

**Author:** Kristenson, Joel  
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## Overview

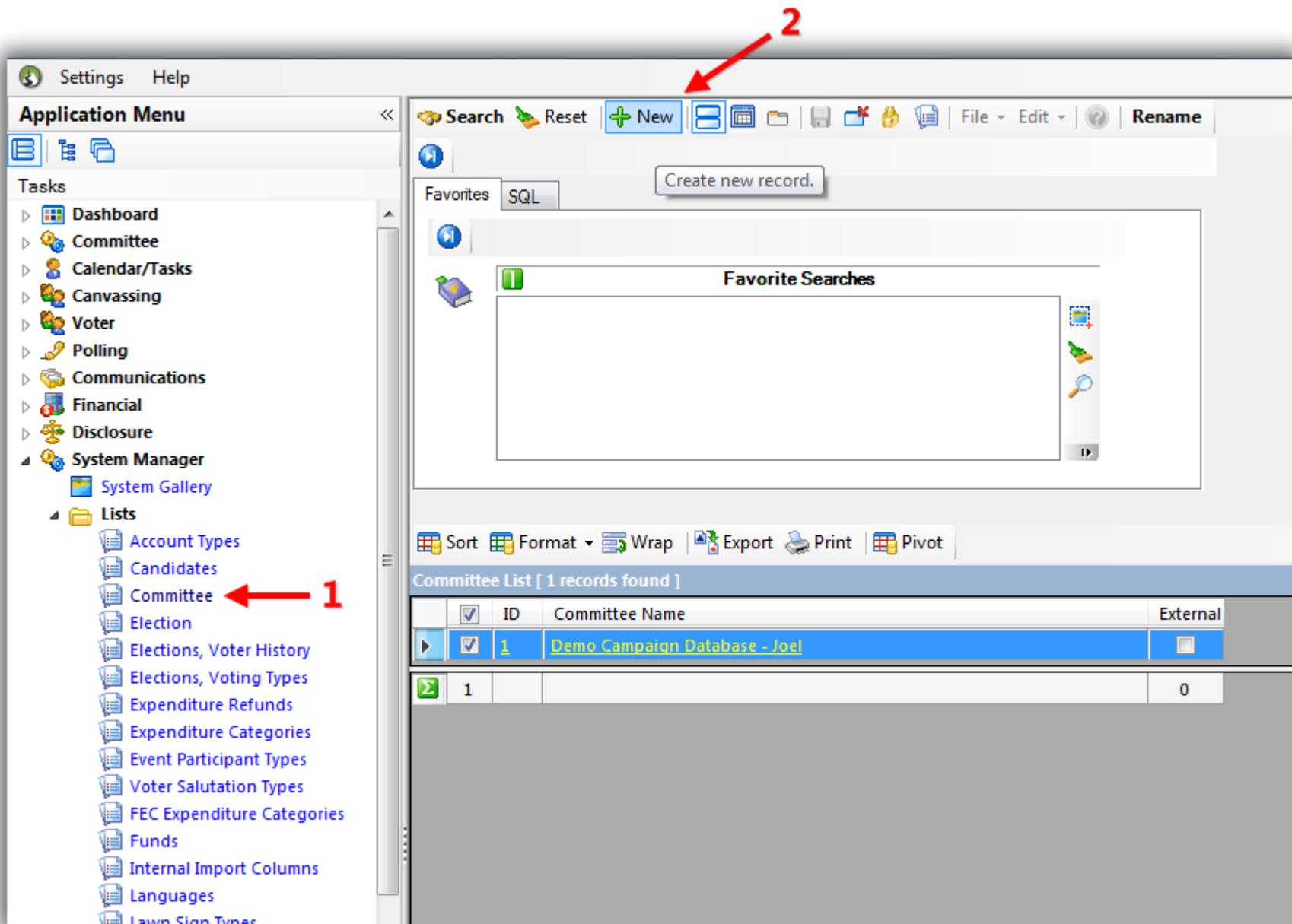
This article is for **political customers** (campaigns, PACs and political parties). It goes through the steps to record a **'transfer in'** contribution from a **Joint Fundraising Committee**, and how to record the **individual contributor's** gifts that make up the **transfer in**.

