

C-SMART HELP

LOAN DOCUMENTATION

HOW TO ADD LOAN DOCUMENTATION

- Go to the lender's **Loans** page.
 - Click the loan's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.
 - For a forgiven loan or repayment, use that **Transaction ID**.

Loan ⓘ [Back to Loans](#)

Search by Last Name or Entity Name

Profile		Totals	
Name:	Schmidt, Hilda	Total Contributions:	\$500.00 View
Address:	36-12 31st Ave 2C Astoria NY 11106	Total Loans:	\$150.00
Boro:	Queens Individual	Total Repayments:	\$125.00
Employer:	NYPD	Total Forgiven:	\$0.00
Occupation:	Police Officer		
Address:	306 W 54th Street New York NY 10019		

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8487	10/30/2018	\$150.00	(\$125.00)	(\$0.00)	\$25.00

OR

NYC **C-SMART**
New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

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Transactions Documentation Reports Submission

8487

Add Name

8487 -- Loan

Important: Loans, loan payments, and forgiven loans are each assigned separate transaction IDs.

- Click **Add Document** to proceed.

Documentation

Type	Date Linked	Submit Date	Statement Number
No records			

Best practices: As a shortcut, you can click the gear next to the transaction ID on the lender's **Loans** page and then 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 page numbers (1, 3). You also can choose **Select All Pages**.
- ◆ **Type:** Indicate the type of document (agreement, check, EFT, etc.) You can upload multiple documents under a single type if they are contained in one PDF.

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

Add Documentation

Last Name or Entity Name: Schmidt, Hilda **Transaction ID:** 8487 **Amount:** \$150.00 **Date:** 10/30/2018 **Loan Type:** Loan **File Name:** Loan Documentation.pdf

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

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

Page(s) Select All Pages Type:

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 CFB does not receive uploaded documents until the underlying transaction is submitted in a disclosure statement or an amendment.

4. The document has been successfully saved.

✔ You have successfully linked page(s) 1 to Transaction ID: 8487

Loan

Transaction ID: 8487 Statement: N/A

[Back to Schmidt, Hilda](#)

Profile		Totals	
Name:	Schmidt, Hilda	Total Contributions:	\$500.00 View
Address:	36-12 31st Ave 2C Astoria NY 11106	Total Loans:	\$150.00
Boro:	Queens Individual	Total Repayments:	\$0.00
Employer:	NYPD	Total Forgiven:	\$0.00
Occupation:	Police Officer		
Address:	306 W 54th Street New York NY 10019		

➤ At this point, C-SMART will return you to the **Loan** page. The document is now linked to the transaction.

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

Documentation					<input type="button" value="Add Document"/>
	Type	Date Linked	Submit Date	Statement Number	
View PDF	Loan Agreement	10/30/2018			<input type="button" value="Delete"/>

HOW TO DELETE LOAN DOCUMENTATION

1. Go to the lender's **Loans** page.
 - Click the loan's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.
 - For a forgiven loan or repayment, use that **Transaction ID**.

Loan Back to Loans

Search by Last Name or Entity Name

Profile

Name: Schmidt, Hilda **Employer:** NYPD
Address: 36-12 31st Ave 2C Astoria NY 11106 **Occupation:** Police Officer
Boro: Queens Individual **Address:** 306 W 54th Street New York NY 10019

Totals

Total Contributions:	\$500.00	View
Total Loans:	\$150.00	
Total Repayments:	\$125.00	
Total Forgiven:	\$0.00	

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8487	10/30/2018	\$150.00	(\$125.00)	(\$0.00)	\$25.00

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8487

Add Name

8487 -- Loan

Transactions Documentation Reports Submission

2. Click **Delete** under **Documentation** to proceed.

Documentation

	Type	Date Linked	Submit Date	Statement Number
View PDF	Loan Agreement	10/30/2018		<input type="button" value="Delete"/>

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

Are you sure you want to delete this document?

3. The document has been successfully deleted.

✔ The document has been successfully deleted. ✕

Loan [Back to Schmidt, Hilda](#)

Transaction ID: 8487 Statement: N/A + Add Edit Delete

Profile		Totals	
Name: Schmidt, Hilda	Employer: NYPD	Total Contributions: \$500.00 View	
Address: 36-12 31st Ave 2C Astoria NY 11106	Occupation: Police Officer	Total Loans: \$150.00	
Boro: Queens Individual	Address: 306 W 54th Street New York NY 10019	Total Repayments: \$0.00	
		Total Forgiven: \$0.00	

Important: You cannot delete documentation after it has been submitted to the CFB.