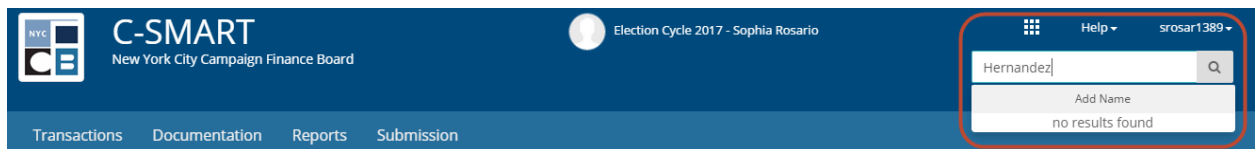


Help Content: Names

HOW TO ADD A NAME RECORD

1. Search for the name by last name or entity name.

Use the **Search Last Name or Transaction ID** bar to search for the last name of the individual or entity you wish to add. If the name is not in your database, click **Add Name** to add the record.



2. Enter the details of the name and click Save.

CANDIDATE SERVICES TIP(S):

- ✓ Use the **tab key** to navigate through the fields so that you don't miss one. After Floor/Apt/Suite, clicking tab will bring you to ZIP. Once you enter the ZIP and click the tab key, the City, State, and Borough fields will autofill if it is a New York City ZIP code.
- ✓ Check off the **Intermediary** box if this person is an intermediary for any contributions.
- ✓ If you leave the **District Resident** box unchecked, C-SMART will notify you if the individual is a district resident (if applicable based on your office sought). If you know the contributor is a district resident, check the box.
- ✓ **Employment Information** is needed for contributors who have contributed more than \$99 over the course of the election cycle.
- ✓ The **Affiliated Groups** section refers to an entity the individual contributor owns or has a significant decision-making control over.
- ✓ If you want to use C-SMART to send compliance-related and thank-you emails, you must include an **Email address**.

Add Name

Personal Information

* Name Code: Individual

Formal Prefix:

Prefix: Please Select

* Last Name: Hernandez

* First Name: David

Middle Initial:

Suffix: Please Select

Address: 75-24 Broadway 1B
Corona New York 11368

Borough: Queens

Intermediary:

District Resident:

District:

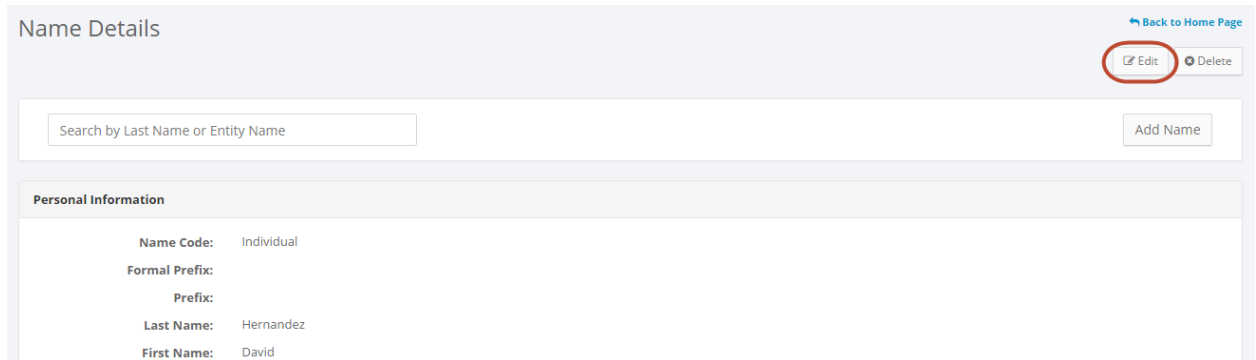
HOW TO EDIT A NAME RECORD

1. Search for the name by last name or entity name.

Use the **Search Last Name or Transaction ID** bar to search for the last name of the individual or the name of the entity whose name record you wish to modify. This will bring you to the **Name Details** page.



2. Click Edit.



The screenshot shows the 'Name Details' page. At the top right, there is a 'Back to Home Page' link and two buttons: 'Edit' (with a pencil icon) and 'Delete' (with a trash icon). The 'Edit' button is circled in red. Below the buttons is a search bar labeled 'Search by Last Name or Entity Name' and an 'Add Name' button. The main content area is titled 'Personal Information' and contains the following details:

Name Code:	Individual
Formal Prefix:	
Prefix:	
Last Name:	Hernandez
First Name:	David

3. Update and click Save.

Modify, add, or remove the applicable fields and then click **Save**.

CANDIDATE SERVICES TIP(S):

- ✓ Notice that the timestamp will be updated to reflect who made the modification to the transaction and when.

4. Your edit has been successfully saved.

HOW TO DELETE A NAME RECORD

1. Search for the name by last name or entity name.

Use the **Search Last Name or Transaction ID** bar to search for the last name of the individual or the name of the entity whose name record you wish to delete.



The screenshot shows the top navigation bar with a user profile icon, the text 'Election Cycle 2017 - Sophia Rosario', a grid icon, 'Help', and the user ID 'srosar1389'. Below the navigation bar is a search bar containing the text 'Hernan'. A search icon is to the right of the search bar. Below the search bar is a dropdown menu with the following options:

- Add Name
- Hernandez, David -- 75-24 Broadway

2. Click Delete.

Review the name record before you delete it. When you are sure you wish to delete it, click **Delete**.

Name Details [Back to Home Page](#)

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

Search by Last Name or Entity Name [Add Name](#)

Personal Information

Name Code:	Individual
Formal Prefix:	
Prefix:	
Last Name:	Hernandez
First Name:	David

CANDIDATE SERVICES TIP(S):

- ✓ You will not be able to delete the name record if it has any transactions associated with it.
- ✓ If you are deleting this name record because it is a duplicate name, please review the [Merge Duplicate Names](#) module instead.

3. The name record has been successfully deleted.