



**nyc**  
**votes contribute**

# USER GUIDE

MAY 2020



NEW YORK CITY CAMPAIGN FINANCE BOARD





# NYC VOTES CONTRIBUTE USER GUIDE

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## WHAT IS NYC VOTES CONTRIBUTE?

**NYC Votes Contribute**, a platform created by the **New York City Campaign Finance Board** (CFB), is the first of its kind—a fundraising tool for candidates, built as a public good. The CFB created NYC Votes Contribute with the goal of extending our small-dollar matching funds program online. The platform aims to transform political engagement for campaigns, voters, and contributors. Contribute is user-friendly and simplifies the process of collecting credit card contributions online while meeting the CFB’s reporting and recordkeeping requirements. By offering a tool that helps candidates to connect with their supporters and to collect potentially matchable contributions, we hope to make it easier for candidates of all backgrounds to qualify for matching funds and build a viable campaign with the help of small-dollar contributions.

NYC Votes Contribute is exclusively available to CFB-registered campaigns, who can sign up as soon as they register with the CFB.

- ◆ **Contribute** is accessible on desktops, tablets, and smartphones through [nycvotes.org](https://nycvotes.org), your campaign’s website, or your direct fundraising link.
- ◆ The platform simplifies collecting, reporting, and recordkeeping of credit card contributions and collects required CFB disclosure details.
- ◆ Contribution data and documentation can be uploaded directly to C-SMART.
- ◆ The default contribution amounts are customizable to meet each campaign’s fundraising needs.

This guide provides step-by-step instructions on how to sign up for NYC Votes Contribute and how to connect your account to **Stripe**, the credit card processor that Contribute uses. The User Guide also explains how to use Contribute and describes the contributor’s experience.

## NYC VOTES CONTRIBUTE IN THE 2017 ELECTIONS

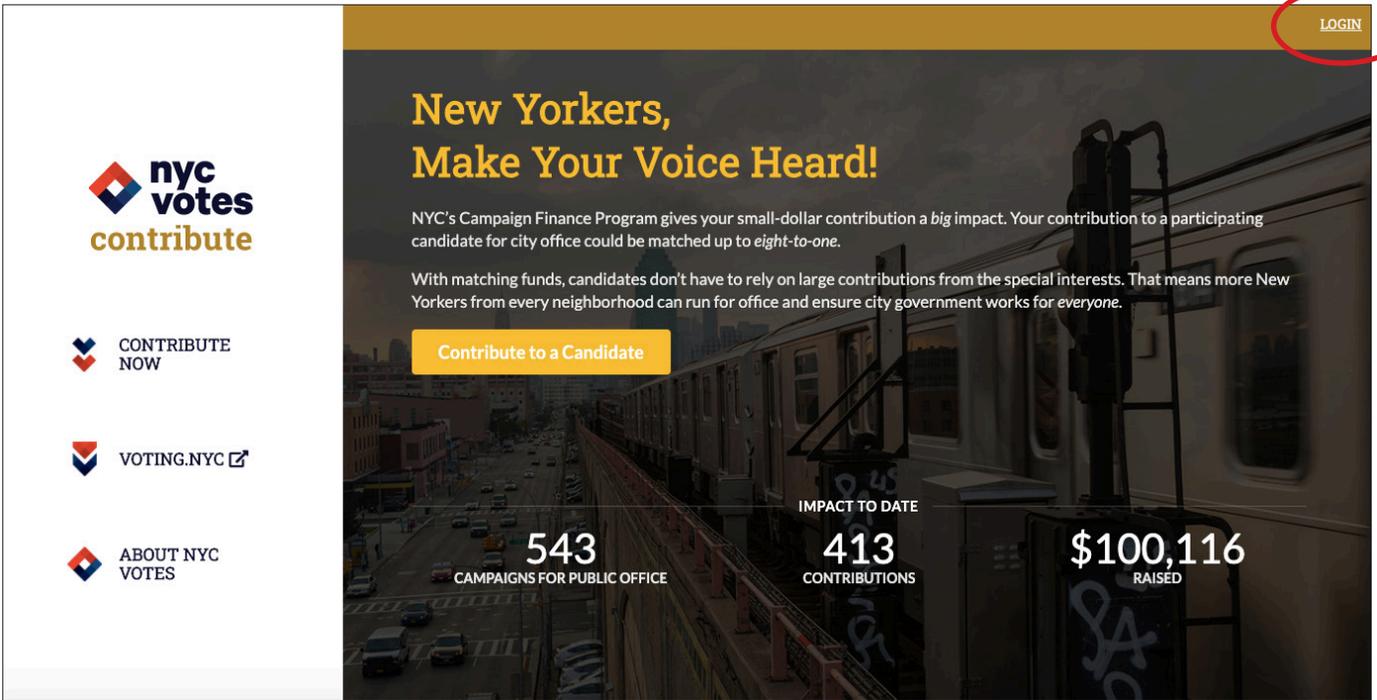
During the 2017 election cycle, NYC Votes Contribute:

- ◆ Was used to raise \$4.5 million over 28,000 contributions.
- ◆ Was used by 75% of all candidates and 86% of public funds recipients.
- ◆ Helped 50% of campaigns receive public funds.

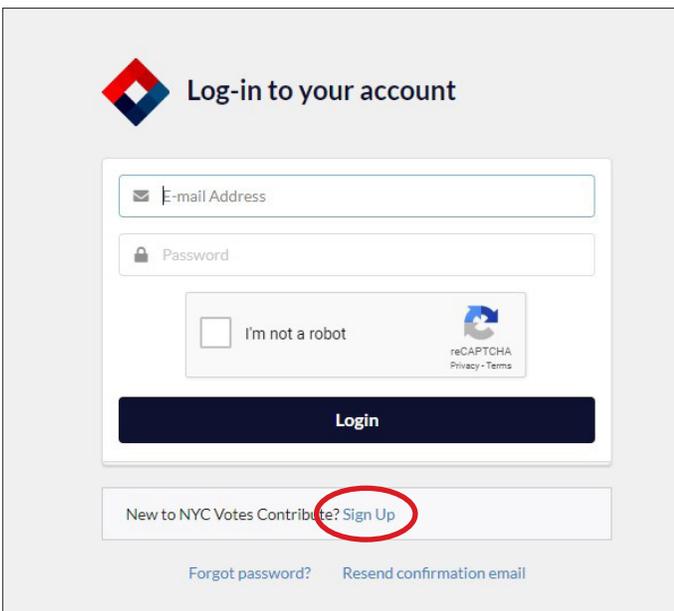
# HOW DO I USE NYC VOTES CONTRIBUTE?

