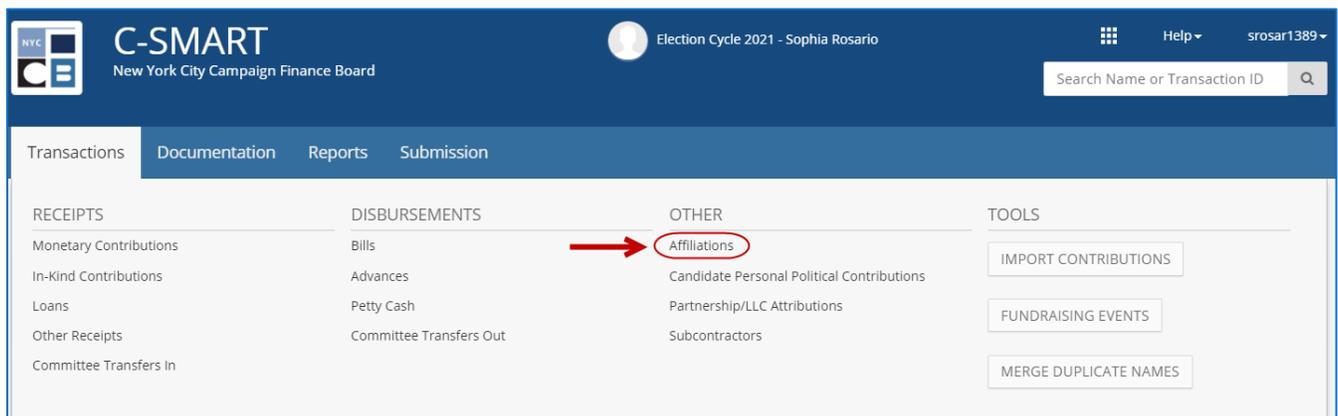


C-SMART HELP

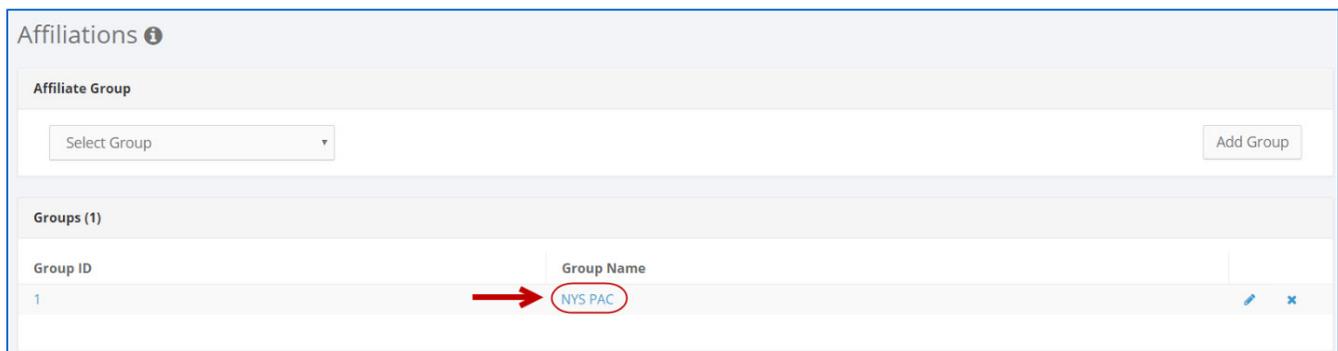
AFFILIATED GROUP MEMBERS

HOW TO ADD A MEMBER TO AN AFFILIATED GROUP

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



2. Click the **Group Name**.



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**.

- 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" affiliation and a contribution amount of "\$0.00". A yellow arrow points from the success message down to the "Add Group" button.

HOW TO EDIT AN AFFILIATED GROUP MEMBER

- 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 used to edit a member's information.

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

Dialog box titled "Edit Member" with a close button (X). 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) 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.

