

C-SMART HELP

LOAN REPAYMENTS

HOW TO ADD A LOAN REPAYMENT

1. Go to the lender's **Loans** page.
 - Click the loan's **Transaction ID** OR enter it into the **Search Transaction ID** bar.

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:	\$0.00	
Total Forgiven:	\$0.00	

Loan

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

OR

NYC **C-SMART** Election Cycle 2021 - Sophia Rosario Help srosar1389

New York City Campaign Finance Board

Transactions Documentation Reports Submission

8487

Add Name

8487 - Loan

2. Click **Add Repayment**.

Loan Repayment

Transaction ID	Paid Date	Bank Account	Check Number	Credit Card	Third Party Payor	Amount
No records						

3. Enter and save the repayment details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Paid Date:** Enter the repayment date.
 - ◆ **Amount:** Enter the repayment amount.
 - ◆ **Check/Money Order Number:** Enter the check or money order number if necessary.
 - ◆ **Bank Account:** Select the account the payment was made from. C-SMART will default to your primary bank account, but you can select a different one if necessary.
 - ◆ **Credit Card Account No.:** Complete this field if you are using a credit card.
 - ◆ **Third Party Payer:** Indicate if a party other than the campaign is repaying this loan.
 - ◆ **Notes:** Enter any additional information. The CFB does not receive what you enter in this field. Your notes will be saved across all related transactions.
- Then, click **Save**.

Enter Details
Loan Date: 10/30/2018 Amount: \$150.00

***Paid Date:**

***Amount:**

***Check / Money Order Number:**

***Bank Account:**

Credit Card Account No:

Third Party Payer:

Notes:
[For Campaign Use Only]

➔

4. Your repayment has been successfully saved.

✔ Your transaction has been successfully saved.

Loan

Transaction ID: 8487 Statement: N/A

[Back to Schmidt, Hilda](#)

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:	\$150.00	
Total Forgiven:	\$0.00	

- At this point, C-SMART will return you to the **Loan** page. The **Totals** box and list of repayments will be updated to reflect the newly saved transaction.

Best Practice: Write the C-SMART **Transaction ID** on the copy of the canceled committee check.

HOW TO EDIT A LOAN REPAYMENT

1. Go to the lender's **Loans** page.
 - Click the loan's **Transaction ID**, scroll down to **Loan Repayment**, click the **gear** and then **Edit Loan Repayment**. You can also use the **Search Name or Transaction ID** bar.

The screenshot shows the 'Loan' page with a search bar at the top. Below the search bar, there are two main sections: 'Profile' and 'Totals'. The 'Profile' section contains personal and employment details for Hilda Schmidt, a Police Officer at NYPD. The 'Totals' section shows financial summaries: Total Contributions (\$500.00), Total Loans (\$150.00), Total Repayments (\$125.00), and Total Forgiven (\$0.00). At the bottom, a table lists loan transactions. The first row is highlighted, with the Transaction ID '8487' circled in red and a red arrow pointing to it.

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

The screenshot shows the 'Loan Repayment' page with a table of repayment records. The first row is highlighted, with the Transaction ID '8491' circled in red and a red arrow pointing to it. Below the table, there are two buttons: 'Edit Loan Repayment' and 'Add Document', both circled in red.

Transaction ID	Paid Date	Bank Account	Check Number	Credit Card	Third Party Payor	Amount
8491	10/30/2018	Smart Savings Bank(****3522)	1238	Master Card(****1216)		150.00

OR

The screenshot shows the C-SMART navigation bar. On the right side, there is a search bar containing the number '8491'. A dropdown menu is open below the search bar, showing the selected item '8491 -- Loan Payment' with a red arrow pointing to it.

The screenshot shows the 'Loan Repayment' details page for Transaction ID 8491. At the top right, there are 'Edit' and 'Delete' buttons, with the 'Edit' button circled in red and a red arrow pointing to it. Below this, there are 'Profile' and 'Totals' sections. The 'Profile' section shows details for David Hernandez, a Teacher at NYC Department of Education. The 'Totals' section shows financial summaries: Total Contributions (\$500.00), Total Loans (\$150.00), Total Repayments (\$150.00), and Total Forgiven (\$0.00).

2. Modify the necessary fields and click **Save**.

Edit Repayment Details Loan Date: 10/30/2018 Loan Amount: \$150.00

*Paid Date: 10/30/2018

*Amount: \$ 125.00

*Check / Money Order Number: 1238

Void Check: Void Date:

*Bank Account: Smart Savings Bank(****3522)

Credit Card Account No: Master Card(****1216)

Third Party Payor:

Notes: [For Campaign Use Only]

Entered By: srosar1389 Date: 10/30/2018 05:20 PM Updated By: srosar1389 Date: 10/30/2018 05:20 PM

Save Cancel

Important:

- ◆ The timestamp at the bottom will be updated to show who last modified the transaction.

Best practices:

- ◆ If the check was voided, click **Void Check** and enter the void date. This will also void the repayment. If you issue a new check, you must create a new repayment in C-SMART.

3. The repayment has been successfully edited.

✔ Your transaction has been successfully saved.

