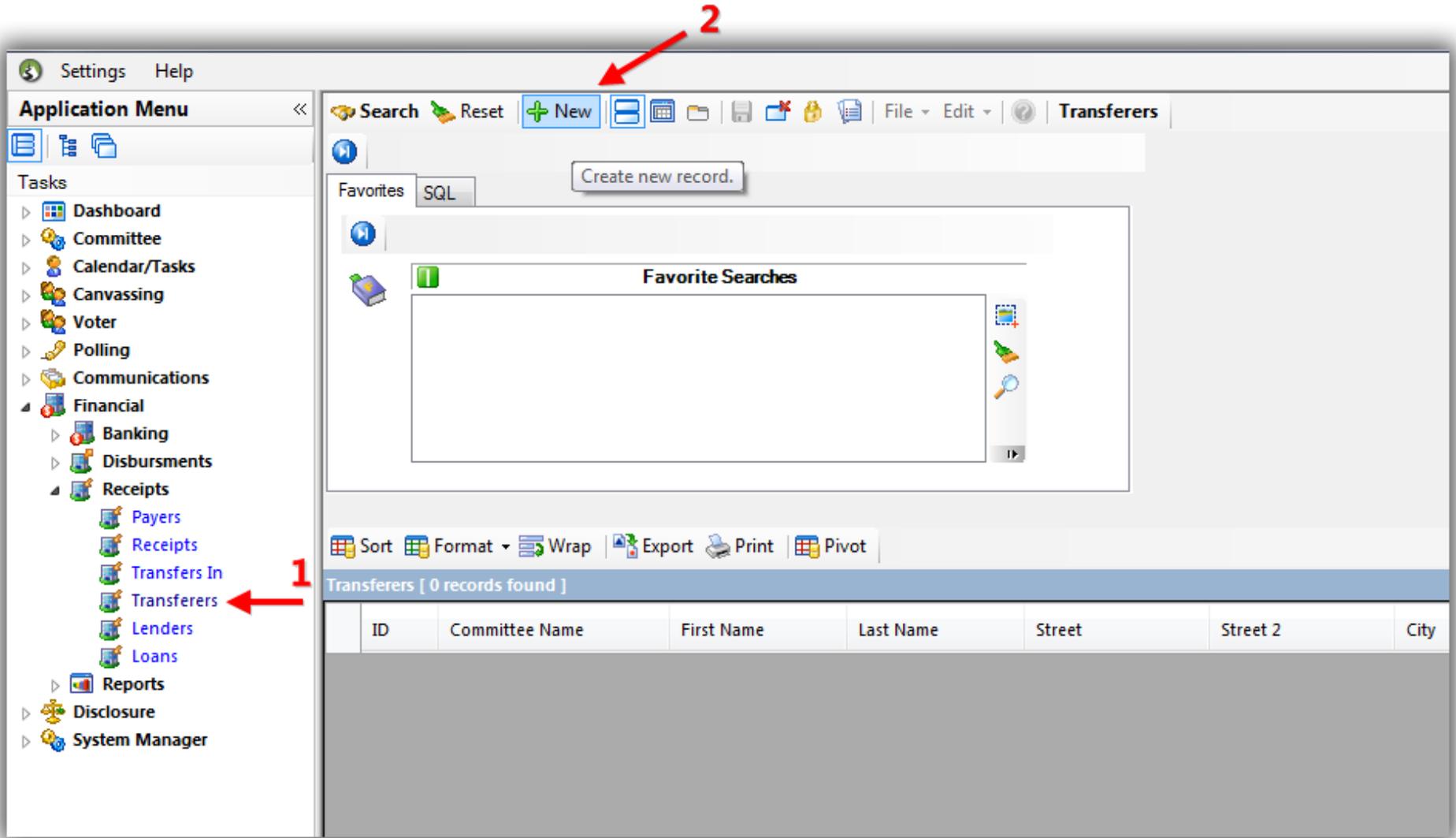
💡 **Tip:** Click here to read the FEC's article on joint fundraising transfers.

Steps

1) Create a new **Committee** record by following **Application Menu** > **System Manager** > **Lists** > **Committee** > Click **[+ New]**.

2) Enter the **name**, **address**, and **contact** details. Under the **Disclosure** tab set the **committee type**, and the **office sought**. Click **[Save and Close]** once you're finished.

3) Create the **'Transferer'** by following **Application Menu** > **Financial** > **Receipts** > **Transferers** > Click **[+ New]**

4) Fill in the information for the **Transferer** record, and then click **[Save]**. Keeping the record open, click **[New]** to begin adding the **transfer-in** (gift) record.

1. Enter the relevant information for the transferer as you did in the committee record and then click [Save] in the lower-right.