 **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]**.

# Entering a Transfer In from a JFC (Joint Fundraising Committee) – Political Only



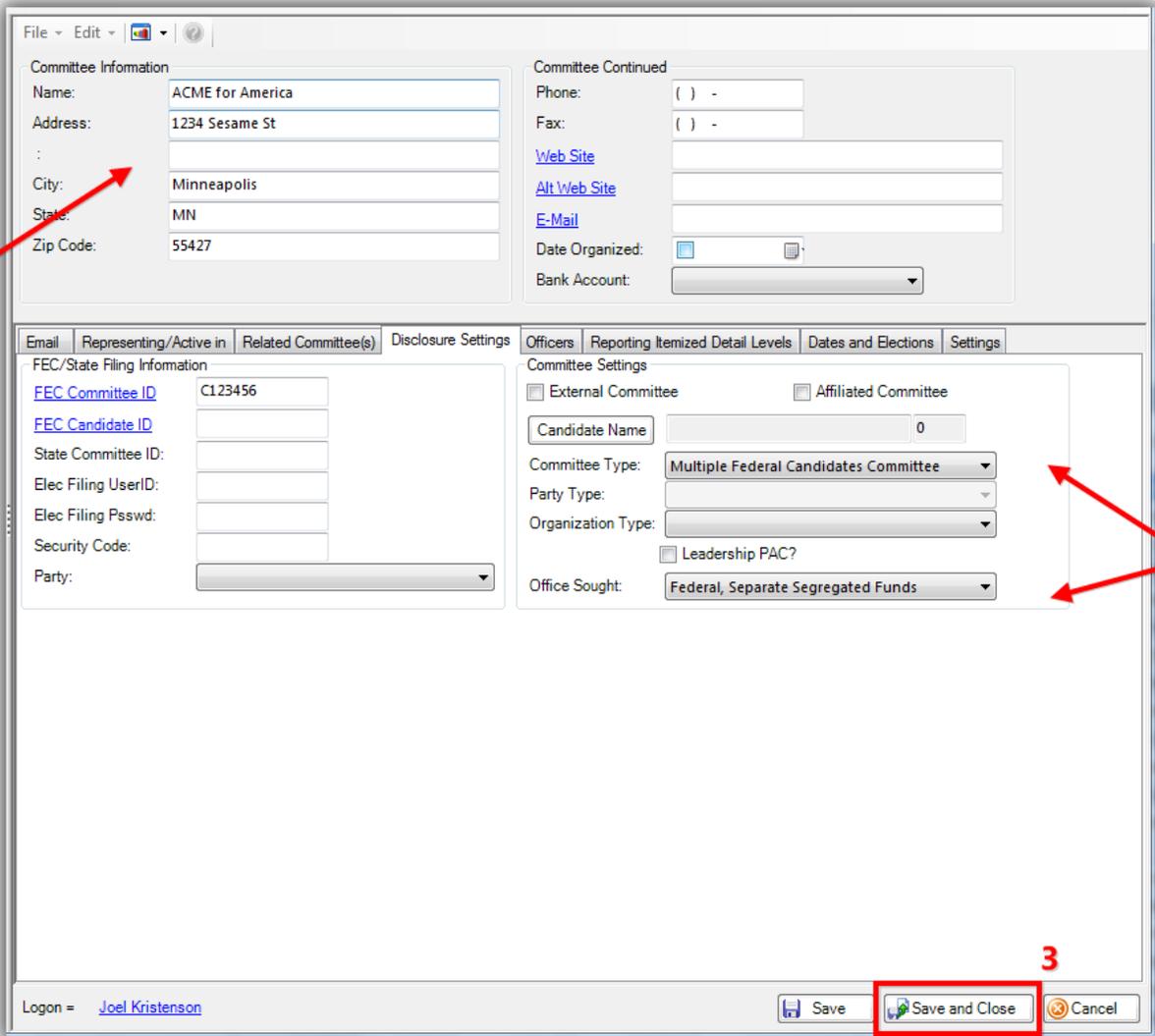
The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with a 'Tasks' list. The 'System Manager' folder is expanded to show a 'Lists' folder, which contains various list types. A red arrow labeled '1' points to the 'Committee' item in the 'Lists' folder. The main window displays a toolbar with a 'New' button (a green plus sign) highlighted by a red arrow labeled '2'. Below the toolbar is a 'Favorites' section with a 'SQL' search bar and a 'Create new record.' button. A 'Favorite Searches' section is also visible. At the bottom, there is a table titled 'Committee List [ 1 records found ]' with columns for 'ID', 'Committee Name', and 'External'. The table contains one record: ID 1, Committee Name 'Demo Campaign Database - Joel', and External checkbox unchecked.

