

C-SMART HELP

ADVANCES

Advances are purchases by individuals made on behalf of the campaign for which they expect to be reimbursed. An advance is considered an in-kind contribution, subject to the same contribution limits and source restrictions, until repaid.

HOW TO ADD AN ADVANCE

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

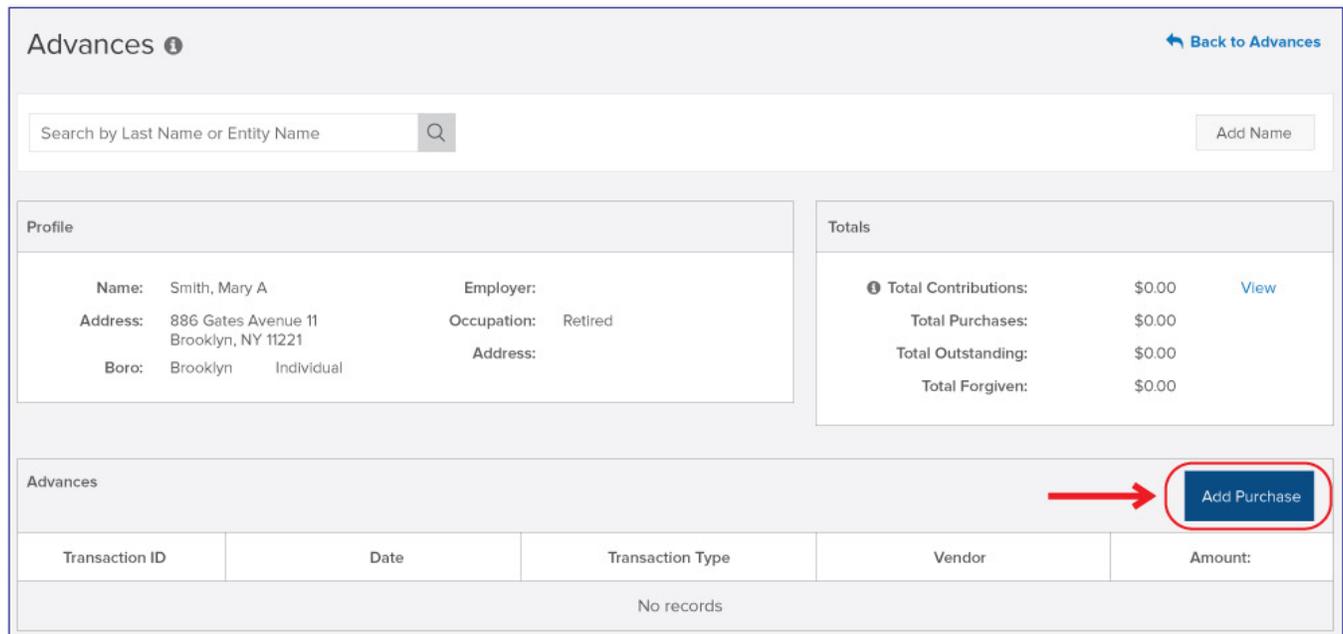
The screenshot shows the C-SMART New York City Campaign Finance Board interface. The user is logged in as 'Election Cycle 2021 - Sophia Rosario'. The 'Transactions' menu is open, and the 'Advances' option is highlighted with a red circle and a red arrow pointing to it. The interface includes a search bar for 'Search Name or Transaction ID' and various navigation tabs like 'Documentation', 'Reports', and 'Submission'.

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

The screenshot shows the 'Advances' page in the C-SMART system. The search bar is highlighted with an orange box, and the 'Add Name' button is also highlighted with an orange box. A red double-headed arrow points between the search bar and the 'Add Name' button. The table below shows no matching records found.

Transaction ID	Date	Advancer	Vendor	Transaction Type	Amount
No matching records found.					

