

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

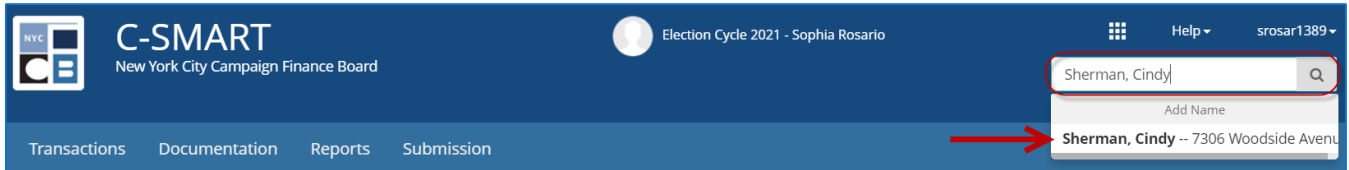
- ◆ [Missing Employment Information](#)
- ◆ Thank You

BILLS

- ◆ Subcontractor

HOW TO PRINT A LETTER

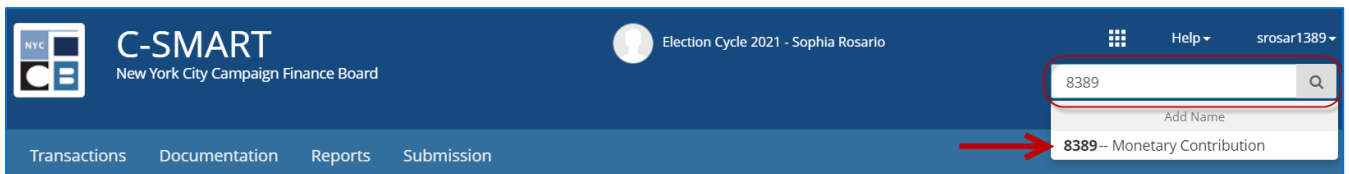
1. Go to the contribution's **Monetary Contribution** details page.
 - Find the contributor using the **Search Name or Transaction ID** bar and click on the contribution's **Transaction ID** OR enter it directly into the search bar.



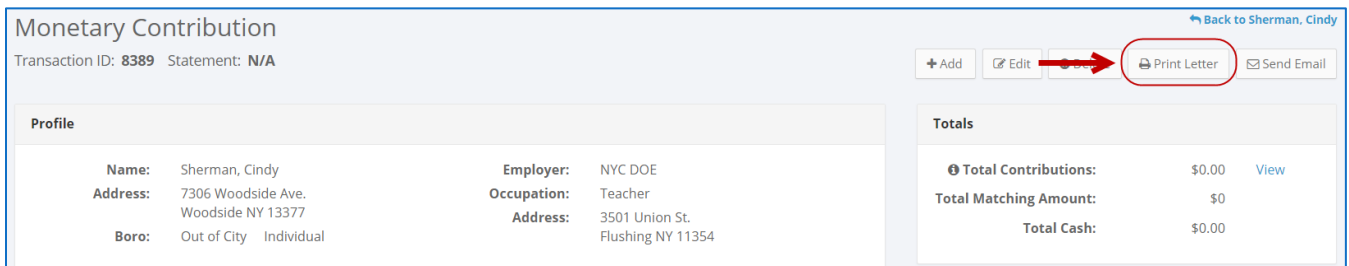
The screenshot shows a table of transactions. The table has columns for Transaction ID, Received Date, Transaction Type, Documentation, and Amount. The row with Transaction ID 8389 is circled in red, and a red arrow points to it.

Transaction ID	Received Date	Transaction Type	Documentation	Amount
8481	10/30/2018	Monetary Contribution Refund	<input type="checkbox"/>	(\$500.00)
8389	10/23/2018	Monetary Contribution	<input checked="" type="checkbox"/>	\$500.00

OR



2. Click **Print Letter**.



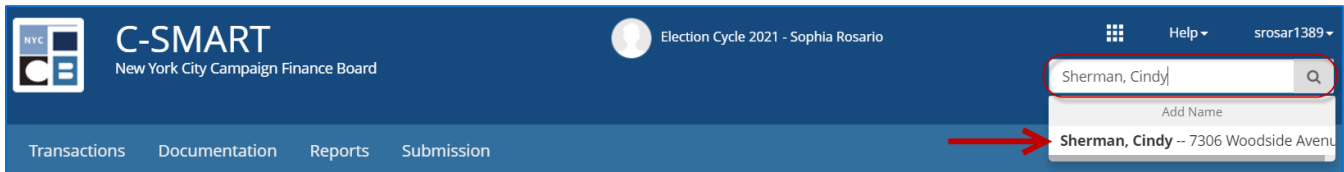
3. Prepare the letter.
 - On the window that opens, indicate the following:
 - ◆ The type of letter
 - ◆ The signature
 - ◆ Type of file
 - ◆ Letterhead margin

➤ 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.

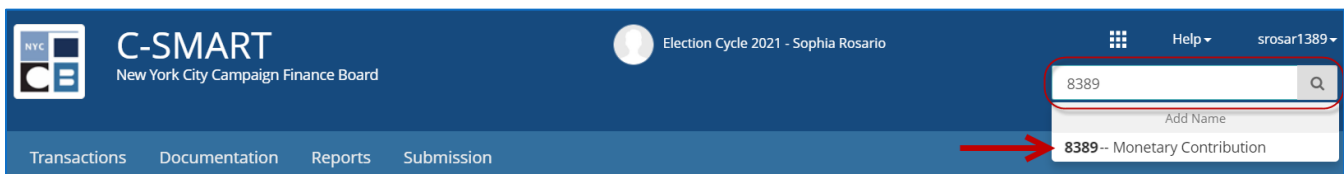


Transaction ID	Received Date	Transaction Type	Documentation	Amount
8481	10/30/2018	Monetary Contribution Refund	<input type="checkbox"/>	(\$500.00)
8389	10/23/2018	Monetary Contribution	<input checked="" type="checkbox"/>	\$500.00

Showing 1 to 2 of 2 entries

Previous 1 Next

OR



2. Click **Send Email**.

Monetary Contribution

Transaction ID: 8389 Statement: N/A

Back to Sherman, Cindy

+ Add Edit Delete **Send Email**

Profile		Totals	
Name: Sherman, Cindy	Employer: NYC DOE	Total Contributions: \$0.00	View
Address: 7306 Woodside Ave. Woodside NY 13377	Occupation: Teacher	Total Matching Amount: \$0	
Boro: Out of City Individual	Address: 3501 Union St. Flushing NY 11354	Total Cash: \$0.00	

3. Generate the email.
 - On the window that opens, indicate the following:
 - ◆ 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.

