

# 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 with a search bar, profile information for Mary A. Smith, and a table of advances. The 'Add Repayment' button is highlighted with a red circle and a red arrow pointing to it.

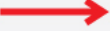
Transaction ID	Date	Transaction Type	Vendor	Amount:
8327	08/29/2018	Purchase	US Postal Service	\$30.00

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.

<b>Profile</b>	<b>Totals</b>
Name: Smith, Mary A Address: 886 Gates Avenue 11 Brooklyn, NY 11221 Boro: Brooklyn Individual Employer: Occupation: Retired Address:	Total Contributions: \$0.00 <a href="#">View</a> Total Purchases: \$30.00 Total Outstanding: \$0.00 Total Forgiven: \$0.00
<b>Enter Details</b>	
<div style="border: 2px solid red; padding: 10px;"><p>*Repayment Date: 08/29/2018</p><p>*Amount: \$ 30.00</p><p>*Check Number: 5734</p><p>*Committee: Sophia for Council</p><p>*Bank Account: Smart Savings Bank (**3522)</p><p>Void Check: <input type="checkbox"/> Void Check: <input type="text"/></p><p>Segregated: <input type="checkbox"/></p><p>Runoff / Rerun: <input type="checkbox"/></p><p>Notes: <input type="text"/> [For Campaign Use Only]</p></div>	
Entered By: srosar1389    Date: 09/27/2018 02:16 PM    Updated By: srosar1389    Date: 09/27/2018 02:16 PM	
<div style="text-align: right;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/></div>	

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

Profile		Totals	
<b>Name:</b> Smith, Mary A	<b>Employer:</b>	<b>Total Contributions:</b> \$0.00	<a href="#">View</a>
<b>Address:</b> 886 Gates Avenue 11 Brooklyn, NY 11221	<b>Occupation:</b> Retired	<b>Total Purchases:</b> \$30.00	
<b>Boro:</b> Brooklyn Individual	<b>Address:</b>	<b>Total Outstanding:</b> \$0.00	
		<b>Total Forgiven:</b> \$0.00	

Advances

Transaction ID	Date	Transaction Type	Vendor	Amount:	
8403	08/30/2018	Repayment		\$30.00	<input type="button" value="⚙"/>
8327	08/29/2018	Purchase	US Postal Service	\$30.00	<input type="button" value="⚙"/>

## 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	⚙️		

Edit

Add Document

OR

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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 <a href="#">View</a>
Total Purchases:	\$30.00
Total Outstanding:	\$0.00
Total Forgiven:	\$0.00

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

<b>Name:</b> Smith, Mary A <b>Address:</b> 886 Gates Avenue 11 Brooklyn, NY 11221 <b>Boro:</b> Brooklyn    Individual	<b>Employer:</b> <b>Occupation:</b> Retired <b>Address:</b>	<b>Total Contributions:</b> \$0.00 <a href="#">View</a> <b>Total Purchases:</b> \$30.00 <b>Total Outstanding:</b> \$0.00 <b>Total Forgiven:</b> \$0.00
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Enter Details

**\*Repayment Date:**

**\*Amount:** \$

**\*Check Number:**

**\*Committee:**

**\*Bank Account:**


Void Check:     Void Check:

