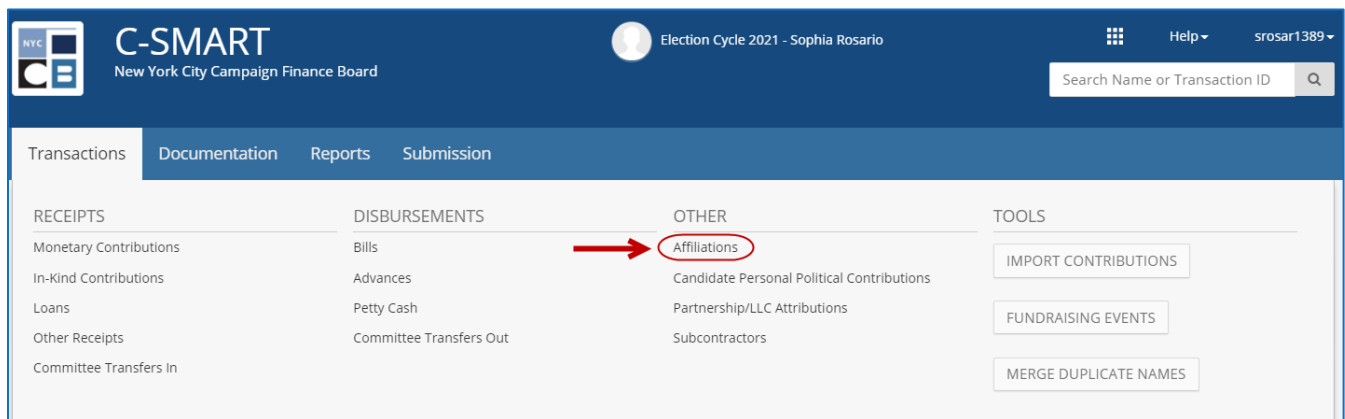


C-SMART HELP

AFFILIATED GROUP MEMBERS

HOW TO ADD A MEMBER TO AN AFFILIATED GROUP

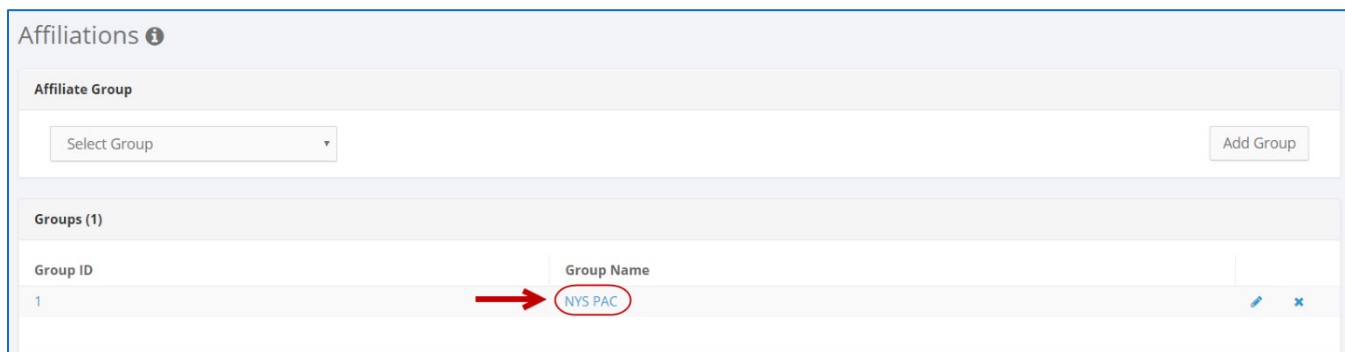
1. Go to the **Affiliations** page.
 - Hover your cursor over **Transactions** and click **Affiliations**.



The screenshot shows the C-SMART New York City Campaign Finance Board interface. The user is logged in as 'Election Cycle 2021 - Sophia Rosario' with the user ID 'srosar1389'. The 'Transactions' menu is open, and the 'Affiliations' option is circled in red with a red arrow pointing to it. The interface includes a search bar, navigation tabs, and a grid of transaction categories.

