

C-SMART HELP

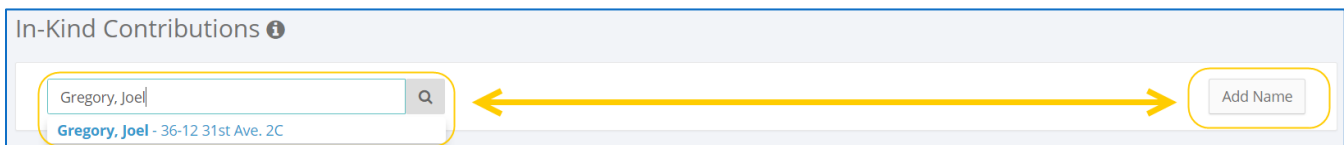
IN-KIND CONTRIBUTIONS

HOW TO ADD AN IN-KIND CONTRIBUTION

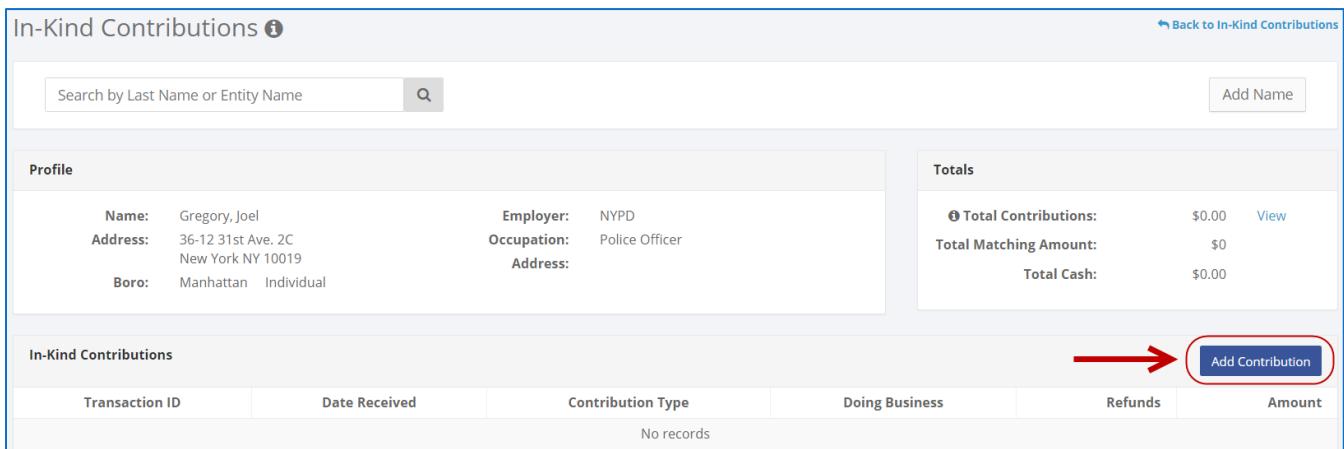
1. Go to **In-Kind Contributions**.
 - Hover your cursor over **Transactions** and click **In-Kind Contributions**.



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 in-kind 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 determined fair market value of the contribution.
 - ◆ **Contribution Type:** Indicate the nature of the contribution (**Expenses Paid, Property Given, or Services/Facilities**).
 - ◆ **Exempt Code:** Review Chapter 3 of the [Handbook](#) for more information on exempt expenditures or consult with your Candidate Services liaison. In-kinds are considered expenditures as well.
 - ◆ **Purpose Code:** Select the purpose code best represents the contribution. Review the [C-SMART Purpose Codes Guide](#) for more information.
 - ◆ **Explanation:** Enter a short description of the contribution.
 - ◆ **Is this contributor in the [Doing Business Database](#)?** Answer **Yes** or **No** after referencing the linked Doing Business Database.
 - ◆ **Runoff/Rerun:** Check this box if the expenditure 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 can 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.
 - ◆ **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**.

