

C-SMART HELP

AFFILIATED GROUPS

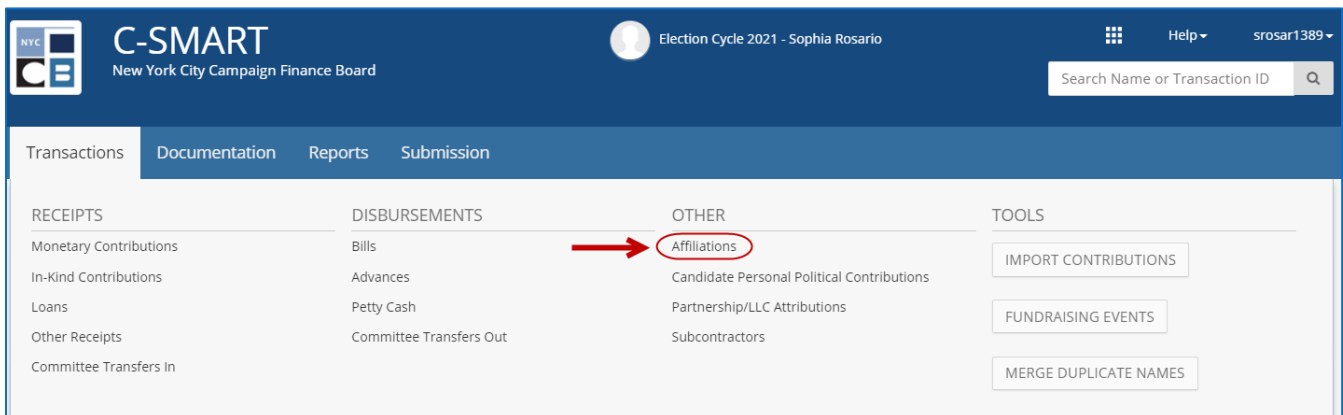
When an individual who has contributed to your campaign either owns or has significant decision-making control over an entity that has also contributed to your campaign, your campaign must disclose the affiliation and the contributions will be aggregated.

To disclose affiliated contributions, first enter the contributions made by the affiliated contributors. After you've added the affiliated group following these steps, you can add members to it.

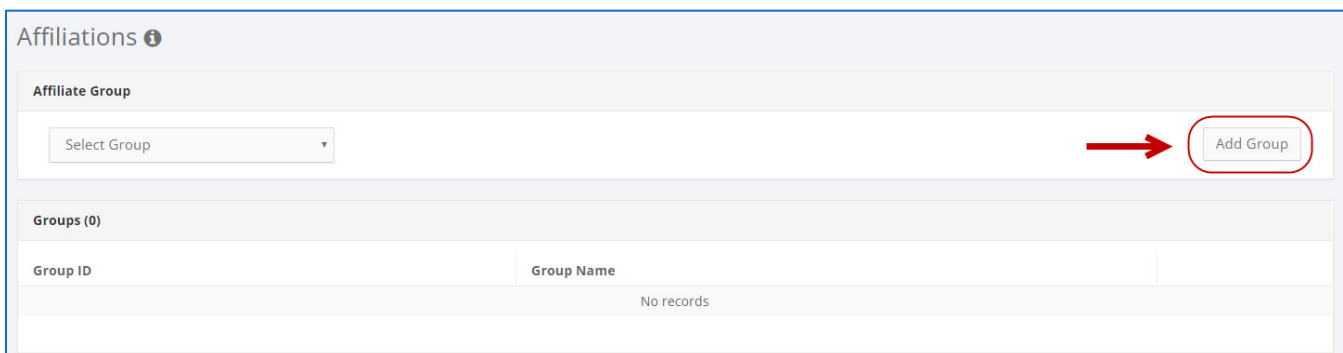
Create affiliated groups in C-SMART as needed to ensure that contributions from individuals and their affiliated groups are aggregated. This will help you avoid issues with over-the-limit contributions.

