

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 with personal and employment details, a 'Totals' summary, 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		Totals	
Name:	Smith, Mary A	Total Contributions:	\$30.00 View
Address:	886 Gates Avenue 11 Brooklyn, NY 11221	Total Purchases:	\$30.00
Boro:	Brooklyn Individual	Total Outstanding:	\$30.00
Employer:		Total Forgiven:	\$0.00
Occupation:	Retired		
Address:			

Advances

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

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

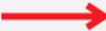
Profile		Totals	
Name: Smith, Mary A	Employer:	Total Contributions: \$30.00 View	
Address: 886 Gates Avenue 11 Brooklyn, NY 11221	Occupation: Retired	Total Purchases: \$30.00	
Boro: Brooklyn Individual	Address:	Total Outstanding: \$30.00	
		Total Forgiven: \$0.00	

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](#)

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: \$0.00
Total Forgiven: \$30.00

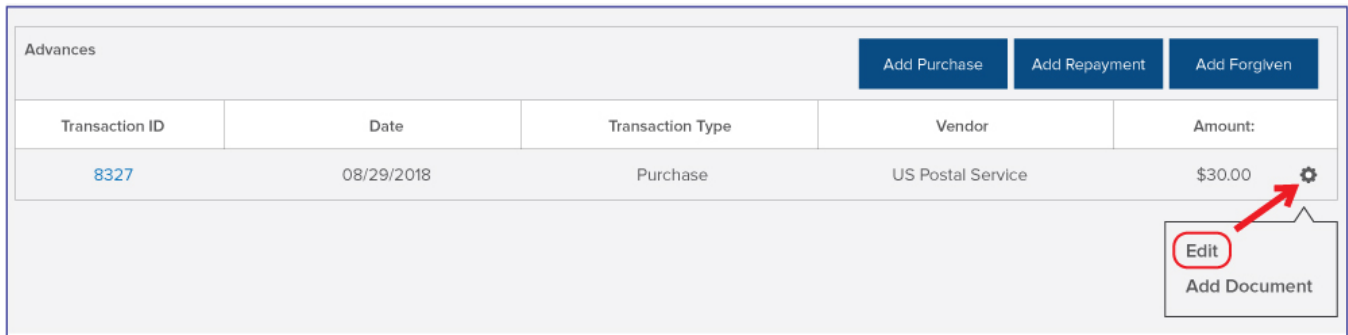
Advances

Transaction ID	Date	Transaction Type	Vendor	Amount:
8402	09/27/2018	Forgiven		\$30.00 <input type="button" value="⚙"/>
8399	08/29/2018	Purchase	US Postal Service	\$30.00 <input type="button" value="⚙"/>

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**.



