C-SMART HELP

LETTERS

You can use C-SMART to generate letters (as PDF or rich text files) and emails to your contributors and vendors for various reasons. The following are some examples of the types of letters that you may send:

MONETARY CONTRIBUTIONS
◆ Letters to respond to Invalid Matching Claim codes:
◆ Address Verification
◆ Contribution Affirmation
◆ Contribution Drawn on Business Account
◆ Contributor Under Eighteen Years of Age
◆ Missing/Incomplete Residential Information
◆ Reported Contributor Name Does Not Match Backup Document
◆ Missing Employment Information
◆ Thank You

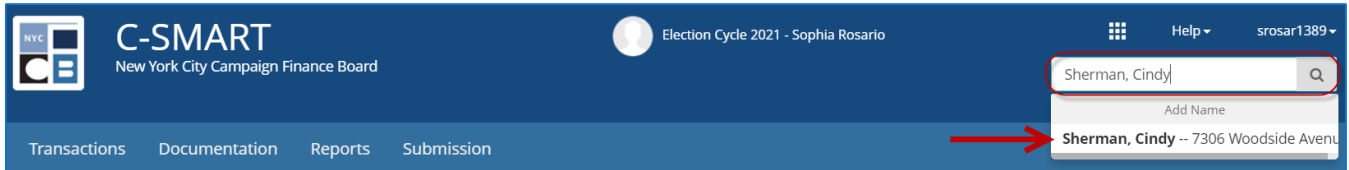| MONETARY CONTRIBUTION REFUNDS (PDF FILES ONLY) |
| --- |
| ◆ Cash-Over-Hundred Contribution |
| ◆ Over-the-Limit Doing Business |
| ◆ Over-the-Limit Contribution |
| ◆ Prohibited Contribution |
| ◆ Unregistered Political Committee |

IN-KIND CONTRIBUTIONS
◆ Missing Employment Information
◆ Thank You

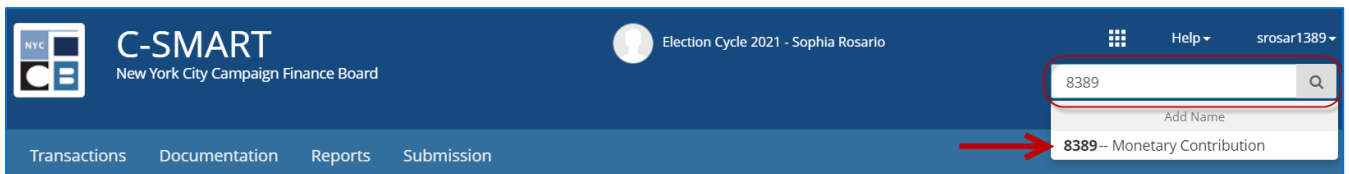| BILLS |
| --- |
| ◆ Subcontractor |

HOW TO PRINT A LETTER

1. Go to the contribution's **Monetary Contribution** details page.

   ➢ Find the contributor using the **Search Name or Transaction ID** bar and click on the contribution's **Transaction ID** OR enter it directly into the search bar.
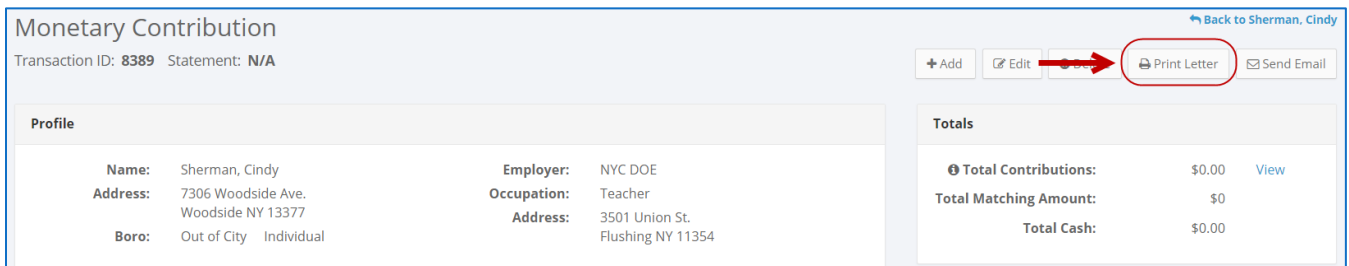

OR
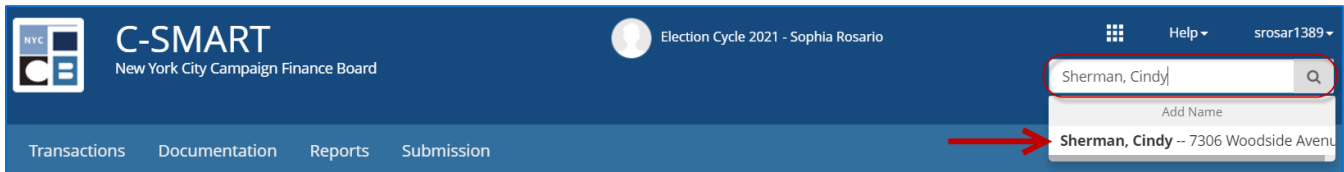

2. Click **Print Letter**.

3. Prepare the letter.

   ➢ On the window that opens, indicate the folowing:

      ◆ The type of letter

      ◆ The signature

      ◆ Type of file

      ◆ Letterhead margin

➢ Click **Print** to download the letter to your computer.

Important: To modify the letter before sending it, select **Rich Text**.

HOW TO SEND AN EMAIL

1. Go to the contribution's **Monetary Contribution** page.

   ➢ Enter the contributor's name into the **Search Name or Transaction ID** bar and then click on the contribution's **Transaction ID** OR enter it directly into the search bar.
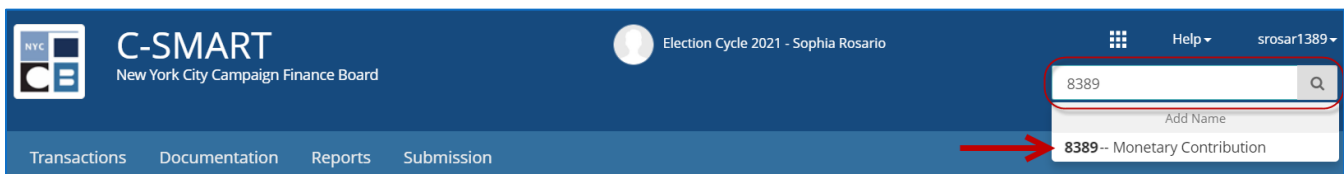

OR

2. Click **Send Email**.

3. Generate the email.

   ➢ On the window that opens, indicate the folowing:

      ◆ The recipient's email address

      ◆ The type of message

      ◆ The sending address

      ◆ The signature

➢ Then, click **Send** to send the email.

Important: You must have an email address saved for the contact.