Enter Details

*Date Received: 02/01/2019

*Amount: \$ 500.00

*Contribution Type: Property Given

Exempt Code:

*Purpose Code: Office Expenses

*Explanation: Laptop

Is this contributor in the [Doing Business Database?](#)

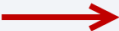
Runoff / Rerun:

*Committee: Sophia for Council

Event:

Intermediary Name: Add Intermediary

Notes:
[For Campaign Use Only]



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.
- ◆ The **Childcare Services** purpose and exempt codes must be used together.

5. The contribution has been successfully saved.

- Once you click **Save**, C-SMART will return you to the contributor's **In-Kind Contributions** page. The **Totals** box and list of contributions will be updated to reflect the newly saved transaction.

The screenshot displays the 'In-Kind Contributions' page. At the top, a green banner states 'Your transaction has been successfully saved.' Below this, the page title 'In-Kind Contributions' is shown with an information icon and a 'Back to In-Kind Contributions' link. A search bar is present with the placeholder text 'Search by Last Name or Entity Name' and a search icon. To the right is an 'Add Name' button. The 'Profile' section contains the following information:

Name:	Gregory, Joel	Employer:	NYPD
Address:	36-12 31st Ave. 2C New York NY 10019	Occupation:	Police Officer
Boro:	Manhattan Individual	Address:	

The 'Totals' section is highlighted with a yellow box and contains:

Total Contributions:	\$500.00	View
Total Matching Amount:	\$0	
Total Cash:	\$0.00	


The 'In-Kind Contributions' section features an 'Add Contribution' button and a table with the following data:

Transaction ID	Date Received	Contribution Type	Doing Business	Refunds	Amount
8386	2/1/2019	Property Given	No	(\$0.00) 0	\$500.00

Best Practice: Write the C-SMART **Transaction ID** on the backup documentation ([In-Kind Contribution form](#), proof of fair market value, etc.).

HOW TO EDIT AN IN-KIND CONTRIBUTION

1. Go to the contributor's **In-Kind Contributions Details** 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**.


In-Kind Contributions						Add Contribution
Transaction ID	Date Received	Contribution Type	Doing Business	Refunds	Amount	
8386	2/1/2019	Property Given	No	(\$0.00) 0	\$250.00	

[Edit](#)

[Add Document](#)

[Add Refund](#)

OR



C-SMART
New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

[Add Name](#)
[8386 -- In-Kind Contribution](#)

In-Kind Contribution Details

Transaction ID: 8386 Statement: N/A

[Edit](#) [Delete](#) [Print Letter](#) [Send Email](#)

Profile		Totals	
Name: Gregory, Joel	Employer: NYPD	Total Contributions: \$500.00 View	
Address: 36-12 31st Ave. 2C New York NY 10019	Occupation: Police Officer	Total Matching Amount: \$0	
Boro: Manhattan Individual	Address:	Total Cash: \$0.00	

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

Edit Details

*Date Received: 02/01/2019

*Amount: \$ 250.00

*Contribution Type: Property Given

Exempt Code:

*Purpose Code: Office Expenses

*Explanation: Laptop

Is this contributor in the [Doing Business Database?](#) No

Runoff / Rerun:

*Committee: Sophia for Council

Event:

Intermediary Name: Add Intermediary

Notes: [For Campaign Use Only]

Entered By: srosar1389 Date: 02/01/2019 10:16 AM Updated By: srosar1389 Date: 02/01/2019 10:16 AM

Save Cancel

3. The contribution has been successfully edited.

Your Transaction has been successfully deleted.

