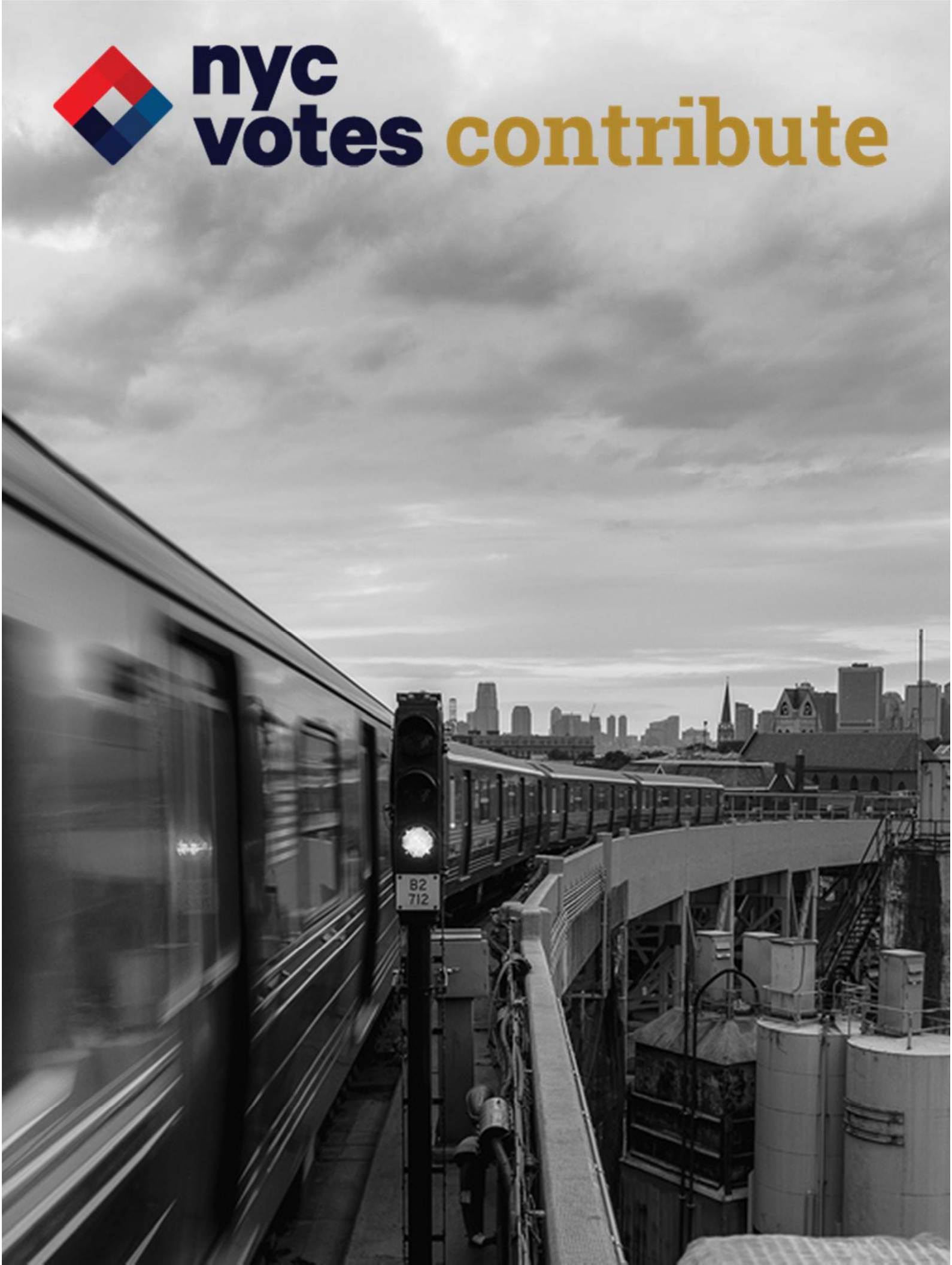
nyc votes

contribute



nyc votes

contribute

LAUNCH ORIENTATION

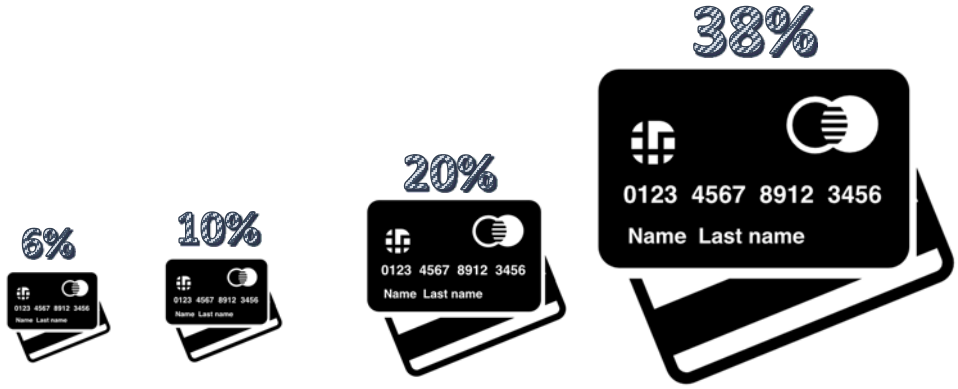
Highlights of NYCVotes.org

✓NYC Votes aims to transform political engagement for voters and campaigns

✓Voter engagement tools include:

- Find Your Poll Site
- See Who's Running
- Learn About Voting
- Register to Vote
- NYC Votes Contribute

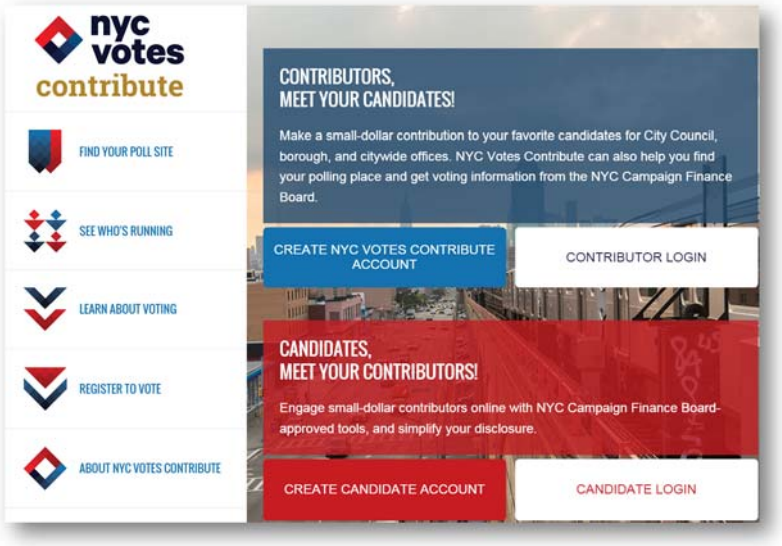
Credit Card Contributions



NYC Votes Contribute

- ✓Simplifies collecting, reporting, and recordkeeping of credit card contributions
- ✓Can be accessed from any browser on desktop, tablet, or mobile
- ✓CFB-created interface
- ✓Contribution data and documentation can be imported directly into C-SMART
- ✓Contributors can use your page on NYCVotes.org or you can embed the tool on your own existing website
- ✓No need to disclose a merchant account or submit merchant account statements- that is done automatically

