

The following are the steps to creating a Candidate In-Kind in Crimson:

1. Go to the **Treasury Dashboard**.
2. Click the **New Receipts** action button on the dashboard.
3. Either search for the Candidate’s **Payee** record or add a **Payee** record
 - If there’s no payee record for the Candidate, then click the **Add New Payee** button.
 - Select **Candidate** from the **Payee Type** drop-down menu and enter the appropriate information into the remaining fields where necessary, then click **Save**.
4. A receipt window will appear after selecting the **Payee**. Enter the date of the In-Kind into the **Batch Date** field and enter the **Amount** of the gift.
5. Select the **Fund Code** from the **Fund** drop-down menu.
6. Select the **Payment Type** as **IK- In Kind**. *Note: If this is not done, you will not see the dialogue box for step 10.*
7. You can select a **Bank Account Code** in the **Account** drop-down menu, or leave the **N/A** default if you do not have bank accounts setup in Crimson.
8. Select **SA11D – Contributions from the Candidate** from the **Line Number** drop-down menu.
9. Finally, enter the appropriate description as you want it to appear on the FEC report in the **FEC Description** field (Ex: “Candidate In-Kind– Personal Funds”), then click **Save**.

New Receipt
Mr. Washington P. George, Sr. (id: 9)
1593 Spring Hill Rd
Vienna, VA 22182-1212

Date: 11/05/2018

Line Number: SA11D - Contributions from the Candidate

G/L Code: [Empty]

Batch #: 1003

FEC Description: Candidate In-Kind- Personal Funds

Amount: \$ 1000

Fund: P2018 - Primary 2018

Account: N/A - N/A

Check No: [Empty]

Payment: IK - In-Kind

Comment (Invoice#): [Empty]

Transaction Category: [Empty]

Transaction Code: [Empty]

Election Code: [Empty]

Year: [Empty] Other Election: [Empty]

Adjustment Type: [Empty] Adjustment Date: [Empty]

General Ledger

Name	Amount

Ultimate Vendor

Name	Amount

10. You will be asked if you would like to create a corresponding Expenditure for the IK. If you select **Yes**, then you do not need to manually enter any Schedule B disbursements for Candidate In-Kinds. Crimson will automatically create the corresponding disbursements. Both the Other Receipts and Disbursements will pull in CrimsonFiler when an FEC report is created. If you select **No**, then you will need to manually add the expenditure details.

Do you want to create an expenditure record for in-kind payment?

Yes No

Vienna, VA 22182-1212