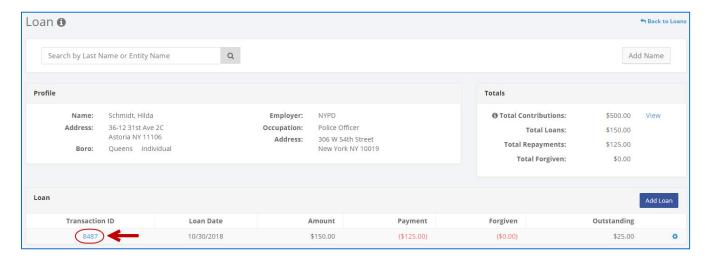# C-SMART HELP

LOAN DOCUMENTATION

HOW TO ADD 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**.

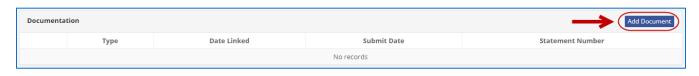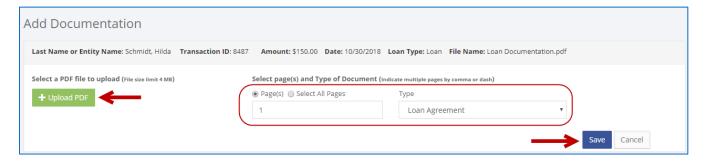<div align="center">**OR**</div>

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

2. Click **Add Document** to proceed.

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)

+ Upload PDF   ⦿ Page(s) ◯ Select All Pages   Type

                        1   Loan Agreement ▾

                                                              Save   Cancel
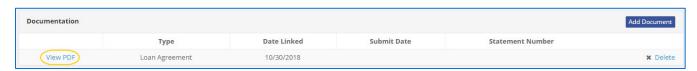

Important:

   ◆ The maximum allowable file size is 4MB and only PDFs can be uploaded. For help with larger files, contact your Candidate Services liaison.

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

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4. The document has been successfully saved.

⊘ **You have successfully linked page(s) 1 to Transaction ID: 8487**   ✕

Loan   ↩ Back to Schmidt, Hilda
Transaction ID: **8487**   Statement: **N/A**   **+ Add**   **✎ Edit**   **⊘ Delete**

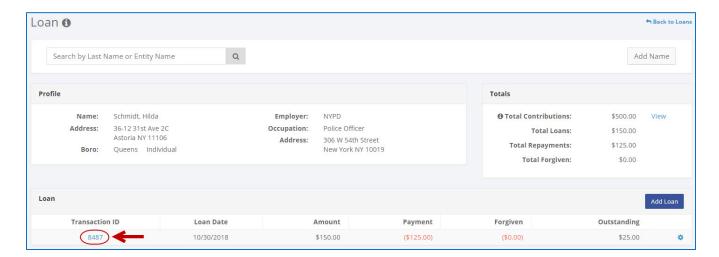| Profile			Totals	
Name:	Schmidt, Hilda	**Employer:** NYPD	❶ **Total Contributions:**	$500.00 View
Address:	36-12 31st Ave 2C	**Occupation:** Police Officer	**Total Loans:**	$150.00
	Astoria NY 11106	**Address:** 306 W 54th Street	**Total Repayments:**	$0.00
Boro:	Queens Individual	New York NY 10019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

   ➤ 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   Add Document

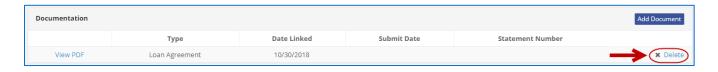|	Type	Date Linked	Submit Date	Statement Number	
View PDF	Loan Agreement	10/30/2018			✕ Delete

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**.
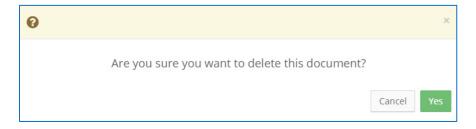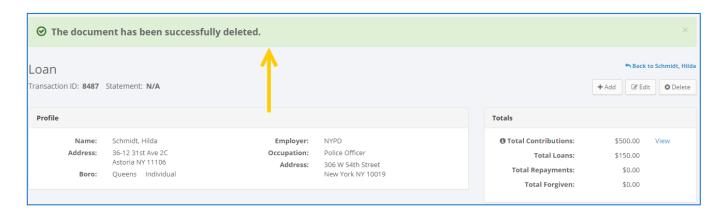

OR

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

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

3. The document has been successfully deleted.

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