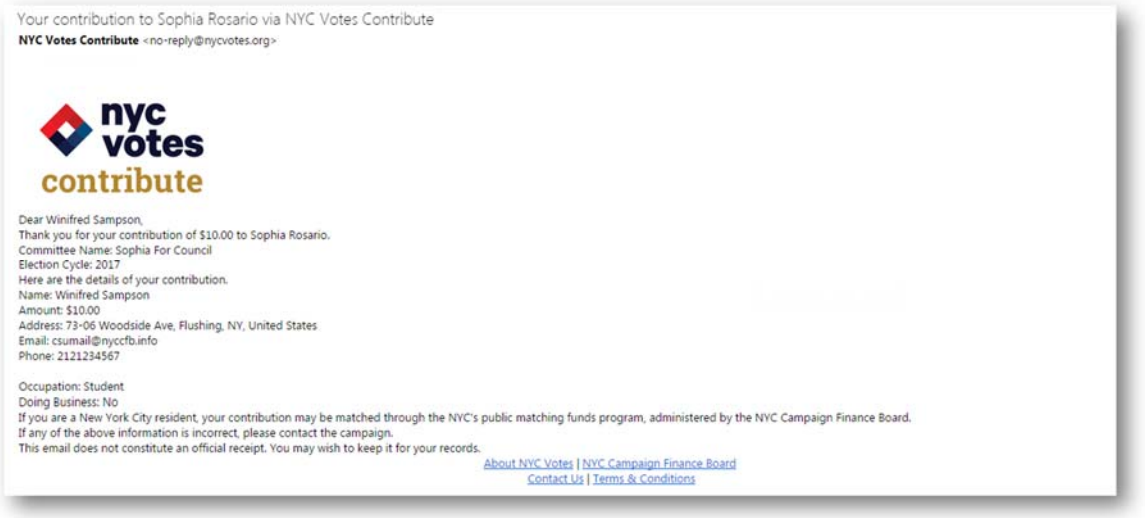
Contributor Experience



Contributor Experience: Recap

- ✓Contributors must:
  - o fill out all required fields
  - o agree to the affirmation statement
- ✓Contributors can:
  - o create an NYC Votes account for making future contributions
  - o make a contribution without creating an account
  - o make a contribution even if the campaign doesn't have its own website
- ✓Contributors and campaigns receive a "Thank You" email for each contribution

Contributor Experience: Thank You Email



Your contribution to Sophia Rosario via NYC Votes Contribute

NYC Votes Contribute <no-reply@nycvotes.org>

nyc votes contribute

Dear Winifred Sampson,
Thank you for your contribution of $10.00 to Sophia Rosario.
Committee Name: Sophia For Council
Election Cycle: 2017
Here are the details of your contribution.
Name: Winifred Sampson
Amount: $10.00
Address: 73-06 Woodside Ave, Flushing, NY, United States
Email: csumail@nyccfb.info
Phone: 2121234567

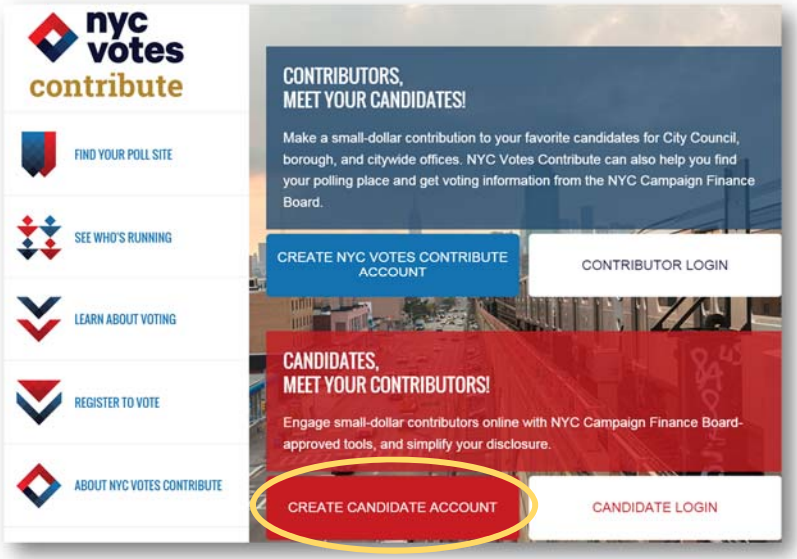
Occupation: Student
Doing Business: No
If you are a New York City resident, your contribution may be matched through the NYC's public matching funds program, administered by the NYC Campaign Finance Board.
If any of the above information is incorrect, please contact the campaign.
This email does not constitute an official receipt. You may wish to keep it for your records.

About NYC Votes | NYC Campaign Finance Board
Contact Us | Terms & Conditions

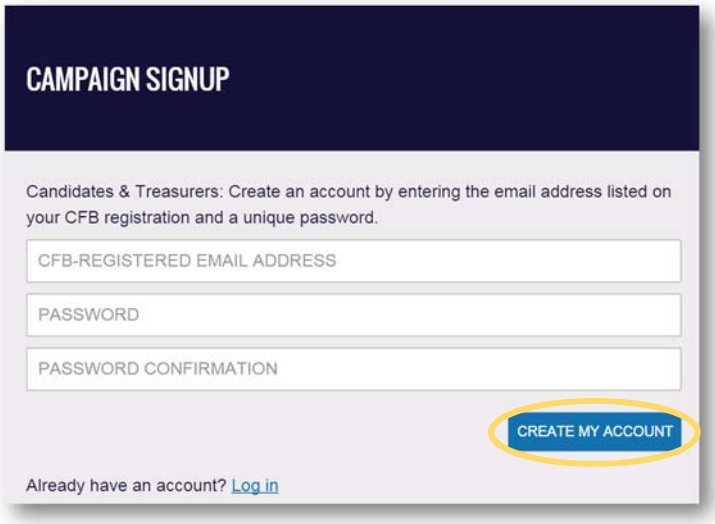
Contribute: Compliance Reminders

- ✓ Contribute will not accept single contributions over the office limit for the candidate's declared office
  - ❑ Screen for aggregate contributions that exceed the contribution limit
  - ❑ To declare an Office Sought, contact your Candidate Services Liaison
- ✓ Contributors who indicate they are doing business with the city may contribute more than the doing business limit
  - ❑ Review the Doing Business Database for contributions that exceed the doing business limit

