

C-SMART HELP

ADVANCE DOCUMENTATION

HOW TO ADD ADVANCE PURCHASE/REPAYMENT/FORGIVEN DOCUMENTATION

1. Go to the advancer's **Advances** page.
 - Click the advance's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.
 - For an advance repayment or forgiven advance, click or search for its **Transaction ID**.

Advances Back to Advances

Search by Last Name or Entity Name Add Name

Profile

Name: Smith, Mary A Employer:
Address: 886 Gates Avenue 11 Occupation: Retired
Brooklyn, NY 11221 Address:
Boro: Brooklyn Individual

Totals

Total Contributions: \$30.00 View
Total Purchases: \$30.00
Total Outstanding: \$0.00
Total Forgiven: \$30.00

Advances Add Purchase Add Repayment Add Forgiven

Transaction ID	Date	Transaction Type	Vendor	Amount
8403	08/29/2018	Purchase	US Postal Service	\$30.00
8405	08/29/2018	Forgiven		\$30.00

OR

C-SMART New York City Campaign Finance Board
Election Cycle 2021 - Sophia Rosario
Help srosar1389

Transactions Documentation Reports Submission

8403 | Add Name
8403 -- Advance Purchase

Best Practice: As a shortcut, click the **gear** next to the **Transaction ID** and then **Add Document**.

2. Click **Add Document**.

Purchase Details


Vendor: US Postal Service
Address: 99 Church St
New York, NY 10007
Boro: Manhattan

Purchase Date: 08/29/2018
Amount: \$30.00
Payment Type: Cash
Purpose Code: Campaign Mailing
Explanation: Palmcards mailing
Exempt Code:
Committee: Sophia for Council
Event:

Notes: [For Campaign Use Only]

Entered By: srosar1389 Date: 09/27/2018 02:16 PM Updated By: srosar1389 Date: 09/27/2018 02:16 PM

Documentation

 [Add Document](#)

Type	Date Linked	Submit Date	Statement Number
No records			

3. Click **Upload PDF** and select a file from your computer.

- Complete the following fields:
 - ◆ **Page(s):** Use a dash to select a page range (3-4) or a comma to select non-consecutive pages (1, 3). You also can choose **Select All Pages**.
 - ◆ **Type:** Indicate the type of document. If your PDF contains more than one type of documentation, you can upload them together under a single document type.
- Then, click **Save** to store the document in C-SMART and link it to the transaction.

Important: The maximum allowable file size is 4MB and only PDFs can be uploaded. For help with larger files, contact your Candidate Services liaison.

Add Documentation

Last Name or Entity Name: Smith, Mary A Transaction ID: 8403 Amount: \$30.00 Date: 09/27/2018 Advance Type: Purchase File Name: Number 1A 08-20-18.pdf

Select a PDF file to upload (File size limit 4 MB)

[+ Upload PDF](#) Page(s) Select All Pages Type:

[Save](#) [Cancel](#)

✔ You have successfully linked page(s) 1 to Transaction ID: 8403

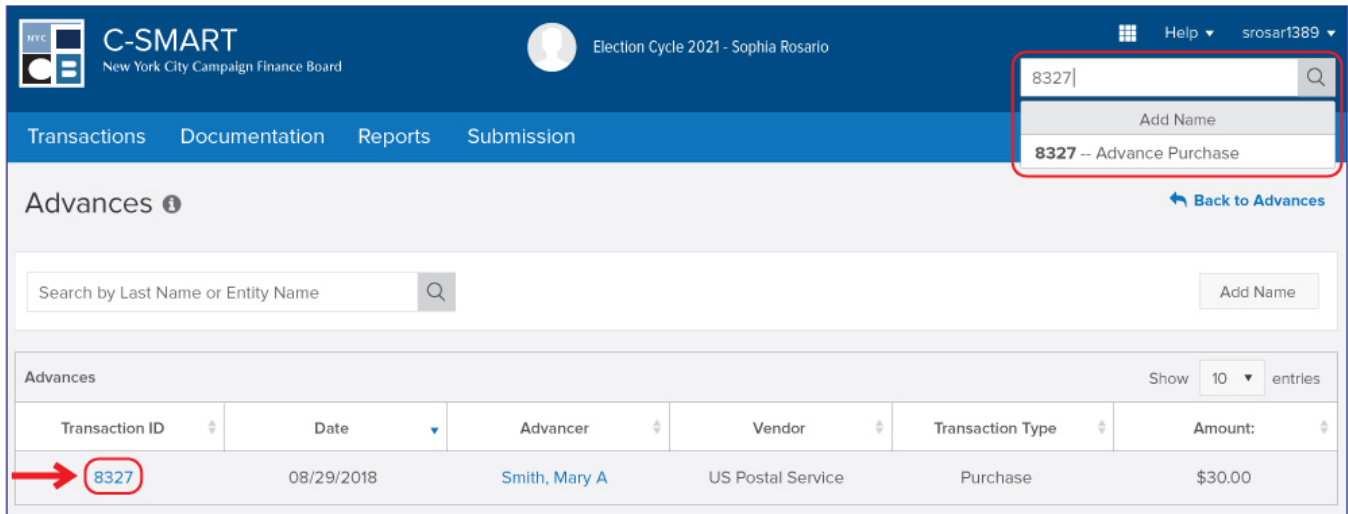
Best Practice: Even after a document is stored in C-SMART and linked to a transaction, it is not immediately submitted to the CFB. The documentation will be submitted when the underlying transaction is included with a disclosure statement or an amendment.