RECEIPTS	DISBURSEMENTS	OTHER	TOOLS
Monetary Contributions	Bills	Affiliations	IMPORT CONTRIBUTIONS
In-Kind Contributions	Advances	Candidate Personal Political Contributions	FUNDRAISING EVENTS
Loans	Petty Cash	Partnership/LLC Attributions	MERGE DUPLICATE NAMES
Other Receipts	Committee Transfers Out	Subcontractors	
Committee Transfers In			

2. Click the **Group Name**.



The screenshot shows the 'Affiliations' page in the C-SMART system. The 'Affiliate Group' dropdown is set to 'Select Group'. Below, a table shows one group with ID '1' and name 'NYS PAC', which is circled in red with a red arrow pointing to it.

Group ID	Group Name
1	NYS PAC

Affiliations ⓘ

Affiliate Group

NYS PAC Add Group

Group Details Edit Delete

Group ID: 1
Group Name: NYS PAC
Notes:

Group Members Add Member

Name	How Affiliated	Contribution Amount
No records		
		Total: \$0.00

3. Click **Add Member**.

Add Member

Name: Schmidt, Hilda
How Affiliated: Chair

Add Cancel

4. Enter and save the group member's details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Name:** Select the name of the member. The individual must already be in your **Names** database to be added. If it is not, you must [create the record](#).
 - ◆ **How Affiliated:** You may indicate the nature of the relationship.
- Then, click **Add**.

- 5. The individual has been successfully added to the group.
 - At this point, C-SMART will return you to the **Affiliate Group's** page. The **Group Members** section will be updated to include the new member and his or her total contributions.

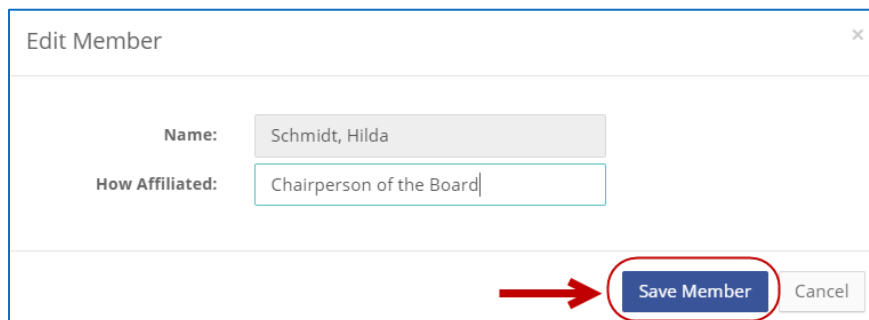
A screenshot of the C-SMART Affiliations page. At the top, a green banner displays the message: "Your transaction has been successfully saved." Below this, the page is titled "Affiliations" with an information icon. The "Affiliate Group" section shows a dropdown menu set to "NYS PAC" and an "Add Group" button. The "Group Details" section includes "Group ID: 1", "Group Name: NYS PAC", and a "Notes" text area. There are "Edit" and "Delete" buttons in the top right of this section. The "Group Members" section features an "Add Member" button and a table with columns for "Name", "How Affiliated", and "Contribution Amount". The table contains one entry: "Schmidt, Hilda" with "Chair" as the affiliation. A "Total: \$0.00" is shown at the bottom right of the table. A yellow arrow points from the "Add Member" button area up to the success message banner.

HOW TO EDIT AN AFFILIATED GROUP MEMBER

- 1. Go to the group's **Affiliations** page.
 - Under **Group Members** click the **pencil** next to the member.

A screenshot of the C-SMART Affiliations page, identical to the one above. In this version, a red arrow points to the pencil icon in the "Group Members" table, which is circled in red. The rest of the page content, including the success message and group details, remains the same.

