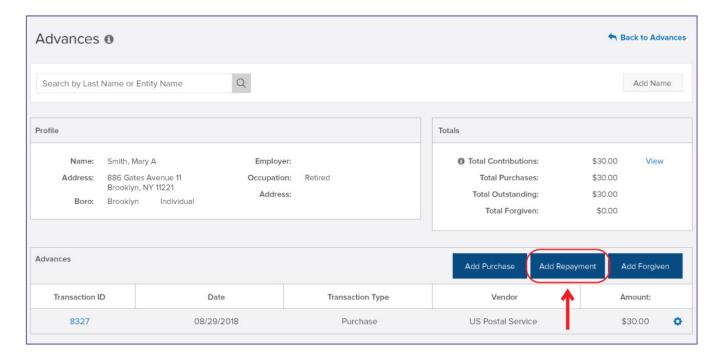# C-SMART HELP

ADVANCE REPAYMENTS

HOW TO ADD AN ADVANCE REPAYMENT

1.   Go to the advancer's **Advances** page.
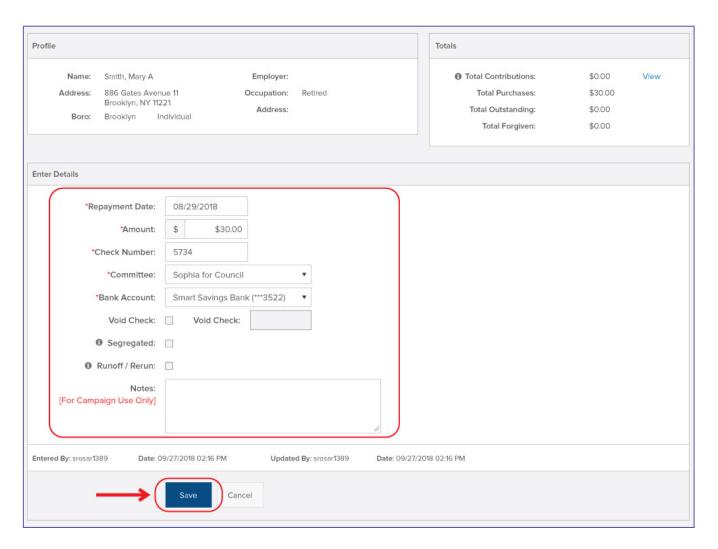
   ➢   Click **Add Repayment**.

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.
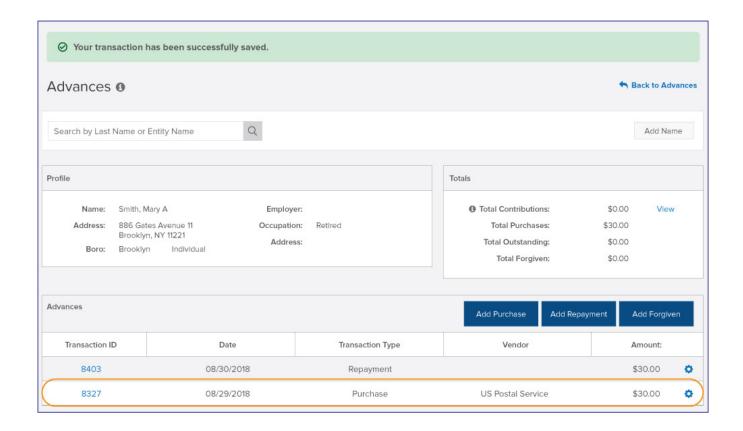
Important: C-SMART will prevent you from saving the record if you leave out required information.
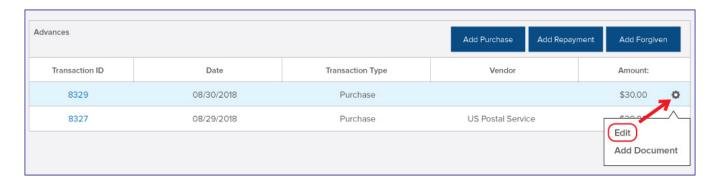
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3.   The advance repayment has been successfully saved.