HOW TO ADD AN AFFILIATED GROUP

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

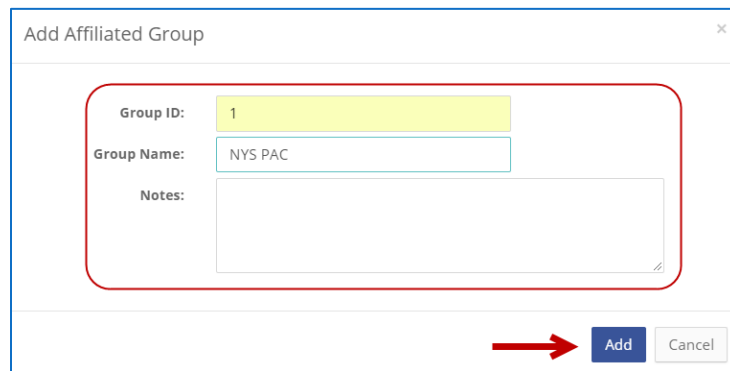


2. Click **Add Group**.



3. Enter and save the affiliated group's details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Group ID:** Enter a numeric identifier for this group.
 - ◆ **Group Name:** Enter the name of the affiliated group.
 - ◆ **Notes:** Enter any additional information. The CFB does not receive the information you enter in this field.
- Then, click **Add**.



