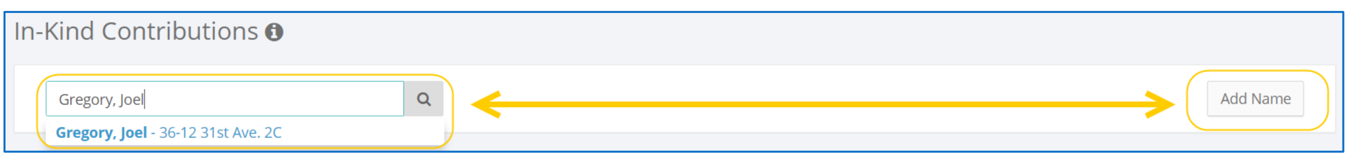
C-SMART HELP

IN-KIND CONTRIBUTIONS

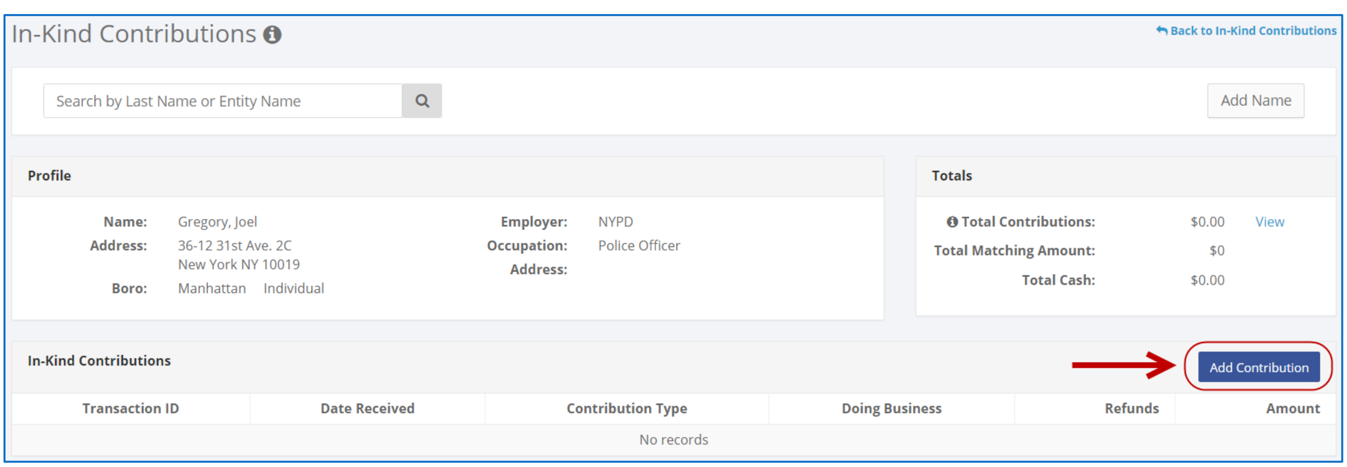
HOW TO ADD AN IN-KIND CONTRIBUTION

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**.

