

# C-SMART HELP

## LOAN REPAYMENTS

### HOW TO ADD A LOAN REPAYMENT

1. Go to the transaction'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**

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

**Totals**

Total Contributions:	\$500.00	<a href="#">View</a>
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

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 details of the repayment.

- C-SMART will alert you if you leave out required information. Complete the fields below:
  - ◆ **Paid Date:** Enter the date the repayment was made.
  - ◆ **Amount:** Enter the amount of the repayment.
  - ◆ **Check/Money Order Number:** Enter the check or money order number.
  - ◆ **Bank Account:** Select the account from which the payment was made. C-SMART will default to your primary bank account, but you may select a different one if applicable.
  - ◆ **Credit Card Account No.:** Indicate the credit account 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: 10/30/2018

\*Amount: \$150.00

\*Check / Money Order Number: 1239

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

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

Third Party Payer:

Notes:  
[For Campaign Use Only]

Save Cancel

### 4. Your repayment has been successfully saved.

✔ Your transaction has been successfully saved.

Loan [Back to Schmidt, Hilda](#)

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

**Profile**

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

**Totals**


Total Contributions:	\$500.00	<a href="#">View</a>
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.

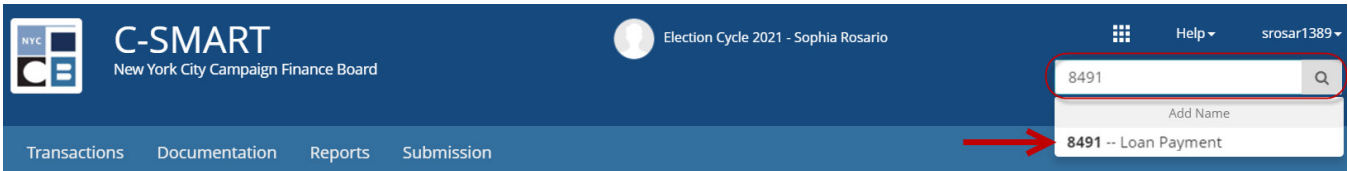
**Best Practice:** Write the C-SMART **Transaction ID** on the copy of the canceled repayment check.

## HOW TO EDIT A LOAN REPAYMENT

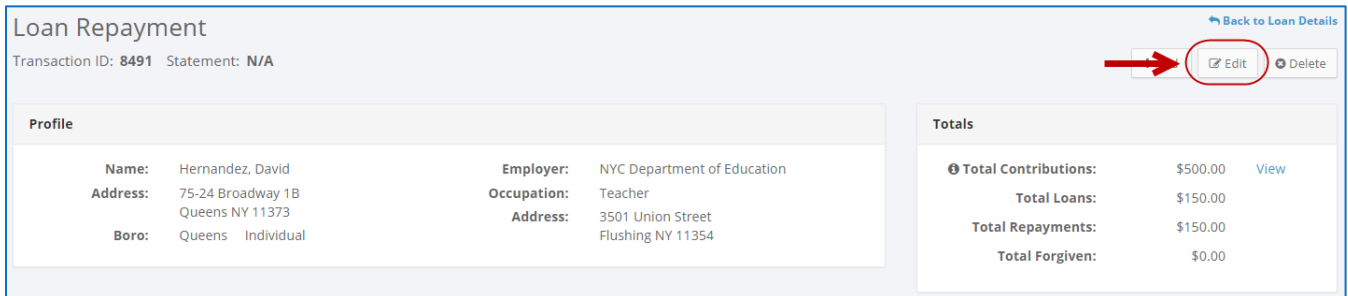
1. Go to the transaction's **Loan Repayment** page.
  - Click the **gear** and then **Edit** OR enter the **Transaction ID** into the **Search Transaction ID** bar and then click **Edit**.

Loan Repayment							<a href="#">Add Repayment</a>
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	
							<a href="#">Edit Loan Repayment</a>
							<a href="#">Add Document</a>

OR



The screenshot shows the top navigation bar of the C-SMART system. On the left is the NYC C-SMART logo. In the center, it says "Election Cycle 2021 - Sophia Rosario". On the right, there is a search bar containing the number "8491". Below the search bar, a dropdown menu is open, showing "Add Name" and "8491 -- Loan Payment". A red arrow points to the "8491 -- Loan Payment" option.



