

How to Assume a Partial Repayment of a Candidate Loan

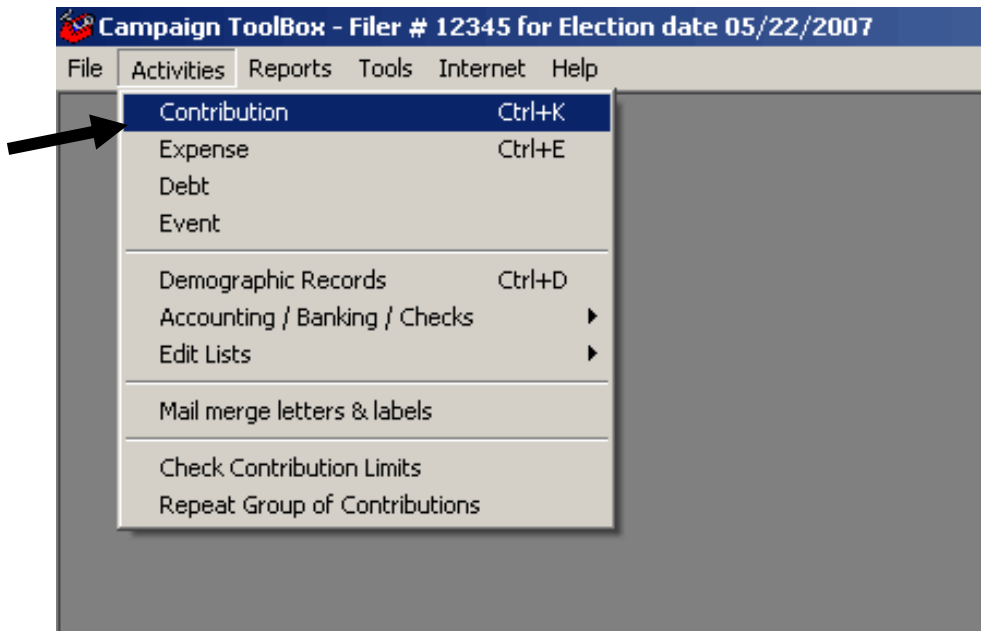
In this tutorial, we are assuming we have the following \$3000.00 loan:

The screenshot shows a data entry form for a loan record. The title bar reads "Campaign.mdb - Debt - Expire date = 12/31/2007". The form contains the following fields and values:

- Name of Creditor: Bank of Frankfort
- Date debt incurred: 04/10/2007
- Last name: [empty]
- First name: [empty]
- Middle name: [empty]
- Suffix: [empty]
- Prefix: [empty]
- Address (required Street or PO Box): 100 East Main
- Original amount: 3000.00
- Prior amount paid: 0.00
- Current amount paid: 0.00
- Balance due: 3000.00
- Address (optional Suite, Apt., etc.): [empty]
- City: Frankfort
- State: KY
- Zip Code: 40601
- Description (nature or purpose of debt): this is a test
- Comments (for this transaction): this is a test
- Type of debt: Debt owed BY this campaign (selected)
- This debt is classified as a Loan
- Amendment

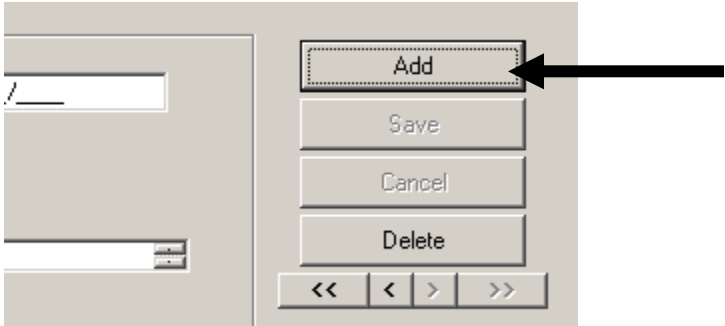
Buttons on the right include Add, Save, Cancel, Delete, and navigation arrows. A text box on the right contains the following text: "Debt records are independent of any other records. Creating an expense record to repay a loan does NOT cause any change to a debt record. You must make such changes directly on the debt record."