ID	Committee Name	External
1	Demo Campaign Database - Joel	<input type="checkbox"/>

**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.

# Entering a Transfer In from a JFC (Joint Fundraising Committee) – Political Only

**1. Enter the name and contact info.**



**Committee Information**  
Name: ACME for America  
Address: 1234 Sesame St  
City: Minneapolis  
State: MN  
Zip Code: 55427

**Committee Continued**  
Phone: ( ) -  
Fax: ( ) -  
Web Site  
Alt Web Site  
E-Mail  
Date Organized:    
Bank Account:

**FEC/State Filing Information**  
FEC Committee ID: C123456  
FEC Candidate ID:  
State Committee ID:  
Elec Filing UserID:  
Elec Filing Pswd:  
Security Code:  
Party:

**Committee Settings**  
 External Committee  Affiliated Committee  
Candidate Name: 0  
Committee Type: Multiple Federal Candidates Committee  
Party Type:  
Organization Type:  
 Leadership PAC?  
Office Sought: Federal, Separate Segregated Funds

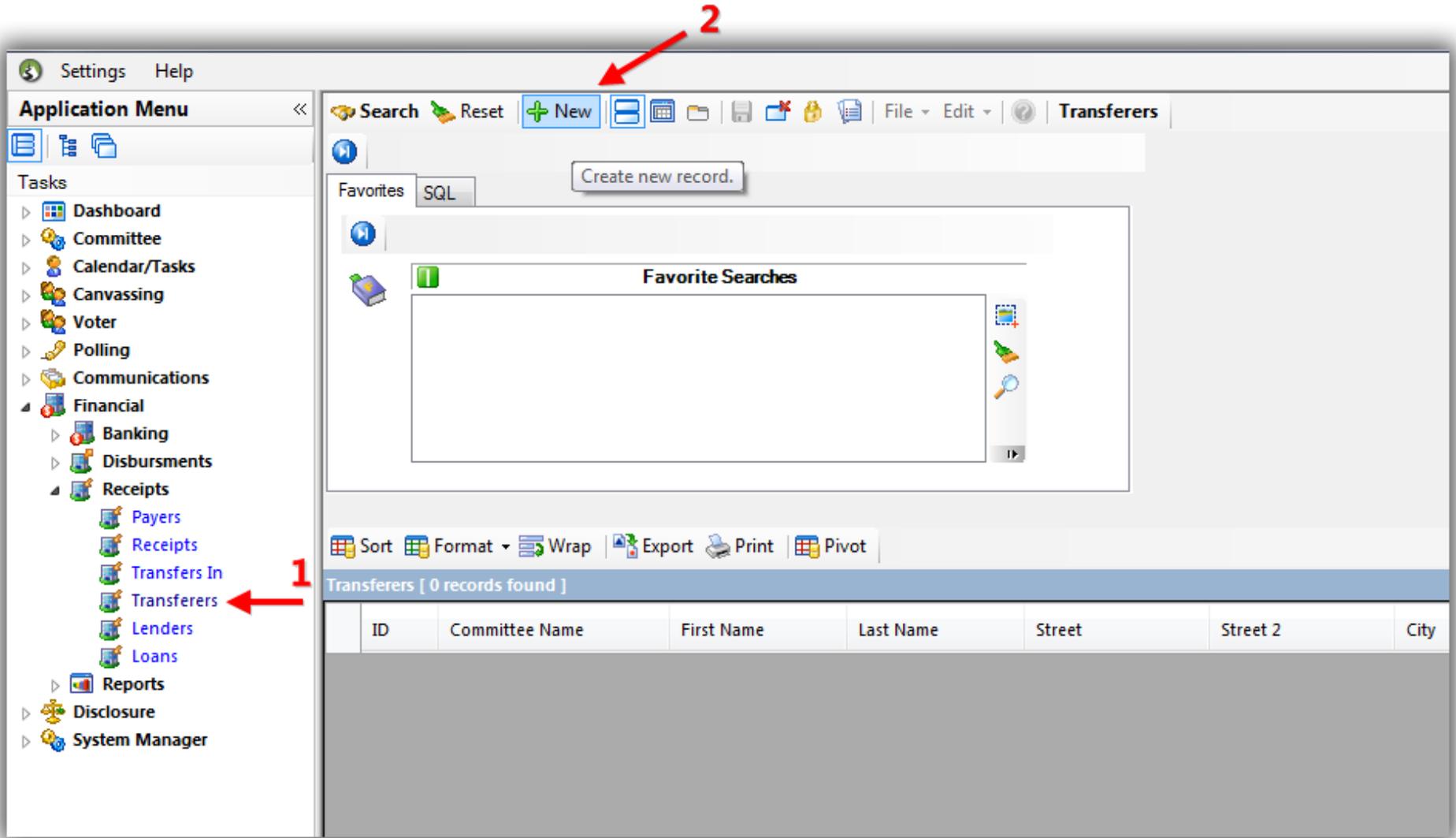
Logon = Joel Kristenson  
Save Save and Close Cancel

