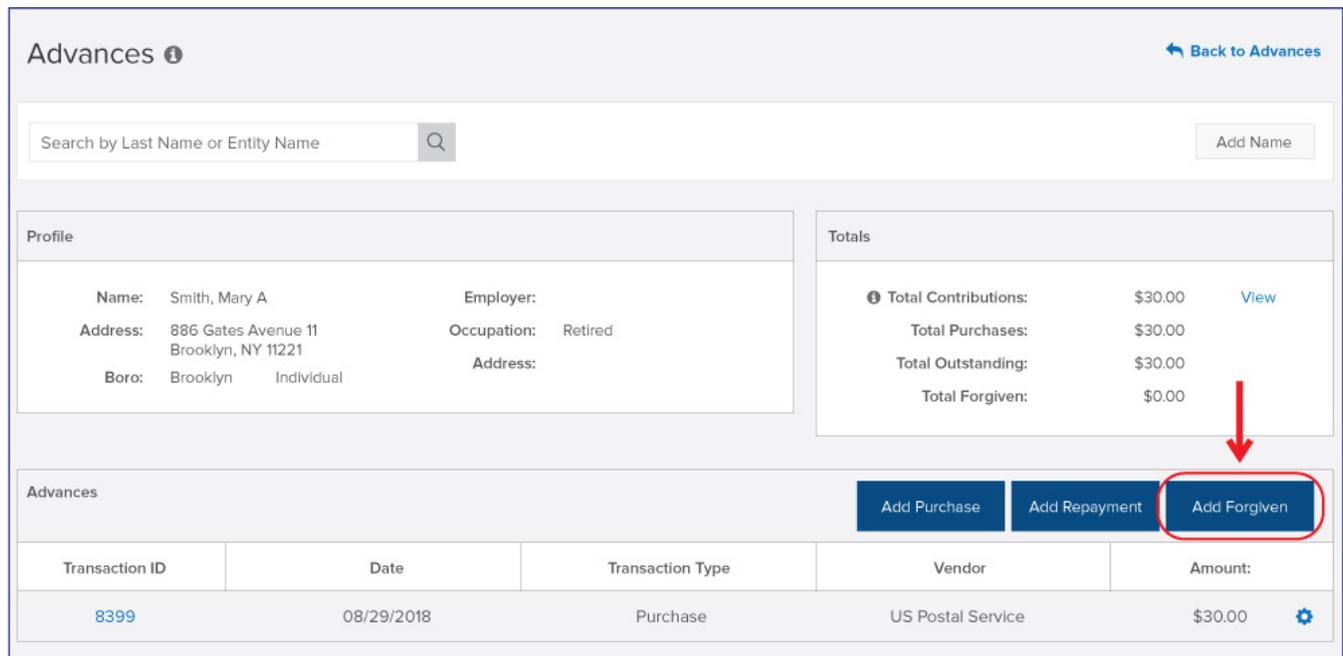


C-SMART HELP

FORGIVEN ADVANCES

HOW TO ADD A FORGIVEN ADVANCE

1. Go to the advancer's **Advances** page.
 - Click **Add Forgiven**.



The screenshot shows the 'Advances' page for a user named Mary A. Smith. The page includes a search bar, a profile section, a totals section, and a table of advances. The 'Add Forgiven' button is highlighted with a red circle and a red arrow pointing to it.

Advances ⓘ [Back to Advances](#)

Search by Last Name or Entity Name

Profile

Name: Smith, Mary A Employer:
Address: 886 Gates Avenue 11 Occupation: Retired
Brooklyn, NY 11221 Address:
Boro: Brooklyn Individual

Totals

Total Contributions: \$30.00 [View](#)
Total Purchases: \$30.00
Total Outstanding: \$30.00
Total Forgiven: \$0.00

Advances

Transaction ID	Date	Transaction Type	Vendor	Amount
8399	08/29/2018	Purchase	US Postal Service	\$30.00 <input type="button" value="⚙"/>

2. Enter and save the forgiven advance's details.
 - C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Forgiven Date:** Enter the date the advancer forgave the amount.
 - ◆ **Amount:** Enter the forgiven amount.
 - ◆ **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**.

Advances - Add Forgiven

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

Enter Details

***Forgiven Date:**

***Amount:** \$

Notes:
[For Campaign Use Only]



Important: When an advance is forgiven, it is considered an in-kind contribution from the advancer and is subject to contribution and expenditure limits and source restrictions.

3. The transaction has been successfully saved.

- At this point, C-SMART will return you to the advancer’s **Advances** page. The **Totals** box and list of advances/forgiven advances will be updated to reflect the newly saved transaction.