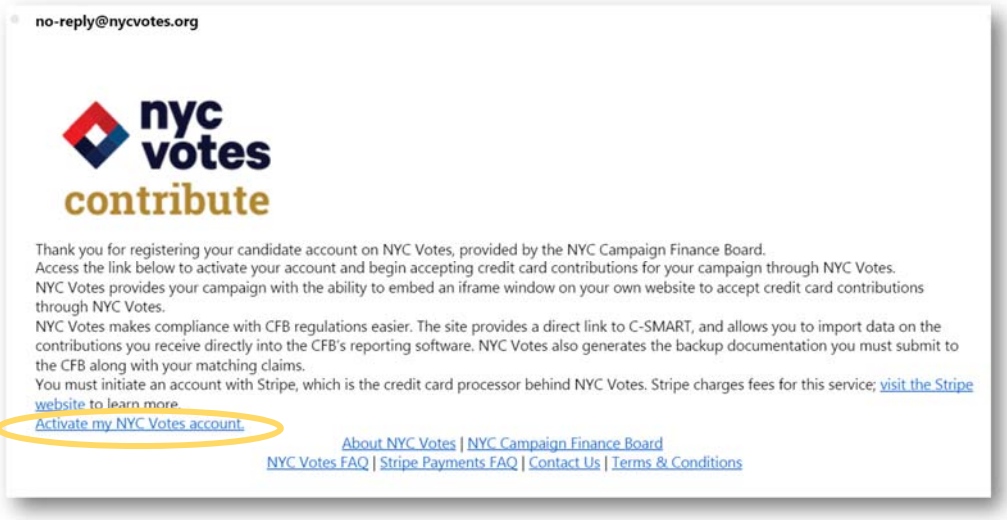
Campaign Signup



Campaign Signup



Campaign Signup: Activation Email



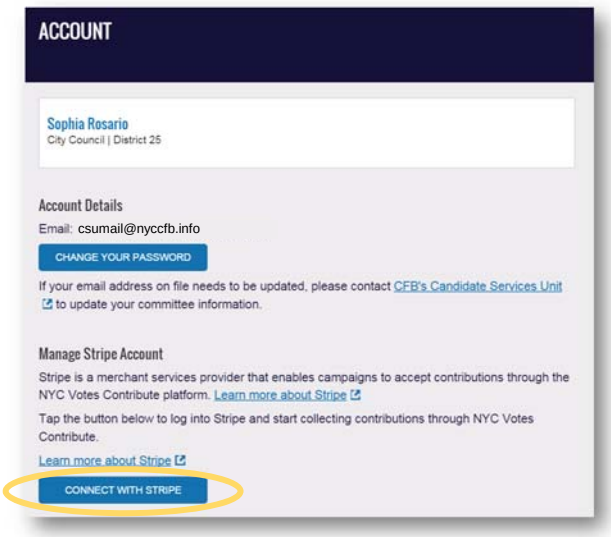
no-reply@nycvotes.org

nyc votes contribute

Thank you for registering your candidate account on NYC Votes, provided by the NYC Campaign Finance Board.
Access the link below to activate your account and begin accepting credit card contributions for your campaign through NYC Votes.
NYC Votes provides your campaign with the ability to embed an iframe window on your own website to accept credit card contributions through NYC Votes.
NYC Votes makes compliance with CFB regulations easier. The site provides a direct link to C-SMART, and allows you to import data on the contributions you receive directly into the CFB's reporting software. NYC Votes also generates the backup documentation you must submit to the CFB along with your matching claims.
You must initiate an account with Stripe, which is the credit card processor behind NYC Votes. Stripe charges fees for this service; visit the Stripe website to learn more.
Activate my NYC Votes account.

About NYC Votes | NYC Campaign Finance Board
NYC Votes FAQ | Stripe Payments FAQ | Contact Us | Terms & Conditions

Campaign Signup: Connect With Stripe



ACCOUNT

Sophia Rosario
City Council | District 25

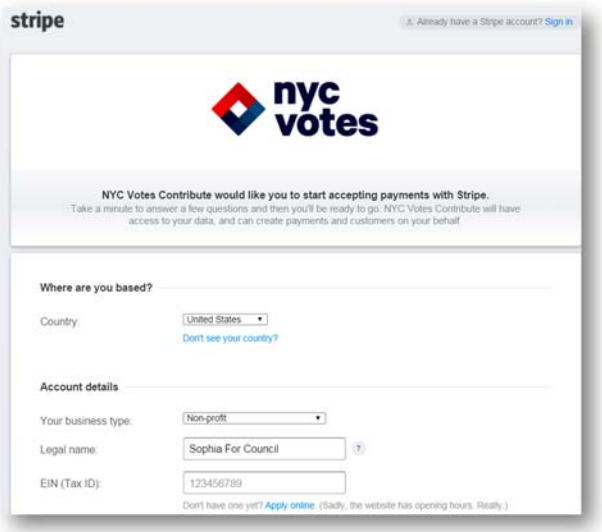
Account Details
Email: csumail@nyccfb.info
CHANGE YOUR PASSWORD
If your email address on file needs to be updated, please contact CFB's Candidate Services Unit to update your committee information.