**2. Set committee type and office sought.**

**3**

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

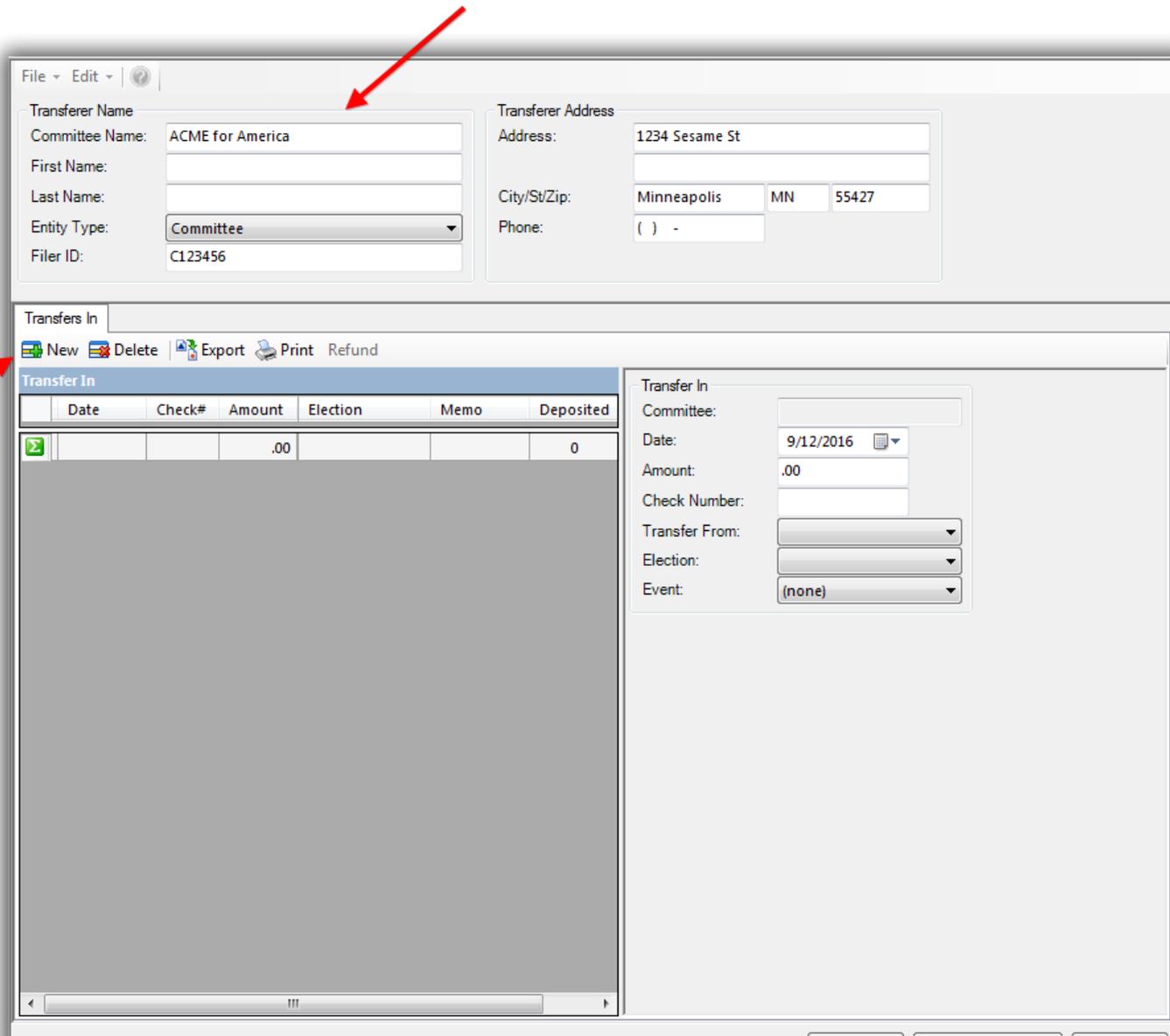
# Entering a Transfer In from a JFC (Joint Fundraising Committee) – Political Only



