



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”.

The screenshot shows a window titled "Name List". At the top, there is a search area with a "Type" dropdown set to "Individual" and a text field containing "BROWN". A "Show All" checkbox is checked, and a "Display" button is to the right. Below this is a table with columns: #, Name, Type, G., C., L., Street, and City. The table contains four rows of data:

#	Name	Type	G.	C.	L.	Street	City
1	JANE BROWN GOOD	IND		N	N	PO BOX 123	RAL
2	JOHN BROWN	IND		N	N	PO BOX 111	RAL
3	DEREK K BROWN	IND		N	N	PO BOX 2335	GRE
4	JOAN BROWN	IND		N	N		

On the left side of the window are buttons for "Add New", "Edit", "Delete", and "Clear". At the bottom, it says "4 Names listed." and has "Ok" and "Cancel" buttons.

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.

The screenshot shows a window titled "Receipt Information". At the top, there is a "Receipt Type" dropdown set to "General Contribution" and a "Note(s)" button. Below this is a section for "Name/Address" with a text field containing "JOAN BROWN, NC". To the right is a "Summary Information" section with a text area containing:

Sum to Date (Election Cycle): \$ .00  
 Sum to Date (To Receipt Date): \$ .00  
 Sum to Date (Current Election): \$ .00

Below the name field are "Edit Contributor ..." and "Find Contributor ..." buttons. Further down are fields for "Form of Payment" (dropdown), "Amount" (text field), and "Date" (text field). Below these is an "Account" dropdown set to "101010 (Checking (0000000) FROM TEST BA)". At the bottom of the window are buttons for "Add Close", "Add Refresh", "Add Exist", "Refresh", and "Cancel".

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