Add Affiliated Group

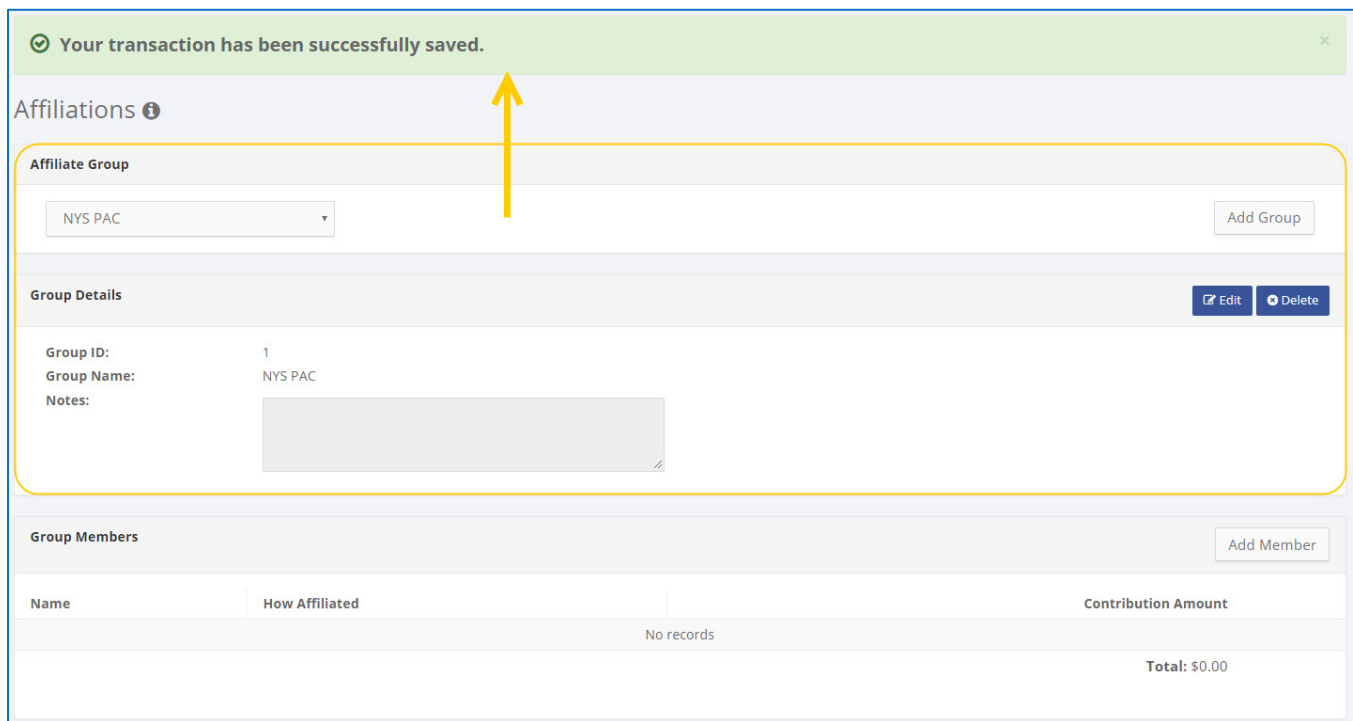
Group ID: 1

Group Name: NYS PAC

Notes:

Add Cancel

4. The affiliated group has been successfully added.



✓ Your transaction has been successfully saved.

Affiliations ⓘ

Affiliate Group

NYS PAC Add Group

Group Details Edit Delete

Group ID: 1

Group Name: NYS PAC

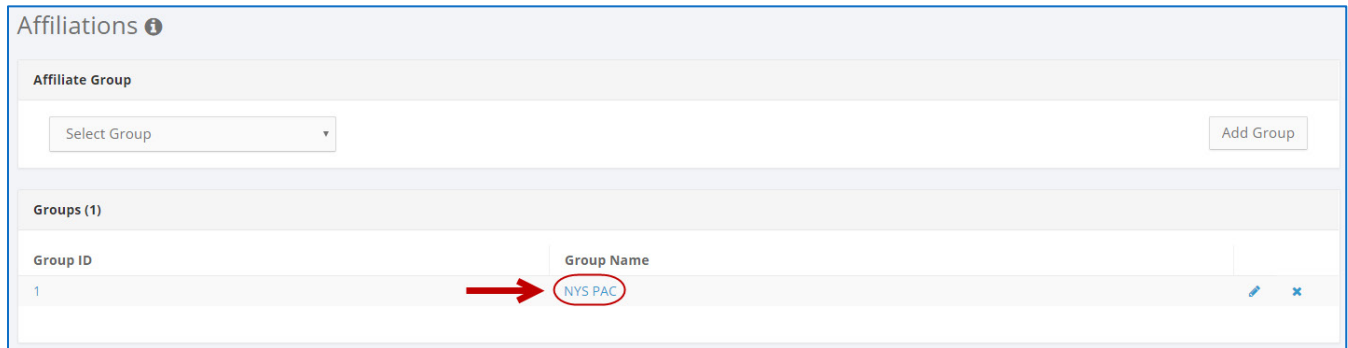
Notes:

Group Members Add Member

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

HOW TO EDIT AN AFFILIATED GROUP

1. Go to the **Affiliations** page.
 - Click the **Group Name**.



Affiliations ⓘ

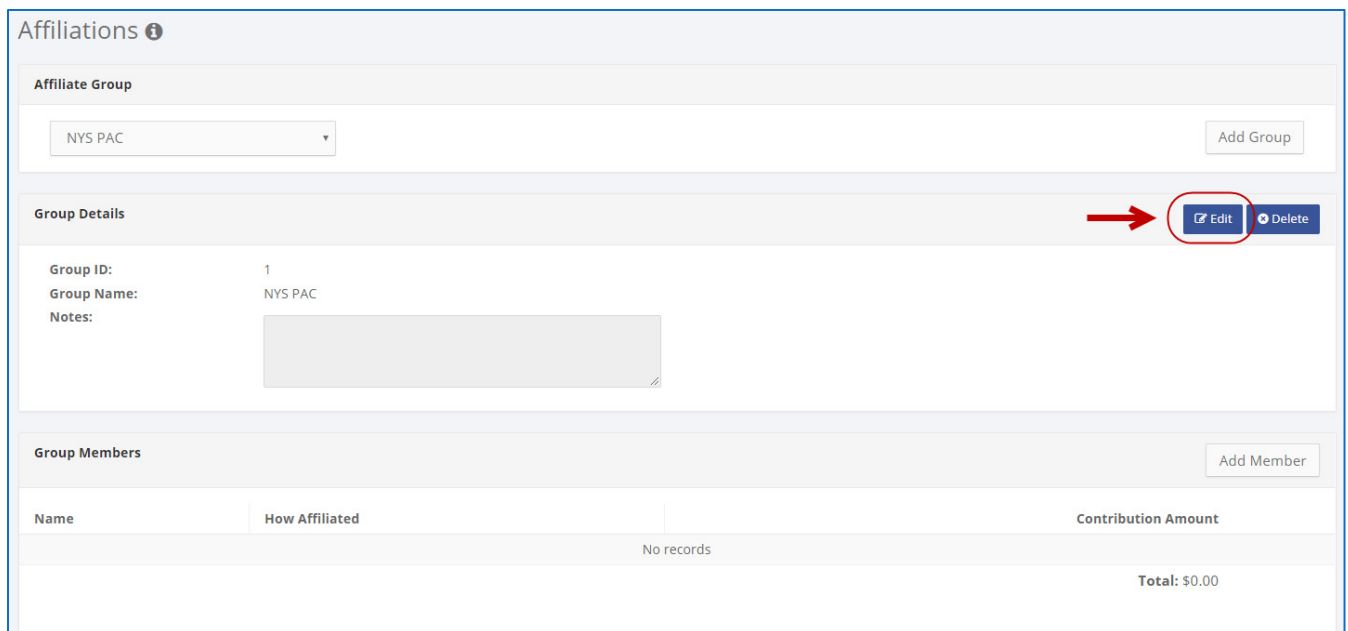
Affiliate Group

Select Group ▼ Add Group

Groups (1)

Group ID	Group Name	
1	NYS PAC	✎ ✕

2. Click **Edit**.



Affiliations ⓘ

Affiliate Group

NYS PAC ▼ Add Group

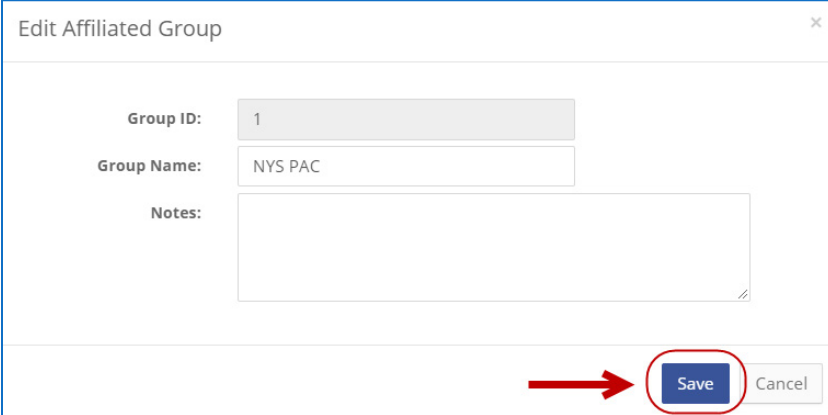
Group Details Edit Delete

Group ID: 1
Group Name: NYS PAC
Notes:

Group Members Add Member

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

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



Dialog box titled "Edit Affiliated Group" with a close button (X) in the top right corner. The form contains the following fields:

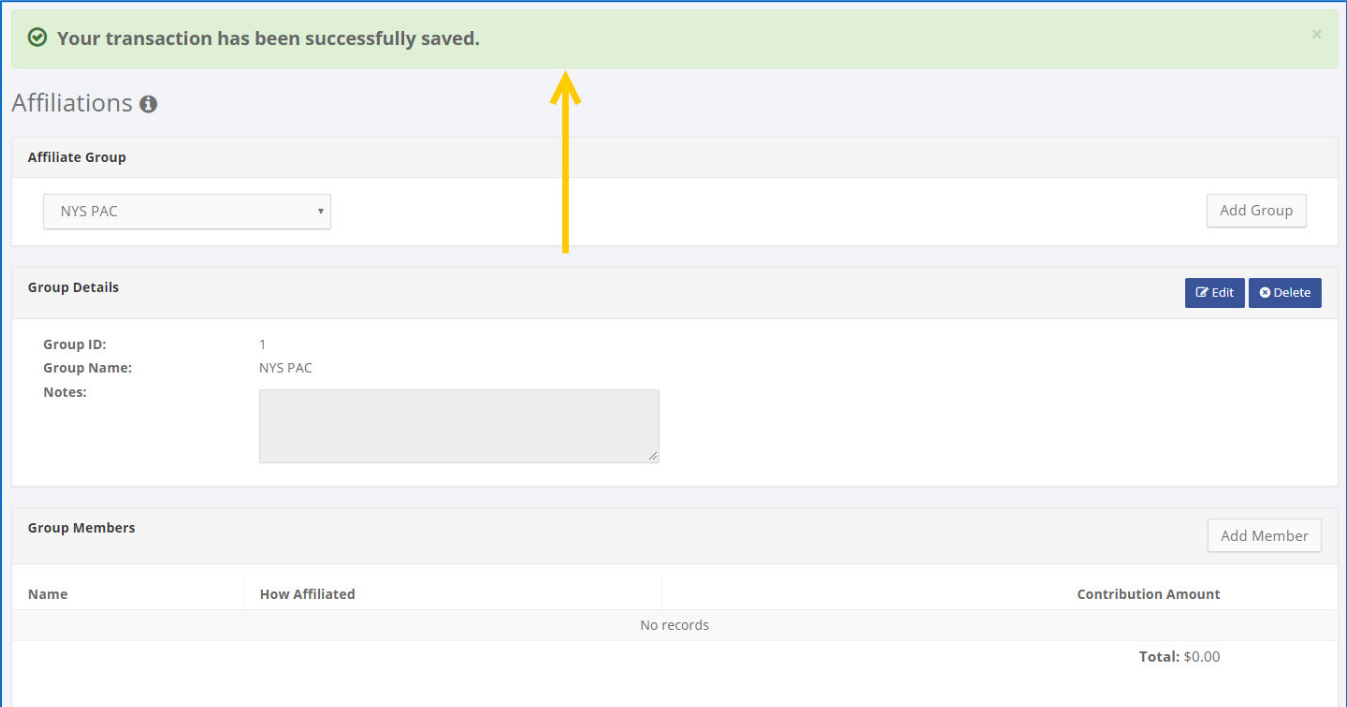
- Group ID: 1
- Group Name: NYS PAC
- Notes: (empty text area)

At the bottom right, there are two buttons: "Save" (highlighted with a red circle and a red arrow pointing to it) and "Cancel".

Best Practice: You can click the pencil next to the record to skip Step 2.

Important: You can only edit the **Group Name** and **Notes** fields.

