

C-SMART HELP

ADVANCE REPAYMENTS

HOW TO ADD AN ADVANCE REPAYMENT

1. Go to the advancer's **Advances** page.

- Click **Add Repayment**.

The screenshot shows the 'Advances' page for a user named Mary A. Smith. The page includes a search bar, a profile section with personal and employment details, a 'Totals' summary, and a table of advances. The 'Add Repayment' button is highlighted with a red circle, and a red arrow points to it from below.

Transaction ID	Date	Transaction Type	Vendor	Amount:
8327	08/29/2018	Purchase	US Postal Service	\$30.00

2. Enter and save the repayment details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Repayment Date:** Enter the date the repayment was issued.
 - ◆ **Amount:** Enter the amount of the repayment.
 - ◆ **Check Number:** Enter the check number.
 - ◆ **Committee:** Select the committee repaying the advance.
 - ◆ **Bank Account:** Select the account from which the repayment was made.
 - ◆ **Segregated:** Indicate if the contribution was collected through a segregated bank account. See Chapter 6 of the [Handbook](#) for guidance on segregated bank accounts.
 - ◆ **Runoff/Rerun:** Check this box if the expenditure was for an expected runoff or court-ordered rerun election. Accepting contributions for a runoff is allowed only if the CFB confirms one is expected. Review [Runoff Guidance](#) for more information.
 - ◆ **Notes:** Enter any additional information. The CFB cannot review what you enter in this field. Your notes will be saved across all related transactions.

- Then, click **Save**.

Best Practice: You can make a single repayment to the same advancer for multiple advance purchases. Enter the full amount that you are repaying, which should match the amount of the check issued to the advancer.

Important: C-SMART will prevent you from saving the record if you leave out required information.

The screenshot displays the C-SMART interface for entering advance repayment details. It is divided into three main sections: Profile, Totals, and Enter Details.

Profile Section:

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

Totals Section:

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

Enter Details Section:

*Repayment Date: 08/29/2018

*Amount: \$ 30.00

*Check Number: 5734

*Committee: Sophia for Council

*Bank Account: Smart Savings Bank (**3522)

Void Check: Void Check:

Segregated:

Runoff / Rerun:

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

Save Cancel

3. The advance repayment has been successfully saved.

- At this point, C-SMART will return you to the **Advances** page. The **Totals** box and list of bills will be updated to reflect the newly saved transaction.

Best Practice: Notice that the transaction now has a **transaction ID**. Write this number on the [Advance Repayment Voucher](#) and copy of the canceled committee check.

✔ Your transaction has been successfully saved.

Advances ?

[← Back to Advances](#)

Profile

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

Totals


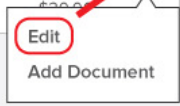
❗ Total Contributions:	\$0.00	View
Total Purchases:	\$30.00	
Total Outstanding:	\$0.00	
Total Forgiven:	\$0.00	

Advances

Transaction ID	Date	Transaction Type	Vendor	Amount	
8403	08/30/2018	Repayment		\$30.00	⚙️
8327	08/29/2018	Purchase	US Postal Service	\$30.00	⚙️

HOW TO EDIT AN ADVANCE REPAYMENT

1. Go to the advancer's **Advances** page.
 - Click the **gear** next to the repayment and then **Edit** or enter the **Transaction ID** into the **Search Transaction ID** bar and click **Edit**.