✔ Your transaction has been successfully saved.

Advances ⓘ[← Back to Advances](#)

Profile

Name: Smith, Mary A	Employer:
Address: 886 Gates Avenue 11 Brooklyn, NY 11221	Occupation: Retired
Boro: Brooklyn Individual	Address:

Totals

ⓘ Total Contributions:	\$30.00	View
Total Purchases:	\$30.00	
Total Outstanding:	\$0.00	
Total Forgiven:	\$30.00	

Advances

Transaction ID	Date	Transaction Type	Vendor	Amount:	
8402	09/27/2018	Forgiven		\$30.00	⚙
8399	08/29/2018	Purchase	US Postal Service	\$30.00	⚙

Best Practices: Write the C-SMART **Transaction ID** on all related documentation.

HOW TO EDIT A FORGIVEN ADVANCE

1. Go to the advancer's **Advances** page.
 - Click the **gear** next to the forgiven amount and then **Edit** OR enter the **Transaction ID** into the **Search Transaction ID** bar and click **Edit**.

Advances

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

Buttons: Add Purchase, Add Repayment, Add Forgiveness

Dropdown menu: Edit, Add Document

OR

Advances

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

Buttons: Add Purchase, Add Repayment, Add Forgiveness



Advance Purchase

Transaction ID: 8327 Statement: N/A

Buttons: + Add, Edit, - Delete

Back to Smith, Mary A

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

Totals	
Total Contributions:	\$30.00 View
Total Purchases:	\$30.00
Total Outstanding:	\$30.00
Total Forgiven:	\$0.00

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

Enter Details

*Forgiven Date:

*Amount: \$

Notes:
[For Campaign Use Only]

Entered By: srosar1389 Date: 09/27/2018 10:51 AM Updated By: srosar1389 Date: 09/27/2018 10:51 AM



Important: The timestamp at the bottom will be updated to show who last modified the transaction.

3. The transaction has been successfully edited.

✔ Your transaction has been successfully saved.

Advances ? [Back to Advances](#)

Search by Last Name or Entity Name

Profile

Name: Smith, Mary A Employer: Occupation: Retired

Address: 886 Gates Avenue 11 Brooklyn, NY 11221 Address:

Boro: Brooklyn Individual

Totals

Total Contributions:	\$30.00	View
Total Purchases:	\$30.00	
Total Outstanding:	\$0.00	
Total Forgiven:	\$30.00	

Advances

Transaction ID	Date	Transaction Type	Vendor	Amount:	
8402	09/27/2018	Forgiven		\$30.00	
8399	08/29/2018	Purchase	US Postal Service	\$30.00	

HOW TO DELETE A FORGIVEN ADVANCE

1. Go to the advancer's **Advances** page.
 - Click the **Transaction ID** for the forgiven amount OR enter it into the **Search Transaction ID** bar.

Advances ?

[Back to Advances](#)

Search by Last Name or Entity Name

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

Advances

Transaction ID	Date	Transaction Type	Vendor	Amount:
8403	08/29/2018	Purchase	US Postal Service	\$30.00 <input type="button" value="Settings"/>
8405	08/29/2018	Forgiven		\$30.00 <input type="button" value="Settings"/>

OR

C-SMART
New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

8405

8405 -- Advance Forgiven

Transactions Documentation Reports Submission

2. Click **Delete** to proceed.

Advance Forgiven
Transaction ID: 1295 Statement: N/A

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

Profile

Name: Minuit, Peter	Employer: NYC Dept. of Education
Address: 7306 Woodside Avenue Woodside, NY 11377	Occupation: Teacher
Boro: Queens Individual	Address: 3501 Union Street Flushing, NY 11354

Totals

Total Contributions:	\$8.71	View
Total Purchases:	\$8.71	
Total Outstanding:	\$0.71	
Total Forgiven:	\$800	

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

Are you sure you want to delete this transaction?

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

3. The forgiven advance has been successfully deleted.

✔ Your advance forgiven has been successfully deleted.

Advances [Back to Advances](#)

Search by Last Name or Entity Name

Profile

Name: Minuit, Peter	Employer: NYC Dept. of Education
Address: 7306 Woodside Avenue Woodside NY 11377	Occupation: Teacher
Boro: Queens Individual	Address: 3501 Union Street Flushing NY 11354

Totals

Total Contributions:	\$8.71	View
Total Purchases:	\$8.71	
Total Outstanding:	\$8.71	
Total Forgiven:	\$0.00	

Important:

- ◆ An unpaid advance is considered an in-kind contribution until repayment is reported.
- ◆ You should generally only delete a transaction if it was entered in error.