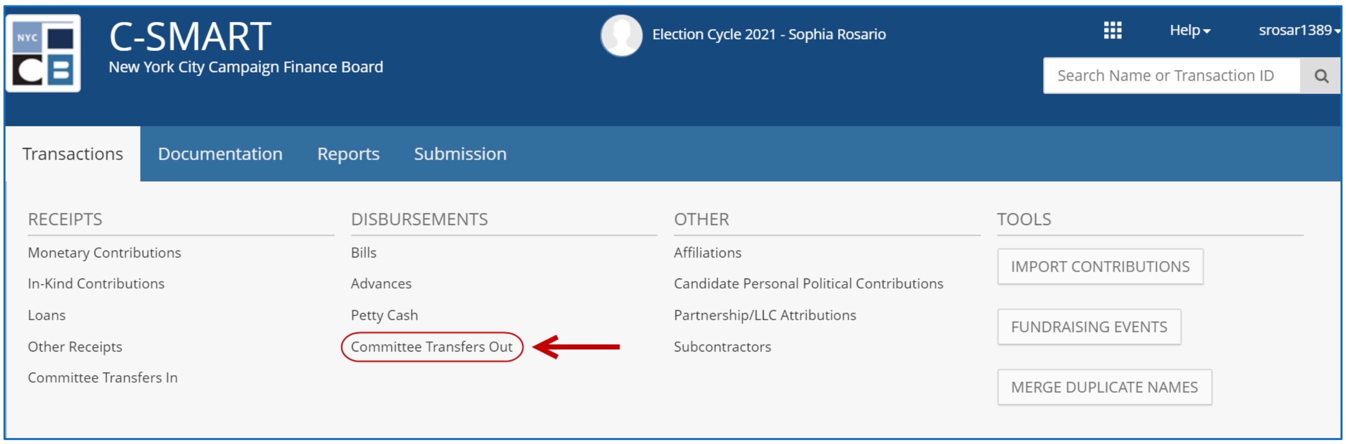
C-SMART HELP

COMMITTEE TRANSFERS OUT

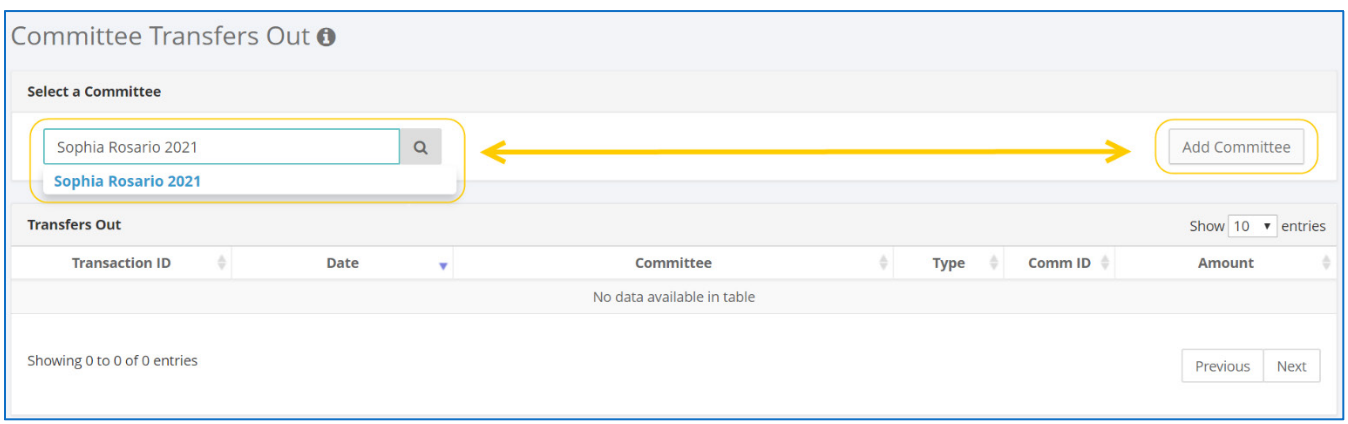
HOW TO ADD A TRANSFER OUT

1. Go to **Committee Transfers Out**.

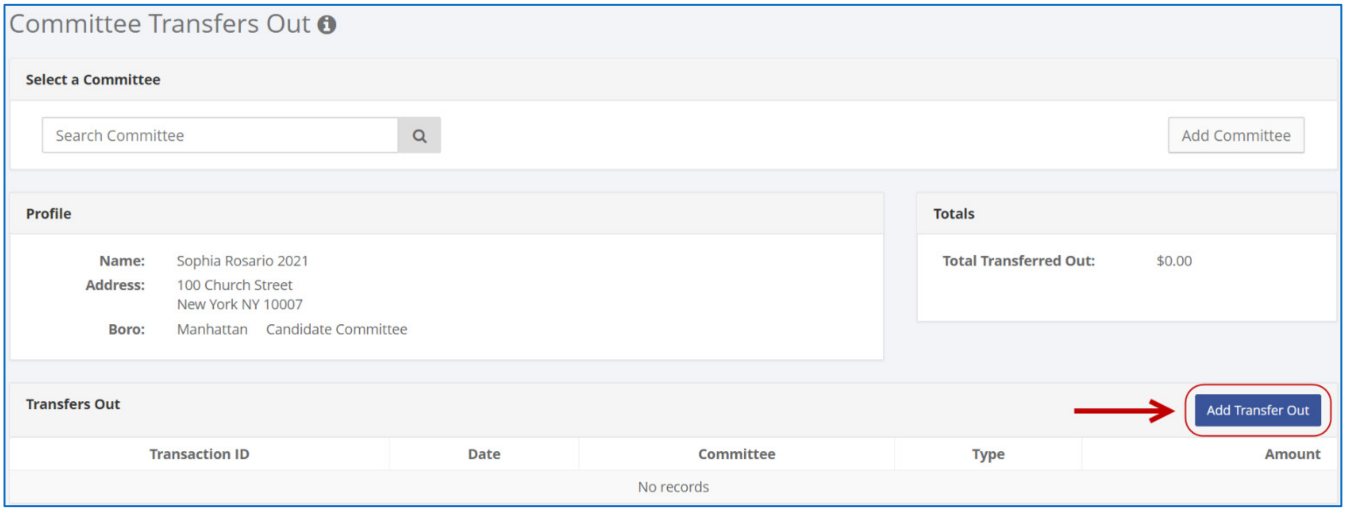
   ➢ Hover your cursor over **Transactions** and click **Committee Transfers Out**.



2. Use the **Search Committee** bar to find the committee receiving the transferred funds OR click **Add Committee** to create a new record.