➢   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.
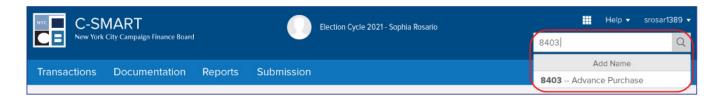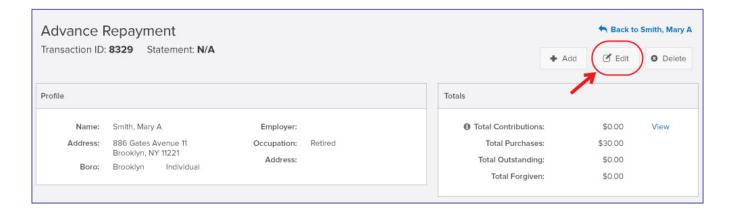

⊘ **Your transaction has been successfully saved.**

Advances ⓘ

↩ Back to Advances

| Search by Last Name or Entity Name 🔍 | | Add Name |

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

Advances

Add Purchase   Add Repayment   Add Forgiven

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
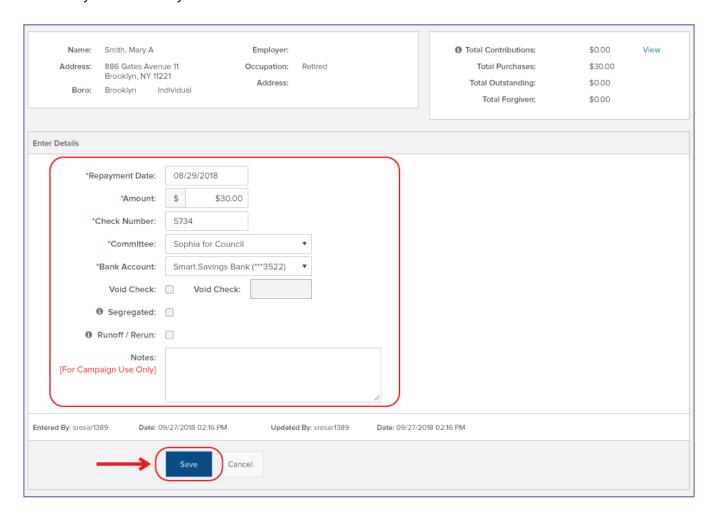   **Search Transaction ID** bar and click **Edit**.

<div align="center">**OR**</div>

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

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

Enter Details

*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
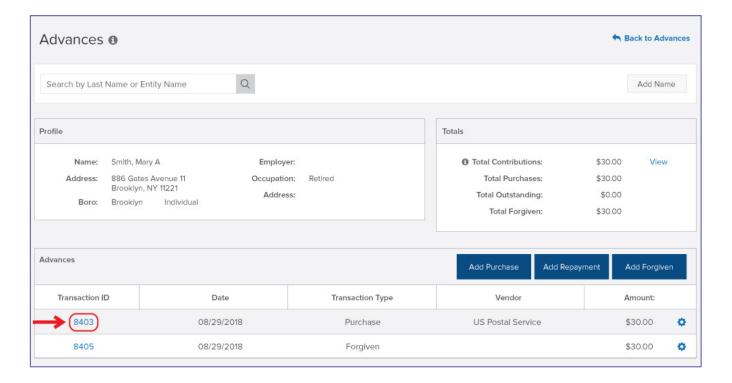
3. The repayment has been successfully edited.

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.
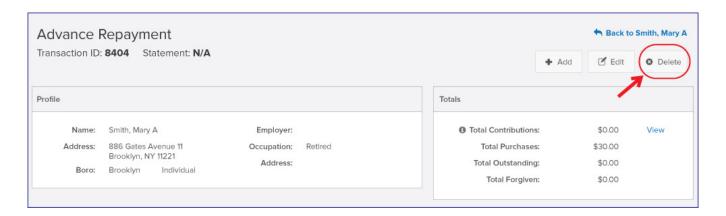
HOW TO DELETE AN ADVANCE REPAYMENT

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

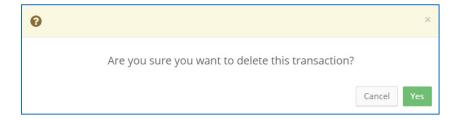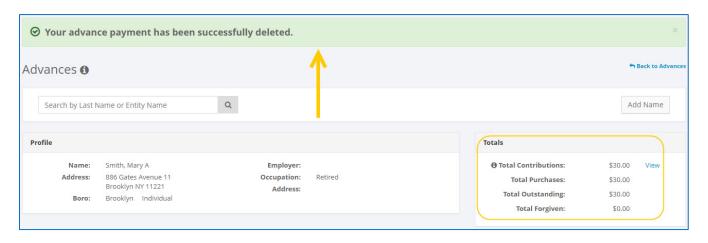   ➢ Click the repayment's **Transaction ID** OR enter it into the **Search Transaction ID** bar.

OR

2. Click **Delete** to proceed.

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

3. The repayment has been successfully deleted.

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