## 1. SIGN UP AT NYCVOTES.ORG

After submitting a **Filer Registration** or **Certification** to the CFB, your campaign will have access to NYC Votes Contribute. In order to create your account, go to [nycvotes.org](http://nycvotes.org) and click on the **Login** button in the upper right hand corner.



## 2. CLICK THE SIGN UP LINK ON THE NEXT PAGE



### 3. CREATE YOUR PASSWORD

Click the **For Candidates** tab and enter the email address listed on your CFB registration and a unique password. Only candidates and treasurers are eligible to have a Contribute account.

**Best practice:** Both the candidate and treasurer should create an account.

### 4. AGREE TO THE AFFIRMATION STATEMENT

Review the affirmation statement and click **I Agree** in the bottom right hand corner.

## 5. ACTIVATE YOUR ACCOUNT

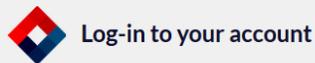
You will receive an email, which will prompt you to activate your NYC Votes Contribute account.

**Note:** You will not be able to begin receiving contributions until you activate your account.

## 6. ACTIVATION CONFIRMATION

If you activated your account successfully, you will be prompted to log into your account.

Your account was successfully confirmed. Please log in.



E-mail Address

Password

Login

New to NYC Votes Contribute? Sign Up

[Forgot password?](#)

[Resend confirmation email](#)

## 7. CONNECT WITH STRIPE

You must connect your NYC Votes Contribute account with [Stripe](#), an online payment processor, which charges a nominal and standard fee (2.9% + \$0.30) for each contribution. Candidates who have run in the past must create a new Stripe account with a different email address for each election.



Receives credit card contribution



Processes contribution



Contribution delivered to your committee bank account

After logging into your NYC Votes Contribute account, click the **Connect with Stripe** button.

MY ACCOUNT LOGOUT

CITY COUNCIL | DISTRICT 25

# Sophia Rosario

*Sophia for Council*

Email contribute@nyccfb.info  
If your email address on file needs to be updated, please contact CFB's Candidate Services Unit to update your committee information.

Account Co-Manager candidateservicesunit+1389@yahoo.com

Password [Change Password](#)

Stripe Account  
Stripe is a merchant services provider that enables campaigns to accept contributions through the NYC Votes Contribute platform.

[Connect with Stripe](#) [Learn more about Stripe](#)

After clicking Connect with Stripe, you will be directed to a registration form to create a Stripe account. Your Stripe account is separate from your NYC Votes Contribute account and will be used to process contributions made to your campaign on NYC Votes Contribute to your campaign's bank account. Some of the information you will need to enter in the registration form includes:

- ◆ Business Details: Enter your committee's information in this section. You will need to complete fields such as:
  - » Type of business: Select "Nonprofit Organization"
  - » Legal business name: Enter the committee's name (as disclosed to the IRS and CFB)
  - » Business website: If your committee does not have a website, you can use [www.nycvotes.org](http://www.nycvotes.org) for this field
  - » Business description: Select "Political Organization"
  - » How long after paying will customers typically receive their good or services?: Select "Within One Day"
- ◆ Executive Details: The campaign's Stripe account should be created by the candidate (strongly recommended), treasurer, or another campaign representative with significant managerial control. The individual who creates the account will be the Stripe account holder and will need to provide personal identifying information. (For example, home address and the last four digits of Social Security Number.)

- ◆ Credit Card Statement Details: In this section, you will be able to customize how contributions made to your campaign will appear on your contributors' bank statements.
  - » Statement descriptor: This is the "business name" that will appear on your contributors' bank statement. You should use the committee's name to avoid disputes over unrecognized transactions.
  - » Support phone number: Enter a phone number that can be used to contact you and your campaign.
  - » Customer support address: Use the committee's address.
- ◆ Bank Details: Enter your committee's bank account number and routing number to set up transfers for contributions received. You must use the same bank account on file with the CFB.
- ◆ Two-Step Authentication: Choose one of Stripe's security methods to protect your account.
- ◆ Save your Stripe account: Create your login credentials for your Stripe dashboard. Use these credentials to log in directly at [www.stripe.com](https://www.stripe.com). You can choose to use the same email address linked to your NYC Votes Contribute account, but it is not necessary.

Click the **Authorize access to this account** button to complete the registration form for Stripe.

## 8. RECEIVE NYC VOTES CONTRIBUTE LINK

After creating your Stripe account, you will receive an email that confirms that your NYC Votes Contribute account has been connected to Stripe and that contains your unique NYC Votes Contribute link. This link can be used for promotional materials, campaign flyers and mailings, and social media posts.

Once you have connected your NYC Votes Contribute account with Stripe, your campaign can begin receiving contributions.

**Best practice:** Have the candidate or treasurer make a small test contribution (which may be matchable).

## 9. TRANSFER CONTRIBUTIONS TO YOUR BANK ACCOUNT

Transfers will occur daily and consist of contributions received two business days prior. Your first transfer may take up to one week to process. You will receive a monthly Stripe account statement from NYC Votes Contribute, which shows the contributions received for the month as well as the month's lump sum total of Stripe processing fees deducted from your contributions.

Beginning January 2020, you will be able to upload Stripe fees directly to C-SMART from your Contribute account page. This feature does not apply retroactively, so your campaign should manually enter all Stripe fees incurred before December 2019 in C-SMART. The fees uploaded or manually entered by the campaign will be recorded as a bill and bill payment in C-SMART.

## STRIPE CONTACT INFORMATION

For all Stripe-related inquiries, please visit <https://support.stripe.com> or contact [support@stripe.com](mailto:support@stripe.com).

# NYC VOTES CONTRIBUTE ACCOUNT PAGE

You should familiarize yourself with your NYC Votes Contribute account page after activating your Contribute account and connecting it to Stripe.

In **Data**, you will be able to upload all contributions received, fundraising events created, and monthly Stripe fees deducted to C-SMART. Under this tab, you will also be able to view your campaign's fundraising to date and export your **Contribute Activity Report**.

