

C-SMART HELP

LOANS

HOW TO ADD A LOAN

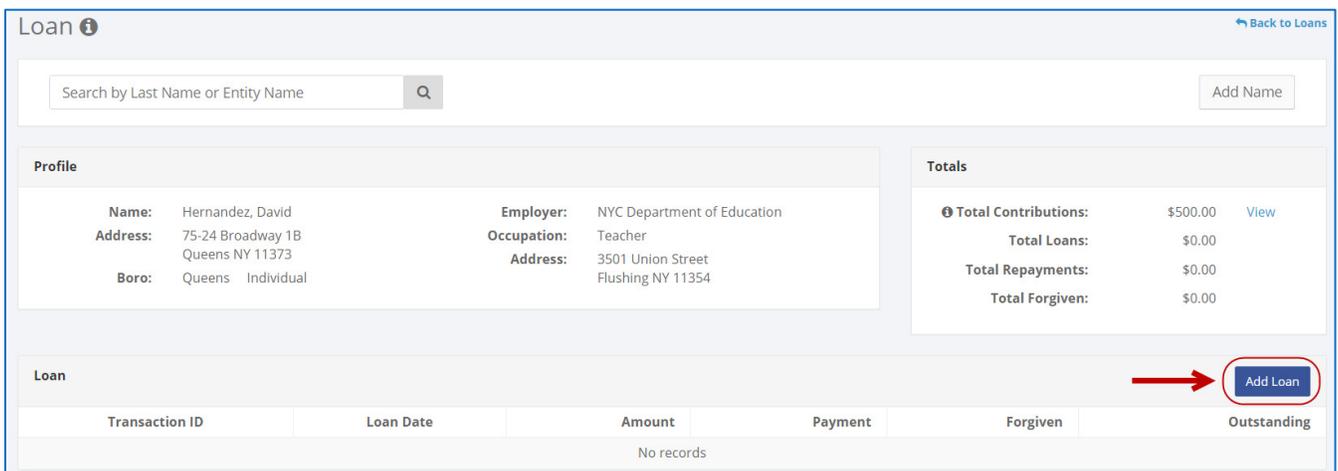
1. Go to **Loans**.
 - Hover your cursor over **Transactions** and click **Loans**.



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



3. Click **Add Loan**.



4. Enter and save the loan details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Loan Date:** Enter the date the loan was received.
 - ◆ **Amount:** Enter total amount of the loan.
 - ◆ **Committee:** Select the committee receiving the loan. C-SMART will default to your principal committee, but you can select a different one if necessary.
 - ◆ **Bank Loan:** Check this box if the loan was from a bank or other financial institution.
 - ◆ **Runoff/Rerun:** Check this box if the loan was for an expected runoff or court-ordered rerun election. Accepting loans for a runoff is allowed only if the CFB confirms one is expected. Review [Runoff Guidance](#) for more information.
 - ◆ **Segregated:** Indicate if the loan was collected through a segregated bank account. See Chapter 6 of the [Handbook](#) for guidance on segregated bank accounts
 - ◆ **Notes:** Enter any additional information. The CFB does not receive what you enter in this field. Your notes will be saved across all related transactions.
- Then, click **Save**.

Enter Details

*Loan Date: 10/30/2018

*Amount: \$50.00

*Committee: Sophia for Council

Bank Loan:

Runoff / Rerun:

Segregated:

Notes:
[For Campaign Use Only]

Save Cancel

Best Practice:

- ◆ Use the tab key to navigate between fields.

Important:

- ◆ If a warning appears on clicking **Save**, read it. It might refer to a compliance issue.
- ◆ Loans not repaid by Election Day, in part or in whole, are also considered contributions, subject to the relevant limits and restrictions.

5. The loan has been successfully saved.

- At this point, C-SMART will return you to the lender’s **Loans** page. The **Totals** box and list of loans will be updated to reflect the newly saved transaction.

