

C-SMART HELP

FUNDRAISING EVENTS

HOW TO ADD AN EVENT

1. Go to **Fundraising Events**.
 - Hover your cursor over **Transactions** and click **Fundraising Events**.

The screenshot shows the C-SMART New York City Campaign Finance Board interface. The user is logged in as Sophia Rosario for the 2021 Election Cycle. The 'Transactions' menu is expanded, showing various categories. The 'FUNDRAISING EVENTS' button in the 'TOOLS' section is highlighted with a red circle and a red arrow pointing to it.

2. Click **Add Event**.

The screenshot shows the 'Fundraising Events' page. The 'Add Event' button is circled in red and has a red arrow pointing to it. Below the button is a table with one entry:

Date	Event Name	Host Name	Venue Name
4/18/2018	Sophia's Spring Fundraiser		CFB Office

Showing 1 to 1 of 1 entries

3. Enter and save the event details.

- C-SMART will alert you if you leave out required information. Complete the fields below:

- ◆ **Event Name:** Enter the name of the event.
- ◆ **Host Name:** If necessary, indicate the person or organization hosting the event.
- ◆ **Event Date:** Enter the date when the event occurred.
- ◆ **Venue Name:** Enter where the event took place.
- ◆ **Location:** Enter the venue's address.

- Then, click **Save**.

Fundraising Events – Add New Event

Enter Details

* Event Name: Elect Sophia Fundraiser

Host Name: Clark, Patty

Event Date: 10/27/2018

Venue Name: Jimmy's Pizzeria

Location: 100 Church Street Floor/ Apt/ Suite
New York New York 10007

Save Cancel

Best Practice: Use the tab key to navigate between fields. Upon clicking Save, if a warning message pops up, read it. It may refer to a potential compliance issue you need to address immediately.

4. The event has been successfully saved.

- C-SMART will return you to the **Fundraising Events** page. The list of events will be updated to show the newly saved event.

✔ The Fundraising Event has been successfully saved.

Fundraising Events ⓘ

Select Event

Select Event Add Event

Fundraising Events Show 10 entries

Date	Event Name	Host Name	Venue Name
4/18/2018	Sophia's Spring Fundraiser		CFB Office
10/27/2018	Elect Sophia Fundraiser	Clark, Patty	Jimmy's Pizzeria

Showing 1 to 2 of 2 entries

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Best practices: The [Fundraising Events Report](#) allows you to review a list of all your fundraisers along with the contributions and expenditures related to each. The **Fundraising Events Maintenance** will allow you to link contributions, bills, and other transactions related to a fundraiser.

HOW TO EDIT AN EVENT

1. Go to the **Fundraising Events** page and click the **Event Name**.

Fundraising Events

Select Event

Select Event Add Event

Fundraising Events Show 10 entries

Date	Event Name	Host Name	Venue Name
4/18/2018	Sophia's Spring Fundraiser		CFB Office
10/27/2018	Elect Sophia Fundraiser	Clark, Patty	Jimmy's Pizzeria

Showing 1 to 2 of 2 entries Previous 1 Next

2. Click **Edit**.

Elect Sophia Fundraiser [Back to Fundraising Events](#)

[Edit](#) [Delete](#)

Event Details

Event Name: Elect Sophia Fundraiser
Host Name: Clark, Patty
Event Date: 10/27/2018
Venue Name: Jimmy's Pizzeria
Location: 100 Church Street
New York NY 10007

Entered By: srosar1389 Date: 10/26/2018 02:40 PM Updated By: srosar1389 Date: 10/26/2018 02:40 PM

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

Fundraising Events – Edit Event

Enter Details

* Event Name: Elect Sophia Fundraiser

Host Name: Clark, Patty

Event Date: 10/27/2018

Venue Name: Jimmy's Restaurant

Location: 100 Church Street Floor/ Apt/ Suite
New York New York 10007

Entered By: srosar1389 Date: 10/26/2018 02:40 PM Updated By: srosar1389 Date: 10/26/2018 02:40 PM

Save Cancel

Important: The timestamp at the bottom will be updated to show who last modified the transaction.

4. The event has been successfully edited.

✔ The Fundraising Event has been successfully updated.