The screenshot shows the TrailBlazer application interface. On the left is the 'Application Menu' with a tree view of tasks. The 'Financial' category is expanded, and 'Transfers In' is highlighted with a red arrow labeled '1'. At the top of the main window, a toolbar contains a '+ New' button, which is also highlighted with a red arrow labeled '2'. Below the toolbar, there is a 'Create new record.' button and a 'Favorite Searches' section. At the bottom, a table header is visible with columns: ID, Committee Name, First Name, Last Name, Street, Street 2, and City. The table currently shows '0 records found'.

**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.**



The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with 'File' and 'Edit'. Below it, the 'Transferer Name' section includes fields for 'Committee Name' (ACME for America), 'First Name', 'Last Name', 'Entity Type' (set to 'Committee'), and 'Filer ID' (C123456). The 'Transferer Address' section includes 'Address' (1234 Sesame St), 'City/St/Zip' (Minneapolis, MN, 55427), and 'Phone' (( ) - ).

Below the transferer information is a 'Transfers In' section with a toolbar containing 'New', 'Delete', 'Export', 'Print', and 'Refund'. A table titled 'Transfer In' is displayed with columns: Date, Check#, Amount, Election, Memo, and Deposited. The table contains one row with a green plus icon in the first column, an empty Date field, an empty Check# field, an Amount of .00, an empty Election field, an empty Memo field, and a Deposited amount of 0.