Bills [Back to Bills](#)

Search by Last Name or Entity Name

Profile

Name: A-OK Print Shop, Inc.
Address: 223 Astoria Blvd.
Astoria NY 11102
Boro: Queens Corporation

Totals

Total Outstanding: \$0.00
Total Payments: \$0.00
Total Forgiven: \$0.00

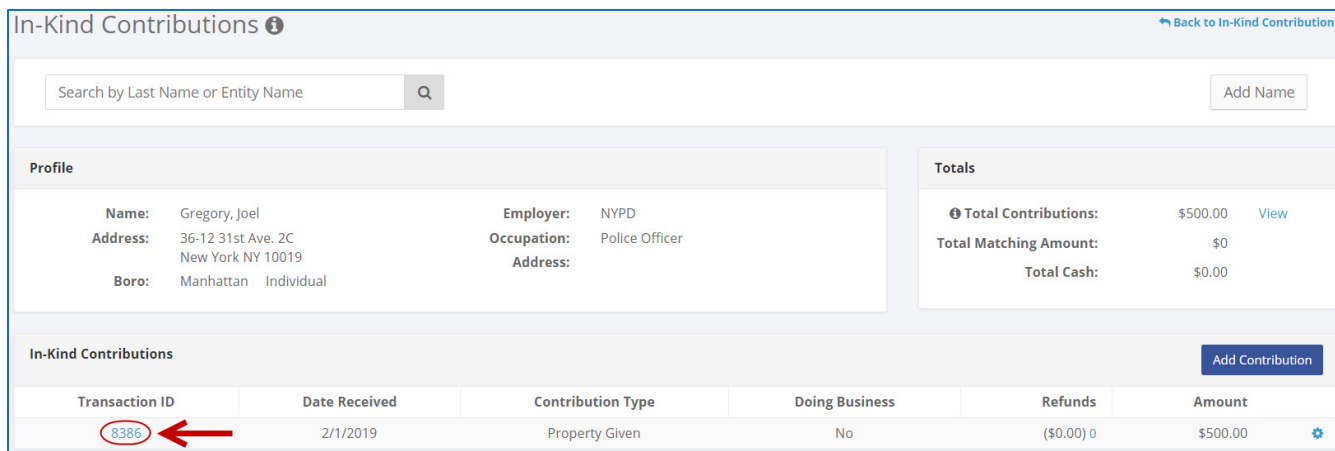
Bills

Transaction ID	Invoice Date	Documentation	Bill Amount	Payment	Payment Refund	Forgiven	Outstanding
No records							

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

HOW TO DELETE AN IN-KIND CONTRIBUTION

1. Go to the contributor's **In-Kind Contributions** page.
 - Click the contribution's **Transaction ID** OR enter it into the **Search Transaction ID** bar.



In-Kind Contributions Back to In-Kind Contributions

Search by Last Name or Entity Name

Profile

Name: Gregory, Joel **Employer:** NYPD
Address: 36-12 31st Ave. 2C
New York NY 10019 **Occupation:** Police Officer
Boro: Manhattan Individual **Address:**

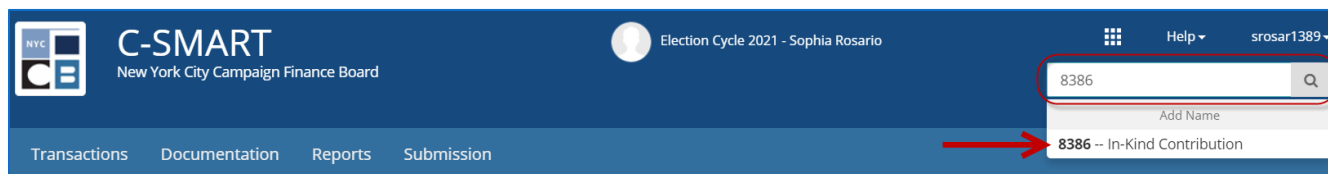
Totals

Total Contributions: \$500.00 [View](#)
Total Matching Amount: \$0
Total Cash: \$0.00

In-Kind Contributions

Transaction ID	Date Received	Contribution Type	Doing Business	Refunds	Amount
8386	2/1/2019	Property Given	No	(\$0.00) 0	\$500.00