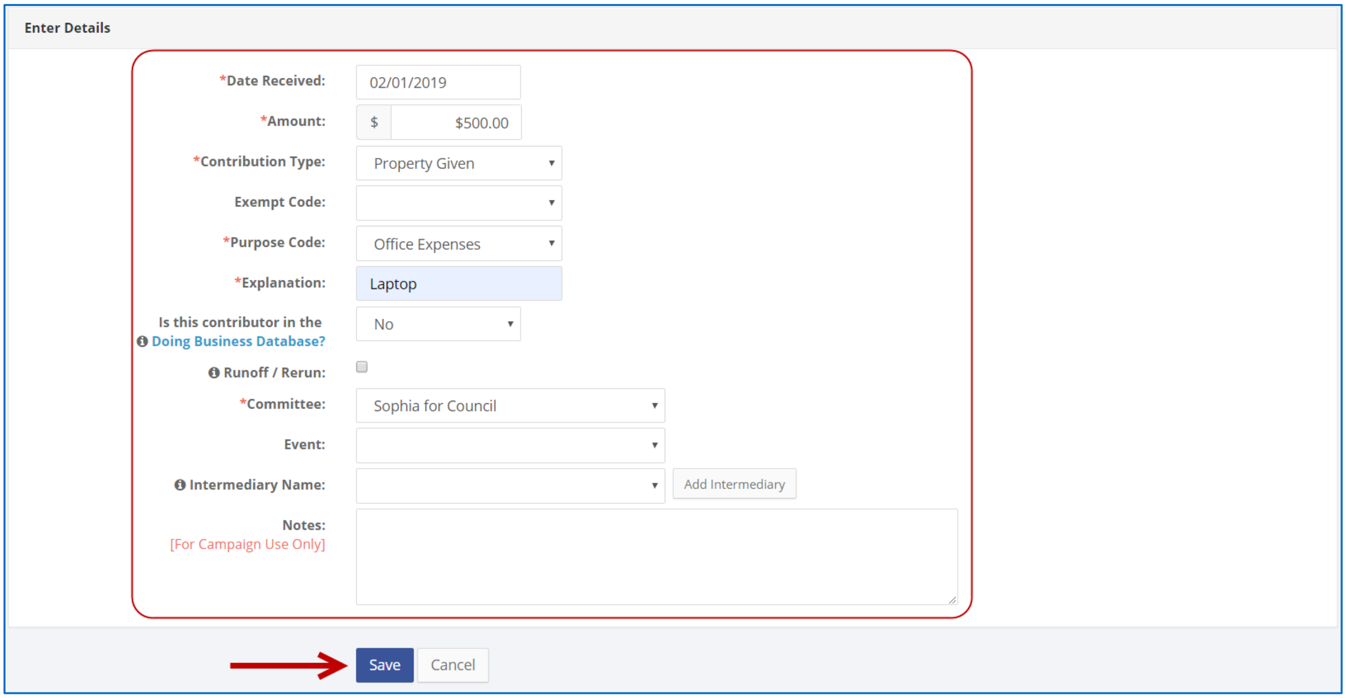


4. Enter and save the in-kind contribution details.

   - 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**.



Best Practice:

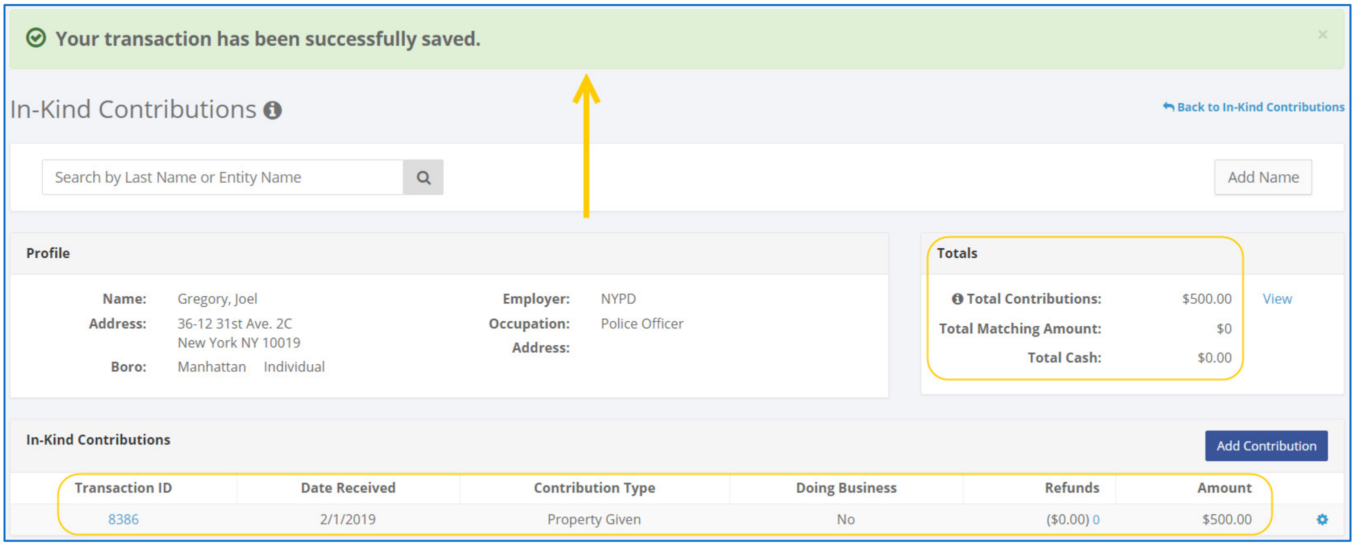
- Use the tab key to navigate between fields.

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.

