Entering Basic Transactions

All contributions and expenditures are entered using a similar procedure. Go to Detail Information →
Receipts (or Expenditures). At the Receipts List select "Add New"

At the Receipt Information screen select "Find Contributor" (or "Find Payee" for expenditures).
NOTE: You MUST first search for a name in your database. If you do not find the name in your database
then select "Add Contributor" (or "Add Payee" for expenditures).

At the Name List screen search for the contributor (or payee) using the "Name (or beginning part of a name)" field. Try using just a last name, rather than searching using the full name. For organizations use a key word, for instance for ABC Printers just use ABC, as you may have previously entered them as ABC Printing.
Select "Display".
All entries will be listed that contain what you showed in the name field. Highlight the correct name and select "OK".

At the Receipt Information screen add the Form of Payment, Amount, Date and Bank Account. For Expenditures you will also need to add the Purpose Type Code and Purpose.

Select "Add Close" to save the transaction and close the screen.