In **Tools**, you will be able to set the contribution amounts that appear on your contribution pages, including those for fundraising events. You will also find the HTML code to embed your contribution page on your website, in your campaign emails, and on your social media pages.

In **Fundraising Events**, you will be able to create unique contribution pages for fundraisers organized by your campaign. Once an event is created, you can access tools to embed or share a direct event link and view contribution information related to the event.

The screenshot shows the 'Tools' tab of the NYC Votes Contribute account page for Sophia Rosario, City Council District 25. The page is titled 'Sophia Rosario' with the subtitle 'Sophia for Council'. The 'Tools' tab is active, showing options for 'Custom Amount Tool', 'Direct Contribution Link', and 'Embed Contribution Tool'. The 'Custom Amount Tool' section includes input fields for \$25, \$50, \$75, \$100, and \$175, with a 'Save New Defaults' button. The 'Direct Contribution Link' section provides a 'DIRECT LINK' (http://nycvotes-dev.herokuapp.com/campaigns/sophiarosario/contributions/new) and a 'SHORT LINK' (https://bit.ly/2VdYifU), both with 'Copy' and 'Visit' buttons. The 'Embed Contribution Tool' section provides HTML code for 'SMALL EMBED' and 'LARGE EMBED'. A 'Please Note' section at the bottom states: 'The iframe embed will only function properly if you have already configured a Stripe account and linked it to your NYC Votes Contribute account.'

# HOW TO UPLOAD YOUR CONTRIBUTIONS TO C-SMART

After receiving contributions, 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 contributions received via NYC Votes Contribute and you will lose the opportunity to claim any eligible contributions for matching funds.

**IMPORTANT:** Do not manually enter C-SMART contributions received via NYC Votes Contribute. If you notice that a contribution is not uploading correctly into C-SMART, contact your Candidate Services liaison.

## 1. SIGN IN TO YOUR CAMPAIGN'S NYC VOTES CONTRIBUTE ACCOUNT

Go to [www.nycvotes.org](http://www.nycvotes.org), click on **Login**, and enter your CFB-registered email address and NYC Votes Contribute password.

## 2. ENTER YOUR C-SMART ENCRYPTION KEY

When you log in, you will be automatically directed to the **Data** section of your account page. Contributions received via **Fundraising Events** will be included in the total number of contributions that appear under this alert. To upload data from NYC Votes Contribute, enter your C-SMART encryption key in the **Encryption Key** field and click **Upload**. NYC Votes Contribute will alert you if you have any contributions that have not been uploaded to C-SMART. You will be able to use the upload function only if there are contributions that have not yet been uploaded to C-SMART.

The screenshot shows the user interface for a campaign manager. At the top, it says 'CITY COUNCIL | DISTRICT 25' and 'Sophia Rosario' with the tagline 'Sophia for Council'. Below this is a navigation bar with four tabs: 'Data', 'Tools', 'Fundraising Events', and 'Account Details'. The 'Data' tab is selected. A red-bordered box highlights an 'Action Required' alert. The alert text says: 'To upload the data below to C-SMART, enter your encryption key and click the Upload button.' Below the text is a list of items: '5 contribution(s)', '2 fundraising event(s)', and '0 Stripe fee expenditure(s)'. To the right of the list is a text input field labeled 'ENCRYPTION KEY' and a red 'Upload' button. Below the alert box, there is a bar chart icon and the text 'Contributions as of May 12th'. Underneath this are three statistics: '9 CONTRIBUTIONS', '\$700.00 RAISED', and '1 DAYS ACTIVE'.

### 3. READ THE UPLOAD CONFIRMATION PAGE

Read this page closely—it provides instructions for further steps you must take in C-SMART once the contributions are uploaded.

#### **You have initiated the process to upload your Contribute data to C-SMART.**

You will receive an email confirming the completion of this upload shortly.

For contributions and fundraising events uploaded to C-SMART, remember to:

- Review the NYC Votes Contributions report under the Reports tab to verify their successful upload
- Merge duplicate name records. (Merge Duplicate Names in C-SMART Help for assistance.)
- Claim eligible contributions for match
- Report expenditure, expenditure documentation, and hosts (other than the campaign) related to your fundraiser(s).

Review the [User Guide](#)

**NOTE:** 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 by the CFB.

You can review Stripe fees uploaded to C-SMART by searching for “Stripe – NYC Votes Contribute” in the Bills section under the Transaction tab in C-SMART. Please note that the upload of Stripe fees is only available for fees deducted from December 2019 to present day.

#### 4. REVIEW EACH CONTRIBUTION IN C-SMART

Review the **NYC Votes Contributions Report** in C-SMART to ensure that each contribution was uploaded. For more information on how to access and use this report, review **Reports** in C-SMART Help. You should also compare the total number of contributions on the C-SMART report to the total number displayed in the **Contribute Activity Report**, which can be accessed through your account page in NYC Votes Contribute. To have this report sent to you by email, click on **Email Contribute Activity Report** from the **Data** tab of your account page. If you notice any discrepancies, contact your Candidate Services liaison.

The screenshot shows the C-SMART interface for Sophia Rosario, City Council District 25. The 'Data' tab is selected, displaying an 'Action Required' notification. Below the notification, there is a list of statistics: 5 contribution(s), 2 fundraising event(s), and 0 Stripe fee expenditure(s). A table shows 'Contributions as of May 12th' with 9 contributions, \$700.00 raised, and 1 day active. At the bottom, there is a 'Contribute Activity Report' section with a button to 'Email Contribute Activity Report' circled in red.

Category	Value
Contributions	9
RAISED	\$700.00
DAYS ACTIVE	1

#### Best practices:

- ◆ Make sure that the total number of contributions found in the **Contribute Activity Report** matches the total number found in C-SMART's **NYC Votes Contributions Report** exactly.
- ◆ From each contribution's Monetary Contribution screen in C-SMART, you can review the backup documentation updated by NYC Votes Contribute. For more information on viewing this documentation, see **How to View Monetary Contribution Documentation** in **Monetary Contributions**.