4. The group has been successfully edited.



Page header: **✓ Your transaction has been successfully saved.**

Affiliations ⓘ

Affiliate Group

NYS PAC Add Group

Group Details Edit Delete

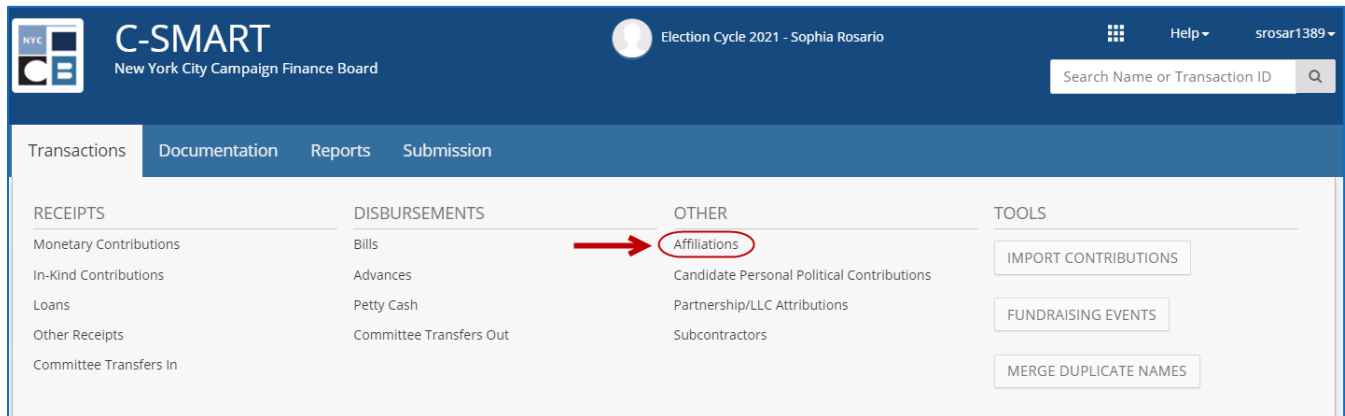
Group ID: 1
Group Name: NYS PAC
Notes: (empty text area)

Group Members Add Member

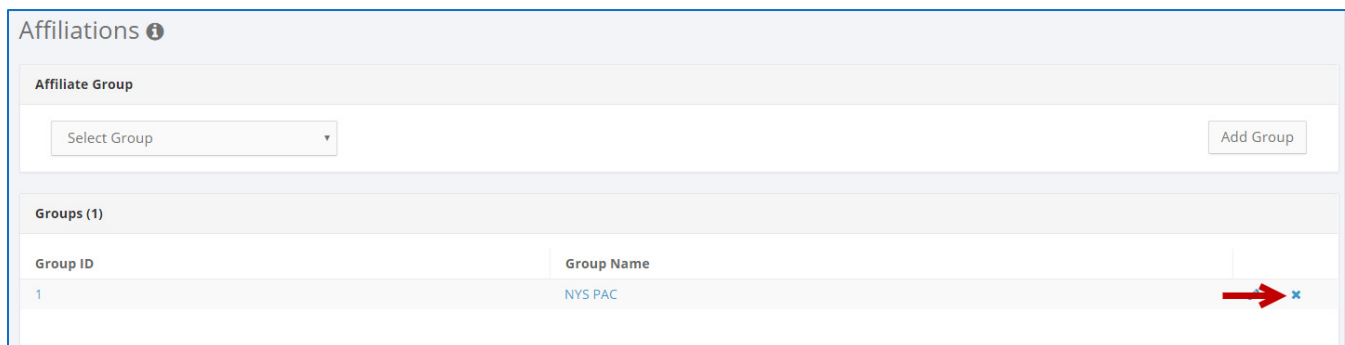
Name	How Affiliated	Contribution Amount
No records		
		Total: \$0.00

HOW TO DELETE AN AFFILIATED GROUP

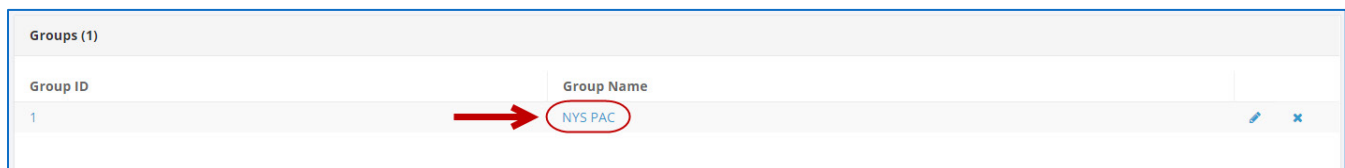
1. Go to the **Affiliations** page.
 - Hover your cursor over **Transactions** and click **Affiliations**.