The screenshot shows the "Loan Repayment" details page. At the top, it says "Transaction ID: 8491 Statement: N/A". On the right, there are "Edit" and "Delete" buttons, with a red arrow pointing to the "Edit" button. Below this, there are two main sections: "Profile" and "Totals".

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

Totals	
<b>Total Contributions:</b>	\$500.00 <a href="#">View</a>
<b>Total Loans:</b>	\$150.00
<b>Total Repayments:</b>	\$150.00
<b>Total Forgiven:</b>	\$0.00

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

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

**\*Paid Date:**

**\*Amount:** \$

**\*Check / Money Order Number:**

**Void Check:**  **Void Date:**


**\*Bank Account:**

**Credit Card Account No:**

**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



**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 loan repayment.

3. The repayment has been successfully edited.

 **Your transaction has been successfully saved.**

**Loan** [Back to Hernandez, David](#)

Transaction ID: 8490 Statement: N/A

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

**Totals**

<b>Total Contributions:</b>	\$500.00	<a href="#">View</a>
<b>Total Loans:</b>	\$150.00	
<b>Total Repayments:</b>	\$125.00	
<b>Total Forgiven:</b>	\$0.00	

## HOW TO DELETE A LOAN REPAYMENT

1. Go to the transaction's **Loan Repayment** page.
  - Click the repayment's **Transaction ID** OR enter it into the **Search Transaction ID** bar.

The screenshot shows the 'Loan' page. At the top, there is a search bar labeled 'Search by Last Name or Entity Name' and an 'Add Name' button. Below this is a 'Profile' section with fields for Name (Schmidt, Hilda), Address (36-12 31st Ave 2C, Astoria NY 11106), Boro (Queens Individual), Employer (NYPD), Occupation (Police Officer), and Address (306 W 54th Street, New York NY 10019). To the right is a 'Totals' section with: Total Contributions: \$500.00, Total Loans: \$150.00, Total Repayments: \$125.00, and Total Forgiven: \$0.00. Below the profile is a 'Loan' table with columns: Transaction ID, Loan Date, Amount, Payment, Forgiven, and Outstanding. The first row has Transaction ID 8487 (circled in red with a red arrow pointing to it), Loan Date 10/30/2018, Amount \$150.00, Payment (\$125.00), Forgiven (\$0.00), and Outstanding \$25.00. There is an 'Add Loan' button in the top right of the loan table.

The screenshot shows the 'Loan Repayment' page. It features a table with columns: Transaction ID, Paid Date, Bank Account, Check Number, Credit Card, Third Party Payor, and Amount. The first row has Transaction ID 8488 (circled in red with a red arrow pointing to it), Paid Date 10/30/2018, Bank Account Smart Savings Bank(\*\*\*\*3522), Check Number 1239, Credit Card Master Card(\*\*\*\*1216), and Amount 125.00. There is an 'Add Repayment' button in the top right.

OR

The screenshot shows the top navigation bar of the C-SMART system. It includes the NYC logo, the text 'C-SMART New York City Campaign Finance Board', the user name 'Election Cycle 2021 - Sophia Rosario', and a user ID 'srosar1389'. On the right, there is a search bar containing '8488' (circled in red) and a magnifying glass icon. Below the search bar is a dropdown menu with the option '8488 -- Loan Payment' (indicated by a red arrow).

2. Click **Delete** to proceed.

The screenshot shows the 'Loan Repayment' page for Transaction ID 8488. The 'Delete' button in the top right corner is circled in red with a red arrow pointing to it. The page layout is similar to the previous screenshots, showing profile and totals information.

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

A confirmation dialog box with a yellow header and a question mark icon. The text inside reads 'Are you sure you want to delete this transaction?'. At the bottom, there are two buttons: 'Cancel' and 'Yes' (highlighted in green).

3. The repayment has been successfully deleted.

✔ Your Transaction has been successfully deleted. ✕

Loan [Back to Schmidt, Hilda](#)

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

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

**Totals**

Total Contributions:	\$500.00	<a href="#">View</a>
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.