Manage Stripe Account
Stripe is a merchant services provider that enables campaigns to accept contributions through the NYC Votes Contribute platform. Learn more about Stripe
Tap the button below to log into Stripe and start collecting contributions through NYC Votes Contribute.
Learn more about Stripe
CONNECT WITH STRIPE

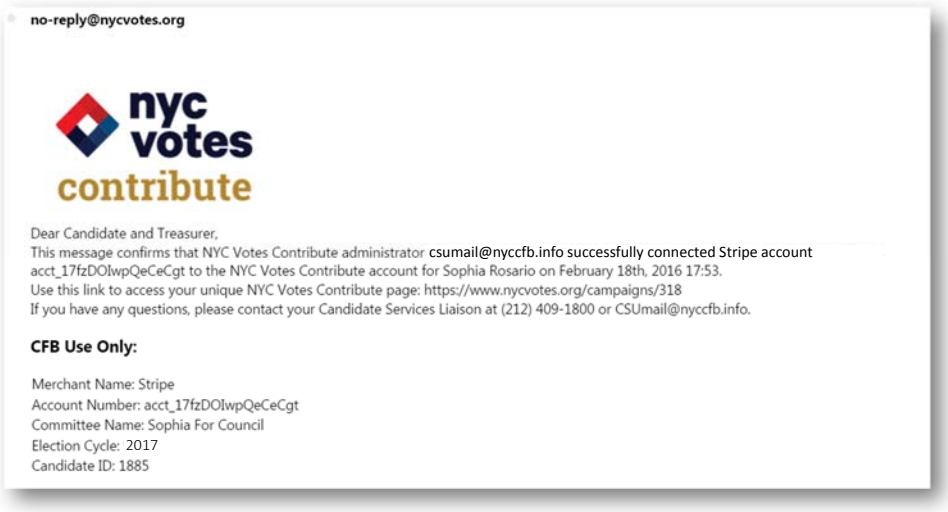
stripe

- Stripe is a payment services provider that enables campaigns to accept contributions via NYC Votes Contribute
- You must create an account with Stripe to use Contribute
- For each successful charge, Stripe withholds fees and deposits the remainder in your designated campaign bank account
- You will receive a monthly statement from Contribute, which shows the amount of fees paid. Your campaign is responsible for reporting these fees as expenditures in C-SMART.
- Any issues with Stripe must be resolved directly with Stripe

Stripe: Account Signup



Stripe: Account Connected Email



no-reply@nycvotes.org

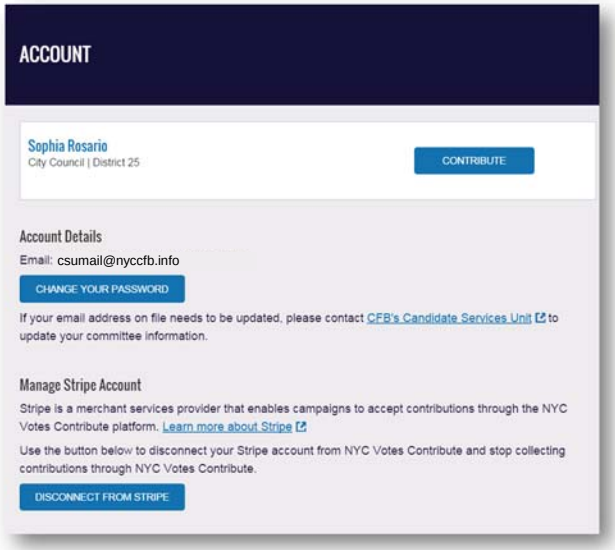
nyc votes contribute

Dear Candidate and Treasurer,
This message confirms that NYC Votes Contribute administrator csumail@nyccfb.info successfully connected Stripe account acct_17fzDOIwpQeCeCgt to the NYC Votes Contribute account for Sophia Rosario on February 18th, 2016 17:53.
Use this link to access your unique NYC Votes Contribute page: https://www.nycvotes.org/campaigns/318
If you have any questions, please contact your Candidate Services Liaison at (212) 409-1800 or CSUmail@nyccfb.info.

CFB Use Only:

Merchant Name: Stripe
Account Number: acct_17fzDOIwpQeCeCgt
Committee Name: Sophia For Council
Election Cycle: 2017
Candidate ID: 1885

Stripe: Account Connected



ACCOUNT

Sophia Rosario
City Council | District 25

CONTRIBUTE

Account Details

Email: csumail@nyccfb.info

CHANGE YOUR PASSWORD

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

Manage Stripe Account

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

Use the button below to disconnect your Stripe account from NYC Votes Contribute and stop collecting contributions through NYC Votes Contribute.

DISCONNECT FROM STRIPE

Signup Complete!

- ✓At this point, your campaign can begin receiving contributions
- ✓Best Practice: Have the candidate or treasurer make a small test contribution (which can be matchable)
- ✓Automatically done for you:
  - o CFB notified if you connect or disconnect the Stripe Account
  - o Disclosure of your Stripe Account
  - o Monthly account activity statements sent to your campaign and the CFB

Embed Contribute

Embed Contribution Tool

Embed the NYC Votes Contribute Contribution Tool on your own website. Copy and paste the code below into the HTML of your site.

Small embed:

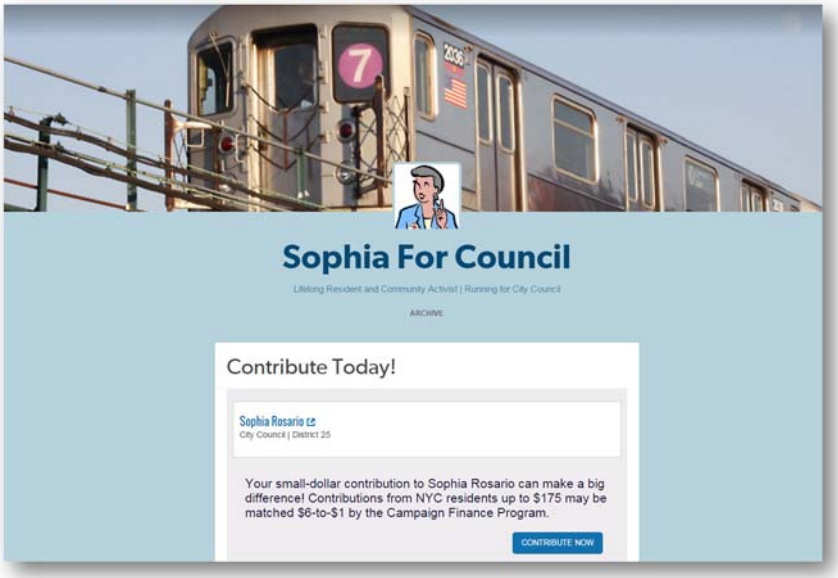
```
<iframe src="https://nycvotes-pre-production.herokuapp.com/campaigns/318/contributions/iframe/new" width='320px' height='500px' frameborder="0"></iframe>
```

Large embed:

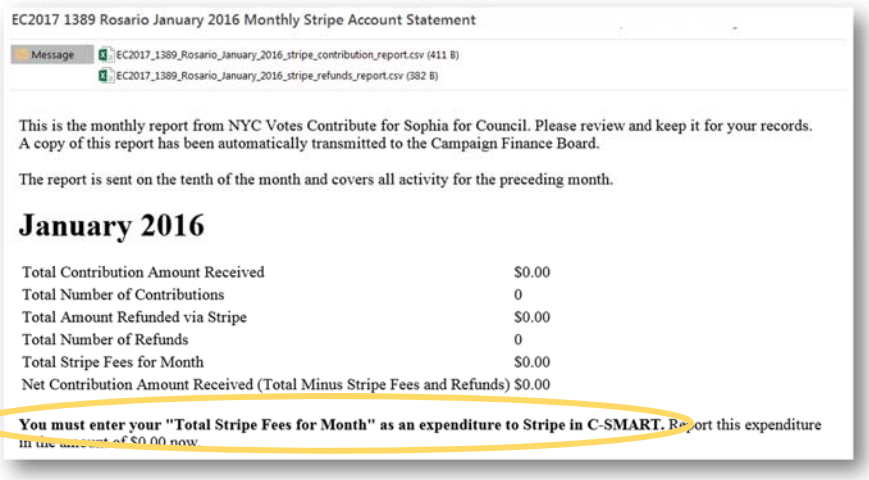
```
<iframe src="https://nycvotes-pre-production.herokuapp.com/campaigns/318/contributions/iframe/new" width='800px' height='600px' frameborder="0"></iframe>
```

PLEASE NOTE: the iframe embed will only function properly if you have already configured a Stripe account and linked it to your NYC Votes Contribute account.

Embed Contribute



Stripe: Activity Email



EC2017 1389 Rosario January 2016 Monthly Stripe Account Statement

Message EC2017_1389_Rosario_January_2016_stripe_contribution_report.csv (411 B)
EC2017_1389_Rosario_January_2016_stripe_refunds_report.csv (382 B)

This is the monthly report from NYC Votes Contribute for Sophia for Council. Please review and keep it for your records. A copy of this report has been automatically transmitted to the Campaign Finance Board.

The report is sent on the tenth of the month and covers all activity for the preceding month.

January 2016

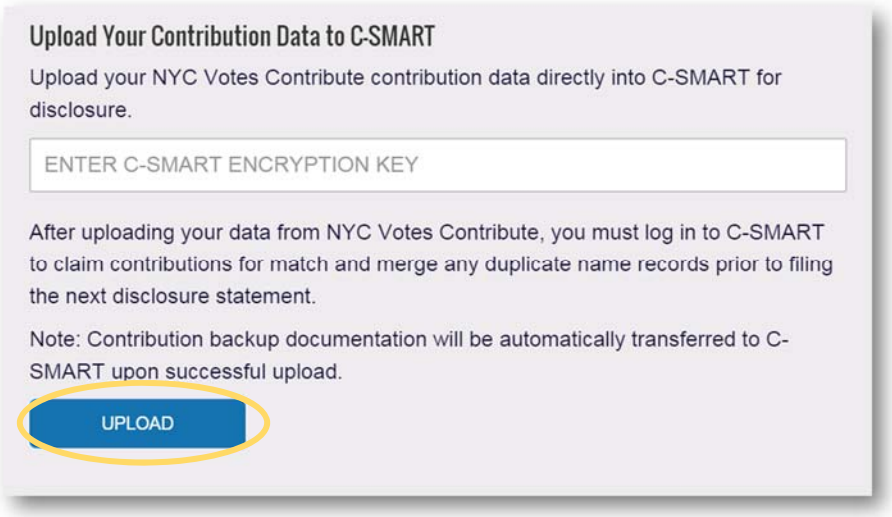
Total Contribution Amount Received	$0.00
Total Number of Contributions	0
Total Amount Refunded via Stripe	$0.00
Total Number of Refunds	0
Total Stripe Fees for Month	$0.00
Net Contribution Amount Received (Total Minus Stripe Fees and Refunds)	$0.00

You must enter your "Total Stripe Fees for Month" as an expenditure to Stripe in C-SMART. Report this expenditure in the amount of $0.00 now.

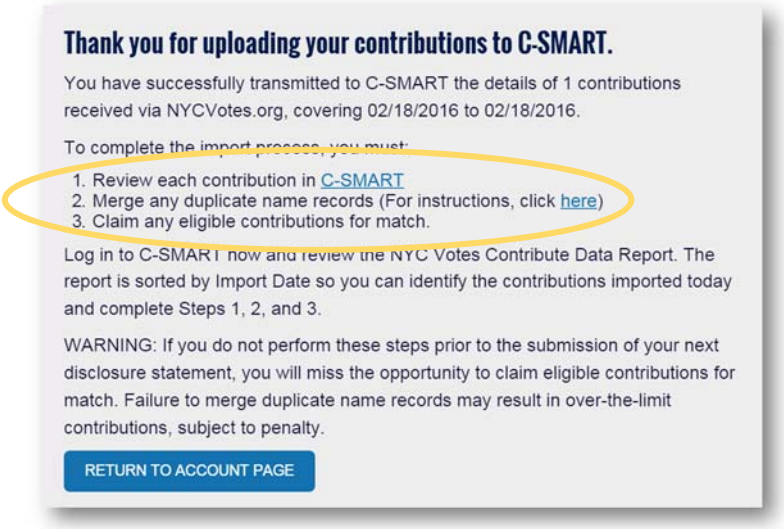
How long does it take for contributions to be deposited in the committee bank account?

- ✓Transfers = daily and composed of contributions received 2 business days prior
- ✓First transfer = up to 1 week to process

Upload Data & Documentation to C-SMART



Upload Data & Documentation to C-SMART



Thank you for uploading your contributions to C-SMART.

You have successfully transmitted to C-SMART the details of 1 contributions received via NYCVotes.org, covering 02/18/2016 to 02/18/2016.

To complete the import process, you must:

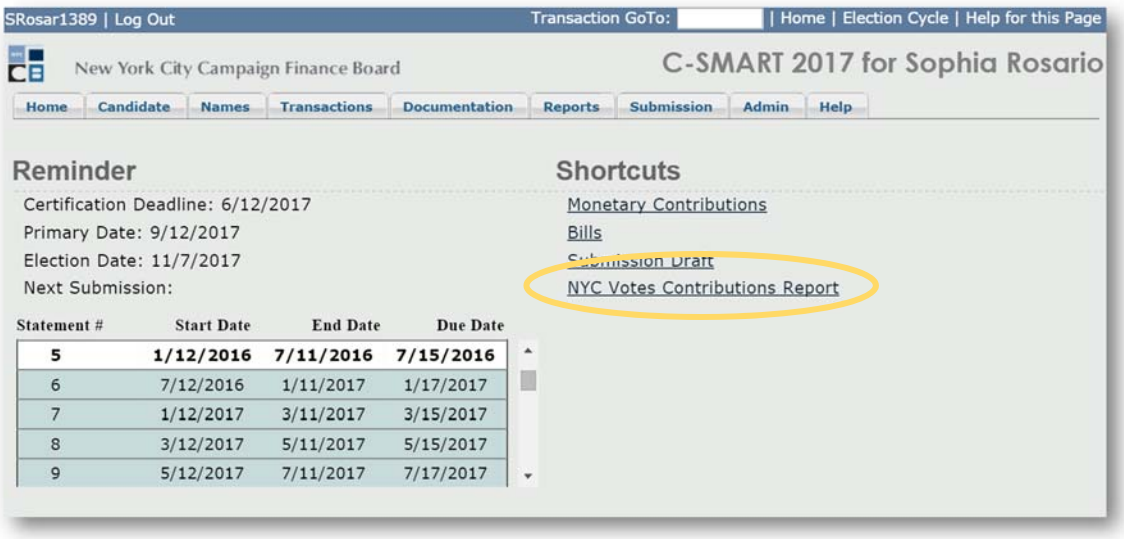
1. Review each contribution in C-SMART
2. Merge any duplicate name records (For instructions, click here)
3. Claim any eligible contributions for match.

Log in to C-SMART now and review the NYC Votes Contribute Data 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 ACCOUNT PAGE

C-SMART



SRosar1389 | Log Out Transaction GoTo: | Home | Election Cycle | Help for this Page

New York City Campaign Finance Board C-SMART 2017 for Sophia Rosario

Home | Candidate | Names | Transactions | Documentation | Reports | Submission | Admin | Help

Reminder

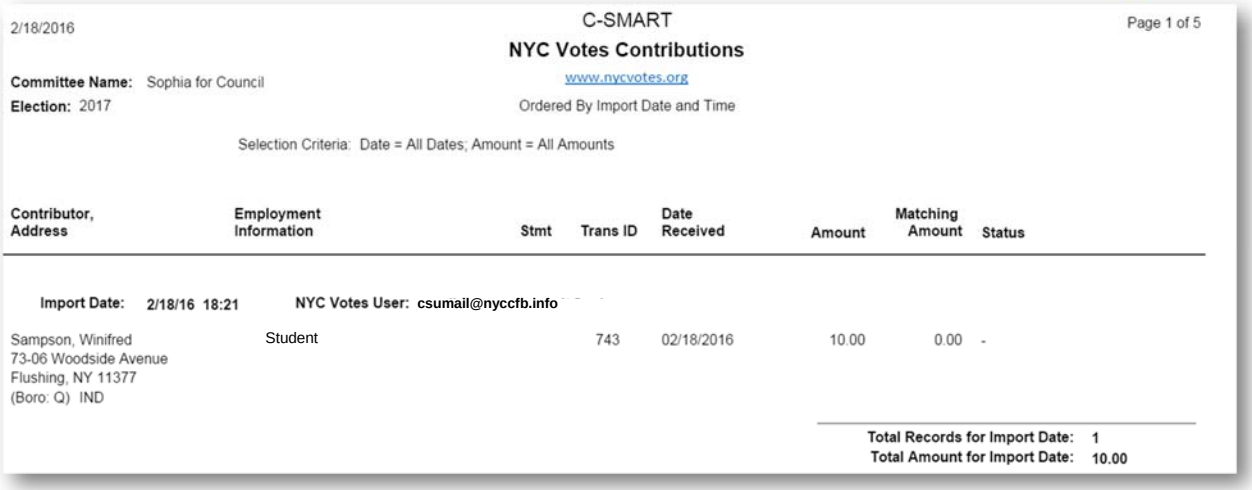
Certification Deadline: 6/12/2017
Primary Date: 9/12/2017
Election Date: 11/7/2017
Next Submission:

Statement #	Start Date	End Date	Due Date
5	1/12/2016	7/11/2016	7/15/2016
6	7/12/2016	1/11/2017	1/17/2017
7	1/12/2017	3/11/2017	3/15/2017
8	3/12/2017	5/11/2017	5/15/2017
9	5/12/2017	7/11/2017	7/17/2017

Shortcuts

Monetary Contributions
Bills
Submission Draft
NYC Votes Contributions Report

C-SMART: NYC Votes Contributions Report



2/18/2016 C-SMART Page 1 of 5

NYC Votes Contributions

Committee Name: Sophia for Council
Election: 2017

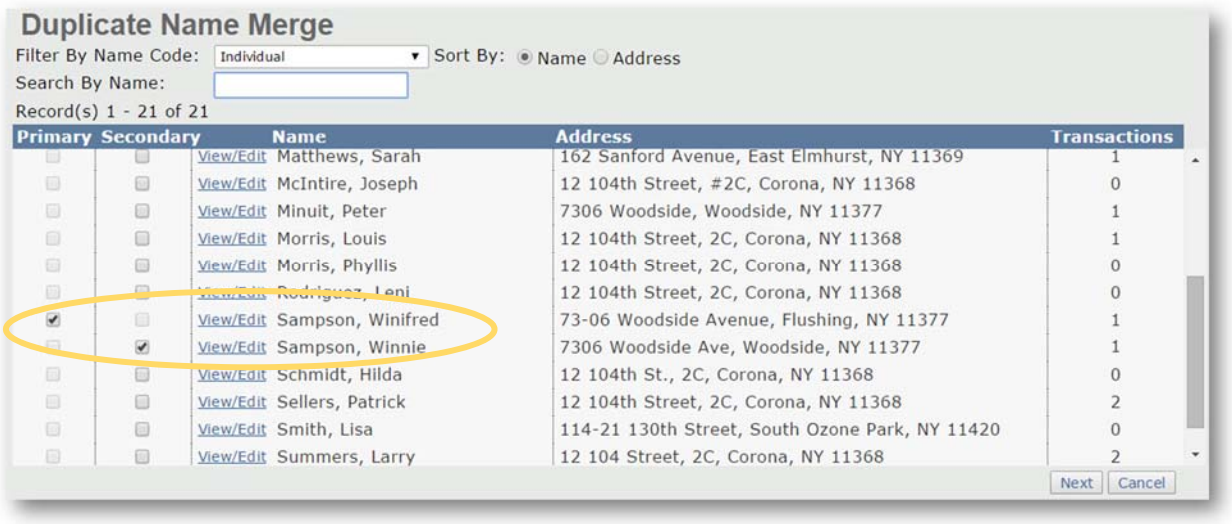
www.nycvotes.org
Ordered By Import Date and Time