#### 5. MERGE DUPLICATE NAME RECORDS

Uploads from NYC Votes Contribute to C-SMART might create duplicate name records for your contributors in your C-SMART database. This will occur when a name record already exists in C-SMART for someone who contributes through NYC Votes Contribute. To ensure accurate disclosure and prevent over-the-limit contributions, you must merge any duplicate name records after each upload. For instructions, see **Merge Duplicate Names**.

## 6. CHECK FOR OVER-THE-LIMIT CONTRIBUTIONS

Review your contributions for any over-the-limit contributions. The easiest way to do this is to generate the **Contributions Over the Limit** report in C-SMART, which will list all of the contributions for a contributor whose total contributions have exceeded the contribution limit for the office sought.

## 7. CLAIM ELIGIBLE CONTRIBUTIONS FOR MATCH

**Contributions from NYC Votes Contribute are not automatically claimed for match.** After each upload, you must enter a matching amount for eligible contributions received through NYC Votes Contribute. For more information on how to edit contributions to claim them for match, see [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 the matching amount; additionally, the report includes an indicator that tells you whether the matching amount has been updated.

## 8. UPLOADING STRIPE FEES TO C-SMART

You can upload monthly Stripe processing fees directly to C-SMART from your Contribute account page. The fees available to upload will be based on the amount reflected on your monthly account statements, which are emailed to your campaign on the 10th day of each month and cover activity for the preceding month.

**Note:** If there were no contributions received for a given month, there will be no Stripe fees available to upload for that month.

Upon your first upload of Stripe fees to C-SMART, a new name record will be created for Stripe in C-SMART to report the lump sum amount of fees deducted for the month. In C-SMART, you can search for "Stripe – NYC Votes Contribute" to review your newly-uploaded Stripe fees. The amount of fees deducted for the month will be reported as bill and bill payment transactions in C-SMART.

## HOW TO CREATE A FUNDRAISING EVENT PAGE

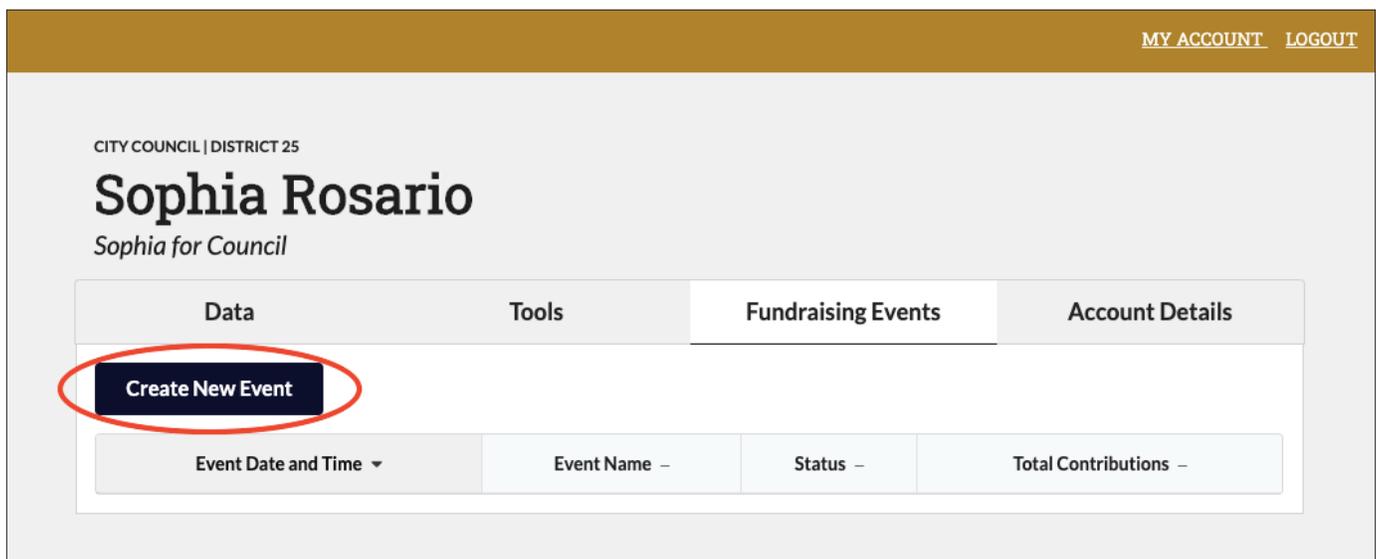
A fundraiser is an event that is organized and sponsored by your campaign. For each fundraiser held by your campaign, you must disclose the following information to the CFB:

- ◆ Date of the event
- ◆ Location of the event
- ◆ List of all contributions received at the event
- ◆ Any persons or organization(s) other than the campaign hosting the event
- ◆ Itemized list of all expenditures related to the event, whether the campaign or another host paid for them

You can create distinct contribution pages on NYC Votes Contribute for fundraisers organized by your campaign. This will allow you to accept contributions for those fundraisers and simplify the reporting of the event's name, location, date, and contributions received.

### 1. VIEW EVENTS AND CREATE A NEW EVENT

From the **Fundraising Events** tab you can create, view, and manage upcoming and past events.



The screenshot shows the user interface for a campaign manager. At the top right, there are links for [MY ACCOUNT](#) and [LOGOUT](#). The main header identifies the user as 'CITY COUNCIL | DISTRICT 25' and 'Sophia Rosario', with the sub-header 'Sophia for Council'. Below this is a navigation bar with four tabs: 'Data', 'Tools', 'Fundraising Events', and 'Account Details'. The 'Fundraising Events' tab is currently selected. Underneath the tabs, there is a dark blue button labeled 'Create New Event', which is circled in red. Below the button is a table with four columns: 'Event Date and Time' (with a dropdown arrow), 'Event Name' (with a minus sign), 'Status' (with a minus sign), and 'Total Contributions' (with a minus sign).

## 2. ENTER EVENT DETAILS

Required fields are marked with an asterisk (\*); *Venue Name* and *Start* and *End Time* are optional fields.

The screenshot shows a web form for creating an event. At the top left, it says "CITY COUNCIL | DISTRICT 25" and "Sophia Rosario" in a large font, with "Sophia for Council" below it. A legend indicates that an asterisk (\*) denotes a required field. The form fields are arranged as follows: "Event Name" (required) and "Venue Name" (optional) are in the first row. The second row contains "Date" (required, MM/DD/YYYY), "Street Number", "Street Name", and "Apt / Suite / Floor". The third row contains "Start Time" (required, HH:MM AM/PM), "City", "State" (a dropdown menu), and "Zip". At the bottom, there is a checkbox for "I have read and agree to the Terms and Conditions".

