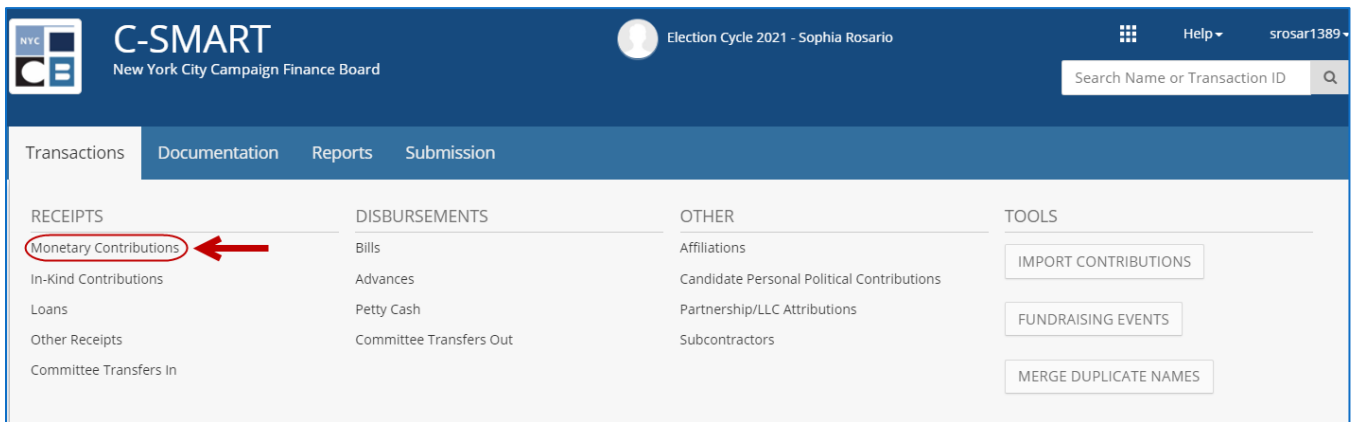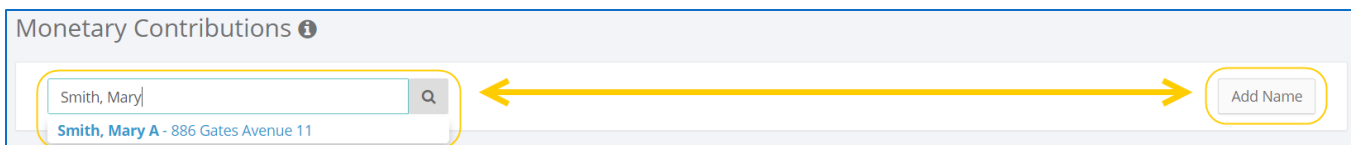# C-SMART HELP

MONETARY CONTRIBUTIONS

HOW TO ADD A MONETARY CONTRIBUTION
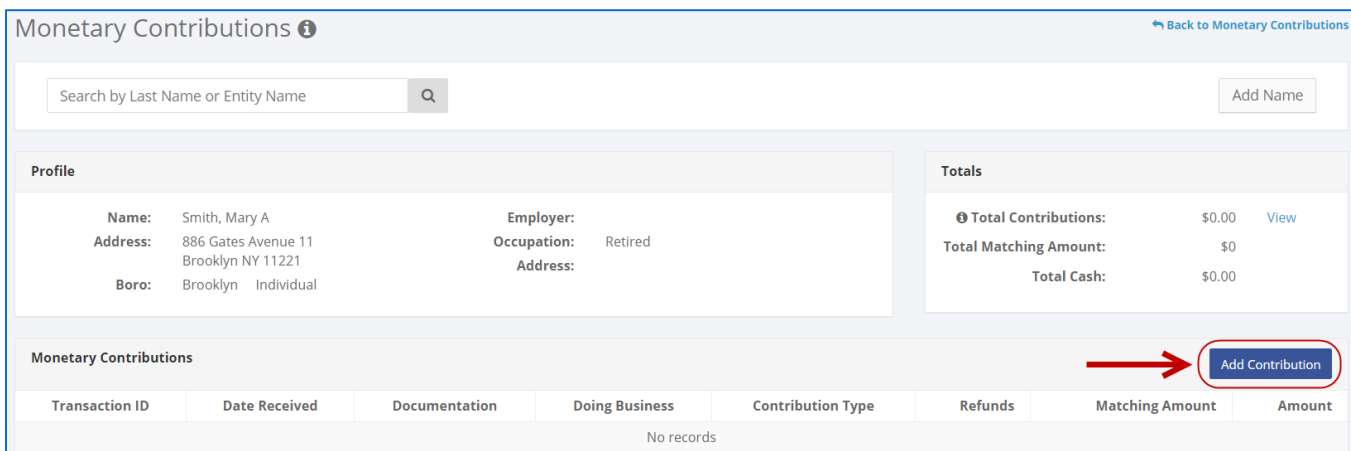
1. Go to **Monetary Contributions**.