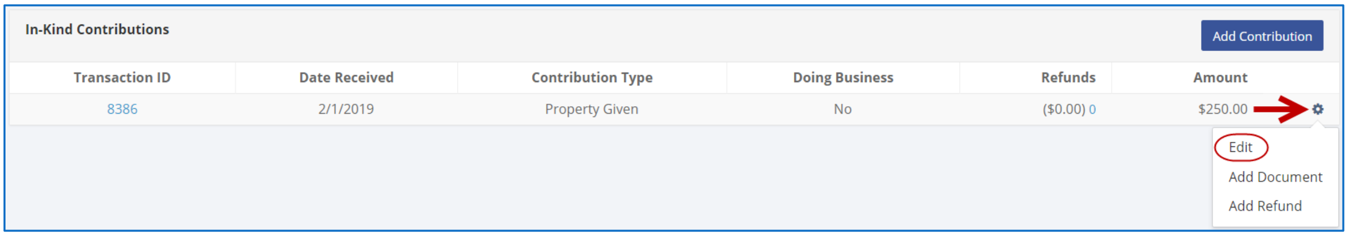


Best Practice: Write the C-SMART **Transaction ID** on the backup documentation (In-Kind Contribution form, proof of fair market value, etc.).

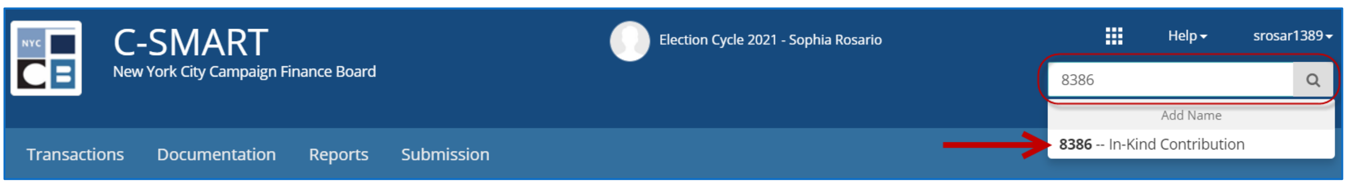
HOW TO EDIT AN IN-KIND CONTRIBUTION

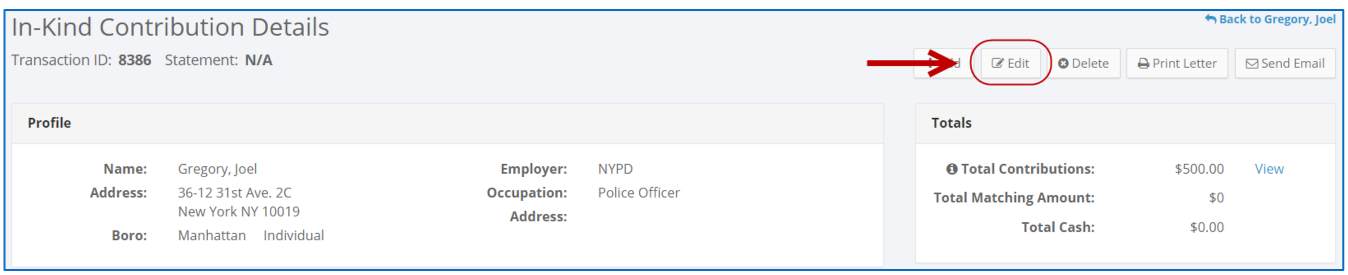
1. Go to the contributor's **In-Kind Contributions Details** page.

   ➢ Click the **gear** next to the contribution and then **Edit** OR enter the **Transaction ID** into the **Search Transaction ID** bar and click **Edit**.