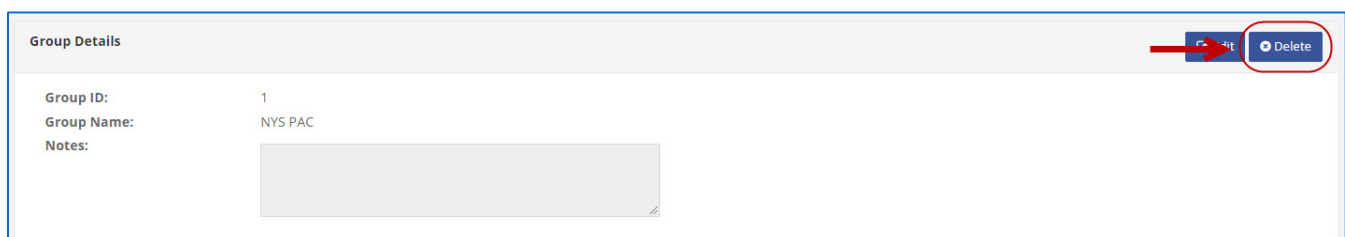
2. Click the × next to the group.



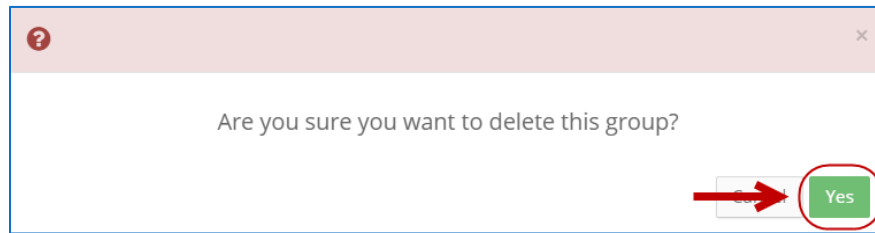
- You can also click the group's name and then click **Delete**.



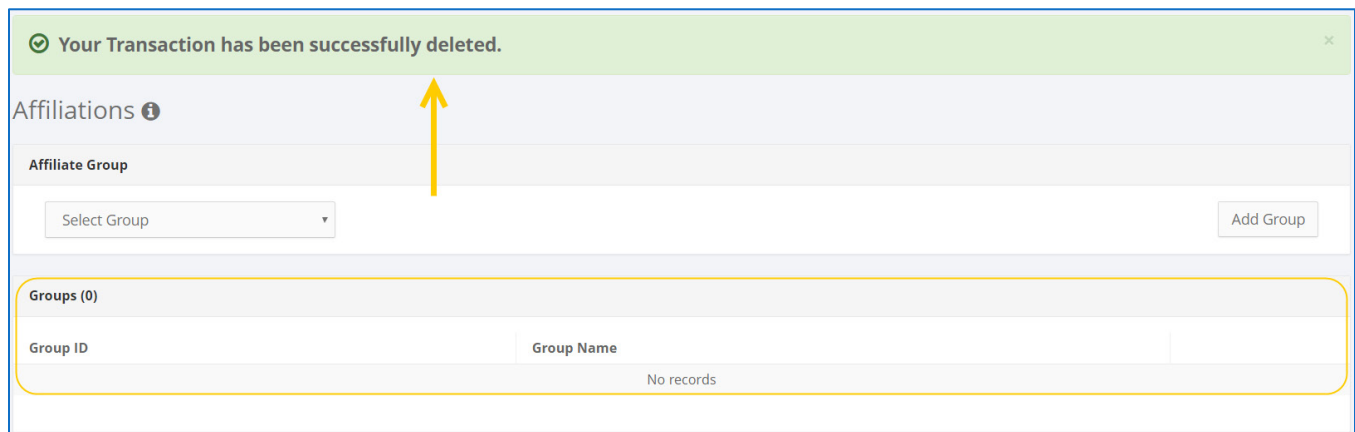
OR



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



4. The group has been successfully deleted.



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