

## C-SMART HELP

### COMMITTEE TRANSFER IN DOCUMENTATION

#### HOW TO ADD COMMITTEE TRANSFER IN DOCUMENTATION

1. Go to the committee's **Committee Transfers In** page.
  - Click the transfer's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

Committee Transfers In ⓘ

Select a Committee

Search Committee

Profile

Name: Sophia Rosario 2017  
Address: 100 Church Street 12 FL  
New York NY 10007  
Boro: Manhattan Candidate Committee

Totals

Total Transferred In: \$2,000.00  
Total Contributions: \$0.00 [View](#)  
Total Matching Amount: \$0  
Total Cash: \$0.00

Transfers In

Transaction ID	Date	Committee	Type	Amount
8371	12/20/2018	Sophia Rosario 2017	2B	\$2,000.00

OR

NYC C-SMART New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

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8371

Add Name

8371 -- Committee Transfer In

Transactions Documentation Reports Submission

2. Go to the details page for the attributed contribution.

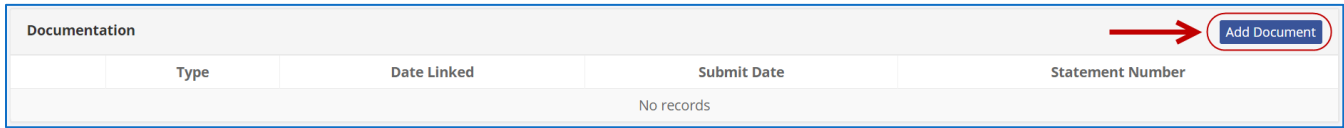
- Click the contribution's **Transaction ID**.

Transfer In Attribution - Individual Contributions

Transaction ID	Date	Contributor	Amount
8372	1/4/2017	Davis, Alexis	\$500.00

### 3. Click **Add Document**.

Documentation				
Type	Date Linked	Submit Date	Statement Number	
No records				



**Best Practice:** For a shortcut, click the gear icon next to the **Transaction ID** and then click **Add Document**.

### 4. Click **Upload PDF** and choose a file from your computer.

- Complete the following fields:
  - ◆ **Page(s):** Use a dash to select a page range (3-4) or a comma to select non-consecutive pages (1, 3). You also can choose **Select All Pages**.
  - ◆ **Type:** Indicate the type of document. If your PDF contains more than one type of documentation, you can upload them together under a single document type.
- Then, click **Save** to store the document in C-SMART and link it to the transaction.

#### Add Documentation

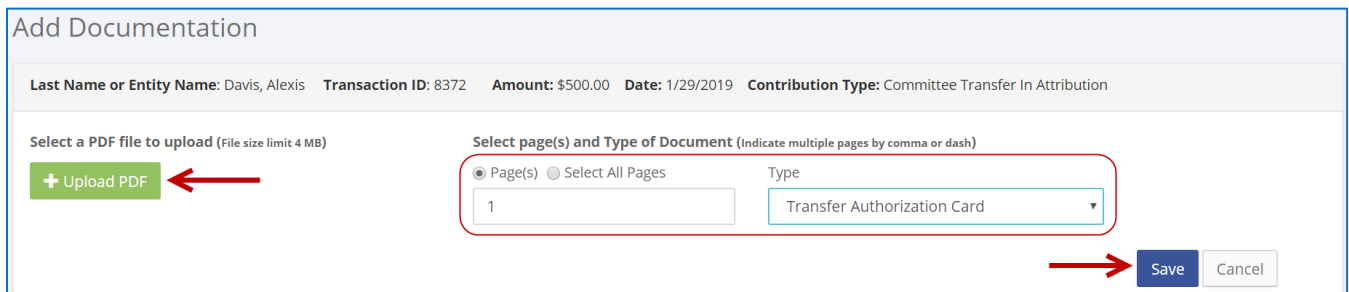
Last Name or Entity Name: Davis, Alexis    Transaction ID: 8372    Amount: \$500.00    Date: 1/29/2019    Contribution Type: Committee Transfer In Attribution

Select a PDF file to upload (File size limit 4 MB)

Select page(s) and Type of Document (Indicate multiple pages by comma or dash)