Page header: "Your transaction has been successfully saved." (green bar with close button)

Section: "Affiliations" (with info icon)

Section: "Affiliate Group" (dropdown menu: "NYS PAC", "Add Group" button)

Section: "Group Details" (with "Edit" and "Delete" buttons)

Group ID: 1
Group Name: NYS PAC
Notes: [Text area]

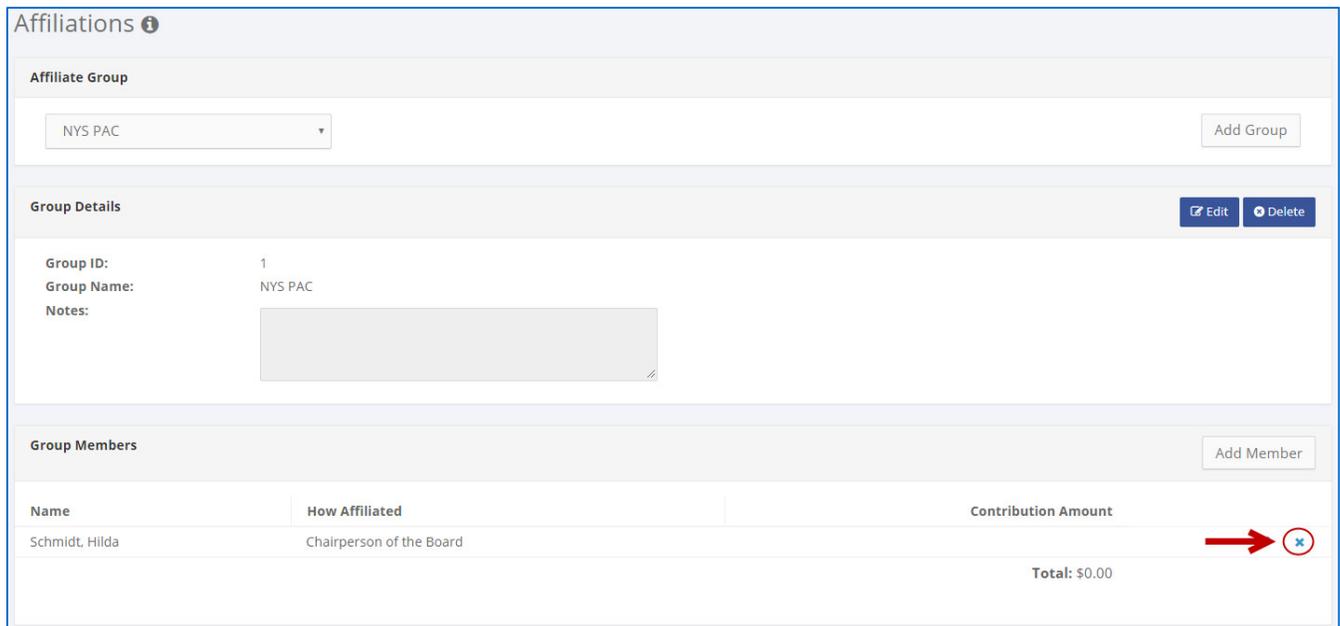
Section: "Group Members" (with "Add Member" button)

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

Total: \$0.00

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:

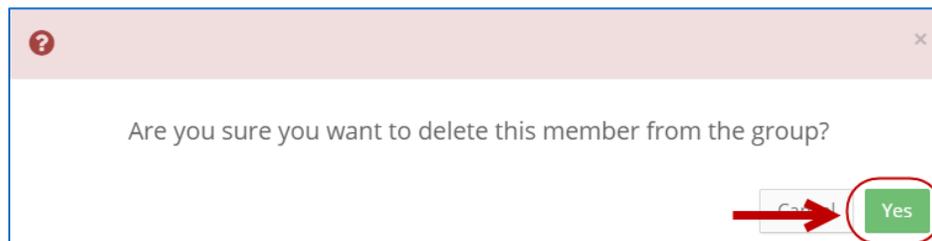
Group Members Add Member

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

Total: \$0.00

A red arrow points to a small 'x' icon in a circle next to the member Hilda Schmidt.

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

A red arrow points to the 'Yes' button, which is circled in red.

3. The group member has been successfully deleted.

✔ Your Transaction has been successfully deleted. ✕

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

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