Loan [Back to Hernandez, David](#)

Transaction ID: 8490 Statement: N/A + Add Edit Delete

Profile	
Name: Hernandez, David	Employer: NYC Department of Education
Address: 75-24 Broadway 1B Queens NY 11373	Occupation: Teacher
Boro: Queens Individual	Address: 3501 Union Street Flushing NY 11354

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

HOW TO DELETE A LOAN REPAYMENT

1. Go to the lender's **Loans** page.
 - Click the loan's **Transaction ID**, scroll down to **Loan Repayment**, and click the repayment's **Transaction ID**. You can also use the **Search Name or Transaction ID** bar.

The screenshot shows the 'Loan' page for a user. At the top, there is a search bar labeled 'Search by Last Name or Entity Name' and a 'Back to Loans' link. Below this is a 'Profile' section with fields for Name, Address, Boro, Employer, Occupation, and Address. To the right is a 'Totals' section with a table of financial data. At the bottom, there is a 'Loan' table with columns for Transaction ID, Loan Date, Amount, Payment, Forgiven, and Outstanding. The Transaction ID '8487' is circled in red with a red arrow pointing to it.

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

The screenshot shows the 'Loan Repayment' page. It features a table with columns for Transaction ID, Paid Date, Bank Account, Check Number, Credit Card, Third Party Payor, and Amount. The Transaction ID '8488' is circled in red with a red arrow pointing to it.

Transaction ID	Paid Date	Bank Account	Check Number	Credit Card	Third Party Payor	Amount
8488	10/30/2018	Smart Savings Bank(****3522)	1239	Master Card(****1216)		125.00

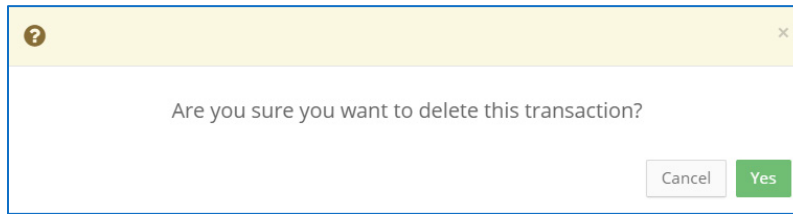
OR

The screenshot shows the C-SMART navigation bar. It includes the NYC logo, the text 'C-SMART New York City Campaign Finance Board', a user profile for 'Election Cycle 2021 - Sophia Rosario', and a search bar. The search bar contains '8488' and has a dropdown menu open showing '8488 -- Loan Payment' selected. A red arrow points to the search bar area.

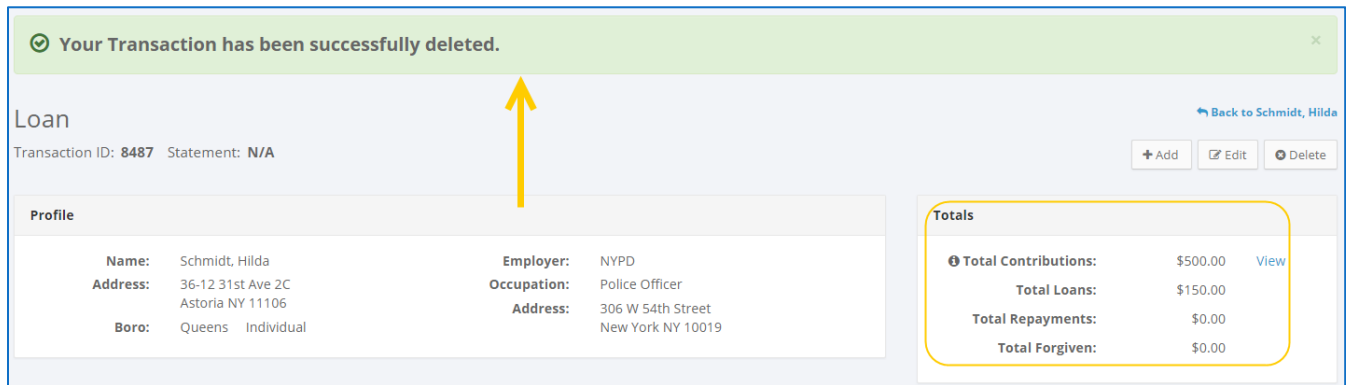
2. Click **Delete** to proceed.

The screenshot shows the 'Loan Repayment' details page for Transaction ID 8488. It includes a 'Profile' section, a 'Totals' section, and a '+ Add' button. A red circle highlights a 'Delete' button next to the '+ Add' button, with a red arrow pointing to it.

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



3. The repayment has been successfully deleted.



The screenshot shows a web interface for loan management. At the top, a green banner with a checkmark icon displays the message: "Your Transaction has been successfully deleted." Below this, the page title is "Loan" and the transaction ID is "8487". A yellow arrow points from the success message down to the "Profile" section. The "Profile" section contains personal and employment details for Hilda Schmidt. To the right, a "Totals" summary box is highlighted with a yellow border, showing financial figures for contributions, loans, repayments, and forgiven amounts. Buttons for "Add", "Edit", and "Delete" are visible in the top right, along with a "Back to Schmidt, Hilda" link.

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

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

Important: You should generally only delete a transaction if it was entered in error.