Selection Criteria: Date = All Dates; Amount = All Amounts

Contributor, Address	Employment Information	Stmt	Trans ID	Date Received	Amount	Matching Amount	Status
Import Date: 2/18/16 18:21	**NYC Votes User: csumail@nyccfb.info**						
Sampson, Winifred 73-06 Woodside Avenue Flushing, NY 11377 (Boro: Q) IND	Student		743	02/18/2016	10.00	0.00	-

Total Records for Import Date: 1
Total Amount for Import Date: 10.00

C-SMART: Duplicate Name Merge



Duplicate Name Merge

Filter By Name Code: Individual ▾ Sort By: ◉ Name ○ Address

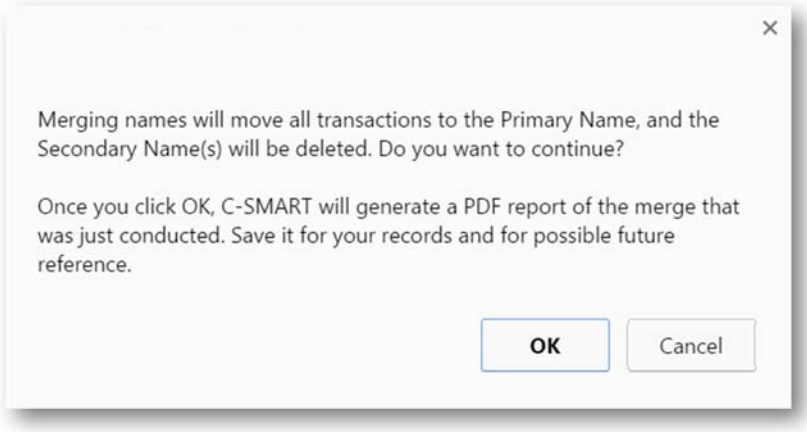
Search By Name:

Record(s) 1 - 21 of 21

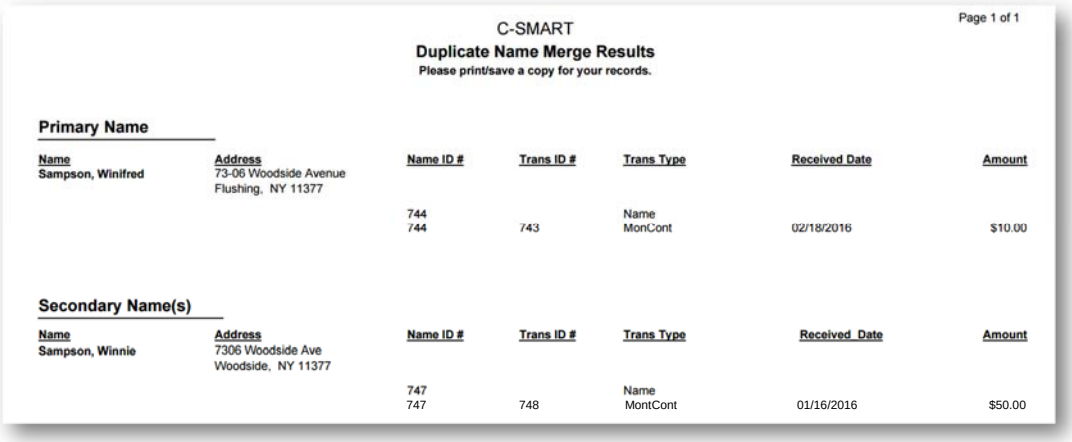
Primary	Secondary		Name	Address	Transactions
☐	☐	View/Edit	Matthews, Sarah	162 Sanford Avenue, East Elmhurst, NY 11369	1
☐	☐	View/Edit	McIntire, Joseph	12 104th Street, #2C, Corona, NY 11368	0
☐	☐	View/Edit	Minuit, Peter	7306 Woodside, Woodside, NY 11377	1
☐	☐	View/Edit	Morris, Louis	12 104th Street, 2C, Corona, NY 11368	1
☐	☐	View/Edit	Morris, Phyllis	12 104th Street, 2C, Corona, NY 11368	0
☐	☐	View/Edit	Rodriguez, Leni	12 104th Street, 2C, Corona, NY 11368	0
☑	☐	View/Edit	Sampson, Winifred	73-06 Woodside Avenue, Flushing, NY 11377	1
☐	☑	View/Edit	Sampson, Winnie	7306 Woodside Ave, Woodside, NY 11377	1
☐	☐	View/Edit	Schmidt, Hilda	12 104th St., 2C, Corona, NY 11368	0
☐	☐	View/Edit	Sellers, Patrick	12 104th Street, 2C, Corona, NY 11368	2
☐	☐	View/Edit	Smith, Lisa	114-21 130th Street, South Ozone Park, NY 11420	0
☐	☐	View/Edit	Summers, Larry	12 104 Street, 2C, Corona, NY 11368	2

Next Cancel

C-SMART: Duplicate Name Merge



C-SMART: Duplicate Name Merge



Page 1 of 1

C-SMART

Duplicate Name Merge Results

Please print/save a copy for your records.

Primary Name

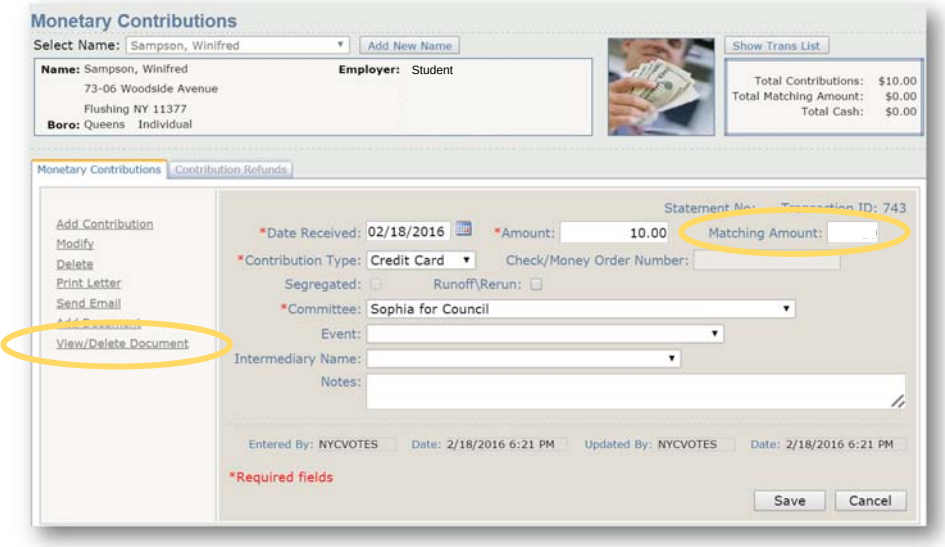
Name	Address	Name ID #	Trans ID #	Trans Type	Received Date	Amount
Sampson, Winifred	73-06 Woodside Avenue Flushing, NY 11377	744 744	743	Name MonCont	02/18/2016	$10.00

