

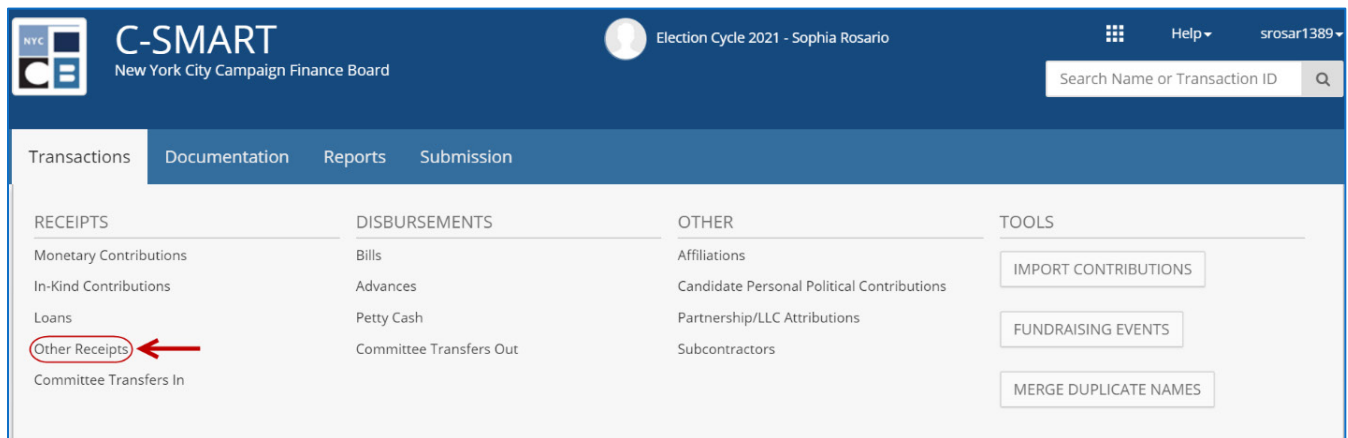
C-SMART HELP

OTHER RECEIPTS

Any money your campaign receives other than contributions are considered other receipts. This includes bank interest, certain types of reimbursements, and cash deposits.