## 3. SHARE EVENT PAGE WITH SUPPORTERS

After successfully creating an event, you will be directed to the **Share** tab found in the event’s administrative page. From here, you will find links to the event page, social media tools to share through different platforms, and HTML codes that can be used to embed the event page on your campaign’s website, emails, and social media pages. The Status of the event will now be **Open**, meaning contributions can now be collected for this event.

## 4. EDIT EVENT

If you would like to make changes to the event, from the event’s administrative page select the **Edit** tab.

From the **Edit** tab you can update event details and close, open, or delete the event. Deleting an event is only possible if no contributions have been made for that particular event. This action cannot be undone.

You will receive an email for any modifications made to your event. If event details are modified after the event has been uploaded to C-SMART, use the details in this email to make the necessary changes to the event in C-SMART.

**IMPORTANT:** After an event has occurred, it should be closed to stop new contributions from being made. From the **Edit** tab in the event’s administrative page, select **Close Event**. All contributions received via the Fundraising Event feature must be reported to the CFB within the disclosure period in which the event occurred.

If you accidentally close an event before it has occurred, the event can be re-opened. Contact your Candidate Services liaison if you need to re-open an event.

CITY COUNCIL | DISTRICT 25

## Sophia Rosario

*Sophia for Council*

Event Name: Sophia's Spring Fundraiser  
 Date: May 15, 2020  
 Address: Tony's Pizza Parlor, [101 Main Street, New York, NY 11234](#)  
 Event Status: Open

[< Return to Events](#)

Contributions	Share	Edit												
<p><b>* Required Field</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;"> <p><b>Event Name *</b></p> <input type="text" value="Sophia's Spring Fundraiser"/> </td> <td style="width: 33%;"> <p><b>Venue Name</b></p> <input type="text" value="Tony's Pizza Parlor"/> </td> <td style="width: 33%;"></td> </tr> <tr> <td> <p><b>Date *</b></p> <input type="text" value="05/15/2020"/> </td> <td> <p><b>Street Address *</b></p> <input type="text" value="101 Main Street"/> </td> <td> <p><b>Apt / Suite / Floor</b></p> <input type="text" value="Apt / Suite / Floor"/> </td> </tr> <tr> <td> <p><b>Start Time</b></p> <input type="text" value="12:00 PM"/> <span style="float: right;">✕</span> </td> <td> <p><b>City *</b></p> <input type="text" value="New York"/> </td> <td> <p><b>State *</b></p> <input type="text" value="NY"/> </td> </tr> <tr> <td> <p><b>End Time</b></p> <input type="text" value="3:00 PM"/> <span style="float: right;">✕</span> </td> <td> <p><b>Zip *</b></p> <input type="text" value="11234"/> </td> <td></td> </tr> </table>			<p><b>Event Name *</b></p> <input type="text" value="Sophia's Spring Fundraiser"/>	<p><b>Venue Name</b></p> <input type="text" value="Tony's Pizza Parlor"/>		<p><b>Date *</b></p> <input type="text" value="05/15/2020"/>	<p><b>Street Address *</b></p> <input type="text" value="101 Main Street"/>	<p><b>Apt / Suite / Floor</b></p> <input type="text" value="Apt / Suite / Floor"/>	<p><b>Start Time</b></p> <input type="text" value="12:00 PM"/> <span style="float: right;">✕</span>	<p><b>City *</b></p> <input type="text" value="New York"/>	<p><b>State *</b></p> <input type="text" value="NY"/>	<p><b>End Time</b></p> <input type="text" value="3:00 PM"/> <span style="float: right;">✕</span>	<p><b>Zip *</b></p> <input type="text" value="11234"/>	
<p><b>Event Name *</b></p> <input type="text" value="Sophia's Spring Fundraiser"/>	<p><b>Venue Name</b></p> <input type="text" value="Tony's Pizza Parlor"/>													
<p><b>Date *</b></p> <input type="text" value="05/15/2020"/>	<p><b>Street Address *</b></p> <input type="text" value="101 Main Street"/>	<p><b>Apt / Suite / Floor</b></p> <input type="text" value="Apt / Suite / Floor"/>												
<p><b>Start Time</b></p> <input type="text" value="12:00 PM"/> <span style="float: right;">✕</span>	<p><b>City *</b></p> <input type="text" value="New York"/>	<p><b>State *</b></p> <input type="text" value="NY"/>												
<p><b>End Time</b></p> <input type="text" value="3:00 PM"/> <span style="float: right;">✕</span>	<p><b>Zip *</b></p> <input type="text" value="11234"/>													
<p><a href="#">Close Event</a> <a href="#">Delete Event</a></p>		<p><a href="#">Save Event</a></p>												

To customize the contribution amounts for your event page, return to your main NYC Votes Contribute account page and update the amounts found under the Custom Amount Tool in the **Tools** tab.

**Note:** Updating the contribution amounts in this section will change the default amounts across all your campaign's NYC Votes Contribute pages, including all open event pages.

FUNDRAISING EVENTS

CITY COUNCIL | DISTRICT 25

## Sophia Rosario

*Sophia for Council*

Data	Tools	Fundraising Events	Account Details					
<p><b>Custom Amount Tool</b></p> <p>Enter amounts to create your own default contribution amounts for contributors to your NYC Votes campaign page.</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;"><input type="text" value="\$ 25"/></td> <td style="width: 20%;"><input type="text" value="\$ 50"/></td> <td style="width: 20%;"><input type="text" value="\$ 75"/></td> <td style="width: 20%;"><input type="text" value="\$ 100"/></td> <td style="width: 20%;"><input type="text" value="\$ 175"/></td> </tr> </table> <p style="text-align: right;"><a href="#">Save New Defaults</a></p>				<input type="text" value="\$ 25"/>	<input type="text" value="\$ 50"/>	<input type="text" value="\$ 75"/>	<input type="text" value="\$ 100"/>	<input type="text" value="\$ 175"/>
<input type="text" value="\$ 25"/>	<input type="text" value="\$ 50"/>	<input type="text" value="\$ 75"/>	<input type="text" value="\$ 100"/>	<input type="text" value="\$ 175"/>				

## 5. MANAGE AND VIEW EVENTS

Return to the **Fundraising Events** tab to view your events. Events can be sorted by *Event Date and Time*, *Event Name*, *Status*, and *Total Contributions* by clicking on each header.