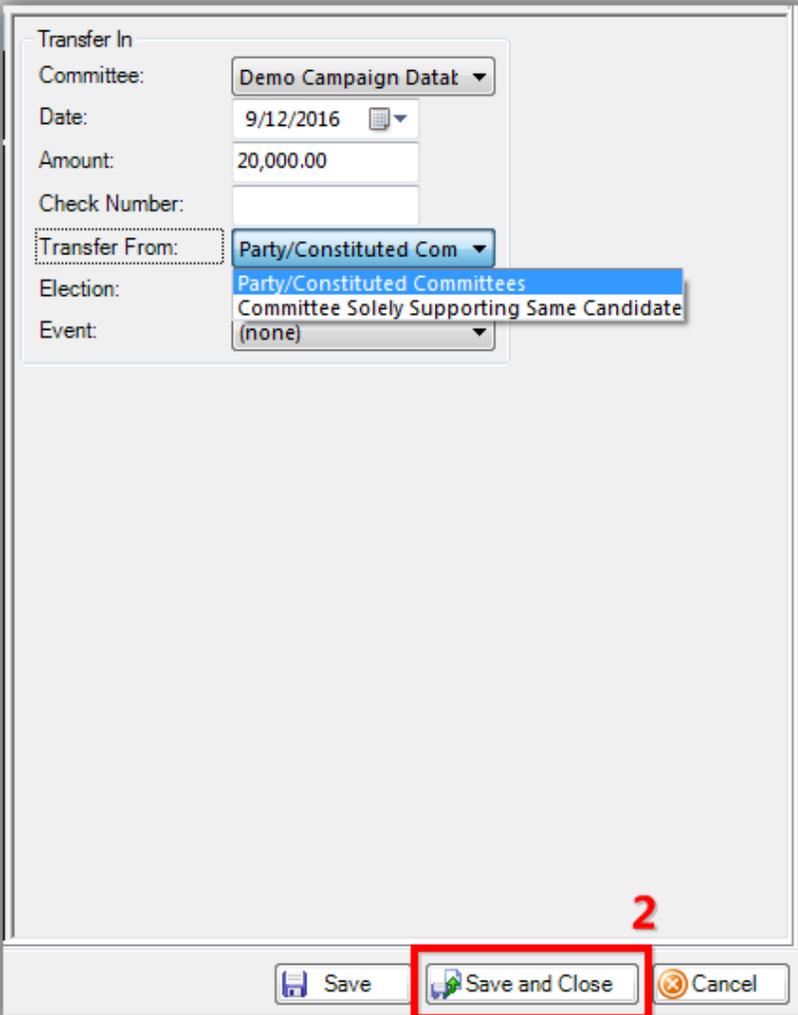
To the right of the table is a 'Transfer In' form with fields for 'Committee', 'Date' (9/12/2016), 'Amount' (.00), 'Check Number', 'Transfer From', 'Election', and 'Event' (none).

Two red arrows point to the 'Committee Name' field and the 'New' button in the toolbar.

**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 Data

Date: 9/12/2016

Amount: 20,000.00

Check Number:

Transfer From: Party/Constituted Com

Election: Party/Constituted Committees  
Committee Solely Supporting Same Candidate

Event: (none)

2

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.**

The screenshot shows the TrailBlazer application interface. The top navigation bar includes 'Settings', 'Help', and an 'Application Menu' with a 'Search' button highlighted in red. The left sidebar shows a 'Tasks' menu with 'Transfers In' highlighted in red. The main window displays a search filter for 'Committees' with 'Demo Campaign Database - Joel' selected. Below the filter is a table with 2 records found.

Transfer In ID	Date	Committee	Transferer Committee Name	Last Name	First Name	Amount	Election Name	Deposit Date
1	9/12/2016	Demo Campaign Database - Joel	ACME for America			20,000.00	General 2016	9/13/2016
2	6/19/2018	Demo Campaign Database - Joel	Campaign to Elect Darlene Mickelson	Mickelson	Darlene	20,000.00	Primary 2018	

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

The screenshot shows the TrailBlazer software interface. On the left is a navigation menu with 'Voters' selected. The main window shows a search bar (3) and a form for entering voter information. The 'Last Name' field (2) contains 'Kristenson'. Below the form is a table of voters with one record found:

ID	Last Name	First Name	MI	Address Type	Street	Street 2	City	State	Zip Code	Gender	County	CD	SD	LD	Reg Id
151258	Kristenson	Joel	Anders		9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	M	Hennepin	05	46	46A	

**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).

## Entering a Transfer In from a JFC (Joint Fundraising Committee) – Political Only

File Edit X [Icons] **Joel Anders Kristenson [151258]**

Title: Mr.

First Name: Joel

Middle Name: Anders

Last Name/Suffix: Kristenson

Prior Last Name:

Nickname: Pepe

Voter Type: Individual

Candidate FEC: (none)

Committee FEC Id:



No Photo

**Home Address**  
9110 Golden Valley Rd  
Apt 10  
Golden Valley, MN 55427  
218-370-1064 Ext 123

**Work Address**  
No Address

**Email**  
jkristenson@trailblz.com

**Employer / Occupation**  
Trail Blazer / N/A

General Household Gallery Vote History Attribute Poll Relation **Financial** Pledge Event Logs Lawn Sales Admin

Contribution Refund

Include  Exclude  **New**  Delete  Export  Print  Add Partner/Earmark Contribution  Resignation  Reattribution  Returned Check  Earmark