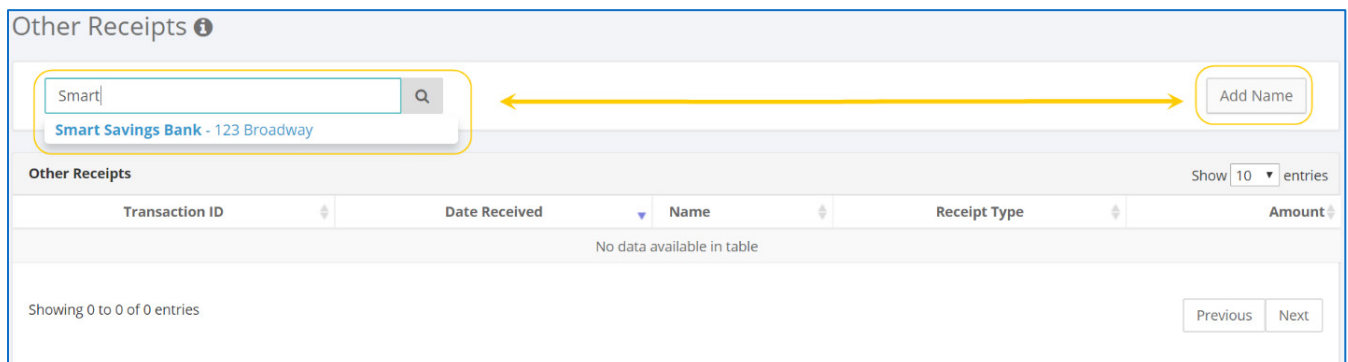
HOW TO ADD AN OTHER RECEIPT

1. Go to **Other Receipts**.
 - Hover your cursor over **Transactions** and click **Other Receipts**.



The screenshot shows the C-SMART New York City Campaign Finance Board interface. The top navigation bar includes the NYC logo, the text 'C-SMART New York City Campaign Finance Board', the user profile 'Election Cycle 2021 - Sophia Rosario', and a search bar 'Search Name or Transaction ID'. Below the navigation bar, the 'Transactions' menu is expanded, showing categories: RECEIPTS (Monetary Contributions, In-Kind Contributions, Loans, Other Receipts, Committee Transfers In), DISBURSEMENTS (Bills, Advances, Petty Cash, Committee Transfers Out), OTHER (Affiliations, Candidate Personal Political Contributions, Partnership/LLC Attributions, Subcontractors), and TOOLS (IMPORT CONTRIBUTIONS, FUNDRAISING EVENTS, MERGE DUPLICATE NAMES). The 'Other Receipts' link is circled in red with a red arrow pointing to it.

2. Use the **Search by Last Name or Entity Name** bar to find the other receipt's source OR click [Add Name](#) to create a new record.



The screenshot shows the 'Other Receipts' form. At the top, there is a search bar with the text 'Smart' and a search icon. Below the search bar, a dropdown menu shows 'Smart Savings Bank - 123 Broadway'. A yellow double-headed arrow points from the search bar to the 'Add Name' button. Below the search bar, there is a table with the following columns: Transaction ID, Date Received, Name, Receipt Type, and Amount. The table is empty, showing 'No data available in table'. At the bottom, there is a status bar that says 'Showing 0 to 0 of 0 entries' and two buttons: 'Previous' and 'Next'.

3. Click **Add Other Receipt**.

Other Receipts ⓘ [Back to Other Receipts](#)

Search by Last Name or Entity Name

Profile

Name: Smart Savings Bank
Address: 123 Broadway
New York NY 10006
Boro: Manhattan Corporation

Totals

Total Other Receipts: \$0.00

Other Receipts

Transaction ID	Date Received	Receipt Type	Amount
No records			

4. Enter and save the other receipt's details.

- C-SMART will alert you if you leave out required information. Complete following fields:
 - ◆ **Date Received:** Enter the date the campaign received the other receipt.
 - ◆ **Amount:** Enter the amount.
 - ◆ **Receipt Type:** Indicate the type of receipt (Interest/Dividends, Other, or Proceed Sale/Lease).
 - ◆ **Explanation:** Enter a brief explanation for the transaction.
 - ◆ **Segregated:** Indicate if the expenditure was made from a segregated bank account. See Chapter 6 of the [Handbook](#) for more information on segregated bank accounts.
 - ◆ **Runoff/Rerun:** Check this box if the expenditure was for a runoff or court-ordered rerun. Such expenses are allowed only if the CFB has announced that one is reasonably expected. Review the [Runoff guidance document](#) for more information.
 - ◆ **Committee:** Select the committee incurring the expenditure. C-SMART will default to your principal committee, but you may select a different one if necessary.
 - ◆ **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**.

Other Receipts - Add Other Receipt

Profile

Name: Smart Savings Bank
Address: 123 Broadway
New York NY 10006
Boro: Manhattan Corporation

Totals

Total Other Receipts: \$0.00

Enter Details

***Date Received:** 08/29/2018

***Amount:** \$ 0.99

***Receipt Type:** Interest/Dividends


Explanation: Bank interest

Segregated:

Runoff / Rerun:

***Committee:** Sophia for Council

Notes:
[For Campaign Use Only]

 **Save** Cancel

Best Practice:

- ◆ Use the tab key to navigate between fields.
- ◆ Upon clicking **Save**, if a warning message opens, read it. It may refer to a potentially urgent compliance issue.