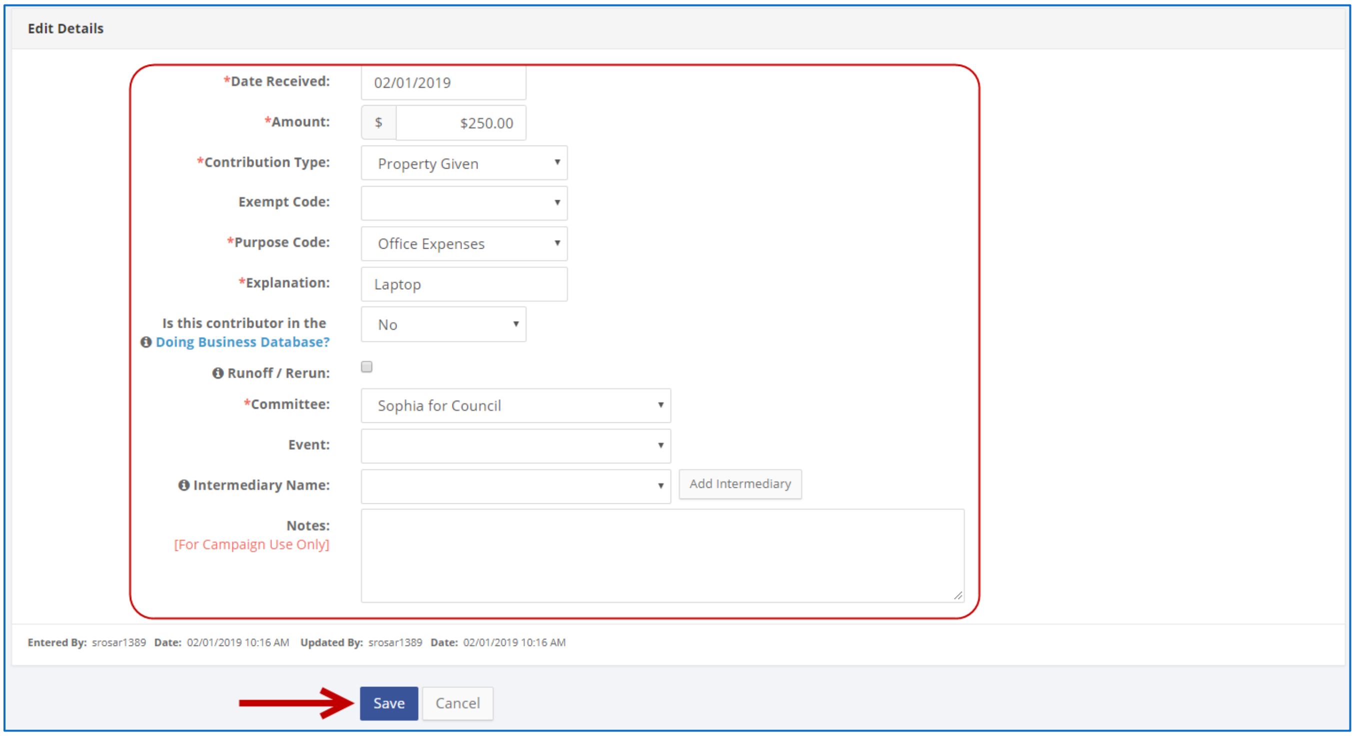


OR

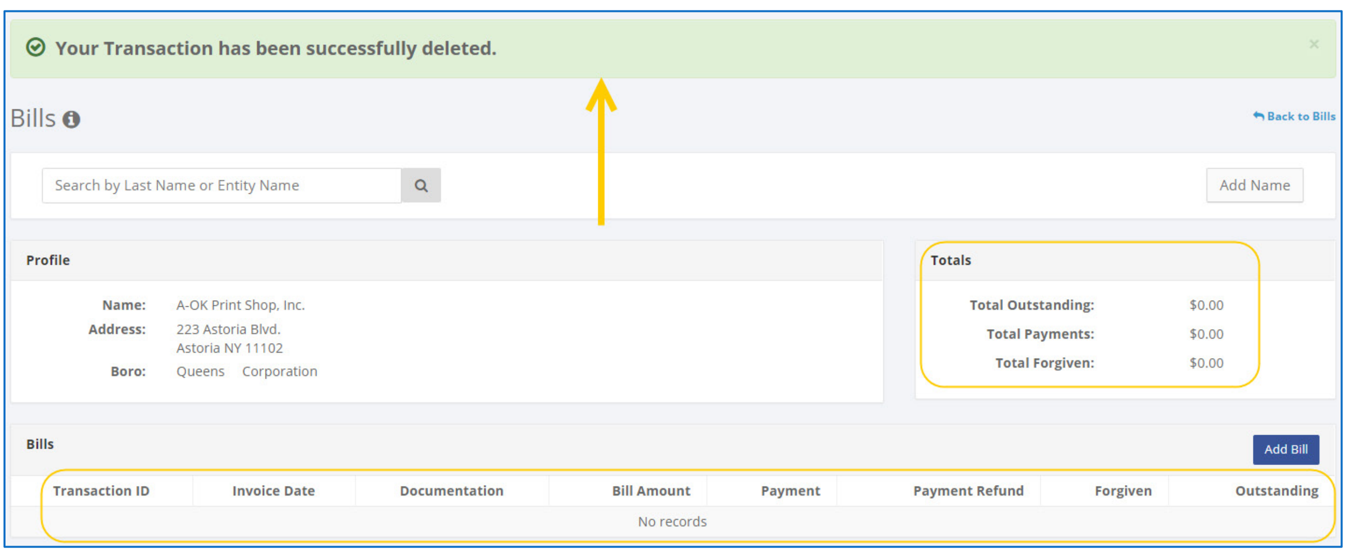




2. Modify the necessary fields and click **Save**.