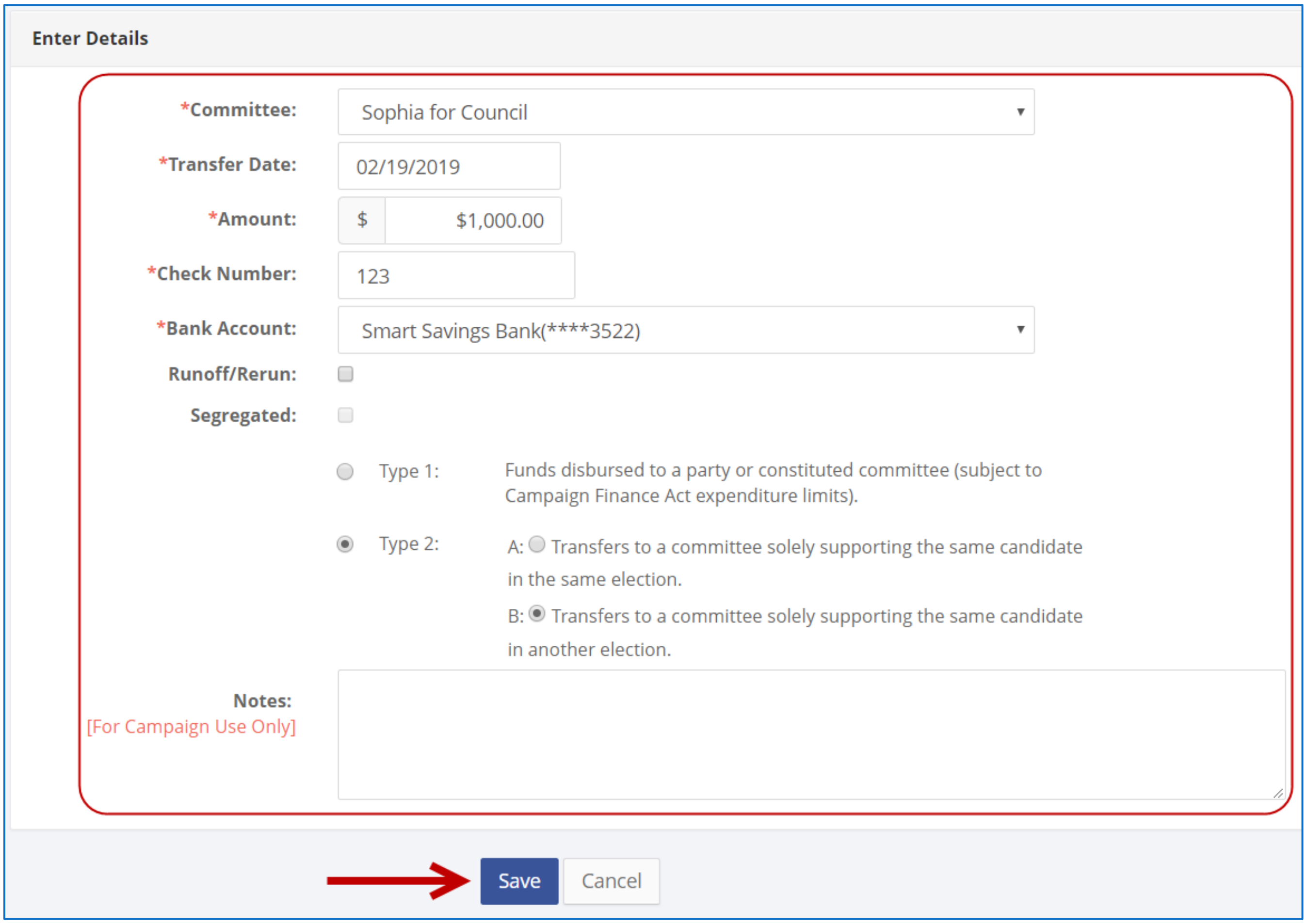


3. Click **Add Transfer Out**.



4. Enter the details of the transfer and click **Save**.

- C-SMART will alert you if you leave out required information. Complete the fields as follows:
  - **Committee:** Select the committee making the transfer. C-SMART will default to your principal committee, but you may select a different one if necessary.
  - **Transfer Date:** Enter the transfer date.
  - **Amount:** Enter the amount of the transfer.
  - **Check Number:** Enter the number of the check used to make the transfer or “EFT” if the transfer was made electronically.
  - **Bank Account:** Select the bank account from which the transfer is being made.
  - **Runoff/Rerun:** Check this box if the transfer was for an anticipated runoff or court-ordered rerun. See the Runoff Elections guidance document for more information.
  - **Segregated:** Indicate if the transfer was made with a segregated bank account. See Chapter 6 of the Handbook for information on segregated bank accounts.
  - **Transfer Out Types:** Indicate the transfer type. For more information, review the Transfers guidance document.
  - **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 pops up, read it. It might refer to a potentially urgent compliance issue.