<input checked="" type="checkbox"/>	ID	Date	Committee	Original Amount	Amount After Refunds	Election ID	Election	Deposited	Applied Against Pledges
<input checked="" type="checkbox"/>	2240	7/31/2013	Demo Campaign Database - Joel	2,500.00	2,500.00	20	General 2012	<input checked="" type="checkbox"/>	.00
<input checked="" type="checkbox"/>	2241	9/29/2014	Demo Campaign Database - Joel	40,000.00	40,000.00	22	General 2014	<input checked="" type="checkbox"/>	.00
<input checked="" type="checkbox"/>	2242	9/29/2014	Demo Campaign Database - Joel	50,000.00	50,000.00	22	General 2014	<input checked="" type="checkbox"/>	.00
<input checked="" type="checkbox"/>	2243	10/6/2014	Demo Campaign Database - Joel	500.00	500.00	22	General 2014	<input checked="" type="checkbox"/>	.00
<input checked="" type="checkbox"/>	2259	7/1/2016	Demo Campaign Database - Joel	600.00	600.00	25	General 2016	<input checked="" type="checkbox"/>	.00
				93,600.00				5	.00

Committee: Demo Campaign Database - Joel

FEC Type: Levin

Event: (none)

Election: General 2016  Thank You Sent

Type: Check  Thank You Called

Date Received: 7/1/2016  Earmarked Out

Amount: 600.00 After Refunds: 600.00

Recurrence:

Memo:

Incoming Earmark  FEC Memo  Force Itemization

F3I Bundle:  (none)

Batch Code:

Check Number:

Date deposited: 9/13/2016

Logon = [Joel Kristenson](#)

**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.**

Committee	Original Amount	Amount After Refunds	Election ID	Election	Deposited	Applied Against Pledges
Campaign Database - Joel	2,500.00	2,500.00	20	General 2012	<input checked="" type="checkbox"/>	.00
Campaign Database - Joel	40,000.00	40,000.00	22	General 2014	<input checked="" type="checkbox"/>	.00
Campaign Database - Joel	50,000.00	50,000.00	22	General 2014	<input checked="" type="checkbox"/>	.00
Campaign Database - Joel	500.00	500.00	22	General 2014	<input checked="" type="checkbox"/>	.00
Campaign Database - Joel	600.00	600.00	25	General 2016	<input checked="" type="checkbox"/>	.00
Campaign Database - Joel	175.00	175.00	25	General 2016	<input type="checkbox"/>	.00
		93,600.00			5	.00

Committee: Demo Campaign Database - Joel  
 FEC Type: Federal  
 Event: Fundraiser Dinner  
 Election: General 2016  
 Type: Transfer In  
 Date Received: 9/13/2016  
 Amount: 175.00 After Refunds: 175.00  
 Recurrence: Single  
 Memo:  
 Incoming Earmark  FEC Memo  Force Itemization  
 F3I Bundle: (none)  
 Batch Code: JAK091316  
 Transfer In: ACME for America \$20,000.00

**5**

**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.

File Edit

**Deposit Details**

Committee: Demo Campaign Database - Joel

Date: 9/13/2016

Deposit Amount: 20,000.00

Bank Account: First National Bank

Comment: Deposited by JAK on 9/16/16.

Deposited

**Deposit Ticket**

	Sequence	Ref ID	Name	Item Date	Check#	Amount
▶	1	1	ACME for America	9/12/2016	1246	\$20,000.00
Σ						\$20,000.00

Contributions Loans Receipts Expenditure Refunds Transfers In

Transfers In [1 records found]

	ID	Committee	Last Name	First Name	Date	Check #	Amount	Include in Deposit
▶	1	ACME for America			9/12/2016	1246	20,000.00	<input checked="" type="checkbox"/>
Σ							20,000.00	1

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](mailto: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](#)

**3<sup>rd</sup> Party Article:** [Joint Fundraising Transfers \(from the FEC website\)](#)

**Trail Blazer Training:** [Introduction Training](#)

**Trail Blazer Training:** [Full Curriculums List](#)

## Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

✉ **Email:** [support@trailblz.com](mailto:support@trailblz.com)

f **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

t **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.*