3. Click [New] to create the gift record.

5) Fill in the **transfer in gift information**. Select the appropriate **transfer from** type from the drop-down, and then click **[Save and Close]**. *Note: the 'Committee Solely Supporting Same Candidate" option will* **only** *apply for a committee/org that is dedicated to your candidate.*

1. Compile the "Transfer In" record
and set the "Transfer From" as necessary.
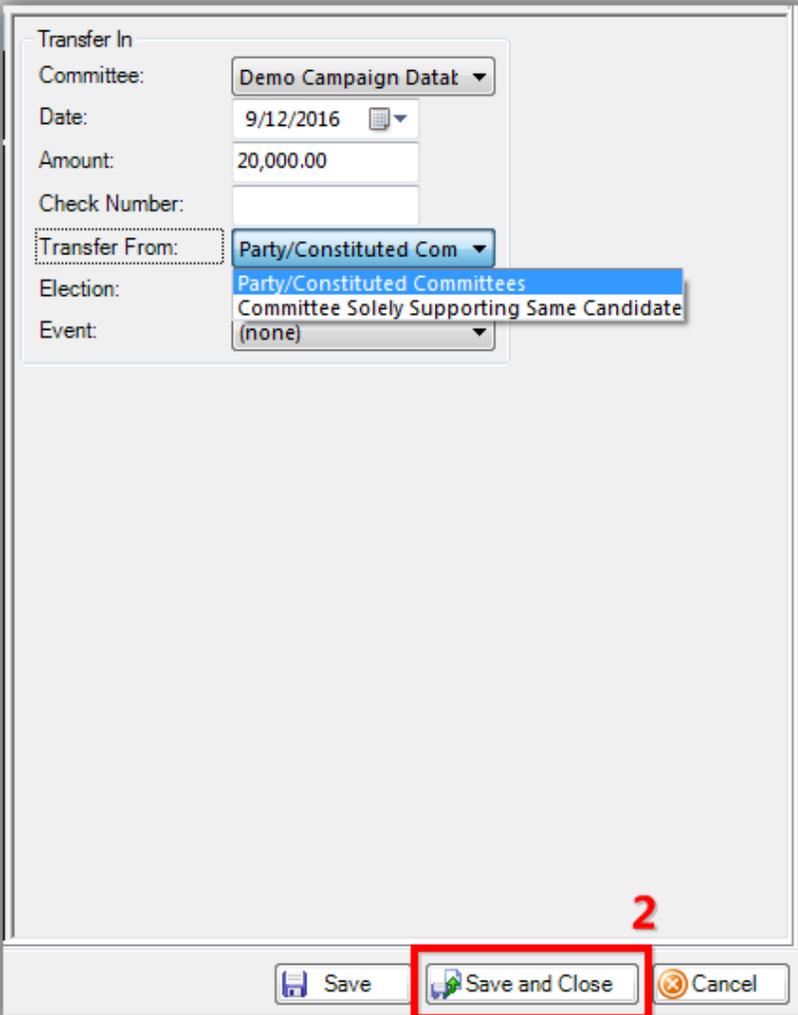
Transfer In

Committee: Demo Campaign Datat ▼

Date: 9/12/2016 ▼

Amount: 20,000.00

Check Number:

Transfer From: Party/Constituted Com ▼

Party/Constituted Committees
Committee Solely Supporting Same Candidate

Election:

Event: (none) ▼

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💾 Save   📗 Save and Close   ⊗ Cancel

Note the 'Committee Solely...' option

Note: After recording **transfer in** records you can view them in **Transfers In** list:

After creating a Transferer record, and the Transfer In, you can search for those records in the Transfers In list.

6) Navigate to the **Voters** list. Search for and **open** the record of the first donor. *In this example I used my own record.*

4. Click on the name to open the record.

7) Navigate to the **Financial** tab and click **[+ New]** to begin recording the **individual 'transfer in' contribution(s)**. These donations will make up the **JFC Transfer In** (created in the previous steps).

Click [+ New] to begin adding a new contribution.

8) Enter the contribution data (amount/date/batch code/etc.). Set the contribution **'type'** as **Transfer In**, select the **Transferer** from the drop-down menu (created in the previous steps), and **[Save and Close]**.

1. Set the 'Type' as Transfer In.

4. Set any other information as it applies (date/event/ batch code/etc).

2. Record the amount.

3. Assign the applicable "Transfer In" record.

6. Repeat for all applicable contributors until you reach the total 'transfer in' amount (in this case, $20k).

9) Repeat these steps until all of the **individual gifts** have been entered. These individual contributions will make up the **entire transfer in** amount ($20,000 in this example).

10) When recording your [deposit](#) in the future, the **transfer in** contributions will display under the **Transfer In** tab.

When recording your next deposit, the transfer in record(s) will display here.

The **related resources** below provide links to other related articles, videos, and live training classes.

If your campaign's treasurer hasn't been trained yet from one of our financial trainers, they can request that live training by emailing support@trailblz.com. Our full list of curriculums is located here. *This requires they've first attended our **required** intro class.*

Trail Blazer

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

Related Resources

Article: How to Un-deposit a Contribution (Primarily for Political Customers)

Article: How to Deposit a Contribution

Article: Delete an Invoice/Payment

Article: How to Record a Contribution Refund – Primarily for Political Customers

Article: How to Delete Payments, and an Invoice (also covered: how to record a refund, and a deduction)

Article: How to Enter an Invoice and Payment with the New Payment System, and How to Add a Refund and Deduction

Article: How to Enter and Expenditure Refund

Video: How to Exclude Specific Contributions from Revenue

Video: Deposits – Setup Bank Account – Set Bank as Default – Create Deposit

Video: Contribution - Refund

Video: Contribution – Entering Earmarked Contributions

Video: Make a Loan Payment (Interest Bearing and Non-Interest Bearing)

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

Video: Contribution – F3L Bundler or How to Track Who Brought in a Donation

3rd Party Article: Joint Fundraising Transfers (from the FEC website)

Trail Blazer Training: Introduction Training

Trail Blazer Training: Full Curriculums List

Trail Blazer Live Support

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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.

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.