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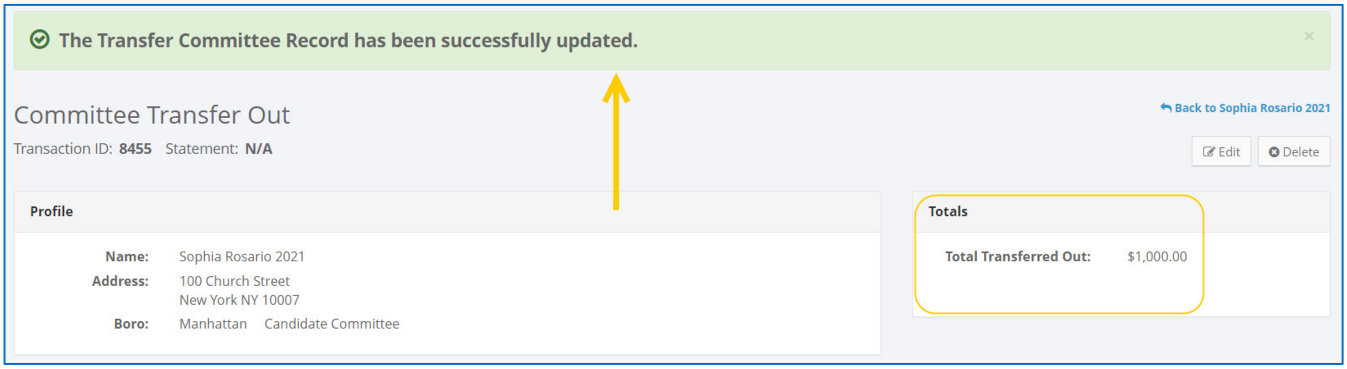
5. Your transaction has been successfully saved.

   ➢ Once you hit save, C-SMART will return you to the **Committee Transfer Out** page. The **Totals** box and list of transfers will be updated to reflect the newly saved transaction.

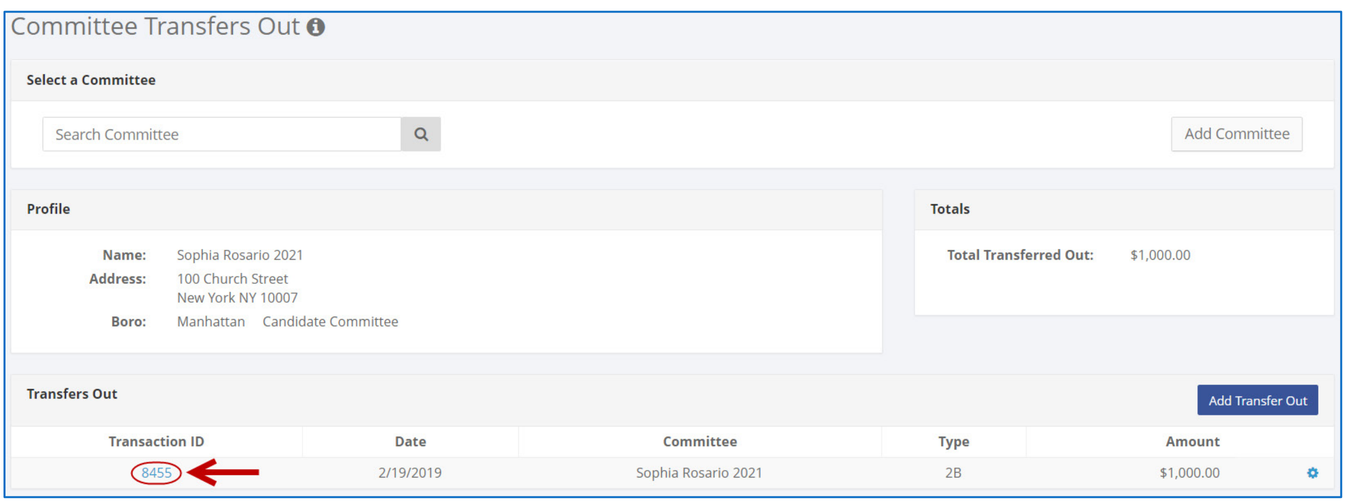


Best Practice: Write the C-SMART **Transaction ID** on any related documentation, including the copy of the transfer check.