On the Menu bar, click **Activities > Contribution**:

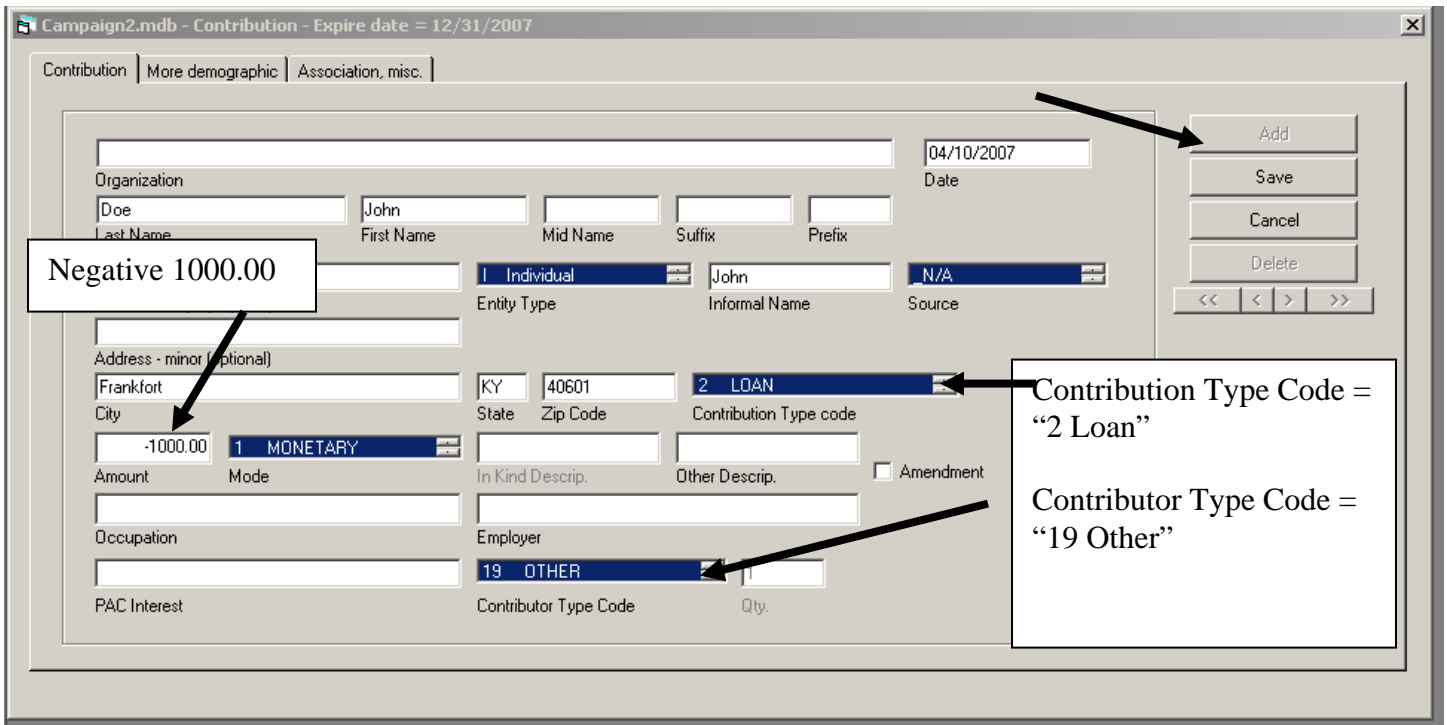
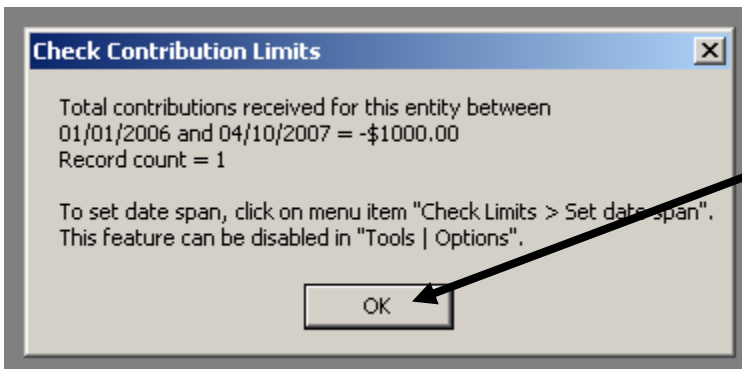


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Click the “Add” button on the Contribution form to add a new contribution.



Create a negative receipt on the contribution form for the amount of the candidate loan repayment. Designate the Contribution Type Code as “2 Loan” and Contributor Type Code as “19 Other.” Click “Save.”