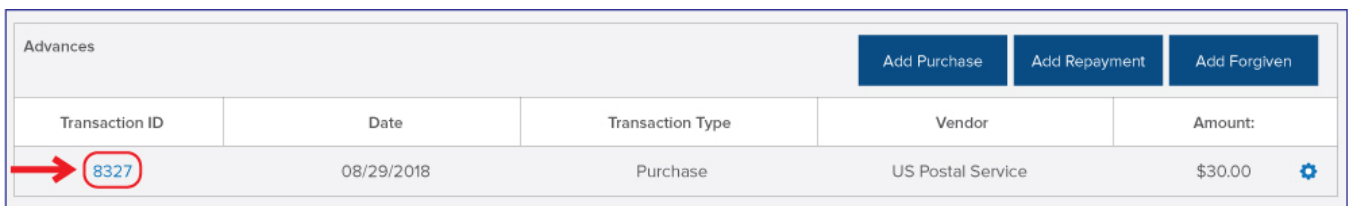
Advances

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

Buttons: Add Purchase, Add Repayment, Add Forgiven

Dropdown menu: Edit, Add Document

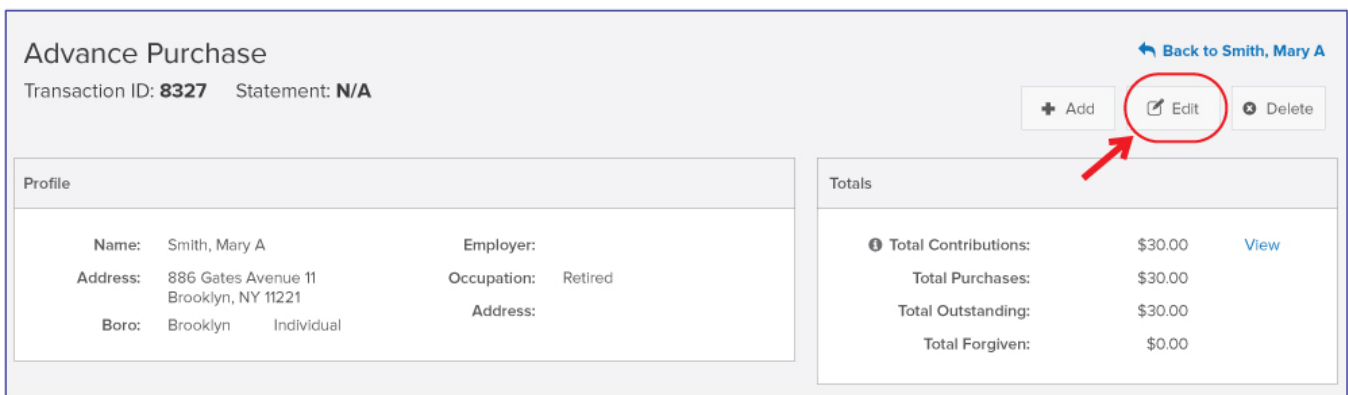
OR



Advances

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

Buttons: Add Purchase, Add Repayment, Add Forgiven



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: \$

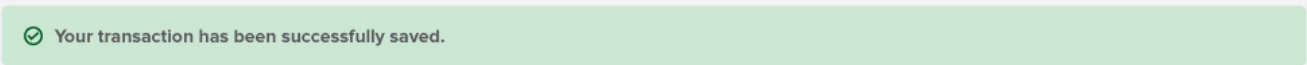
Notes:
[For Campaign Use Only]

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.



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: \$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.

The screenshot shows the 'Advances' page for a user. At the top, there is a search bar labeled 'Search by Last Name or Entity Name' and a 'Back to Advances' link. Below the search bar is a 'Profile' section with the following details: Name: Smith, Mary A; Address: 886 Gates Avenue 11, Brooklyn, NY 11221; Boro: Brooklyn; Individual; Employer: (blank); Occupation: Retired; Address: (blank). To the right of the profile is a 'Totals' section with the following data: Total Contributions: \$30.00 (with a 'View' link); Total Purchases: \$30.00; Total Outstanding: \$0.00; Total Forgiven: \$30.00. Below the totals is a table of 'Advances' with columns for Transaction ID, Date, Transaction Type, Vendor, and Amount. The table contains two rows: one for Transaction ID 8403 (Purchase, US Postal Service, \$30.00) and one for Transaction ID 8405 (Forgiven, \$30.00). The 8405 row is highlighted with an orange border. Above the table are three buttons: 'Add Purchase', 'Add Repayment', and 'Add Forgiven'.

OR

The screenshot shows the C-SMART header and navigation bar. The header includes the NYC logo, 'C-SMART New York City Campaign Finance Board', a user profile for 'Election Cycle 2021 - Sophia Rosario', and a 'Help' dropdown menu with the user ID 'srosar1389'. The navigation bar contains links for 'Transactions', 'Documentation', 'Reports', and 'Submission'. A search bar is located in the top right corner, containing the text '8405'. Below the search bar is a dropdown menu showing the search results: '8405 -- Advance Forgiven'.

2. Click **Delete** to proceed.

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

Advance Forgiven

Transaction ID: **1295** Statement: **N/A**

[← Back to Minuit, Peter](#)

+ 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	

?
✕

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 ?

Search by Last Name or Entity Name Q

[← Back to Advances](#)

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:

- ◆ After you delete a forgiven advance, the advance will remain considered an in-kind contribution until the advance is repaid.
- ◆ You should generally only delete a transaction if it was entered in error.