

C-SMART HELP

IN-KIND CONTRIBUTION REFUNDS

HOW TO ADD AN IN-KIND CONTRIBUTION REFUND

1. Go to the contributor's **In-Kind Contributions** page.
 - Click the contribution's **Transaction ID** OR enter it into the **Search 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: \$500.00 [View](#)
Total Matching Amount: \$0
Total Cash: \$0.00

In-Kind Contributions

Transaction ID	Date Received	Contribution Type	Doing Business	Refunds	Amount
8386	2/1/2019	Property Given	No	(\$0.00) 0	\$500.00

OR

C-SMART Election Cycle 2021 - Sophia Rosario Help srosar1389

Transactions Documentation Reports Submission

8386

Add Name

8386 -- In-Kind Contribution

2. Click **Add Refund**.

Refunds

Transaction ID	Refund Date	Refund Type	Check Number	Explanation	Amount
No records					

3. Enter and save the refund details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Refund Date:** Enter the date the contribution was refunded.
 - ◆ **Amount:** Enter the amount refunded.
 - ◆ **Refund Type:** Indicate how the refund was issued. Select Refund if you are using a certified/bank check or **Other** if you are returning the good.
 - ◆ **Explanation:** If you chose **Other** as the refund type, enter an explanation.
 - ◆ **Check Number:** Enter the refund check number.
 - ◆ **Bank Account:** Select the account that is being drawn from. C-SMART will default to your principal bank account, but you may select a different one if necessary.
 - ◆ **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**.

Enter Details
Contribution Date Received: 2/1/2019 Contribution Amount: \$250.00

*Refund Date:

*Amount: \$

*Refund Type:

Explanation:

*Check Number:

*Bank Account:

Notes:
[For Campaign Use Only]

➔

4. The refund has been successfully saved.

✔ Your transaction has been successfully saved.

In-Kind Contribution Details

Transaction ID: 8386 Statement: N/A

[Back to Gregory, Joel](#)

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

- At this point, C-SMART will return you to the **In-Kind Contribution Details** page. The **Totals** box and list of refunds will be updated to reflect the newly saved transaction.

Best Practice: Write the C-SMART **Transaction ID** on the copy of the canceled committee check.

HOW TO EDIT AN IN-KIND CONTRIBUTION REFUND

- Go to the refund's **In-Kind Contribution Refund** page.
 - Click the contribution's **Transaction ID**, scroll down to **Refunds**, click the **gear** next to the refund and then **Edit Refund**. You can also use the **Search Name or Transaction ID** bar.

In-Kind Contributions Back to In-Kind Contributions

Search by Last Name or Entity Name

Profile		Totals	
Name: Gregory, Joel	Employer: NYPD	Total Contributions: \$0.00 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	

In-Kind Contributions

Transaction ID	Date Received	Contribution Type	Doing Business	Refunds	Amount
8386	2/1/2019	Property Given	No	(\$250.00) 1	\$250.00 <input type="button" value="⚙"/>

Refunds

Transaction ID	Refund Date	Refund Type	Check Number	Explanation	Amount
8387	2/1/2019	Refund	1234		\$250.00 <input type="button" value="⚙"/>

OR

NYC C-SMART New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario srosar1389

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8387

8387 -- ...In-Kind Contribution Refund

In-Kind Contribution Refund Back to In-Kind Contributions Detail

Transaction ID: 8387 Statement: N/A

Profile		Totals	
Name: Gregory, Joel	Employer: NYPD	Total Contributions: \$0.00 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	

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

Edit Refund Details Contribution Date Received: 2/1/2019 Contribution Amount: \$250.00

*Refund Date:

*Amount: \$

*Refund Type:

Explanation:


*Check Number:

*Bank Account:

Void Check: Void Date:

Notes:
[For Campaign Use Only]

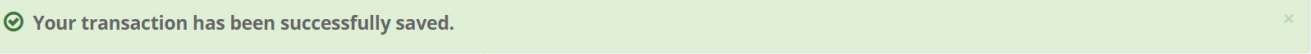
Entered By: srosar1389 Date: 02/01/2019 10:52 AM Updated By: srosar1389 Date: 02/01/2019 10:52 AM



Best practices: If the check was voided, click **Void Check** and enter the void date. This will also void the refund. If you issue a new check, you must create a new **In-Kind Contribution Refund**.

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

3. The refund has been successfully edited.



In-Kind Contribution Details

Transaction ID: 8386 Statement: N/A [Back to Gregory, Joel](#)

+ Add Edit Delete Print Letter Send Email

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:	\$75.00	View
Total Matching Amount:	\$0	
Total Cash:	\$0.00	

HOW TO DELETE AN IN-KIND CONTRIBUTION REFUND

1. Go to the refund's **In-Kind Contributions Refund** page.
 - Click the contribution's **Transaction ID**, scroll down to **Refunds**, and click the refund's **Transaction ID**. You can also use the **Search 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 Occupation: Police Officer
New York NY 10019 Address:
Boro: Manhattan Individual

Totals

Total Contributions: \$0.00 [View](#)
Total Matching Amount: \$0
Total Cash: \$0.00

In-Kind Contributions

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

Refunds

Transaction ID	Refund Date	Refund Type	Check Number	Explanation	Amount
8387	2/1/2019	Refund	1234		\$250.00

OR

NYC C-SMART Election Cycle 2021 - Sophia Rosario Help srosar1389

New York City Campaign Finance Board

Transactions Documentation Reports Submission

8387

8387 -- ...In-Kind Contribution Refund

2. Click **Delete** to proceed.

In-Kind Contribution Refund Back to In-Kind Contributions Detail

Transaction ID: 8387 Statement: N/A

Profile

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

Totals

Total Contributions: \$0.00 [View](#)
Total Matching Amount: \$0
Total Cash: \$0.00

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

Are you sure you want to delete this transaction?

3. The refund has been successfully deleted.

✔ Your Transaction 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	
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

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