# **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 <u>Campaign Finance</u> <u>Handbook</u>.

## 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.

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## 2. Click Add Document.

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- 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 nonconsecutive 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 Documen	tation	
Select a PDF file to upload (File size limit 4 MB)   Upload PDF	Select page(s) and Type of Document (in Page(s) Select All Pages  1	dicate multiple pages by comma or dash) Type 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.

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#### Page 3

#### HOW TO DELETE INTERMEDIARY DOCUMENTATION

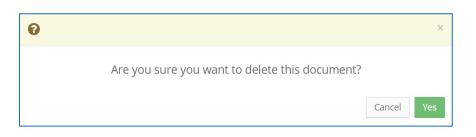
- 1. Go to the intermediary's **Name Details** page.
  - > Enter the intermediary's name into the **Search Name or Transaction ID** bar.

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

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



3. The document has been successfully deleted.

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