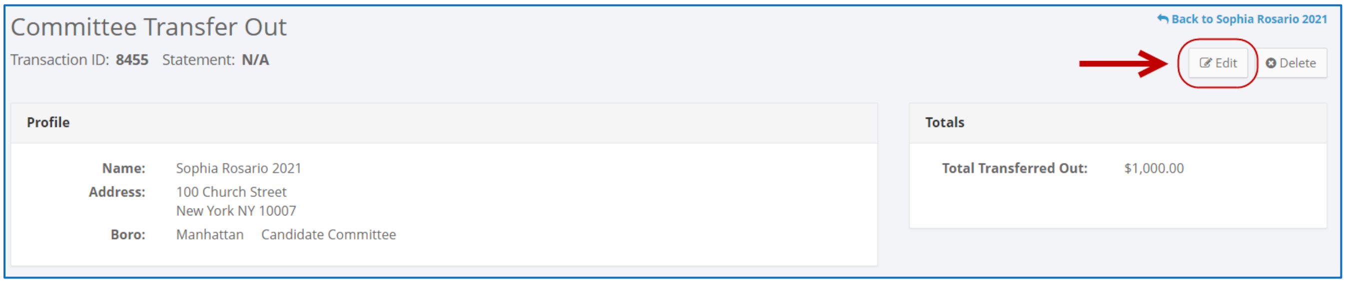
HOW TO EDIT A TRANSFER OUT

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

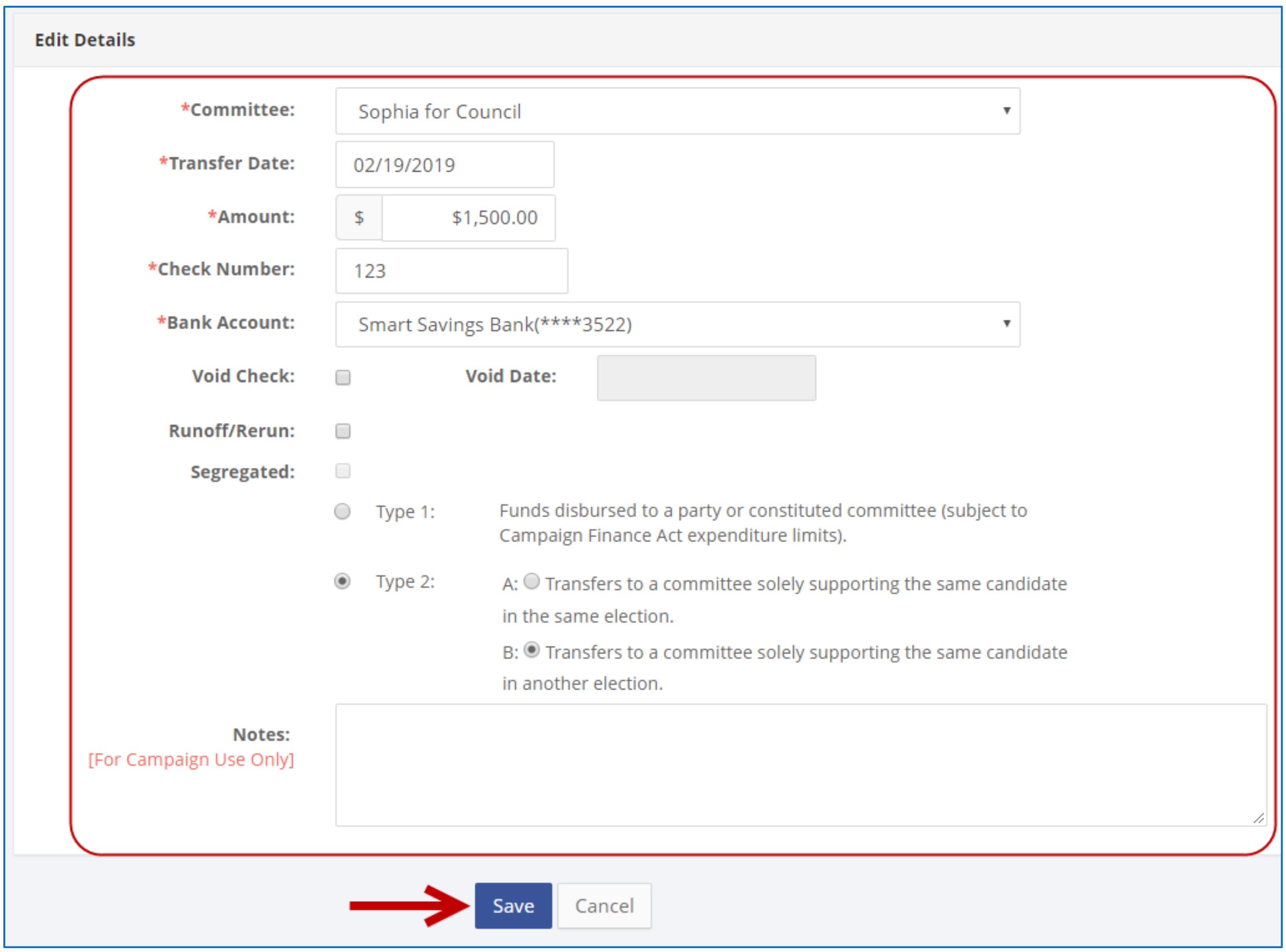
   ➢ Click the transfer's **Transaction ID**.



