Help Content: NYC Votes Contribute Upload

If you are an NYC Votes Contribute user, you must upload your credit card contribution data and documentation directly into C-SMART. You must perform the upload in order for contributions to appear in C-SMART; otherwise, your disclosure statement will not include your NYC Votes contributions and you will lose the opportunity to claim any eligible contributions for matching funds.

> *CANDIDATE SERVICES TIP:*
> ✓ *Do NOT manually enter in C-SMART contributions received via NYC Votes Contribute. If you notice that a contribution does not upload correctly into C-SMART, contact your Candidate Services Liaison.*

## HOW TO UPLOAD YOUR NYC VOTES CONTRIBUTIONS TO C-SMART

1. **Sign in to your campaign's NYC Votes account.**

   Go to www.nycvotes.org, click on **Campaign Login**, and enter your CFB-registered email address and NYC Votes password.
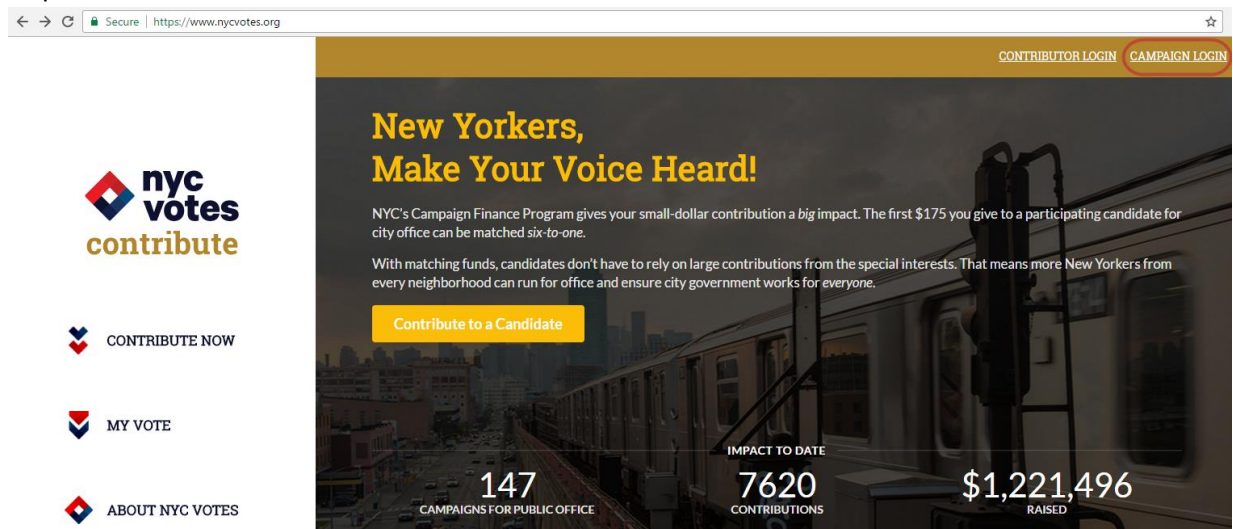
2. **Enter your C-SMART encryption key.**