Elect Sophia Fundraiser

Back to Fundraising Events

Edit Delete

Event Details

Event Name: Elect Sophia Fundraiser

Host Name: Clark, Patty

Event Date: 10/27/2018

Venue Name: Jimmy's Restaurant

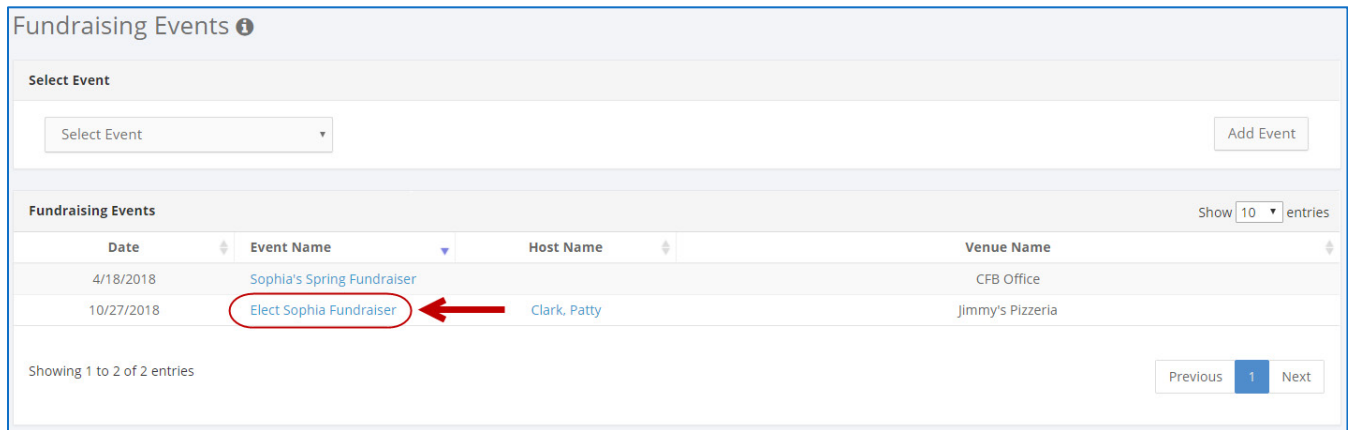
Location: 100 Church Street
New York NY 10007

Entered By: srosar1389 Date: 10/26/2018 02:40 PM Updated By: srosar1389 Date: 10/26/2018 02:43 PM

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HOW TO DELETE AN EVENT

1. Go to the **Fundraising Events** page and click the **Event Name**.



Fundraising Events ?

Select Event

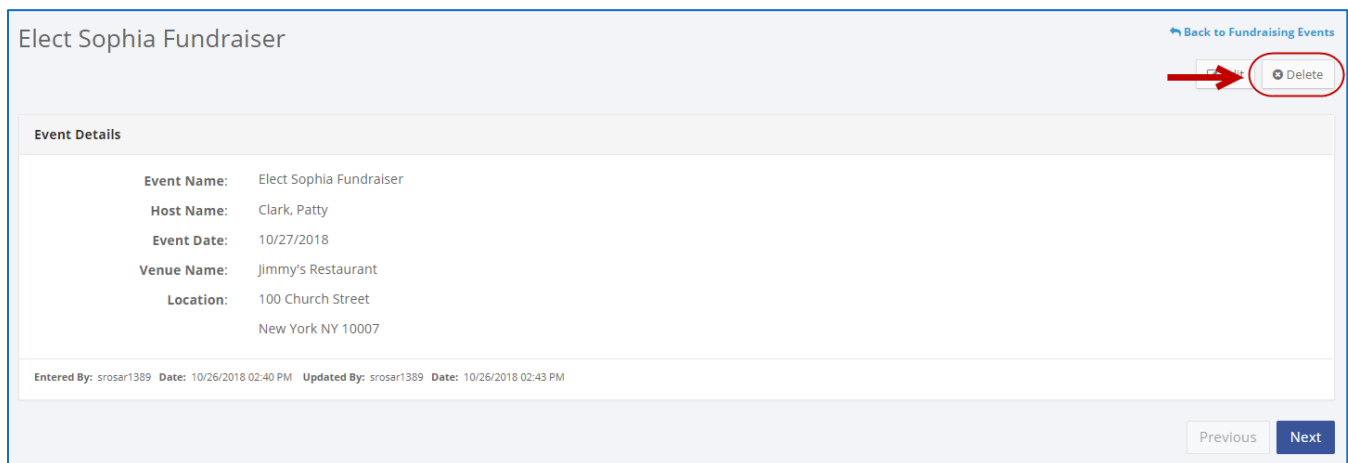
Select Event ▼ Add Event

Fundraising Events Show 10 entries

Date	Event Name	Host Name	Venue Name
4/18/2018	Sophia's Spring Fundraiser		CFB Office
10/27/2018	Elect Sophia Fundraiser	Clark, Patty	Jimmy's Pizzeria