**Segregated:**

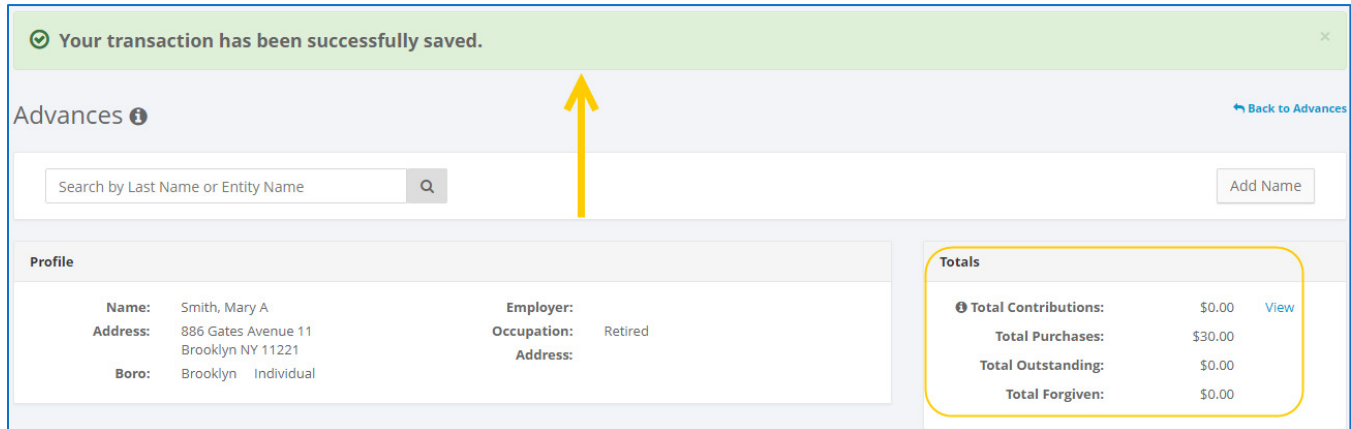
**Runoff / Rerun:**

**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 the 'Advances' section of a web application. At the top, a green notification bar states 'Your transaction has been successfully saved.' with a close button. Below this, the 'Advances' header 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, including her address in Brooklyn, NY, and her occupation as 'Retired'. The 'Totals' section, highlighted with a yellow border, shows financial summary data: Total Contributions (\$0.00), Total Purchases (\$30.00), Total Outstanding (\$0.00), and Total Forgiven (\$0.00). A 'View' link is present next to the Total Contributions value.

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

Totals	
<b>Total Contributions:</b>	\$0.00 <a href="#">View</a>
<b>Total Purchases:</b>	\$30.00
<b>Total Outstanding:</b>	\$0.00
<b>Total Forgiven:</b>	\$0.00

**Important:**

- ◆ Notice that the timestamp will be updated to reflect who made the modification to the transaction and when.
- ◆ If your repayment check was voided, click **Void Check** and enter the date voided. Voiding the check will void the advance repayment. If you have to issue the advancer a new repayment check, 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	
<b>Name:</b> Smith, Mary A	<b>Employer:</b>	<b>Total Contributions:</b> \$30.00	<a href="#">View</a>
<b>Address:</b> 886 Gates Avenue 11 Brooklyn, NY 11221	<b>Occupation:</b> Retired	<b>Total Purchases:</b> \$30.00	
<b>Boro:</b> Brooklyn Individual	<b>Address:</b>	<b>Total Outstanding:</b> \$0.00	
		<b>Total Forgiven:</b> \$30.00	

**Advances**

Transaction ID	Date	Transaction Type	Vendor	Amount:
<b>8403</b>	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.

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

**Advance Repayment** [Back to Smith, Mary A](#)

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

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

Profile		Totals	
<b>Name:</b> Smith, Mary A	<b>Employer:</b>	<b>Total Contributions:</b> \$0.00	<a href="#">View</a>
<b>Address:</b> 886 Gates Avenue 11 Brooklyn, NY 11221	<b>Occupation:</b> Retired	<b>Total Purchases:</b> \$30.00	
<b>Boro:</b> Brooklyn Individual	<b>Address:</b>	<b>Total Outstanding:</b> \$0.00	
		<b>Total Forgiven:</b> \$0.00	

Are you sure you want to delete this transaction?

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

3. The repayment has been successfully deleted.

**Advances** [Back to Advances](#)

Search by Last Name or Entity Name

Profile		Totals	
<b>Name:</b> Smith, Mary A	<b>Employer:</b>	<b>Total Contributions:</b> \$30.00	<a href="#">View</a>
<b>Address:</b> 886 Gates Avenue 11 Brooklyn NY 11221	<b>Occupation:</b> Retired	<b>Total Purchases:</b> \$30.00	
<b>Boro:</b> Brooklyn Individual	<b>Address:</b>	<b>Total Outstanding:</b> \$30.00	
		<b>Total Forgiven:</b> \$0.00	

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