2. Click **Edit**.

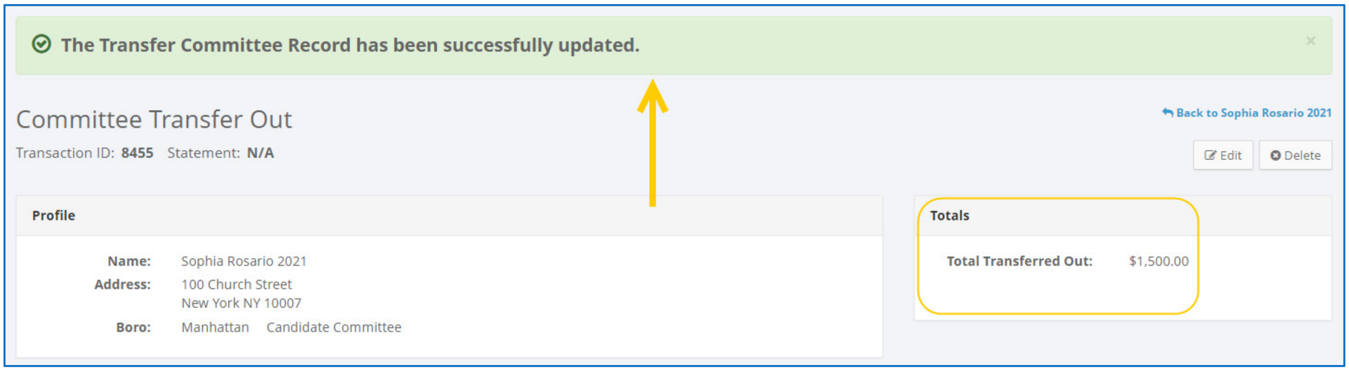


3. Modify the necessary fields and then click **Save**.



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

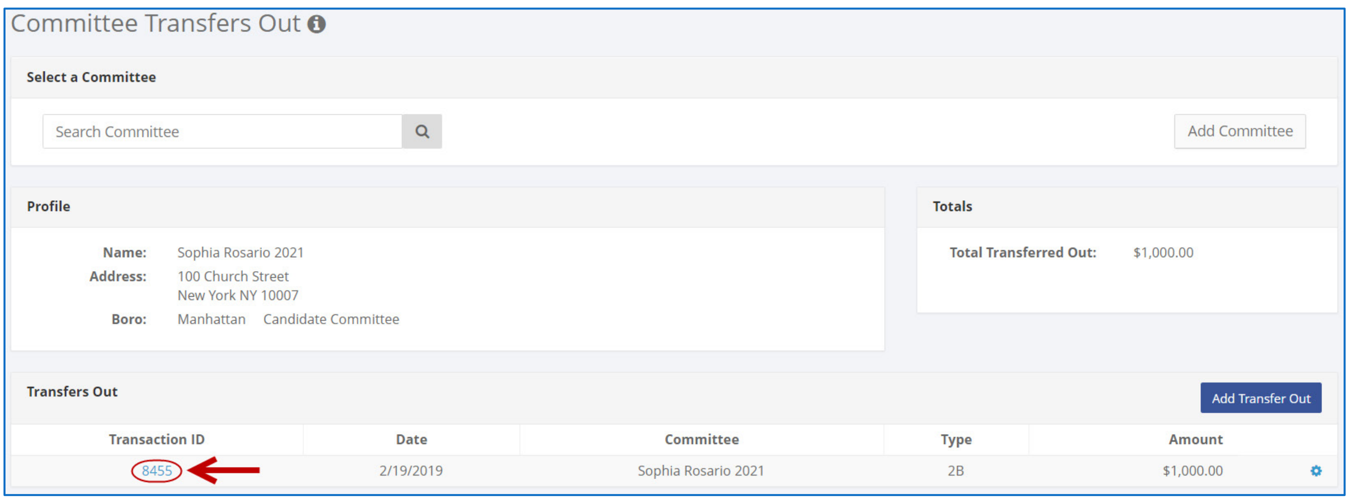
4. The transfer out has been successfully edited.



