

C-SMART HELP

IN-KIND CONTRIBUTION DOCUMENTATION

HOW TO ADD IN-KIND CONTRIBUTION DOCUMENTATION

1. Go to the contributor's **In-Kind Contributions** page.
 - Click the contribution's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

The screenshot shows the 'In-Kind Contributions' page for a contributor. At the top, there is a search bar labeled 'Search by Last Name or Entity Name' and an 'Add Name' button. Below this is a 'Profile' section with the following details: Name: Gregory, Joel; Address: 36-12 31st Ave. 2C, New York NY 10019; Boro: Manhattan Individual; Employer: NYPD; Occupation: Police Officer; Address: (blank). To the right is a 'Totals' section: Total Contributions: \$250.00 (View); Total Matching Amount: \$0; Total Cash: \$0.00. Below the profile is a table of 'In-Kind Contributions' with columns: Transaction ID, Date Received, Contribution Type, Doing Business, Refunds, and Amount. The first row has Transaction ID 8386, Date Received 2/1/2019, Contribution Type Property Given, Doing Business No, Refunds (\$0.00) 0, and Amount \$250.00. A red arrow points to the Transaction ID 8386. An 'Add Contribution' button is in the top right of the table area.

OR

The screenshot shows the C-SMART navigation bar. On the left is the NYC C-SMART logo and 'New York City Campaign Finance Board'. In the center is the user profile 'Election Cycle 2021 - Sophia Rosario'. On the right is a search bar containing '8386' and a dropdown menu showing '8386 -- In-Kind Contribution'. A red arrow points to the dropdown item. Below the navigation bar are links for Transactions, Documentation, Reports, and Submission.

2. Click **Add Document**.

The screenshot shows the 'Documentation' section. At the top right is an 'Add Document' button circled in red, with a red arrow pointing to it. Below is a table with columns: Type, Date Linked, Submit Date, and Statement Number. The table currently shows 'No records'.

Best Practice: As a shortcut, you can click the **gear** next to the contribution and then **Add Document**.

3. Click **Upload PDF** and select a file from your computer.

➤ Complete the following fields:

- ◆ **Page(s):** Use a dash to select a page range (3-4) or a comma to select non-consecutive pages (1, 3). You also can choose **Select All Pages**.
- ◆ **Type:** Indicate the type of document. If the file contains multiple types, you can upload them together under a single type.

➤ Click **Save** to store the document in C-SMART and link it to the transaction.

Add Documentation

Last Name or Entity Name: Gregory, Joel Transaction ID: 8386 Amount: \$250.00 Date: 2/1/2019 Contribution Type: Property Given File Name: Packet 4 08-06-18.pdf

Select a PDF file to upload (File size limit 4 MB)

PDF Preview

IN-KIND CONTRIBUTION FORM

Committee Use Only
Transaction ID: _____

SOPHIA FOR COUNCIL
(Committee Name)

4. The document has been successfully uploaded.

✔ You have successfully linked page(s) 1 to Transaction ID: 8386

In-Kind Contribution Details

Transaction ID: 8386 Statement: N/A

[Back to Gregory, Joel](#)

Profile		Totals	
Name: Gregory, Joel	Employer: NYPD	Total Contributions: \$250.00 View	
Address: 36-12 31st Ave. 2C New York NY 10019	Occupation: Police Officer	Total Matching Amount: \$0	
Boro: Manhattan Individual	Address:	Total Cash: \$0.00	

Important:

- ◆ The maximum allowable file size is 4MB and only PDFs can be uploaded. For help with larger files, contact your Candidate Services liaison.
- ◆ The CFB does not receive uploaded documents until the underlying transaction is submitted in a disclosure statement or an amendment.

5. You can return to this page anytime and click **View PDF** to review your upload.

Documentation Add Document				
	Type	Date Linked	Submit Date	Statement Number
View PDF	In-Kind Contribution Form	2/4/2019		Delete

HOW TO DELETE IN-KIND CONTRIBUTION DOCUMENTATION

1. Go to the contributor's **In-Kind Contributions** page.
 - Click the contribution's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

In-Kind Contributions Back to In-Kind Contributions

Search by Last Name or Entity Name

Profile

Name: Gregory, Joel	Employer: NYPD
Address: 36-12 31st Ave. 2C New York NY 10019	Occupation: Police Officer
Boro: Manhattan Individual	Address:

Totals

Total Contributions:	\$250.00	View
Total Matching Amount:	\$0	
Total Cash:	\$0.00	

In-Kind Contributions Add Contribution

Transaction ID	Date Received	Contribution Type	Doing Business	Refunds	Amount
8386	2/1/2019	Property Given	No	(\$0.00) 0	\$250.00

OR

C-SMART
New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389


8386

Add Name

8386 -- In-Kind Contribution

Transactions Documentation Reports Submission


2. Click **Delete** under **Documentation** to proceed.

Documentation					Add Document
	Type	Date Linked	Submit Date	Statement Number	
View PDF	In-Kind Contribution Form	2/4/2019			 Delete

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

Are you sure you want to delete this document?

3. The document has been successfully deleted.

 The document has been successfully deleted.

In-Kind Contribution Details

Transaction ID: 8386 Statement: N/A

[Back to Gregory, Joel](#)

[+ Add](#) [Edit](#) [Delete](#) [Print Letter](#) [Send Email](#)

Profile		Totals	
Name: Gregory, Joel	Employer: NYPD	Total Contributions: \$250.00 View	
Address: 36-12 31st Ave. 2C New York NY 10019	Occupation: Police Officer	Total Matching Amount: \$0	
Boro: Manhattan Individual	Address:	Total Cash: \$0.00	

Important: You cannot delete documentation after it has been submitted to the CFB.
