

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

Profile		Totals	
Name:	Smith, Mary A	Total Contributions:	\$30.00 View
Address:	886 Gates Avenue 11 Brooklyn, NY 11221	Total Purchases:	\$30.00
Boro:	Brooklyn Individual	Total Outstanding:	\$0.00
Employer:		Total Forgiven:	\$30.00
Occupation:	Retired		

Advances

Transaction ID	Date	Transaction Type	Vendor	Amount
8403	08/29/2018	Purchase	US Postal Service	\$30.00 <input type="button" value="⚙"/>
8405	08/29/2018	Forgiven		\$30.00 <input type="button" value="⚙"/>

OR

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

Transactions Documentation Reports Submission

8403 |

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**.

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Transactions Documentation Reports Submission

Advances [Back to Advances](#)

Search by Last Name or Entity Name Add Name

Advances Show 10 entries

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

Documentation

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

[View PDF](#)

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

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

Are you sure you want to delete this document?