Showing 0 to 0 of 0 entries

3. Click **Add Purchase**.


Advances ⓘ ← Back to Advances

Search by Last Name or Entity Name

Profile		Totals	
Name: Smith, Mary A	Employer:	Total Contributions: \$0.00	View
Address: 886 Gates Avenue 11 Brooklyn, NY 11221	Occupation: Retired	Total Purchases: \$0.00	
Boro: Brooklyn Individual	Address:	Total Outstanding: \$0.00	
		Total Forgiven: \$0.00	

Advances Add Purchase

Transaction ID	Date	Transaction Type	Vendor	Amount:
No records				

4. Enter and save the advance details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Vendor:** Select the vendor or click [Add Name](#).
 - ◆ **Purchase Date:** Enter the date the advance purchase was made.
 - ◆ **Amount:** Enter the total amount of the purchase.
 - ◆ **Payment Type:** Indicate the payment method (e.g. credit card, check).
 - ◆ **Purpose Code:** Choose the purpose code that best represents the expenditure. Please refer to the [C-SMART Purpose Codes Guide](#) for more information.
 - ◆ **Explanation:** Enter a short description of the expenditure.
 - ◆ **Exempt Code:** Review Chapter 3 of the [Handbook](#) for more information on exempt expenditures or consult with your Candidate Services liaison.
 - ◆ **Committee:** Select the committee making the expenditure. C-SMART will default to your principal committee, but you may select a different one if necessary.
 - ◆ **Event:** If the purchase was related to a [fundraising event](#), indicate which one.
 - ◆ **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**.

Important:

- ◆ Carefully read any warning notice that appears when you click Save. It might refer to a potential compliance issue that must be addressed.
- ◆ An advance is considered an in-kind contribution, subject to the same contribution limits and source restrictions, until repaid.
- ◆ The **Childcare Services** purpose and exempt codes must be used together.

Advances - Add Purchase

Search by Last Name or Entity Name

Profile		Totals	
Name:	Smith, Mary A	Total Contributions:	\$0.00 View
Address:	886 Gates Avenue 11 Brooklyn, NY 11221	Total Purchases:	\$0.00
Boro:	Brooklyn Individual	Total Outstanding:	\$0.00
Employer:		Total Forgiven:	\$0.00
Occupation:	Retired		
Address:			

Enter Details

*Filing Period:

*Purchase Date:

*Amount: \$

*Payment Type:

*Purpose Code:

*Explanation:

Exempt Code:

*Committee:

Event:

Notes:

[For Campaign Use Only]



5. The advance has been successfully saved.

- At this point, C-SMART will return you to the **Advances** page. The **Totals** box and list of advances will be updated to reflect the newly saved transaction.

The screenshot displays the C-SMART interface. At the top, a green banner reads "Your transaction has been successfully saved." with a checkmark icon. Below this is the "Advances" header with a search bar and a "Back to Advances" link. The main content area is divided into three sections: "Profile", "Totals", and "Advances".

Profile

Name: Smith, Mary A	Employer:
Address: 886 Gates Avenue 11 Brooklyn, NY 11221	Occupation: Retired
Boro: Brooklyn Individual	Address:

Totals

Total Contributions:	\$30.00	View
Total Purchases:	\$30.00	
Total Outstanding:	\$30.00	
Total Forgiven:	\$0.00	

Advances

Transaction ID	Date	Transaction Type	Vendor	Amount:
8403	08/29/2018	Purchase	US Postal Service	\$30.00

Buttons for "Add Purchase", "Add Repayment", and "Add Forgiven" are located above the table. A gear icon is present at the end of the first row in the table.

Best Practice: Write the C-SMART **Transaction ID** on the [advance repayment voucher](#), receipt, and any other related documentation.

HOW TO EDIT AN ADVANCE

1. Go to the advancer's **Advances** page.
 - Click the **gear** next to the advance and then **Edit** OR click the **Transaction ID** and then **Edit**.

The screenshot shows a table with columns: Transaction ID, Date, Transaction Type, Vendor, and Amount. A row is highlighted with Transaction ID 8327, Date 08/29/2018, Transaction Type Purchase, Vendor US Postal Service, and Amount \$30.00. A gear icon is circled in red next to the amount. A callout box points to the gear icon, containing an 'Edit' button (circled in red) and an 'Add Document' button.

OR

The screenshot shows the same table as above. The Transaction ID '8327' in the first row is circled in red. A red arrow points from the left towards the circled ID.