5. The transaction has been successfully saved.

✔ Your transaction has been successfully saved. ✕

Other Receipts

Search by Last Name or Entity Name

Profile

Name: Smart Savings Bank
Address: 123 Broadway
New York NY 10006
Boro: Manhattan Corporation

Totals

Total Other Receipts: \$0.99

Other Receipts

Transaction ID	Date Received	Receipt Type	Amount
8407	8/29/2018	Interest/Dividends	\$0.99

➤ At this point, C-SMART will return you to the **Other Receipts** page. The **Totals** box and list of other receipts will be updated to reflect the newly saved transaction.

Best Practice: Notice that the transaction now has a Transaction ID. Write this number on all related documentation, including bank records and receipts.

HOW TO EDIT AN OTHER RECEIPT

1. Go to the **Other Receipts** page.
 - Click the **gear** and then **Edit** OR click the other receipt's **Transaction ID** and then **Edit**.

Other Receipts Add Other Receipt

Transaction ID	Date Received	Receipt Type	Amount
8485	10/30/2018	Interest/Dividends	\$0.99

Edit
Add Document

OR

Other Receipts Add Other Receipt

Transaction ID	Date Received	Receipt Type	Amount
8485	10/30/2018	Interest/Dividends	\$0.99

Other Receipts Back to Smart Savings Bank

Transaction ID: 8485 Statement: N/A Edit Delete

Profile

Name: Smart Savings Bank
Address: 123 Broadway
New York NY 10006
Boro: Manhattan Corporation

Totals

Total Other Receipts: \$0.99

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

Enter By: srosar1389 Date: 10/30/2018 01:15 PM Updated By: srosar1389 Date: 10/30/2018 01:15 PM

Save Cancel

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

3. The transaction has been successfully edited.

The screenshot shows the 'Other Receipts' page with a green success message at the top: 'Your transaction has been successfully saved.' Below this is a search bar and a table of receipts. A yellow arrow points to the success message, and a yellow box highlights the 'Totals' section and the first row of the 'Other Receipts' table.

Transaction ID	Date Received	Receipt Type	Amount
8485	10/30/2018	Interest/Dividends	\$0.99

HOW TO DELETE AN OTHER RECEIPT

1. Go to the **Other Receipts** page.

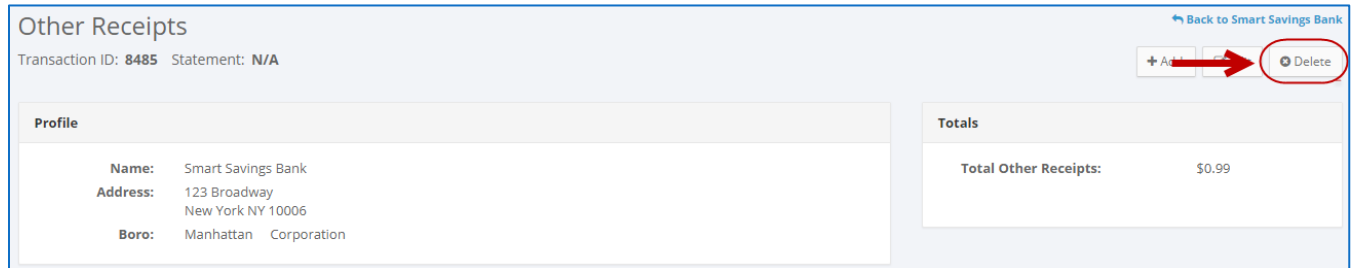
➤ Click the other receipt's **Transaction ID** OR enter it into the **Search Transaction ID** bar.

This screenshot is identical to the previous one, but with a red circle around the '8485' in the 'Transaction ID' column of the table, and a red arrow pointing to it from the left.

OR

The screenshot shows the C-SMART navigation bar. The search bar contains the text '8485'. A dropdown menu is open below the search bar, showing the option '8485 -- Other Receipts' with a red arrow pointing to it.