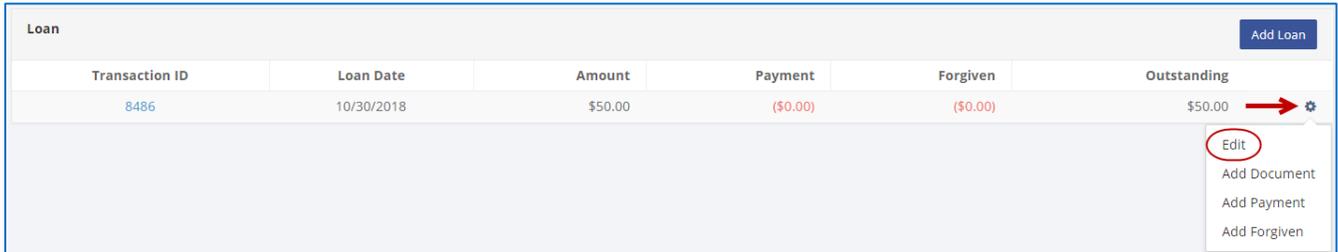
The screenshot displays the C-SMART Loans interface. At the top, a green notification bar states "Your transaction has been successfully saved." Below this, the "Loan" section includes a search bar and an "Add Name" button. A yellow arrow points from the search bar area up to the notification bar. The "Profile" section shows details for David Hernandez, including his address and employer (NYC Department of Education). The "Totals" section is highlighted with a yellow border and shows: Total Contributions: \$500.00, Total Loans: \$50.00, Total Repayments: \$0.00, and Total Forgiven: \$0.00. At the bottom, a "Loan" table lists the transaction with ID 8486, dated 10/30/2018, for an amount of \$50.00, with zero payments, zero forgiven, and \$50.00 outstanding.

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8486	10/30/2018	\$50.00	(\$0.00)	(\$0.00)	\$50.00

Best Practice: Write the C-SMART **Transaction ID** on the copies of the committee check, [loan agreement](#), or other related documentation.

HOW TO EDIT A LOAN

1. Go to the lender's **Loans** page.
 - Click the **gear** and then **Edit** OR enter the loan's **Transaction ID** into the **Search Transaction ID** bar and click **Edit**.



Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8486	10/30/2018	\$50.00	(\$0.00)	(\$0.00)	\$50.00

Buttons: Add Loan, Edit, Add Document, Add Payment, Add Forgiven

OR



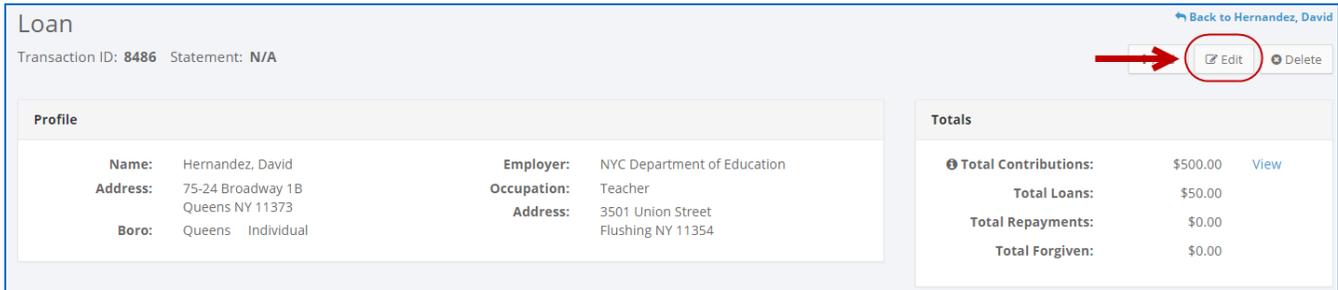
C-SMART New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