   When you log in, you will be automatically directed to the **Contributions** section of your **My Account** page. NYC Votes will alert you if you have any contributions that have not been uploaded to C-SMART. To initiate the upload, enter your C-SMART encryption key in the **Encryption Key** field and click **Upload**. You will be able to use the upload function only if there are contributions that have not yet been uploaded to C-SMART.
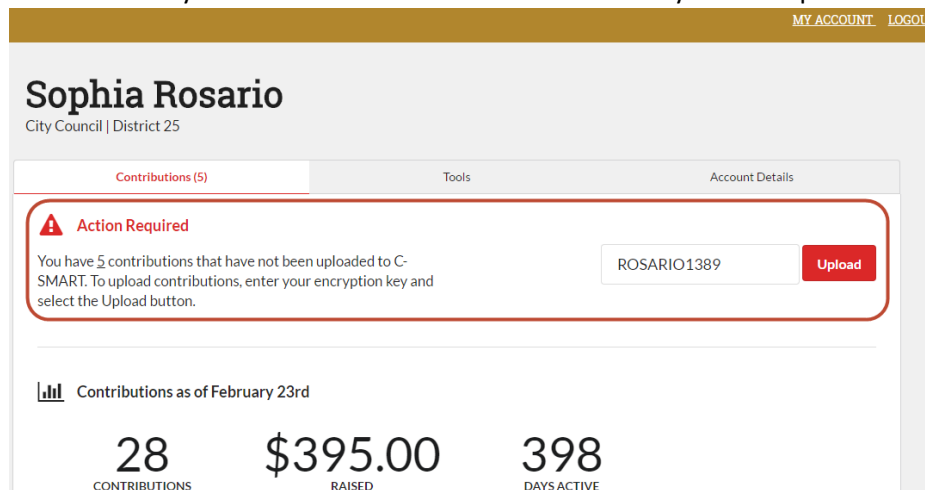
3. Read the confirmation message.

C-SMART will present you with a confirmation message once you have begun the upload. Read this message very closely—it provides directions for further steps you must take to complete the import process.

> **You have initiated the process to upload your contributions to C-SMART.**
>
> A receipt confirming the success of the upload will be sent to you via email.
>
> To complete the import process, you must:
>
> 1. Review each contribution in C-SMART
> 2. Merge any duplicate name records (For instructions, click here)
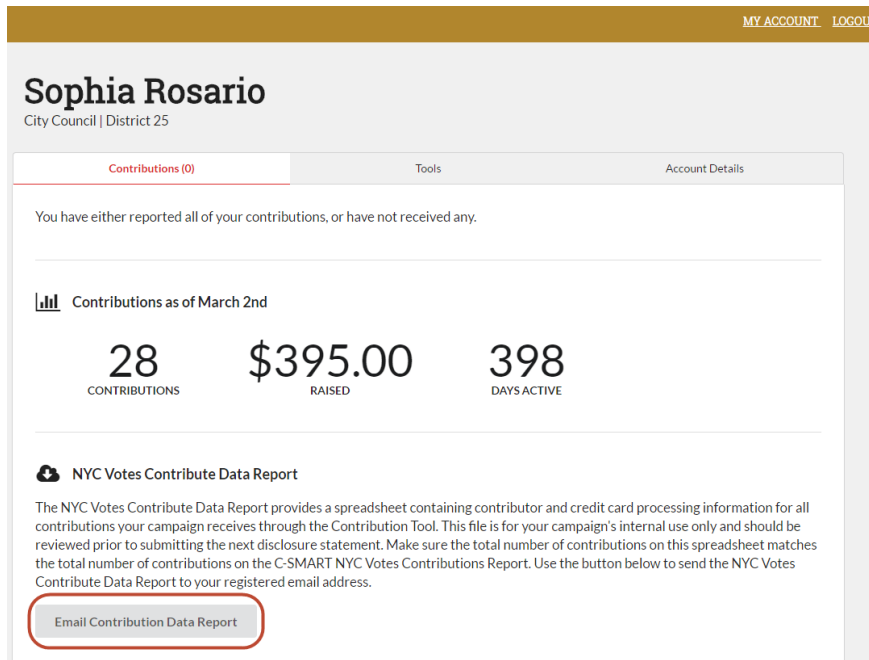> 3. Claim any eligible contributions for match.
>
> Log in to C-SMART now and review the NYC Votes Contribution Report. The report is sorted by Import Date so you can identify the contributions imported today and complete Steps 1, 2, and 3.
>
> WARNING: If you do not perform these steps prior to the submission of your next disclosure statement, you will miss the opportunity to claim eligible contributions for match. Failure to merge duplicate name records may result in over-the-limit contributions, subject to penalty.
>
> Return to My Account

4. Review each contribution in C-SMART.

Review the **NYC Votes Contributions Report** in C-SMART to ensure that each contribution was uploaded properly. For assistance in accessing and using this report, review the C-SMART Help module for Reports. You should also compare the total number of contributions on the C-SMART report to the total displayed on the **NYC Votes Contribute Data Report** available to you through your My Account page in NYC Votes. To have this report sent to you by email from NYC Votes, click on **Email Contribution Data Report** from the **Contributions** section of your **My Account** page. If you notice any discrepancies, contact your Candidate Services Liaison.