Click on the gear icon (⚙️) and select **View** from the drop-down options to view the event page that will be shared with contributors. To return to the event's administrative page, click the hyperlinked event name or click the gear icon and select **Edit**.

CITY COUNCIL | DISTRICT 25

### Sophia Rosario

Sophia for Council

Data Tools Fundraising Events Account Details

Create New Event

Event Date and Time ▾	Event Name –	Status –	Total Contributions –	
May 15, 2020 12:00 PM	<a href="#">Sophia's Spring Fundraiser</a>	Open	0	 Edit View

## 6. REVIEW FUNDRAISING EVENTS AND CONTRIBUTIONS

From the **Contributions** tab on the event's administrative page, individual contributions can be sorted by *Date and Time* received, *Name* of contributor, and *Amount* contributed. From this page, you can also export the list of contributions received through this event page as a CSV file.

CITY COUNCIL | DISTRICT 25

### Sophia Rosario

Sophia for Council

Data Tools Fundraising Events Account Details

Create New Event

Event Date and Time ▲	Event Name –	Status –	Total Contributions –	
May 15, 2020 12:00 PM	<a href="#">Sophia's Spring Fundraiser</a>	Open	1	
Aug 30, 2020 5:00 PM	<a href="#">Summer Fiesta</a>	Open	0	
Dec 05, 2020	<a href="#">Winter Fundraiser</a>	Open	0	

Like any other contribution received through NYC Votes Contribute, contributions made to events must be reported within the same disclosure period in which they are received and uploaded directly to C-SMART. Contributions made to events must also be claimed for match like any other eligible contribution.

**Note:** As with other contributions received in NYC Votes Contribute, Stripe processing fees are deducted from contributions received through fundraising event pages.

# HOW TO UPLOAD YOUR FUNDRAISING EVENTS AND CONTRIBUTIONS TO C-SMART

Fundraising events and contributions received through an event page can be uploaded to C-SMART under the **Data** tab on your account page. A fundraising event will become available to upload once a contribution is received, and not immediately after creating it. Under the **Data** tab on your account page, you can view the events, contributions, and Stripe fees that can be uploaded to C-SMART.

To upload your events and contributions, follow the **How to Upload Your Contributions to C-SMART** instructions in the previous section.

**IMPORTANT:** Once an event has been uploaded to C-SMART, any modifications made to the event details must also be made in C-SMART. For instructions on editing events in C-SMART, see **Fundraising Events**.

Contributions received through an event page will automatically be linked to the fundraising event in C-SMART.

To view all fundraising events in C-SMART, including those uploaded from NYC Votes Contribute, go to **Fundraising Events** listed under the **Tools** section of the **Transactions** tab. You can view a complete list of fundraising events and contributions received for those events on the **Fundraising Events** report listed under the **Finance** section of the **Reports** tab.

**IMPORTANT:** If you incurred expenditures related to a fundraising event created through NYC Votes Contribute, you must manually enter them as bill(s)/bill payment(s) transactions in C-SMART. When entering the Bill(s) transaction, you must link the expenditure to the fundraising event by choosing from the drop-down list next to the **Event** field.

The screenshot displays the C-SMART interface for editing a bill. The header includes the C-SMART logo, the user's name (Sophia Rosario), and a search bar. The main content area is titled 'Bills - Edit Bill' and shows transaction ID 497. It is divided into three sections: Profile, Totals, and Edit Details. The Profile section lists the vendor's name, address, and borough. The Totals section shows financial summary items. The Edit Details section contains various fields for invoice information, including date, amount, purpose code, explanation, exempt code, committee, and event selection.

Profile	Totals
<b>Name:</b> ABC Printing <b>Address:</b> 223 Astoria Blvd. Long Island City NY 11102 <b>Boro:</b> Queens Corporation	<b>Total Outstanding:</b> \$0.00 <b>Total Payments:</b> \$5,400.00 <b>Total Forgiven:</b> \$0.00

**Edit Details**

\*Invoice Date: 05/07/2020  
\*Amount: \$ 5,400.00  
\*Purpose Code: Fundraising  
\*Explanation: Invitations  
Exempt Code:  
\*Committee: Sophia For Council  
Event: Sophia's Spring Fundraiser  
☐ Segregated:  
☐ Runoff / Rerun:  
Vendor Reference Number:

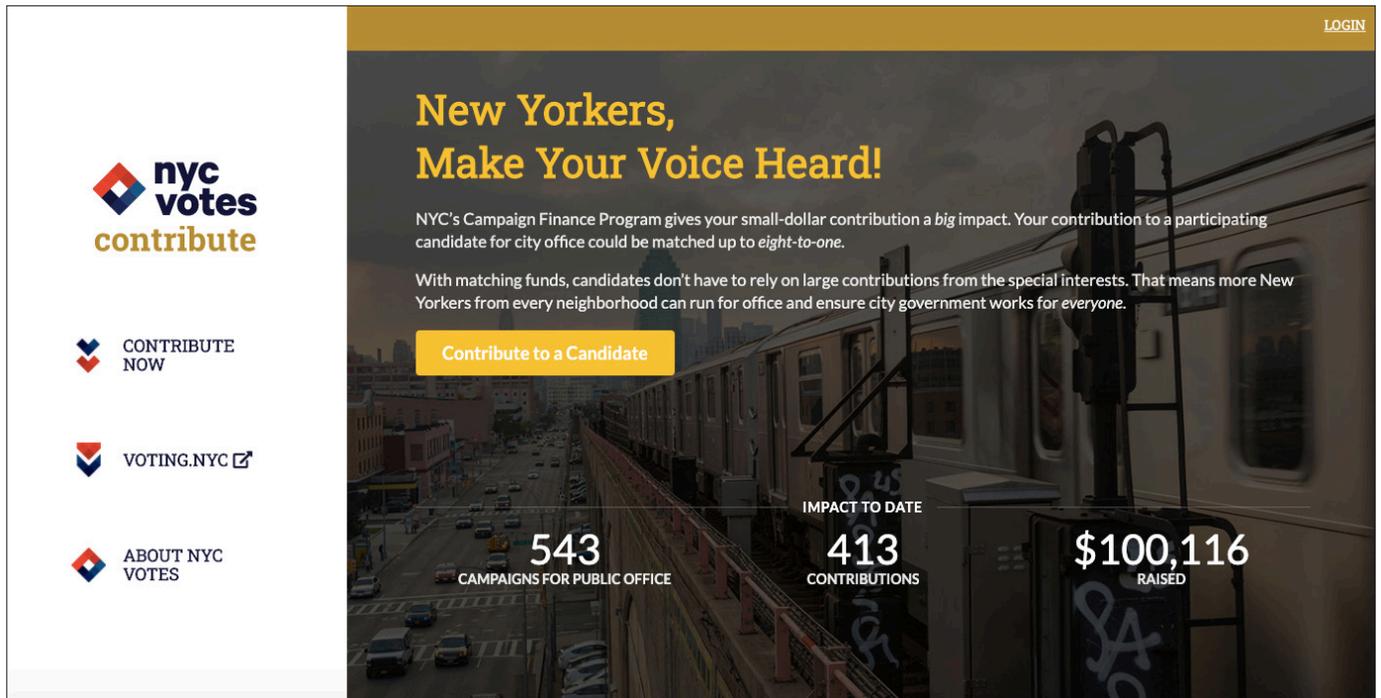
**Best practice:** Close an event once it has ended and perform an upload to C-SMART so that it accurately reflects the campaign's financial activity. Your fundraising event does not close automatically and the campaign is responsible for performing any uploads to C-SMART.