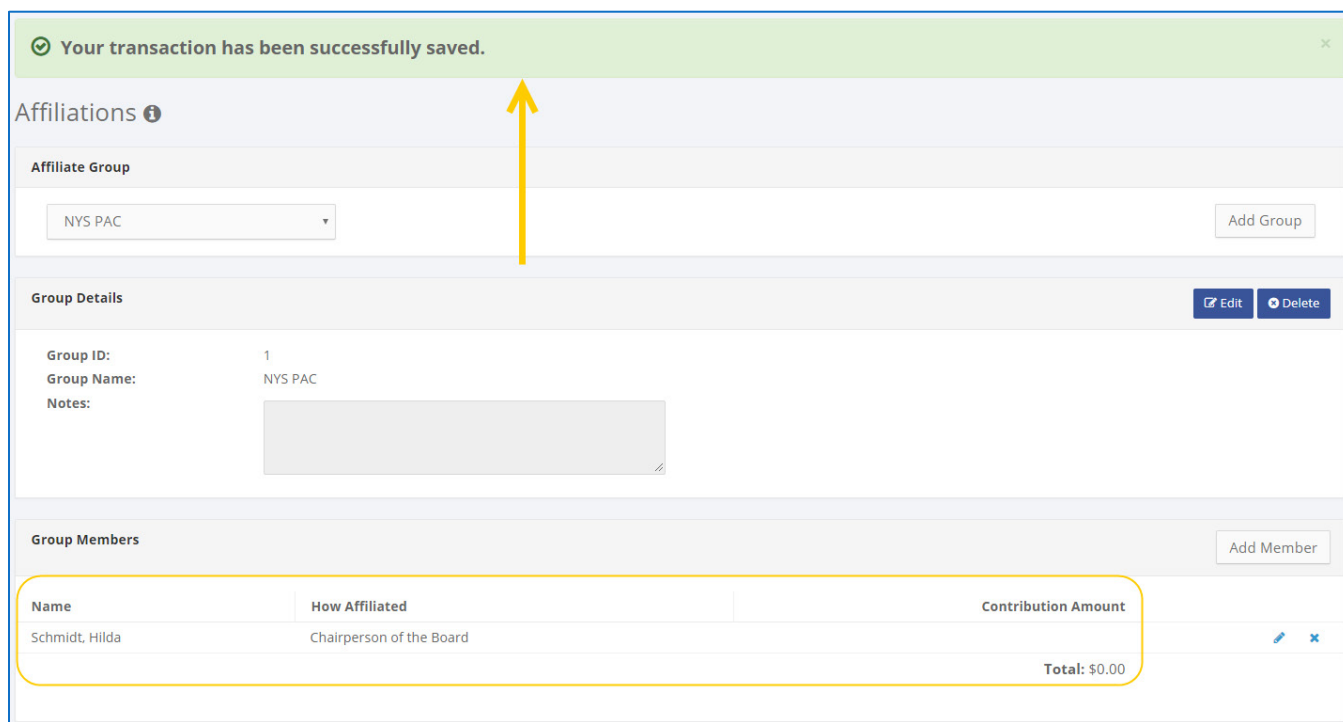
2. Modify the necessary fields and click **Save Member**.



Dialog box titled "Edit Member" with a close button (X) in the top right corner. It contains two input fields: "Name:" with the value "Schmidt, Hilda" and "How Affiliated:" with the value "Chairperson of the Board". At the bottom right, there are two buttons: "Save Member" (highlighted with a red circle and a red arrow pointing to it) and "Cancel".

Important: You can only edit the **How Affiliated** field. To select a different individual, delete the member and add a new one.