3. The contribution has been successfully edited.

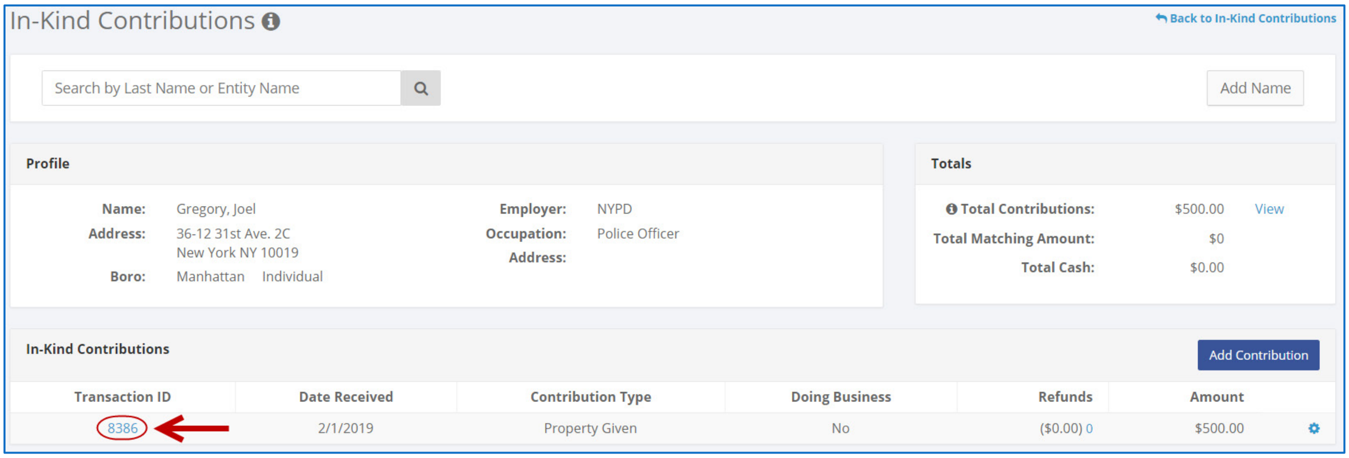


Important: The timestamp at the bottom will be updated to show who last modified the transaction.