Page(s)     Select All Pages    Type

1    Transfer Authorization Card



5. The document has been successfully saved.

**You have successfully linked page(s) 1 to Transaction ID: 8372**

**Committee Transfer In**  
Transaction ID: **8372**

[Back to Sophia Rosario 2017](#) | [Edit](#) | [Delete](#)

Profile		Totals	
<b>Name:</b>	Sophia Rosario 2017	<b>Total Transferred In:</b>	\$2050.00
<b>Address:</b>	100 Church Street 12 FL New York NY 10007	<b>Total Contributions:</b>	\$0.00 <a href="#">View</a>
<b>Boro:</b>	Manhattan Candidate Committee	<b>Total Matching Amount:</b>	\$0
		<b>Total Cash:</b>	\$0.00
		<b>Total Attributed:</b>	\$500.00
		<b>Total Unattributed:</b>	\$1550.00
		<b>Associated Expenditures:</b>	\$0.00

- Once you click **Save**, C-SMART will go back to the transaction’s page and you will see that the transaction will show that it has documentation linked to it.

**Important:**

- ◆ The maximum allowable file size is 4MB and only PDFs can be uploaded. For help with larger files, contact your Candidate Services liaison.
- ◆ The CFB does not receive uploaded documents until the underlying transaction is submitted in a disclosure statement or an amendment.

6. You can return to this page anytime to review your upload.

- In the **Documentation** section, click **View PDF**.

Documentation <span style="float: right;"><a href="#">Add Document</a></span>				
	Type	Date Linked	Submit Date	Statement Number
<a href="#">View PDF</a>	Transfer Authorization Card	1/29/2019		<a href="#">Delete</a>

## HOW TO DELETE COMMITTEE TRANSFER IN DOCUMENTATION

1. Go to the committee's **Committee Transfers In** page.

Committee Transfers In

Select a Committee

Search Committee

Profile

Name: Sophia Rosario 2017  
Address: 100 Church Street 12 FL  
New York NY 10007  
Boro: Manhattan Candidate Committee

Totals

Total Transferred In: \$2,000.00  
Total Contributions: \$0.00 [View](#)  
Total Matching Amount: \$0  
Total Cash: \$0.00

Transfers In

Transaction ID	Date	Committee	Type	Amount
8371	12/20/2018	Sophia Rosario 2017	2B	\$2,000.00

➤ Click the transfer's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

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8371

Add Name

8371 -- Committee Transfer In

Transactions Documentation Reports Submission

OR

Transfer In Attribution - Individual Contributions

Transaction ID	Date	Contributor	Amount
8372	1/4/2017	Davis, Alexis	\$500.00

2. Go to the attributed contribution's **Transfer In Details** page.

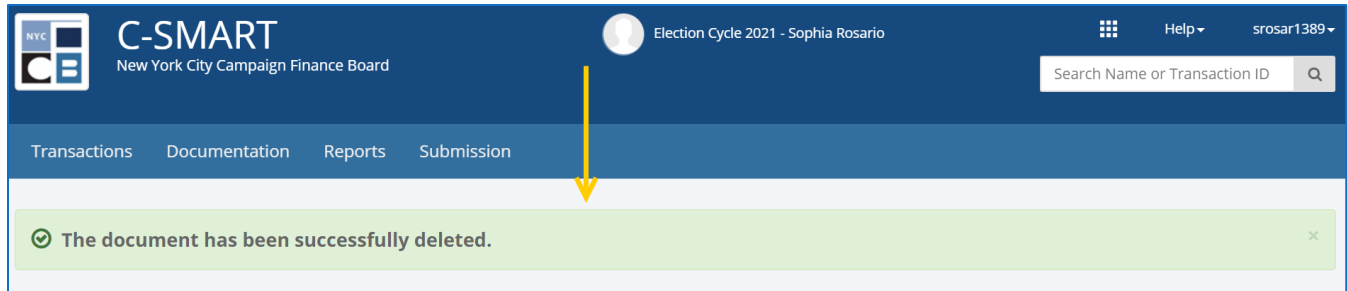
➤ Click the contribution's **Transaction ID**.

Documentation

Type	Date Linked	Submit Date	Statement Number
Transfer Authorization Card	1/29/2019		

[View PDF](#)

3. Click **Delete** to proceed.
  - Click **Yes** on the window that opens to complete the deletion.
4. The document has been successfully deleted.



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**Important:** You cannot delete documentation once it has been submitted to the CFB.

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