   ➢ Hover your cursor over **Transactions** and click **Monetary Contributions.**

2. Use the **Search by Last Name** or **Entity Name bar** to find the contributor OR click **Add Name** to create a new record.

3. Click **Add Contribution**.

4. Enter and save the contribution details.

> ➢ C-SMART will alert you if you leave out required information. Complete the fields below:

  - ◆ **Date Received:** Enter the date the contribution was received.

  - ◆ **Amount:** Enter the contribution amount.

  - ◆ **Matching Amount:** Enter your claim for match.

  - ◆ **Contribution Type:** Indicate the payment type (cash, check, credit card, money order).

  - ◆ **Check/Money Order Number:** Use only if made by check or money order.

  - ◆ **Is this contributor in the Doing Business Database?** Answer **Yes** or **No** after referencing the Doing Business Database. You can find the doing business limits on our website.

  - ◆ **Segregated:** Indicate if the contribution was collected through a segregated bank account. See Chapter 6 of the Handbook for guidance on segregated bank accounts.

  - ◆ **Runoff/Rerun:** Check this box if the contribution was for an expected runoff or court-ordered rerun. Accepting contributions for a runoff is allowed only if the CFB confirms one is expected. Review Runoff Guidance for more information.

  - ◆ **Committee:** Select the committee receiving the contribution. C-SMART will default to your principal committee, but you may select a different one if necessary.

  - ◆ **Event:** If the contribution was collected at a fundraising event, indicate which one. If the event does not appear, you must first add the event in **Fundraising Events**.

  - ◆ **Intermediary Name:** If this contribution was intermediated, select his or her name. If the intermediary's name is not there, click **Add Intermediary** to create the record.

Enter Details

*Date Received:	02/01/2019
*Amount:	$ $500.00
Matching Amount:	$ $175
*Contribution Type:	Check
Check / Money Order Number:	321
Is this contributor in the ❶ Doing Business Database?	No
❶ Segregated:	☐
❶ Runoff / Rerun:	☐
*Committee:	Sophia for Council
Event:	Sophia's Spring Fundraiser
❶ Intermediary Name:	[ ] Add Intermediary
Notes: [For Campaign Use Only]	[ ]

Save   Cancel

- ◆ **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**.

Best Practice:

- ◆ Use the tab key to navigate between fields.

Important:

- ◆ Upon clicking **Save**, if a warning message appears, read it. It might refer to a potentially urgent compliance issue.

- ◆ You <u>must</u> disclose all contributions within the applicable reporting period if they are to be eligible for match. C-SMART will not allow you to claim more than the maximum for any one contributor in a single election cycle.

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5. The contribution has been successfully saved.

➢ At this point, C-SMART will return you to the contributor's **Monetary Contributions** page. The **Totals** box and list of contributions will be updated to reflect the newly saved transaction.

Best Practice: Write the C-SMART **Transaction ID** on the backup documentation (contribution card, check copy, money order, and/or credit card processing documentation).

HOW TO EDIT A MONETARY CONTRIBUTION

1. Go to the contributor's **Monetary Contribution** page.

➢ Click the **gear** next to the contribution and then **Edit** OR enter the **Transaction ID** into the **Search Transaction ID** bar and click **Edit**.

OR

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

Edit Details

*Date Received:	02/01/2019
*Amount:	$ $250.00
Matching Amount:	$ $175
*Contribution Type:	Check
Check / Money Order Number:	321
Is this contributor in the ❶ Doing Business Database?	No
❶ Segregated:	☐
❶ Runoff / Rerun:	☐
*Committee:	Sophia for Council
Event:	Sophia's Spring Fundraiser
❶ Intermediary Name:	[ ] Add Intermediary
Notes: [For Campaign Use Only]	
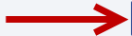
Entered By: srosar1389 Date: 02/01/2019 02:48 PM Updated By: srosar1389 Date: 02/01/2019 02:48 PM

Save   Cancel

3.   The contribution has been successfully edited.

⊘ **Your transaction has been successfully saved.**   ✕

Monetary Contributions ❶   ↩ Back to Monetary Contributions

[Search by Last Name or Entity Name] 🔍   Add Name

Profile   **Totals**

Name:	Smith, Mary A	Employer:		❶ Total Contributions:	$250.00	View
Address:	886 Gates Avenue 11	Occupation:	Retired	Total Matching Amount:	$175	
	Brooklyn NY 11221	Address:		Total Cash:	$0.00	
Boro:	Brooklyn Individual					

Monetary Contributions   Add Contribution

Transaction ID	Date Received	Documentation	Doing Business	Contribution Type	Refunds	Matching Amount	Amount	
8390	2/1/2019	0	No	Check	($0.00) 0	$175	$250.00	⚙

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

HOW TO DELETE A MONETARY CONTRIBUTION

1. Go to the contributor's **Monetary Contributions** page.

   ➢ Click the contribution's **Transaction ID** OR enter it into the **Search Transaction ID** bar.

OR

2. Click **Delete** to proceed.

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

3. The contribution has been successfully deleted.

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