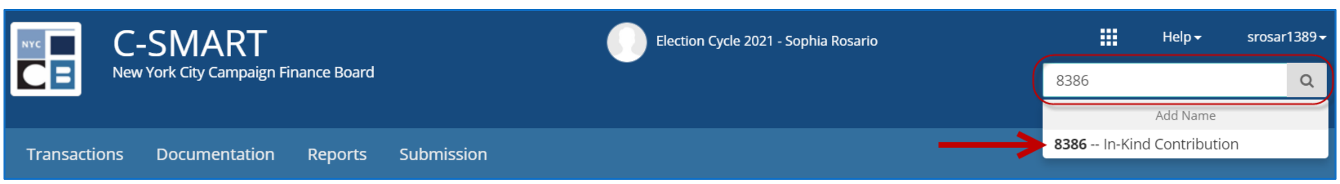
HOW TO DELETE AN IN-KIND CONTRIBUTION

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

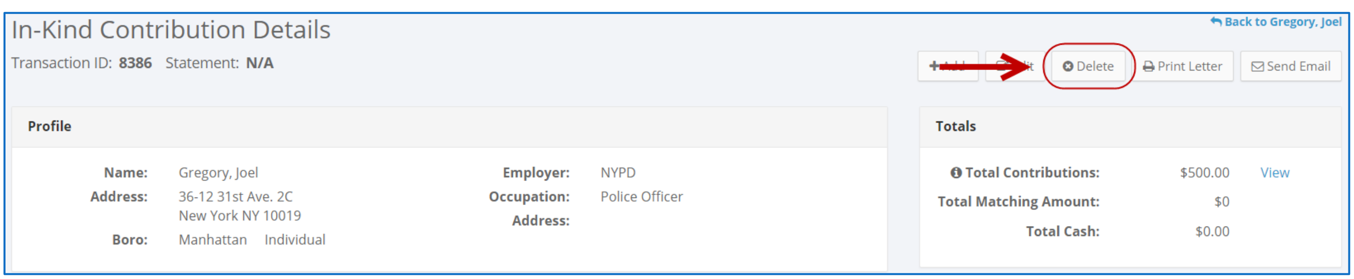
   ➢ Click the contribution's **Transaction ID** OR enter it into the **Search Transaction ID** bar.



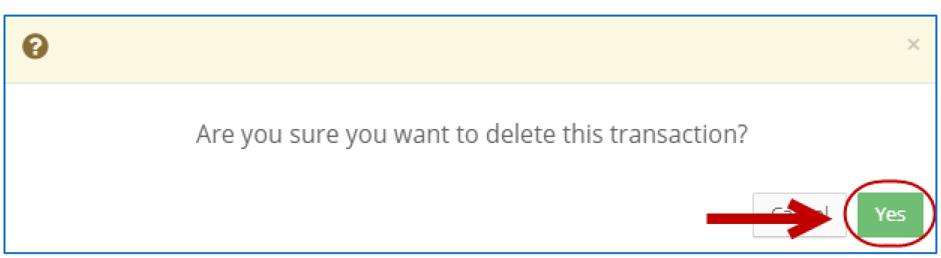
OR



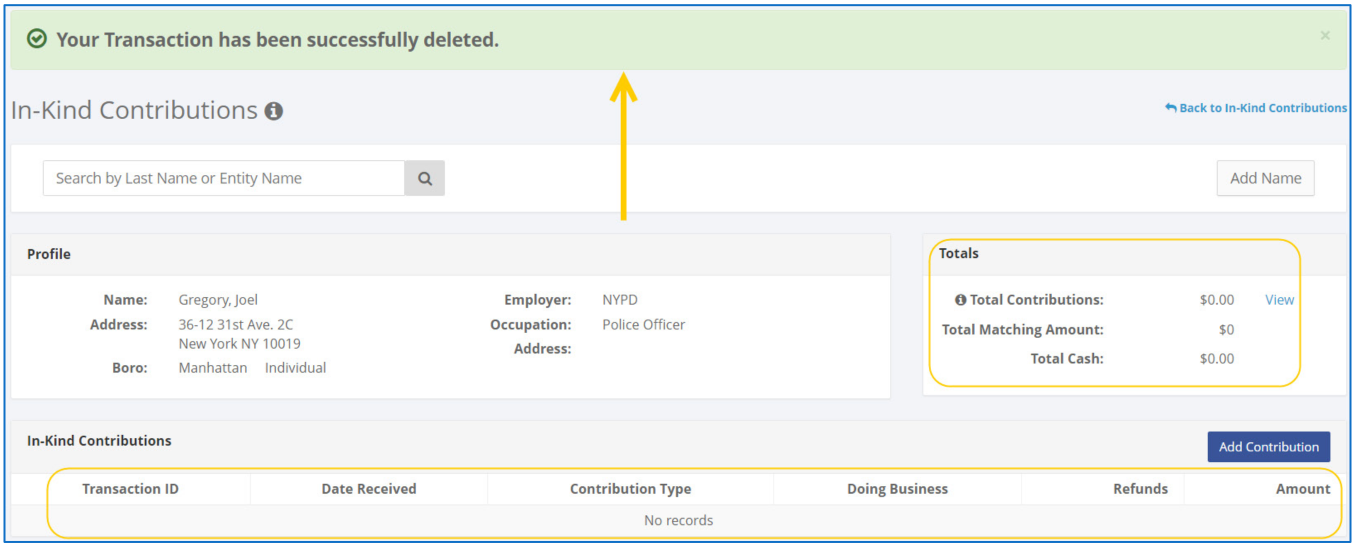
2. Click **Delete** to proceed.



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



3. The contribution has been successfully deleted.



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