2. Click **Delete** to proceed.



Other Receipts

Transaction ID: 8485 Statement: N/A

Back to Smart Savings Bank

+ Add - Delete

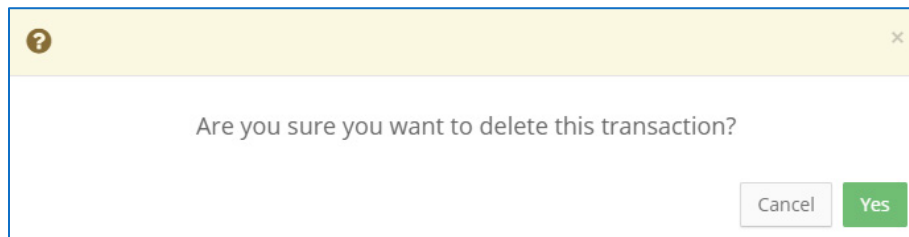
Profile

Name: Smart Savings Bank
Address: 123 Broadway
New York NY 10006
Boro: Manhattan Corporation

Totals

Total Other Receipts: \$0.99

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

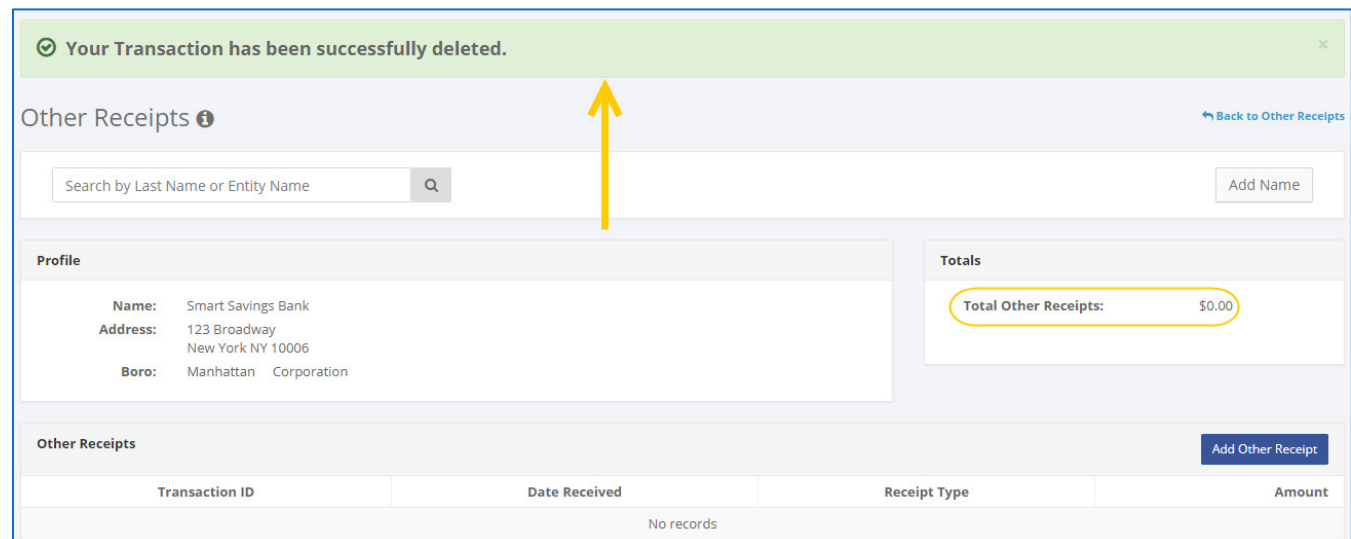


?

Are you sure you want to delete this transaction?

Cancel Yes

3. The other receipt has been successfully deleted.



✔ Your Transaction has been successfully deleted.

Other Receipts

Back to Other Receipts

Search by Last Name or Entity Name

Add Name

Profile

Name: Smart Savings Bank
Address: 123 Broadway
New York NY 10006
Boro: Manhattan Corporation

Totals

Total Other Receipts: \$0.00

Other Receipts

Add Other Receipt

Transaction ID	Date Received	Receipt Type	Amount
No records			

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