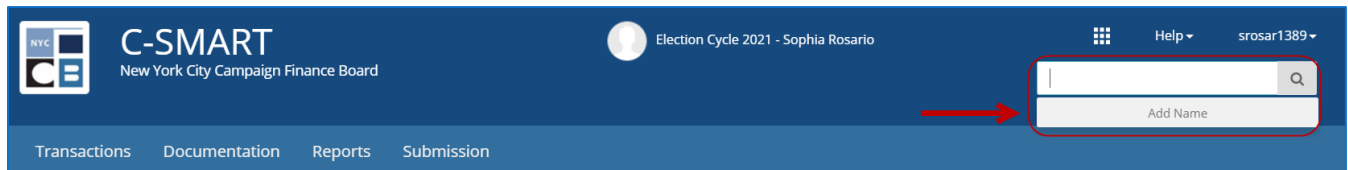


C-SMART HELP

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

Best Practice:

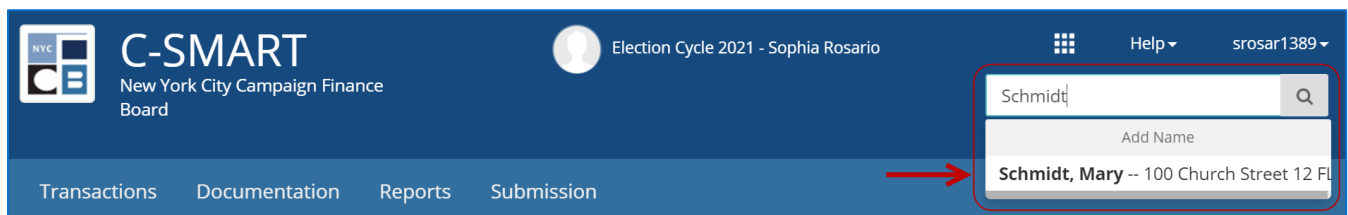
- ◆ Use the tab key to navigate the fields.
- ◆ Once you enter the ZIP, the **City, State, and Borough** fields will autofill.

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



The screenshot shows the C-SMART New York City Campaign Finance Board interface. The header includes the NYC logo, the text 'C-SMART New York City Campaign Finance Board', the user profile 'Election Cycle 2021 - Sophia Rosario', and the user ID 'srosar1389'. The search bar contains the text 'Schmidt' and a search icon. Below the search bar, a dropdown menu is open, showing the option 'Schmidt, Mary -- 100 Church Street 12 FL'. A red arrow points to this dropdown menu. The navigation bar at the bottom includes links for 'Transactions', 'Documentation', 'Reports', and 'Submission'.

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 .

✔ The Name Record has been successfully updated.

Name Details [Back to Home Page](#) [Edit](#) [Delete](#)

HOW TO DELETE A NAME RECORD

- Go to the individual or entity's **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

Election Cycle 2021 - Sophia Rosario

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.

Name Details [Back to Home Page](#)

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

Best Practice:

- ◆ Instead of manually deleting duplicate records, use [Merge Duplicate Names](#).

Important:

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

3. The name record has been successfully deleted.

NYC C-SMART New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario Help srosar1389

Search Name or Transaction ID

Transactions Documentation Reports Submission

✔ The Name Record has been successfully deleted.