# CONTRIBUTOR EXPERIENCE

NYC Votes Contribute allows supporters to contribute quickly and efficiently to campaigns. Contributors do not need to have an account on NYC Votes Contribute in order to make contributions.

## 1. NYC VOTES CONTRIBUTE HOME PAGE

- ◆ Contributors can find your Contribute page by clicking on the **Contribute to a Candidate** button in the center of the page, or the **Contribute Now** link in the sidebar.
- ◆ General information on NYC Votes can be found in [About NYC Votes](#) in the sidebar.
- ◆ For voter education information, visitors can click on the [voting.nyc](#) link in the sidebar.



## 2. CANDIDATES PAGE

The screenshot shows a list of candidates under the heading "Candidates". Each candidate's name and title are listed, followed by a "Contribute" button with a right-pointing arrow. The candidates are:

Name	Title	Contribute Button
George Artino	Mayor   New York City	
Miriam Carlson	City Council   District 45	
Hannah Gibbons	Borough President   2020 Special Election	Contribute >
Carson Holder	City Council   District 18	
Edward Liu	City Council   District 6	Contribute >
Damian Martinez-Byrd	Borough President   Bronx	Contribute >
Nancy O' Donoghue	City Council   District 45	
Anand Patel	Public Advocate   New York City	
Roberto Pellegrini	Borough President   District 10	
Sophia Rosario	City Council   District 25	Contribute >

- ◆ The Candidates page shows all candidates registered with the CFB for the current election cycle(s) in alphabetical order by last name.
- ◆ Only candidates who are using NYC Votes Contribute to fundraise will have a **Contribute** button next to their name.
- ◆ In order to make a contribution to your campaign, contributors must click on the **Contribute** button.

## 3. AMOUNT

The screenshot shows the contribution amount selection screen for Sophia Rosario. The header indicates "CITY COUNCIL | DISTRICT 25" and "Sophia Rosario" with the subtext "Sophia for Council". The main question is "How much would you like to contribute?". There are five buttons for pre-set amounts: \$25, \$50, \$75, \$100, and \$175. There is also an "Other" input field with a ".00" value. A note at the bottom states: "NYC resident? With matching funds, your \$25 contribution can be worth \$175". A "Next" button with a right-pointing arrow is at the bottom right.

- ◆ Contributors can select the amount they would like to contribute based on your campaign's customized pre-set amounts, or the default amounts as shown above.

- ◆ If the office sought has been declared with the CFB, NYC Votes Contribute will not allow for contributions that exceed the contribution limit for that office. **Note:** Doing Business contribution limits will only be applied if “Yes” is answered in the Doing Business screen (see Step 6).
- ◆ If you have not declared an office, contributors will be able to make contributions up to the citywide office limit. Note that if you end up running for City Council or borough president, you will need to refund any over-the-limit portions of contributions.

#### 4. EMPLOYMENT STATUS

CITY COUNCIL | DISTRICT 25  
**Sophia Rosario**  
 Sophia for Council

What is your current employment status?

- Employed
- Self-Employed
- Retired
- Homemaker
- Student
- Unemployed

← Back      Next →

- ◆ To help your campaign comply with CFB reporting requirements, contributors must provide their current employment status.
- ◆ Employment information is required regardless of the amount of the contribution.
- ◆ Choosing *Retired*, *Homemaker*, *Student*, or *Unemployed* will skip the next screen and take contributors directly to the Doing Business screen.

#### 5. EMPLOYMENT INFORMATION

CITY COUNCIL | DISTRICT 25  
**Sophia Rosario**  
 Sophia for Council

Please enter the following details about your employer:

Employer: ABC Designs      Occupation: Designer

Business Street Address: 123 Church Street      Apt./ Suite / Floor: Apt. / Suite / Floor

City: New York      State: NY      Zip: 10007

← Back      Next →

- ◆ If contributors select *Employed* or *Self-Employed*, they will be directed to fill in their employment information in order to continue.

## 6. DOING BUSINESS

CITY COUNCIL | DISTRICT 25

### Sophia Rosario

Sophia for Council

Are you an owner, principal officer or senior manager of an organization that does or is proposing to do business with the City?

Yes  
 No

 If a contributor has business dealings with the City as defined in the Campaign Finance Act, such contributor may give only up to \$250 for city councilmember, \$320 for borough president, and \$400 for mayor, comptroller or public advocate.  
[Find out the rules on contributions from people doing business with the City of New York](#)

- ◆ To ensure compliance with the **doing business contribution limits**, visitors will be asked if they are doing business with the City of New York.
- ◆ If they are doing business with the city, the contributor will only be allowed to make a contribution up to the doing business contribution limit for the office sought.
- ◆ To determine if someone is subject to the doing business contribution limits, search the **Doing Business Database**.