HOW TO DELETE A TRANSFER OUT

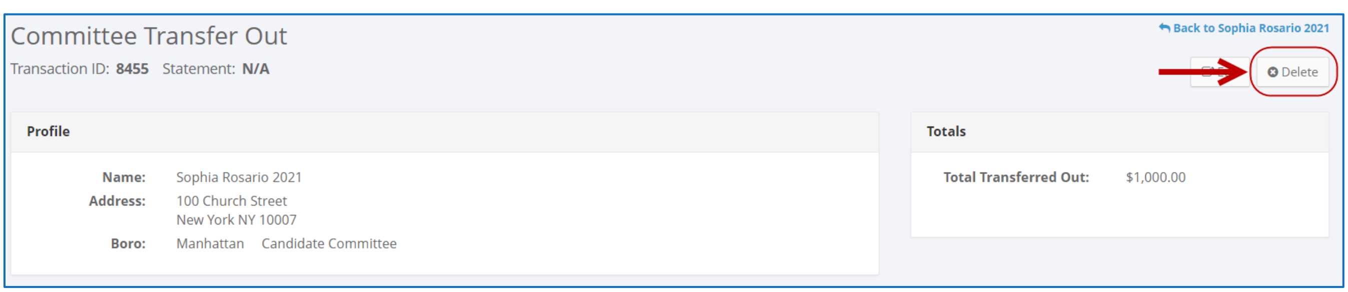
1. Go to the recipient committee's **Committee Transfers Out** page.

   ➢ Click the transfer's **Transaction ID**.

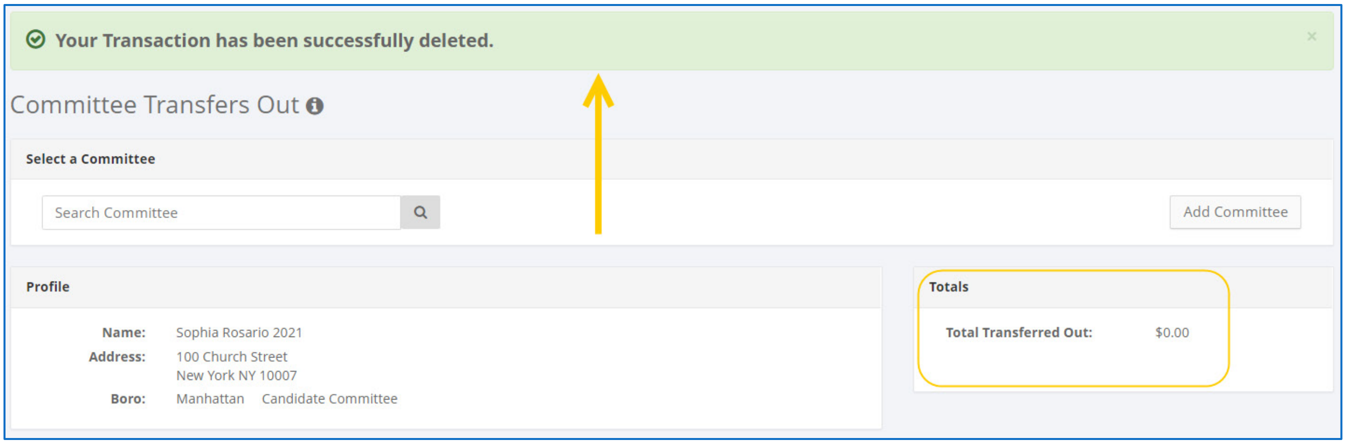


2. Click **Delete** to proceed.

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



3. The transfer out has been successfully deleted.



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