A screenshot of the 'Campaign2.mdb - Contribution' form. The form has several tabs: 'Contribution', 'More demographic', and 'Association, misc.'. The 'Contribution' tab is active. Fields include: Organization (Doe), Date (04/10/2007), Last Name (Doe), First Name (John), Mid Name, Suffix, Prefix, Entity Type (Individual), Informal Name (John), Source (N/A), City (Frankfort), State (KY), Zip Code (40601), Contribution Type code (2 LOAN), Amount (-1000.00), Mode (1 MONETARY), In Kind Descrip., Other Descrip., Occupation, Employer, PAC Interest, Contributor Type Code (19 OTHER), and Qty. A callout box on the left says 'Negative 1000.00' with an arrow pointing to the Amount field. A callout box on the right says 'Contribution Type Code = 2 Loan' and 'Contributor Type Code = 19 Other' with arrows pointing to the respective dropdown menus. The 'Add' button is highlighted with an arrow.A screenshot of a dialog box titled 'Check Contribution Limits'. The text inside reads: 'Total contributions received for this entity between 01/01/2006 and 04/10/2007 = -\$1000.00', 'Record count = 1', and 'To set date span, click on menu item "Check Limits > Set date span". This feature can be disabled in "Tools | Options".' There is an 'OK' button at the bottom.

Click “OK.”

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Create another negative receipt on the contribution form for the remaining amount of the candidate loan. Designate the Contribution Type Code as “**1 Direct**” and Contributor Type Code as “**20 Candidate Debt Assumption.**”

The screenshot shows the 'Contribution' form in Campaign2.mdb. The form is titled 'Contribution - Expire date = 12/31/2007'. It has several tabs: 'Contribution', 'More demographic', and 'Association, misc.'. The form fields are as follows:

- Organization: [Empty]
- Date: 04/10/2007
- Last Name: Doe
- First Name: John
- Mid Name: [Empty]
- Suffix: [Empty]
- Prefix: [Empty]
- Address - major (required): 100 Main
- Entity Type: 1 Individual
- Informal Name: John
- Source: N/A
- Amount: -2000.00
- Mode: 1 MONETARY
- Contribution Type code: 1 DIRECT
- Contributor Type Code: 20 CANDIDATE DEBT ASSUMPTION

Annotations with arrows point to the following fields:

- A box labeled 'Negative 2000.00' points to the Amount field.
- A box labeled 'Contribution Type Code = "1 Direct"' points to the Contribution Type code field.
- A box labeled 'Contributor Type Code = "20 Candidate Debt Assumption"' points to the Contributor Type Code field.

Buttons on the right side of the form include: Add, Save, Cancel, Delete, and navigation arrows (<<, <, >, >>).

The screenshot shows the 'Check Contribution Limits' dialog box. It contains the following text:

Total contributions received for this entity between 01/01/2006 and 04/10/2007 = -\$3000.00
Record count = 2

To set date span, click on menu item "Check Limits > Set date span".
This feature can be disabled in "Tools | Options".

An arrow points to the 'OK' button.

Click “OK.”

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Create another record on the Contribution form for the positive amount equal to the remaining amount in the previous step. Designate the Contribution Type Code as “**1 Direct**” and Contributor Type Code as “**20 Candidate Debt Assumption**.”