The screenshot shows the 'Advance Purchase' detail page. At the top, it says 'Transaction ID: 8327 Statement: N/A'. There are three buttons: '+ Add', 'Edit' (circled in red), and 'Delete'. A red arrow points to the 'Edit' button. Below this are two sections: 'Profile' and 'Totals'. The 'Profile' section contains fields for Name, Address, Boro, Employer, Occupation, and Address. The 'Totals' section contains a table with rows for Total Contributions, Total Purchases, Total Outstanding, and Total Forgiven, each with a corresponding amount and a 'View' link.

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

Advances - Add Purchase

Search by Last Name or Entity Name

Profile		Totals	
Name: Smith, Mary A	Employer:	Total Contributions: \$0.00	View
Address: 886 Gates Avenue 11 Brooklyn, NY 11221	Occupation: Retired	Total Purchases: \$0.00	
Boro: Brooklyn Individual	Address:	Total Outstanding: \$0.00	
		Total Forgiven: \$0.00	

Enter Details

***Filing Period:** US Postal Service

***Purchase Date:** 08/29/2018

***Amount:** \$

***Payment Type:** Cash

***Purpose Code:** Campaign Mailing

***Explanation:** Palmcards mailing

Exempt Code:

***Committee:** Sophia for Council

Event:

Notes:
[For Campaign Use Only]

3. The advance has been successfully edited.

✔ Your transaction has been successfully saved.

Advances ?

[Back to Advances](#)

Search by Last Name or Entity Name

Profile		Totals	
Name: Smith, Mary A	Employer:	Total Contributions: \$30.00	View
Address: 886 Gates Avenue 11 Brooklyn, NY 11221	Occupation: Retired	Total Purchases: \$30.00	
Boro: Brooklyn Individual	Address:	Total Outstanding: \$30.00	
		Total Forgiven: \$0.00	

Advances

Transaction ID	Date	Transaction Type	Vendor	Amount:
8403	08/29/2018	Purchase	US Postal Service	\$30.00 <input type="button" value="⚙"/>

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

HOW TO DELETE AN ADVANCE

1. Go to the advancer's **Advances** page.
 - Click the advance's **Transaction ID** OR enter it into the **Search Transaction ID** bar.

The screenshot shows the C-SMART interface for the Election Cycle 2021 - Sophia Rosario. The top navigation bar includes 'Transactions', 'Documentation', 'Reports', and 'Submission'. A search bar in the top right corner contains the text '8327' and a dropdown menu below it shows '8327 -- Advance Purchase'. Below the navigation bar, the 'Advances' section is visible, featuring a search bar and a table of advances. The table has columns for Transaction ID, Date, Advancer, Vendor, Transaction Type, and Amount. The first row of the table, representing Transaction ID 8327, is circled in red, and a red arrow points to it from the left.

Transaction ID	Date	Advancer	Vendor	Transaction Type	Amount
8327	08/29/2018	Smith, Mary A	US Postal Service	Purchase	\$30.00

2. Click **Delete** to proceed.
 - Click **Yes** on the window that opens to complete the deletion.

The screenshot shows the 'Advance Purchase' detail page for Transaction ID 8327. The page includes a 'Profile' section with personal information for Smith, Mary A, and a 'Totals' section showing financial data. In the top right corner, there are three buttons: '+ Add', 'Edit', and 'Delete'. The 'Delete' button is circled in red, and a red arrow points to it from the right.

Totals	
Total Contributions:	\$60.00 View
Total Purchases:	\$60.00
Total Outstanding:	\$60.00
Total Forgiven:	\$0.00

The screenshot shows a confirmation dialog box with a yellow header and a white body. The text inside the dialog asks, 'Are you sure you want to delete this transaction?'. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Yes'.

3. The advance has been successfully deleted.

The screenshot displays a web application interface. At the top, a green notification banner reads "Your advance has been successfully deleted." with a close button. Below this, the page title "Advances" is shown with an information icon and a "Back to Advances" link. A search bar is present with the placeholder text "Search by Last Name or Entity Name" and a search icon. To the right of the search bar is an "Add Name" button. The main content area is divided into two sections: "Profile" and "Totals".

Profile

Name:	Smith, Mary A	Employer:	
Address:	886 Gates Avenue 11 Brooklyn NY 11221	Occupation:	Retired
Boro:	Brooklyn Individual	Address:	

Totals

Total Contributions:	\$0.00	View
Total Purchases:	\$0.00	
Total Outstanding:	\$0.00	
Total Forgiven:	\$0.00	

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