4. You can return to this page anytime and click **View PDF** to review your upload.

Documentation					Add Document
	Type	Date Linked	Submit Date	Statement Number	
View PDF	Invoice/Receipt	09/27/2018			X Delete

HOW TO DELETE ADVANCE PURCHASE/REPAYMENT/FORGIVEN DOCUMENTATION

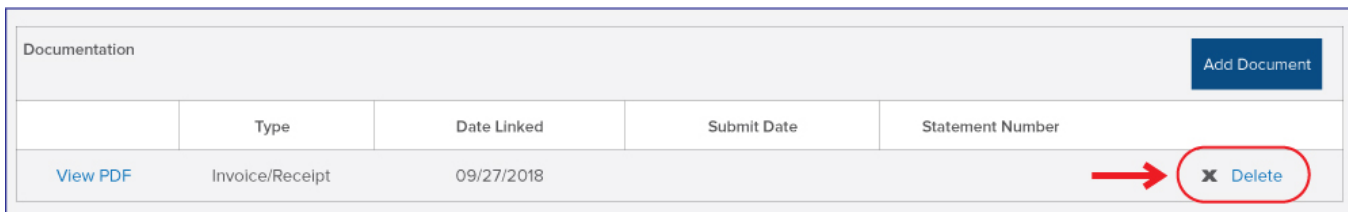
1. Go to the advancer's **Advances** page.
 - Click the advance's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.
 - For an advance repayment or forgiven advance, click on or search for its **Transaction ID**.



The screenshot shows the C-SMART interface for the Election Cycle 2021 - Sophia Rosario. The top navigation bar includes 'Transactions', 'Documentation', 'Reports', and 'Submission'. The 'Advances' section is active, displaying a table of advances. The first row is highlighted, with the Transaction ID '8327' circled in red. A search bar at the top right contains '8327' and a dropdown menu shows '8327 -- Advance Purchase'.

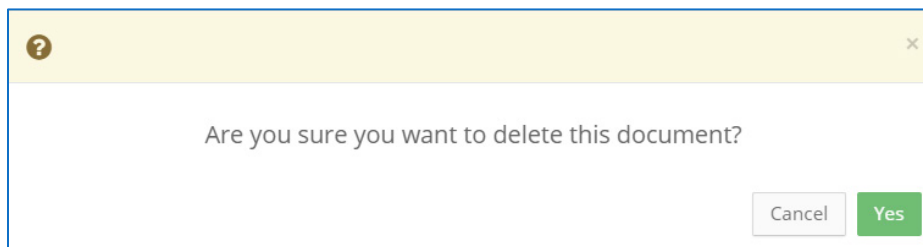
Transaction ID	Date	Advancer	Vendor	Transaction Type	Amount
8327	08/29/2018	Smith, Mary A	US Postal Service	Purchase	\$30.00

2. Click **Delete** under **Documentation** to proceed.
 - Click **Yes** on the window that opens to complete the deletion.



The screenshot shows the 'Documentation' section of the interface. It features a table with columns for 'Type', 'Date Linked', 'Submit Date', and 'Statement Number'. The first row shows 'Invoice/Receipt' with a date of '09/27/2018'. A red arrow points to the 'Delete' button in the bottom right corner of the table row.

Type	Date Linked	Submit Date	Statement Number
Invoice/Receipt	09/27/2018		



A confirmation dialog box is displayed, asking 'Are you sure you want to delete this document?'. The dialog has a yellow background and a question mark icon. At the bottom, there are two buttons: 'Cancel' and 'Yes'.

Important: You cannot delete documentation after it has been submitted to the CFB.