MY ACCOUNT   LOGOUT

Sophia Rosario
City Council | District 25

Contributions (0)	Tools	Account Details

You have either reported all of your contributions, or have not received any.

📊 Contributions as of March 2nd

28	$395.00	398
CONTRIBUTIONS	RAISED	DAYS ACTIVE

☁ NYC Votes Contribute Data Report

The NYC Votes Contribute Data Report provides a spreadsheet containing contributor and credit card processing information for all contributions your campaign receives through the Contribution Tool. This file is for your campaign's internal use only and should be reviewed prior to submitting the next disclosure statement. Make sure the total number of contributions on this spreadsheet matches the total number of contributions on the C-SMART NYC Votes Contributions Report. Use the button below to send the NYC Votes Contribute Data Report to your registered email address.

[Email Contribution Data Report]

CANDIDATE SERVICES TIPS:
- ✓ *Make sure that the total number of contributions found on the NYC Votes Contribute Data Report exactly matches the total found on the C-SMART NYC Votes Contributions Report.*
- ✓ *From each contribution's Monetary Contribution screen in C-SMART, you can review the backup documentation automatically imported by NYC Votes. For assistance in viewing the documentation, see How to View a Document in Monetary Contributions.*

✓ *Note about Address Verification: You may review the NYC Votes Contribute Data Report to see whether the AVS (Address Verification System) check for a New York City resident's contribution that you want to claim for match resulted in a "pass" or "fail." This information is displayed in the "Address Verification" column of the report. If you notice that the "Address Verification" field displays "fail," look at the "Billing Address Same as Residential" field to see whether the contributor indicated that the billing address is different (displayed as "no"). Then, review the "Reason Billing / Residential Differ" column to see if the contributor provided an explanation. If the contributor did not provide an explanation for why the billing and residential addresses differ, you should reach out to the contributor to complete an Address Verification letter in order for the contribution to be eligible for matching funds.*

5. **Merge any duplicate name records.**
   The upload from NYC Votes Contribute to C-SMART might result in duplicate name records in your C-SMART database. This occurs when a C-SMART name record already exists for someone who contributes through NYC Votes Contribute. You must merge any duplicate names after each upload. This ensures that your recordkeeping and disclosure are accurate and helps you to prevent over-the-limit contributions. For assistance, see Merge Duplicate Names.

6. **Claim eligible contributions for match.**
   NYC Votes Contribute does not automatically claim any contribution for match. After each upload, you must modify your NYC Votes contributions in C-SMART to enter a matching amount. For assistance in editing contributions to claim them for match, see the Help content for Monetary Contributions.
   ➢ Use the NYC Votes Contributions Report in C-SMART to assist you when claiming NYC Votes contributions for match. The report contains each contribution's C-SMART Transaction ID and matching amount; additionally, the report includes an indicator that tells you whether the matching amount has been updated. For assistance in accessing and using this report, review the Help module for Reports.

7. **Enter bills and bill payments for Stripe fees.**
   NYC Votes Contribute uses a processor called Stripe, which charges a small fee (2.9% + $0.30) for each contribution. On the Monthly Stripe Account Statements that you receive by email, the "Total Stripe Fees for Month" field will be included. You must enter a bill and bill payment to Stripe in C-SMART each month for that amount. The date of the bill and bill payment should be the last day of the statement month. For assistance in adding bills and bill payments, review the Help content for Bills.

   CANDIDATE SERVICES TIPS:
   ✓ *When entering Stripe as a vendor in C-SMART, be sure to include the company's address: 185 Berry Street, Suite 550, San Francisco, CA 94107. For assistance in adding a name record, see the Help module for Names.*
   ✓ *If no Stripe fees were charged for a given month, no data entry in C-SMART is required for that month.*