

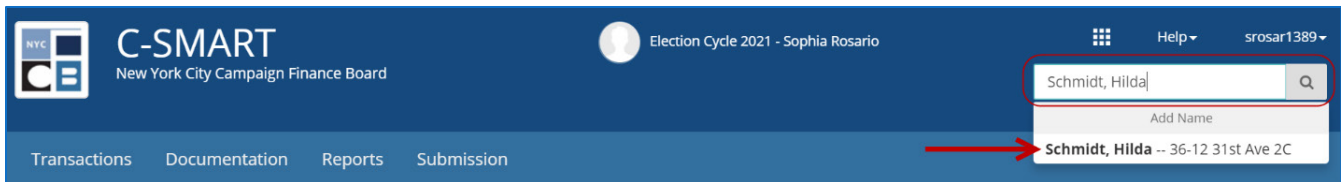
C-SMART HELP

INTERMEDIARY DOCUMENTATION

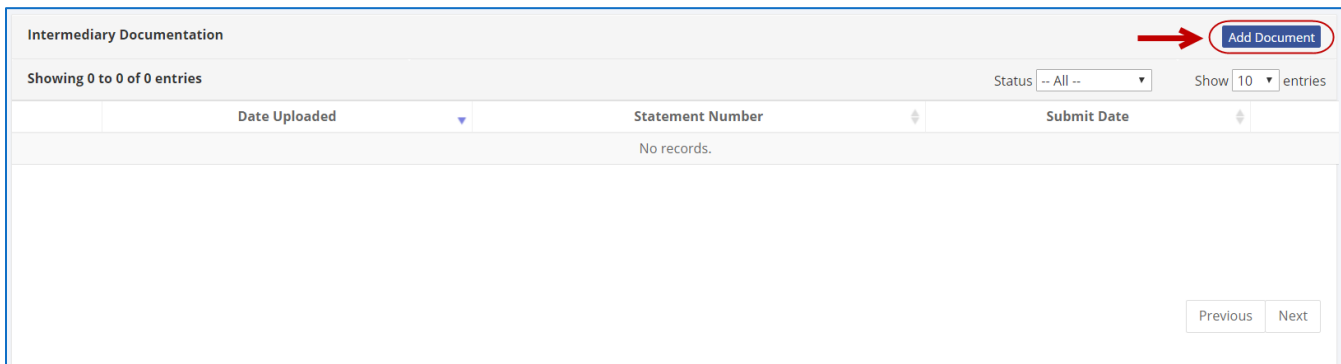
An intermediary is an individual or entity who you know is soliciting contributions for your campaign and/or who delivers (or directs someone else to deliver) contributions to your campaign or your fundraising agent. Intermediaries are covered in pages 27–28 in Chapter 2 of the [Campaign Finance Handbook](#).

HOW TO ADD INTERMEDIARY DOCUMENTATION

1. Go to the intermediary's **Name Details** page.
 - Use the **Search Name or Transaction ID** bar to find the intermediary.



2. Click **Add Document**.



3. Click **Upload PDF** and choose 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:** The default option will be **Intermediary Documentation**.

- Then, click **Save** to store the document in C-SMART and link it to the intermediary.

Add Documentation

Last Name or Entity Name: Schmidt, Hilda Date: 1/25/2019 Contribution Type: Intermediary Documentation

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

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Select page(s) and Type of Document (Indicate multiple pages by comma or dash)

Page(s) Select All Pages Type

1 Intermediary Documentation

→ [Save](#) [Cancel](#)

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 document will be submitted with your next disclosure statement or amendment.

4. The document has been successfully saved.

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

Intermediary Documentation

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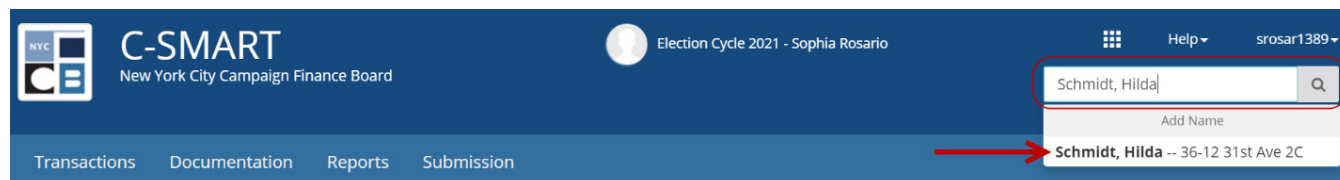
Showing 1 to 1 of 1 entries Status: -- All -- Show 10 entries

	Date Uploaded	Statement Number	Submit Date	
View	10/30/2018			Delete

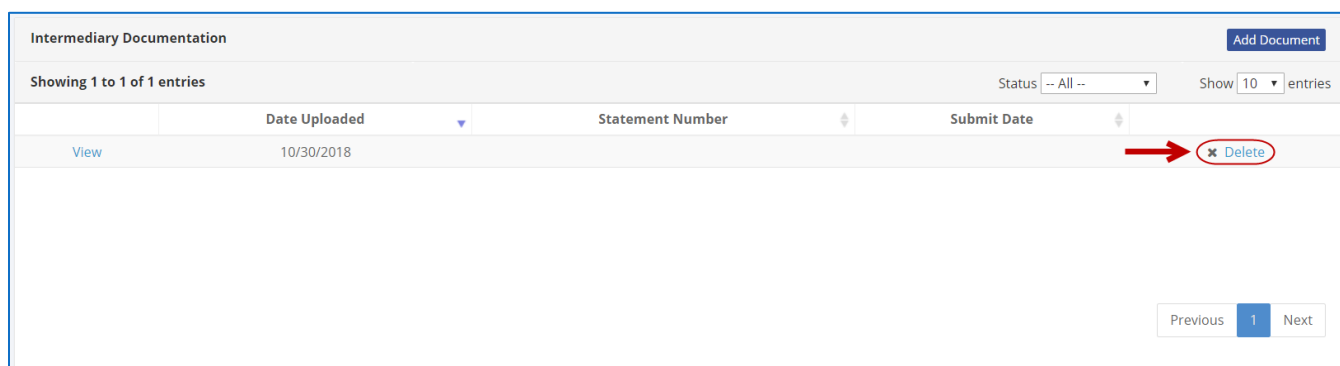
Previous 1 Next

HOW TO DELETE INTERMEDIARY DOCUMENTATION

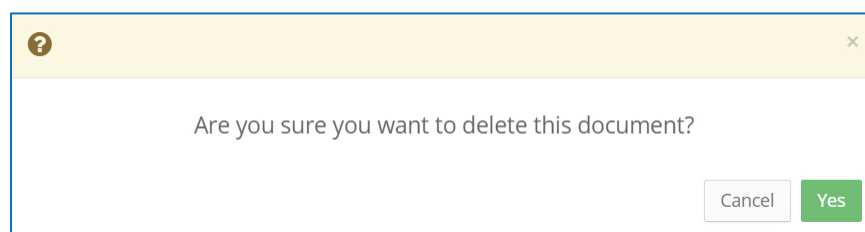
1. Go to the intermediary's **Name Details** page.
 - Enter the intermediary's name into the **Search Name or Transaction ID** bar.



2. Scroll down to **Intermediary Documentation** and click **Delete** once you are ready to proceed.



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



3. The document has been successfully deleted.

