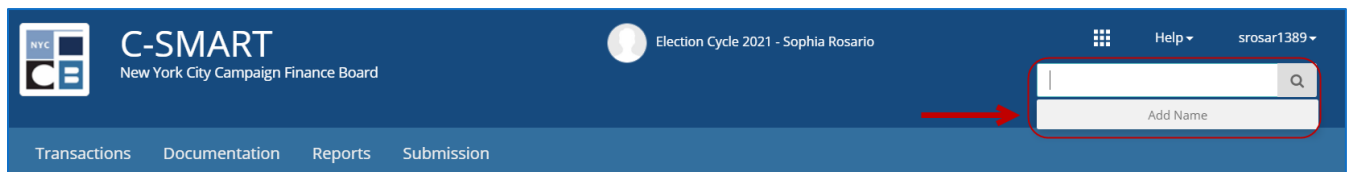


# C-SMART HELP

## NAMES

### HOW TO ADD A NAME RECORD

1. Click the **Search Last Name** or **Transaction ID bar** and then **Add Name**.



2. Enter and save the name record details.
  - C-SMART will alert you if you leave out required information. Complete the fields below:
    - ◆ **Name Code:** Indicate the type of record being created.
    - ◆ **Personal Information:** Enter the name(s) of the individual or entity.
    - ◆ **Address:** Enter the individuals address information.
    - ◆ **Intermediary:** Check this box if this individual is an intermediary for any contributions.
    - ◆ **District Resident:** Check this box if the contributor is a resident of the district.
    - ◆ **Employment Information:** Enter the individual's employment information.
    - ◆ **Affiliated Group:** Indicate if the individual is affiliated with a group you have entered into C-SMART.
    - ◆ **Committee:** Select the committee receiving the contribution. C-SMART will default to your principal committee, but you can select a different one if necessary.
    - ◆ **Contact Information:** You can record the individual's contact information on this page. This information will not be submitted to the CFB.
    - ◆ **Notes:** Enter any additional information. The CFB cannot review what you enter in this field. Your notes will be saved across all related transactions.
  - Then, click **Save**.

**Personal Information**

\* Name Code: Individual

Formal Prefix:

Prefix: Please Select

\* Last Name: Schmidt

\* First Name: Mary

Middle Initial:

Suffix: Please Select

Address: 100 Church Street 12 FL  
New York New York 10007

Borough: Manhattan

Intermediary:

District Resident:

District:

**Employment Information**

Employer: NYC Board of Education

Occupation: Teacher

Address: 3501 Union Street Floor/ Apt/ Suite  
Flushing New York 11354

**Notes**

[For Campaign Use Only]

Save Cancel

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**Best Practice:**

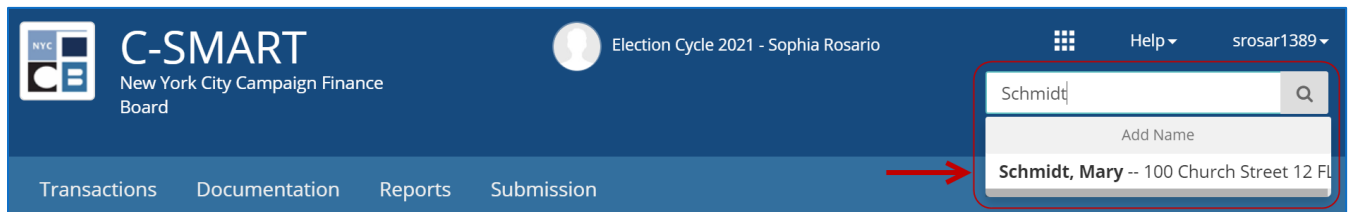
- ◆ Use the tab key to navigate the fields. After **Floor/Apt/Suite**, clicking tab will bring you to **ZIP**. Once you enter the ZIP and click tab, the **City, State, and Borough** fields will autofill.

**Important:**

- ◆ If you leave District Resident unchecked, C-SMART determine if the contributor is a resident.
  - ◆ **Employment Information** is needed for contributors who have given over \$99 in the aggregate.
  - ◆ **Affiliated Groups** refers to an entity the contributor owns or has decision-making control over.
  - ◆ You must include an **Email address** to send affirmation or thank-you letters from C-SMART.
- 

**HOW TO EDIT A NAME RECORD**

1. Go to the **Name Details** page.
  - Use the **Search Last Name or Transaction ID** bar to find the individual or entity.



2. Click **Edit**.

Name Details [Back to Home Page](#)

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

Search by Last Name or Entity Name

**Personal Information**

**Name Code:** Individual

**Formal Prefix:**

**Prefix:**

**Last Name:** Schmidt

**First Name:** Mary

**Middle Initial:**

**Suffix:**

**Address:** 100 Church Street , 12 FL  
New York NY 10007

**Borough:** Manhattan

**Intermediary:**  **ID:**

**District Resident:**

**District:** 01

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

**Personal Information**

**\* Name Code:** Individual

**Formal Prefix:**

**Prefix:** Please Select

**\* Last Name:** Schmidt

**\* First Name:** Mary

**Middle Initial:**

**Suffix:** Please Select

**Address:** 100 Church Street 12 FL  
New York New York 10007

**Borough:** Manhattan

**Intermediary:**

**District Resident:**

**District:**

**Employment Information**

Employer: NYC Board of Education

Occupation: Teacher

Address: 3501 Union Street Floor/ Apt/ Suite  
Flushing New York 11354

**Notes**

[For Campaign Use Only]

Save Cancel

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

4. Your edit has been successfully saved.

✔ The Name Record has been successfully updated.

Name Details

Back to Home Page

Edit Delete

### HOW TO DELETE A NAME RECORD

- Go to the **Name Details** page.
  - Use the **Search Last Name or Transaction ID** bar to find the individual or entity.

NYC C-SMART New York City Campaign Finance Board

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Help srosar1389

Transactions Documentation Reports Submission

Schmidt

Add Name

Schmidt, Mary -- 100 Church Street 12 FL

2. Click **Delete** to proceed.

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

### Best Practice:

- ◆ If you are deleting this name record because it is a duplicate name, please review [Merge Duplicate Names](#) instead.

Name Details ← Back to Home Page

Search by Last Name or Entity Name

**Personal Information**

Name Code: Individual  
Formal Prefix:  
Prefix:  
Last Name: Schmidt  
First Name: Mary  
Middle Initial:  
Suffix:  
Address: 100 Church Street, 12 FL  
New York NY 10007  
Borough: Manhattan  
Intermediary:  ID:   
District Resident:   
District: 01

### Important:

- ◆ You will not be able to delete a name record if it has any transactions associated with it.

3. The name record has been successfully deleted.

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

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Search Name or Transaction ID

Transactions Documentation Reports Submission

✓ The Name Record has been successfully deleted.