OR



NYC C-SMART Election Cycle 2021 - Sophia Rosario Help srosar1389

New York City Campaign Finance Board

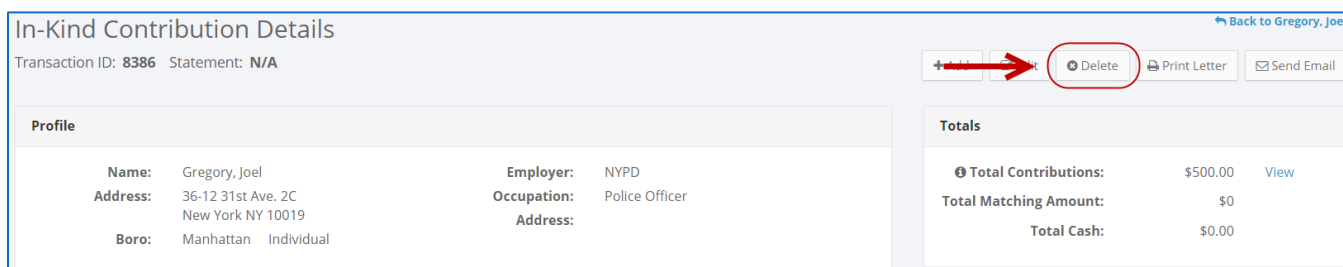
8386

Add Name

8386 -- In-Kind Contribution

Transactions Documentation Reports Submission

2. Click **Delete** to proceed.



In-Kind Contribution Details Back to Gregory, Joel

Transaction ID: 8386 Statement: N/A

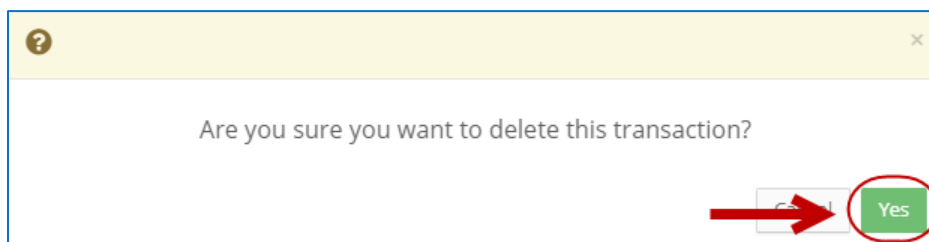
Profile

Name: Gregory, Joel **Employer:** NYPD
Address: 36-12 31st Ave. 2C
New York NY 10019 **Occupation:** Police Officer
Boro: Manhattan Individual **Address:**

Totals

Total Contributions: \$500.00 [View](#)
Total Matching Amount: \$0
Total Cash: \$0.00

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



Are you sure you want to delete this transaction?

3. The contribution has been successfully deleted.

The screenshot displays the 'In-Kind Contributions' interface. At the top, a green notification bar states 'Your Transaction has been successfully deleted.' with a close button. Below this, the page title 'In-Kind Contributions' is shown with a help icon and a 'Back to In-Kind Contributions' link. A search bar is present with the placeholder 'Search by Last Name or Entity Name' and a search button. To the right is an 'Add Name' button. The main content area is divided into three sections: 'Profile', 'Totals', and 'In-Kind Contributions'. The 'Profile' section lists details for Gregory, Joel, including his address (36-12 31st Ave. 2C, New York NY 10019) and occupation (Police Officer). The 'Totals' section shows 'Total Contributions: \$0.00', 'Total Matching Amount: \$0', and 'Total Cash: \$0.00'. The 'In-Kind Contributions' section features a table with columns for Transaction ID, Date Received, Contribution Type, Doing Business, Refunds, and Amount. The table is currently empty, displaying 'No records'. A yellow arrow points from the success message to the search bar, and a yellow box highlights the 'Totals' section.

Profile

Name: Gregory, Joel **Employer:** NYPD
Address: 36-12 31st Ave. 2C
New York NY 10019 **Occupation:** Police Officer
Boro: Manhattan Individual **Address:**

Totals

Total Contributions: \$0.00 [View](#)
Total Matching Amount: \$0
Total Cash: \$0.00

In-Kind Contributions [Add Contribution](#)

Transaction ID	Date Received	Contribution Type	Doing Business	Refunds	Amount
No records					

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