Showing 1 to 2 of 2 entries Previous 1 Next

2. Click **Delete** to proceed.



Elect Sophia Fundraiser Back to Fundraising Events

Delete

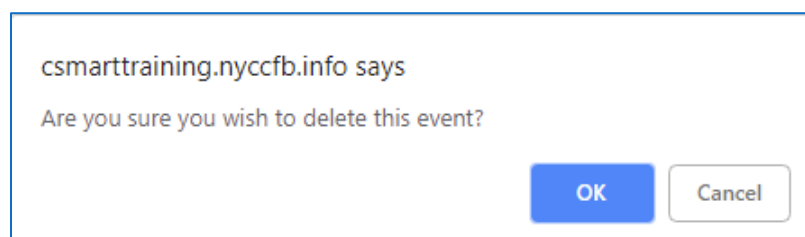
Event Details

Event Name: Elect Sophia Fundraiser
Host Name: Clark, Patty
Event Date: 10/27/2018
Venue Name: Jimmy's Restaurant
Location: 100 Church Street
New York NY 10007

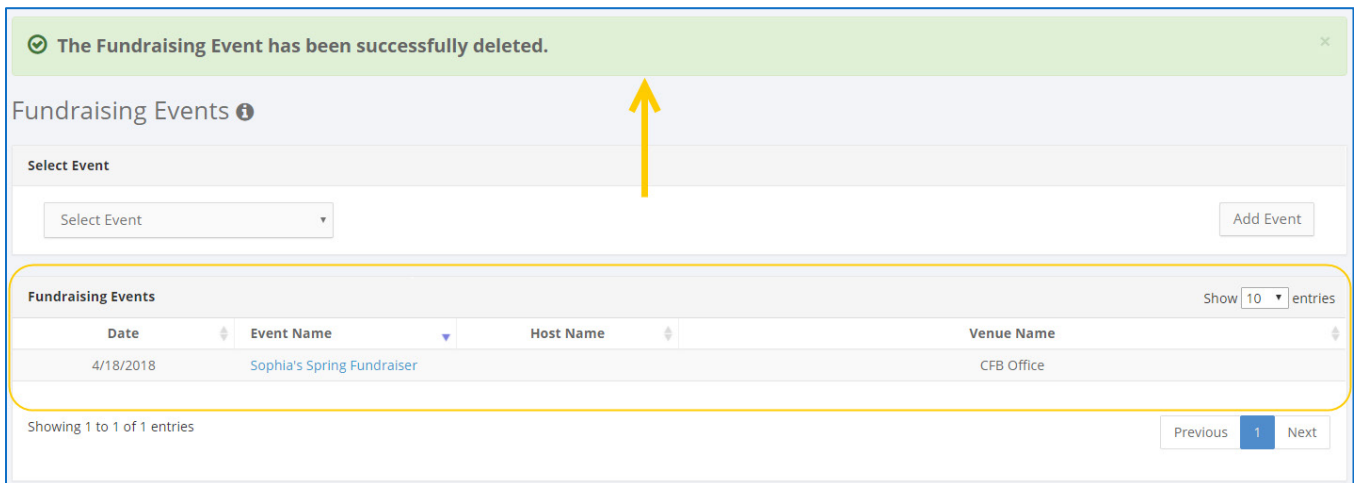
Entered By: srosar1389 Date: 10/26/2018 02:40 PM Updated By: srosar1389 Date: 10/26/2018 02:43 PM

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- Click **OK** on the dialog box that opens to complete the deletion.



3. The event has been successfully deleted.



The screenshot displays a web interface for managing fundraising events. At the top, a green notification bar with a checkmark icon states: "The Fundraising Event has been successfully deleted." Below this, the page title "Fundraising Events" is followed by a "Select Event" section containing a dropdown menu and an "Add Event" button. A yellow arrow points from the dropdown menu area up to the notification bar. The main content area features a table titled "Fundraising Events" with columns for Date, Event Name, Host Name, and Venue Name. The table contains one entry: "4/18/2018", "Sophia's Spring Fundraiser", and "CFB Office". The table is set to show 10 entries, and the current page is 1 of 1.

Date	Event Name	Host Name	Venue Name
4/18/2018	Sophia's Spring Fundraiser		CFB Office

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