## 7. PERSONAL INFORMATION

CITY COUNCIL | DISTRICT 25

### Sophia Rosario

Sophia for Council

Please enter the following personal information:

First Name: 
 Last Name:

Residential Street Address: 
 Apt / Suite / Floor:

City: 
 State: 
 Zip:

Email Address: 
 Telephone # (optional):

- ◆ All fields are required in this screen, except for the *Telephone Number* field.
  - » Dashes and parentheses are not allowed in the *Telephone Number* field.

- ◆ The *Residential Street Address* field will auto-suggest an address once a character has been entered in that field.
  - » If the correct address does not auto-populate, contributors can enter a character in that field and then hit the Enter key. This will allow for the manual entry of an address, as shown below.

Residential Street Address
Apt / Suite / Floor

Residential Street Number

Street Name

Apt / Suite / Floor

## 8. BILLING ADDRESS

CITY COUNCIL | DISTRICT 25

### Sophia Rosario

Sophia for Council

Is your billing address the same as your residential address?

Yes  
 No

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Next →

- ◆ For address verification and matchability purposes, it is important that contributors answer this question accurately.
- ◆ Contributors should only answer yes to this question if the residential address provided in the Personal Information screen exactly matches the billing address they have on file with their bank or credit card company.
- ◆ If the residential address provided in the Personal Information screen does not match the billing address on file with the credit card company, the contributor must provide an explanation on the next screen.
- ◆ **Note:** An address verification (AVS) check will fail if a contributor answers yes to this question but the residential address provided does not actually match the billing address they have on file with their credit card company. Failure of the address verification (AVS) check can lead to a contribution being invalid for match. To correct this, the contributor will then need to provide an **Address Verification affirmation letter**.

## 9. BILLING ADDRESS INFORMATION

CITY COUNCIL | DISTRICT 25

**Sophia Rosario**  
Sophia for Council

My credit card billing address differs because:

My card is billed to my work address.  
 I recently moved.  
 My card is billed to a P.O. Box or mail drop.  
 Other.

**i** Although my billing address is different than my home address, the card is paid from my personal funds.

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- ◆ If “No” was answered in the previous screen, a reason must be provided for the difference in residential and billing addresses.

## 10. CREDIT CARD INFORMATION

CITY COUNCIL | DISTRICT 25

**Sophia Rosario**  
Sophia for Council

Please enter the following credit card information:

Card Number Expiration CVC

1234 1234 1234 1234 MM / YY CVC

[← Back](#) [Make \\$25 Contribution](#)

- ◆ Contributors will be asked for their credit card information. Once they complete all fields, they will be able to click the **Make \$ Contribution** button, which also confirms the amount of their contribution.

## 11. CONTRIBUTION AFFIRMATION

### Contribution Affirmation

By clicking "I agree," you (1) acknowledge that you have read and agree to the [Terms and Conditions](#) for using this site; (2) authorize the campaign's payment processor to charge your account for the contribution amount; (3) confirm that the information provided by you is true, complete, and correct to the best of your knowledge and is supplied in good faith; (4) confirm that you are authorized to make this contribution using the credit or debit card information included in your payment instructions; (5) confirm that you are a natural person and not an organization of any kind including, but not limited to, corporations, partnerships, political committees, or labor unions; and (6) affirm the following statement:

I understand that State law requires that a contribution be in my name and be from my own funds. I hereby affirm that I was not, nor, to my knowledge, was anyone else, reimbursed in any manner for this contribution; that this contribution is not being made as a loan; and that this contribution is being made from my personal funds or my personal account, which has no corporate or business affiliation.

Go Back
Yes, I Agree ✓

- ◆ Immediately before processing their contribution, contributors must agree to the required affirmation statement. This is the final step of the contribution process.

## 12. CONTRIBUTION CONFIRMATION

### Contribution Received!

Your contribution to Sophia Rosario was successful.

Contributions like yours help ensure candidates can run for office with the support of their friends and neighbors, instead of relying on big money from special interests.

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A receipt will be emailed to you shortly with the following information:

*Personal Information*

Name	Evan Baker
Residential Address	34-35 Jordan Street Flushing, NY 11358
Telephone	2124091800
Email	evan.baker@gmail.com

*Billing Information*

Credit Card	XXXX-XXXX-XXXX-4242
Expiration Date	4/2024

*Employment Information*

Employment Status	Employed
Occupation	Designer
Employer	ABC Designs
Employer Address	123 Church Street New York, NY 10007
Doing Business	No

Click here to save your information and make fast, secure contributions in the future.

Sign Me Up!

- ◆ Once the contribution has been processed successfully, contributors will see this page which lists all the information entered for their contribution.
- ◆ A confirmation will be sent to the contributor to the e-mail address provided in the Personal Information screen. Your campaign will also receive an e-mail with the contribution information.
- ◆ To expedite the process of making a future contribution in NYC Votes Contribute, contributors can sign up for a contributor account by clicking **Sign Me Up!** in the right-hand corner.
- ◆ If any contribution information is incorrect, contributors can e-mail [Contribute@nycvotefb.info](mailto:Contribute@nycvotefb.info).

### 13. CONTRIBUTING TO A FUNDRAISING EVENT

- ◆ To contribute to a specific fundraising event, contributors must use the unique link to the event page shared via your campaign. Fundraising event pages cannot be accessed through NYC Votes Contribute’s homepage or your campaign’s page.

CITY COUNCIL | DISTRICT 25

## Sophia Rosario

*Sophia for Council*

📅 Sophia's Spring Fundraiser  
 📅 May 15, 2020  
 ⌚ Start Time: 12:00 PM to 3:00 PM  
 📍 Tony's Pizza Parlor, 101 Main Street, New York, NY 11234

**How much would you like to contribute?**

NYC resident? With matching funds, your \$0 contribution can be worth \$0

Next →

- ◆ From the unique event link, supporters making contributions via the Fundraising Event feature will follow the same process as making a regular contribution. Once a contribution to an event has been processed, contributors will receive an email with the contribution information.

## Contribution Received!

Your contribution to **Sophia's Spring Fundraiser** was successful. A receipt will be emailed to test@test.com shortly.

Contributions like yours help ensure candidates can run for office with the support of their friends and neighbors, instead of relying on big money from special interests.