Search: 8486

Results: 8486 -- Loan



Loan

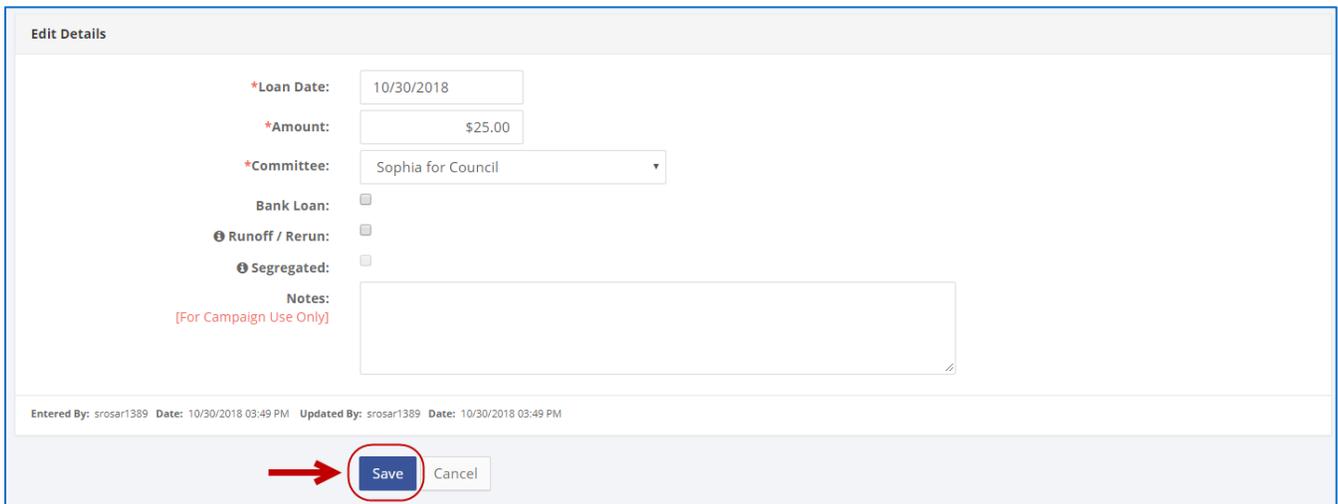
Transaction ID: 8486 Statement: N/A

Buttons: Back to Hernandez, David, Edit, Delete

Profile	
Name:	Hernandez, David
Address:	75-24 Broadway 1B Queens NY 11373
Boro:	Queens Individual
Employer:	NYC Department of Education
Occupation:	Teacher
Address:	3501 Union Street Flushing NY 11354

Totals	
Total Contributions:	\$500.00 View
Total Loans:	\$50.00
Total Repayments:	\$0.00
Total Forgiven:	\$0.00

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



Edit Details

*Loan Date: 10/30/2018

*Amount: \$25.00

*Committee: Sophia for Council

Bank Loan:

Runoff / Rerun:

Segregated:

Notes: [For Campaign Use Only]

Entered By: srosar1389 Date: 10/30/2018 03:49 PM Updated By: srosar1389 Date: 10/30/2018 03:49 PM

Buttons: Save, Cancel

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

3. The loan has been successfully edited.

Your transaction has been successfully saved.

Loan Back to Loans

Search by Last Name or Entity Name

Profile

Name: Hernandez, David	Employer: NYC Department of Education
Address: 75-24 Broadway 1B Queens NY 11373	Occupation: Teacher
Boro: Queens Individual	Address: 3501 Union Street Flushing NY 11354

Totals

Total Contributions:	\$500.00	View
Total Loans:	\$25.00	
Total Repayments:	\$0.00	
Total Forgiven:	\$0.00	

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8486	10/30/2018	\$25.00	(\$0.00)	(\$0.00)	\$25.00

HOW TO DELETE A LOAN

1. Go to the lender's **Loans** page.

➤ Click the loan's **Transaction ID** OR enter it into the **Search Transaction ID** bar.

Loan Back to Loans

Search by Last Name or Entity Name

Profile

Name: Hernandez, David	Employer: NYC Department of Education
Address: 75-24 Broadway 1B Queens NY 11373	Occupation: Teacher
Boro: Queens Individual	Address: 3501 Union Street Flushing NY 11354

Totals

Total Contributions:	\$500.00	View
Total Loans:	\$25.00	
Total Repayments:	\$0.00	
Total Forgiven:	\$0.00	

Loan

Transaction ID	Loan Date	Amount	Payment	Forgiven	Outstanding
8486	10/30/2018	\$25.00	(\$0.00)	(\$0.00)	\$25.00

OR

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Help srosar1389

8486

Add Name

8486 - Loan

Transactions Documentation Reports Submission

2. Click **Delete** to proceed.

The screenshot shows the 'Loan' details page for Transaction ID: 8486. The page is divided into three main sections: Profile, Totals, and a top navigation bar. The Profile section contains the following information:

Name:	Hernandez, David	Employer:	NYC Department of Education
Address:	75-24 Broadway 1B Queens NY 11373	Occupation:	Teacher
Boro:	Queens Individual	Address:	3501 Union Street Flushing NY 11354

The Totals section shows:

Total Contributions:	\$500.00	View
Total Loans:	\$25.00	
Total Repayments:	\$0.00	
Total Forgiven:	\$0.00	

In the top right corner, there are two buttons: '+ Add' and 'Delete'. The 'Delete' button is circled in red, and a red arrow points to it from the left.

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

A yellow confirmation dialog box is shown with a question mark icon in the top left corner. The text inside the dialog reads: "Are you sure you want to delete this transaction?". At the bottom right of the dialog, there are two buttons: "Cancel" (grey) and "Yes" (green).

3. The loan has been successfully deleted.

The screenshot shows the 'Loan' page after a successful deletion. A green banner at the top of the page reads: "Your Transaction has been successfully deleted." with a checkmark icon on the left and a close 'x' icon on the right. A yellow arrow points from this banner to the 'Delete' button in the previous screenshot. Below the banner, the page layout is similar to the previous screenshot, but the 'Totals' section is highlighted with a yellow border. The 'Loan' table at the bottom is empty, with a yellow border around it and the text "No records" centered in the table body. The table headers are: Transaction ID, Loan Date, Amount, Payment, Forgiven, and Outstanding. There is an "Add Loan" button in the top right corner of the table area.

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