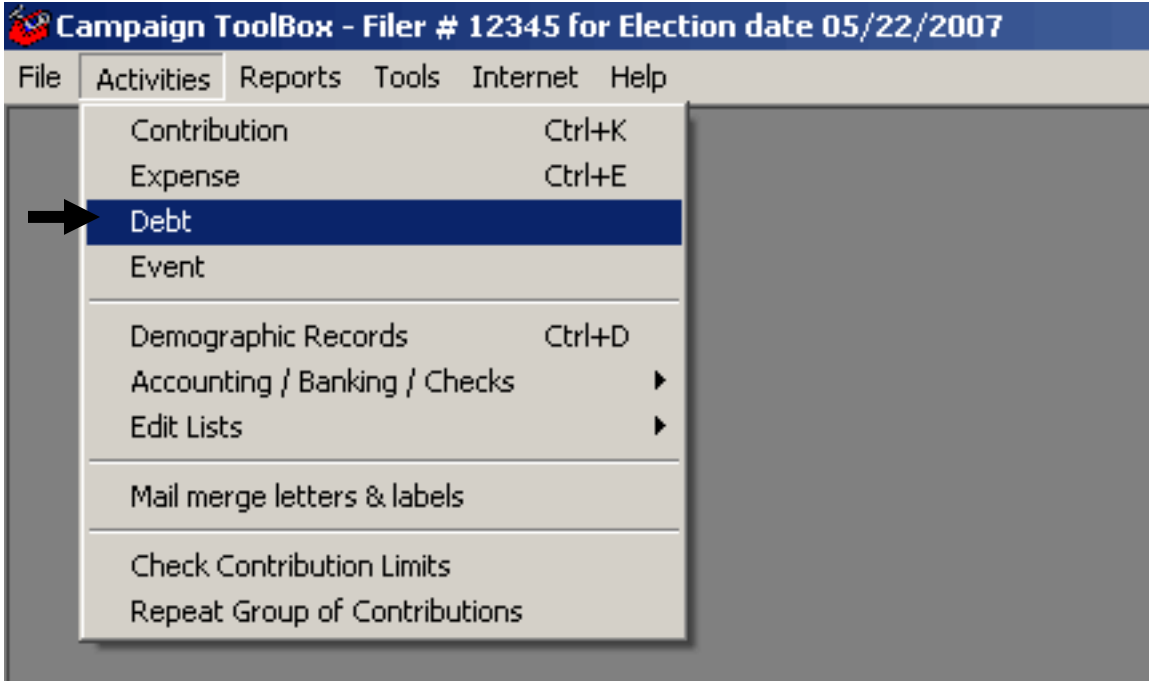
The screenshot shows the 'Contribution' form in Campaign2.mdb. The form is titled 'Contribution - Expire date = 12/31/2007'. The 'Amount' field is set to 2000.00, and the 'Mode' is '1 MONETARY'. The 'Contribution Type code' is '1 DIRECT', and the 'Contributor Type Code' is '20 CANDIDATE DEBT ASSUMPTION'. The 'Entity Type' is '1 Individual'. The 'Informal Name' is 'John'. The 'City' is 'Frankfort', 'State' is 'KY', and 'Zip Code' is '40601'. A callout box points to the 'Amount' field with the text 'Positive 2000.00'. Another callout box points to the 'Contribution Type code' and 'Contributor Type Code' fields with the text 'Contribution Type Code = "1 Direct"' and 'Contributor Type Code = "20 Candidate Debt Assumption"'. The form also includes fields for Organization, Date, Last Name, First Name, Mid Name, Suffix, Prefix, Address, In Kind Descrip., Other Descrip., Amendment, Occupation, Employer, PAC Interest, and Qty.

The screenshot shows the 'Check Contribution Limits' dialog box. It displays the following information: 'Total contributions received for this entity between 01/01/2006 and 04/10/2007 = -\$1000.00' and 'Record count = 3'. Below this, it says: 'To set date span, click on menu item "Check Limits > Set date span". This feature can be disabled in "Tools | Options".' An 'OK' button is visible at the bottom, with an arrow pointing to it.

The contributions created zero out the loan, showing part of the debt has changed to a contribution.

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On the menu, click on **Activities > Debt**



Add a payment on the debt record that equals the amount paid back and the amount of debt assumed. This will zero out the balance of the candidate loan.

The screenshot shows the 'Campaign2.mdb - Debt' form window. The title bar indicates 'Campaign2.mdb - Debt - Expire date = 12/31/2007'. The form contains several input fields and a table of amounts. A black arrow points to the 'Prior amount paid' field, which contains '0.00'. The 'Original amount' field contains '3000.00', and the 'Current amount paid' field contains '3000.00'. The 'Balance due' field contains '0.00'. The 'Name of Creditor' field contains 'Bank of Frankfort', and the 'Date debt incurred' field contains '04/10/2007'. The 'City' field contains 'Frankfort', the 'State' field contains 'KY', and the 'Zip Code' field contains '40601'. The 'Description (nature or purpose of debt)' field contains 'This is a test'. The 'Comments (for this transaction)' field contains 'This is a test'. The 'Type of debt' section has a radio button selected for 'Debt owed BY this campaign'. The 'This debt is classified as a Loan' checkbox is checked, and the 'Amendment' checkbox is unchecked. A text box at the bottom right contains the following text: 'Debt records are independent of any other records. Creating an expense record to repay a loan does NOT cause any change to a debt record. You must make such changes directly on the debt record.'