3. The group member has been successfully edited.



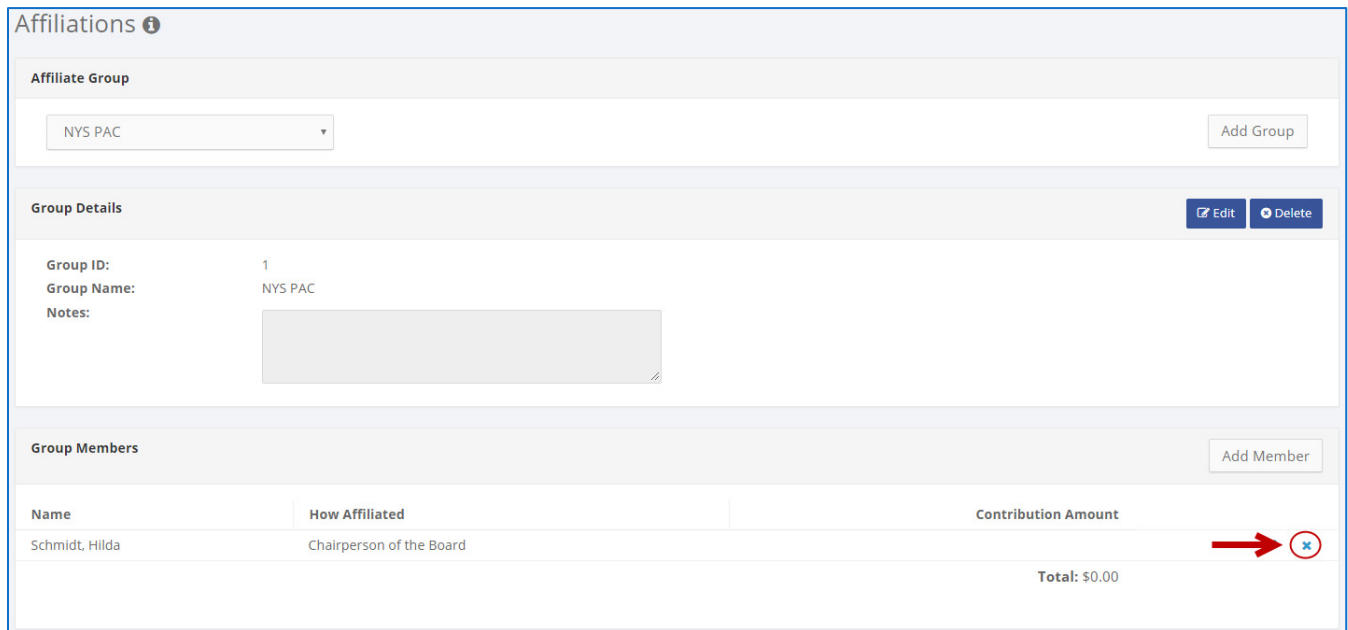
The screenshot shows the "Affiliations" page. At the top, a green banner displays the message: "Your transaction has been successfully saved." with a close button (X). Below this, the "Affiliate Group" section shows a dropdown menu set to "NYS PAC" and an "Add Group" button. The "Group Details" section includes fields for "Group ID:" (1), "Group Name:" (NYS PAC), and "Notes:" (empty). There are "Edit" and "Delete" buttons in the top right of this section. The "Group Members" section features an "Add Member" button and a table with the following data:

Name	How Affiliated	Contribution Amount
Schmidt, Hilda	Chairperson of the Board	

The total contribution amount is shown as "Total: \$0.00". A yellow arrow points to the success message, and a yellow box highlights the table and total.

HOW TO DELETE AN AFFILIATED GROUP MEMBER

1. Go to the group's **Affiliations** page.
 - Click the **x** next to the group member.



Affiliations ⓘ

Affiliate Group

NYS PAC Add Group

Group Details Edit Delete

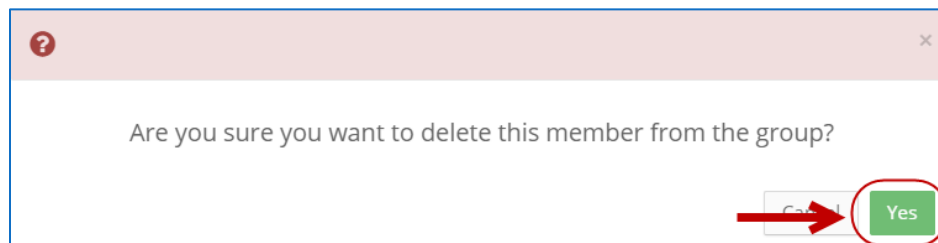
Group ID: 1
Group Name: NYS PAC
Notes:

Group Members Add Member

Name	How Affiliated	Contribution Amount
Schmidt, Hilda	Chairperson of the Board	

Total: \$0.00

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



Are you sure you want to delete this member from the group?

Cancel Yes

3. The group member has been successfully deleted.

The screenshot displays a web interface for managing affiliations. At the top, a green notification bar states "Your Transaction has been successfully deleted." with a close button. Below this, the "Affiliations" section is titled with an information icon. Under "Affiliate Group", a dropdown menu shows "NYS PAC" and an "Add Group" button. The "Group Details" section includes "Edit" and "Delete" buttons, and lists "Group ID: 1", "Group Name: NYS PAC", and a "Notes" field. The "Group Members" section features an "Add Member" button and a table with columns for "Name", "How Affiliated", and "Contribution Amount". The table currently shows "No records" and a "Total: \$0.00". A yellow arrow points from the success message to the "NYS PAC" dropdown menu.

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