Advances					Add Purchase	Add Repayment	Add Forgiven
Transaction ID	Date	Transaction Type	Vendor	Amount:			
8329	08/30/2018	Purchase		\$30.00			
8327	08/29/2018	Purchase	US Postal Service	\$300.00			

OR

C-SMART
New York City Campaign Finance Board

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Help srosar1389

8403

Add Name

8403 -- Advance Purchase

Advance Repayment

Transaction ID: **8329** Statement: **N/A**

[Back to Smith, Mary A](#)

[+ Add](#) [Edit](#) [Delete](#)

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

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

2. Modify the necessary fields and click **Save**.

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

***Repayment Date:**

***Amount:** \$

***Check Number:**

***Committee:** ▼

***Bank Account:** ▼


Void Check: Void Check:

Segregated:

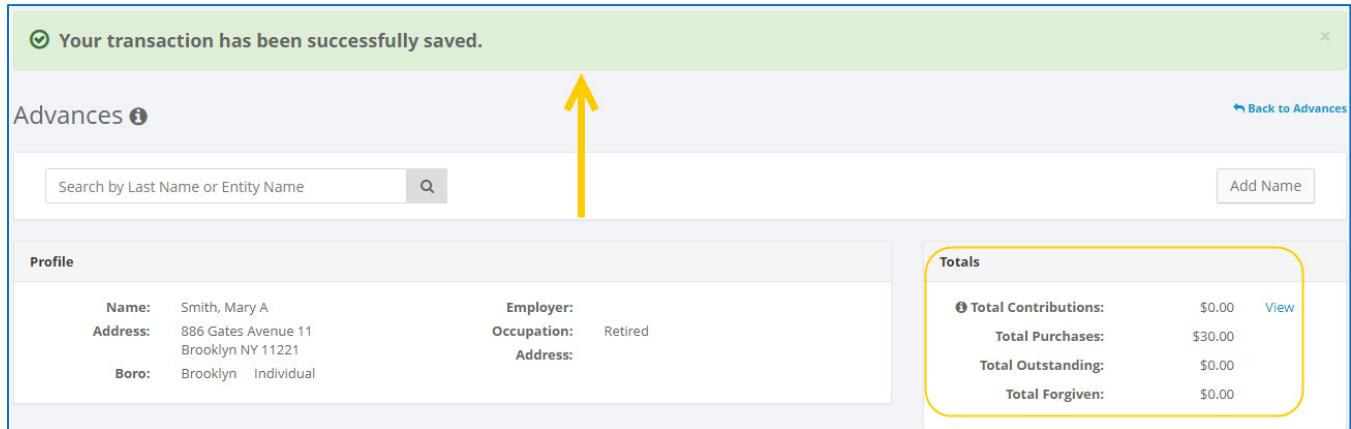
Runoff / Rerun:

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



3. The repayment has been successfully edited.



The screenshot displays a web interface for 'Advances'. At the top, a green notification bar states 'Your transaction has been successfully saved.' with a close button. Below this, the 'Advances' section includes a search bar labeled 'Search by Last Name or Entity Name' and an 'Add Name' button. A yellow arrow points from the search bar area up to the notification bar. The main content area is divided into two sections: 'Profile' and 'Totals'. The 'Profile' section lists personal and employment details for Mary A. Smith. The 'Totals' section, highlighted with a yellow border, shows financial summary data.

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

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

Important:

- ◆ The timestamp at the bottom will be updated to show who last modified the transaction.
- ◆ If your repayment check was voided, click **Void Check** and enter void date. This will void the advance repayment. If you issue a new repayment, you must create a new advance repayment transaction.

HOW TO DELETE AN ADVANCE REPAYMENT

1. Go to the advancer's **Advances** page.
 - Click the repayment's **Transaction ID** OR enter it into the **Search Transaction ID** bar.

Advances ⓘ [← Back to Advances](#)

Search by Last Name or Entity Name

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

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

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

2. Click **Delete** to proceed.

Advance Repayment
Transaction ID: **8404** Statement: **N/A**

[Back to Smith, Mary A](#)

[+ Add](#) [Edit](#) [Delete](#)

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

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

➤ Click **Yes** on the window that opens to complete the deletion.

Are you sure you want to delete this transaction?

[Cancel](#) [Yes](#)

3. The repayment has been successfully deleted.

✔ Your advance payment has been successfully deleted.

Advances [Back to Advances](#)

Search by Last Name or Entity Name [Q](#) [Add Name](#)

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

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

Important: You should generally only delete a transaction if it was entered in error.