Secondary Name(s)

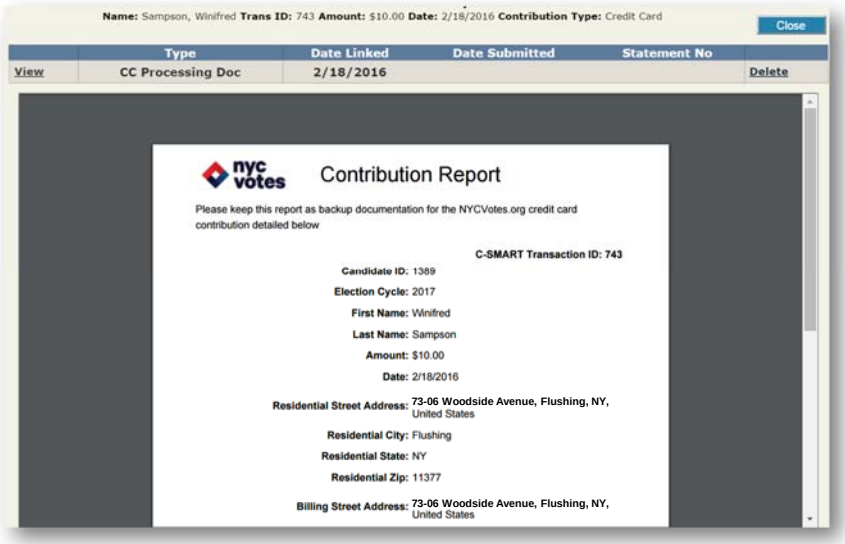
Name	Address	Name ID #	Trans ID #	Trans Type	Received Date	Amount
Sampson, Winnie	7306 Woodside Ave Woodside, NY 11377	747 747	748	Name MontCont	01/16/2016	$50.00

3

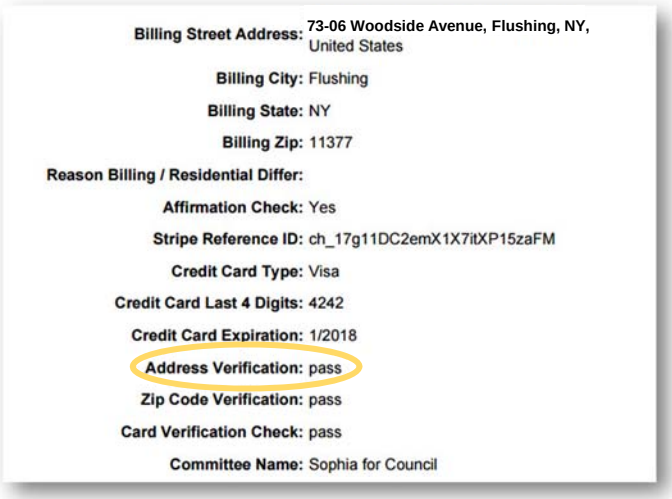
C-SMART: Enter Matching Amount



C-SMART: Backup Documentation



C-SMART: AVS on Backup Documentation



Billing Street Address: 73-06 Woodside Avenue, Flushing, NY, United States
Billing City: Flushing
Billing State: NY
Billing Zip: 11377
Reason Billing / Residential Differ:
Affirmation Check: Yes
Stripe Reference ID: ch_17g11DC2emX1X7itXP15zaFM
Credit Card Type: Visa
Credit Card Last 4 Digits: 4242
Credit Card Expiration: 1/2018
Address Verification: pass
Zip Code Verification: pass
Card Verification Check: pass
Committee Name: Sophia for Council

C-SMART: NYC Votes Contributions Report

2/18/2016 — C-SMART — Page 1 of 5

NYC Votes Contributions

Committee Name: Sophia for Council
Election: 2017
www.nycvotes.org
Ordered By Import Date and Time

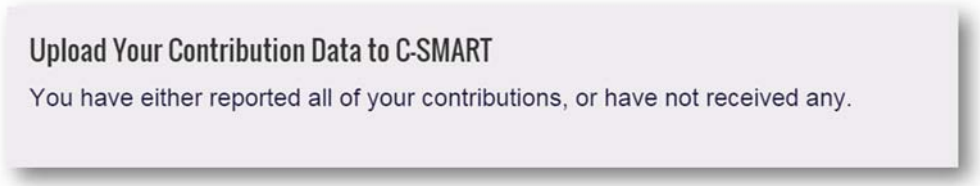
Selection Criteria: Date = All Dates; Amount = All Amounts

Contributor, Address	Employment Information	Stmt	Trans ID	Date Received	Amount	Matching Amount	Status
Import Date: 2/18/16 18:21	**NYC Votes User: csumail@nyccfb.info**						
Sampson, Winifred 73-06 Woodside Avenue Flushing, NY 11377 (Boro: Q) IND	Student		743	02/18/2016	10.00	10.00	Matching Amount Updated

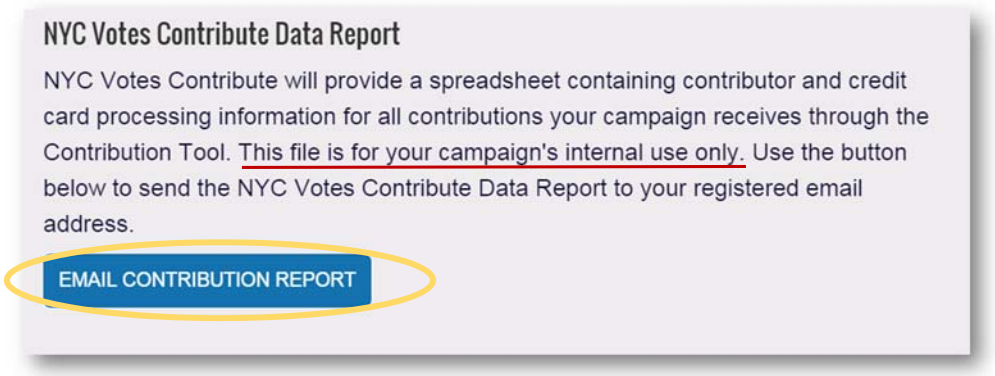
Total Records for Import Date: 1
Total Amount for Import Date: 10.00

Ensure all Contributions are Uploaded

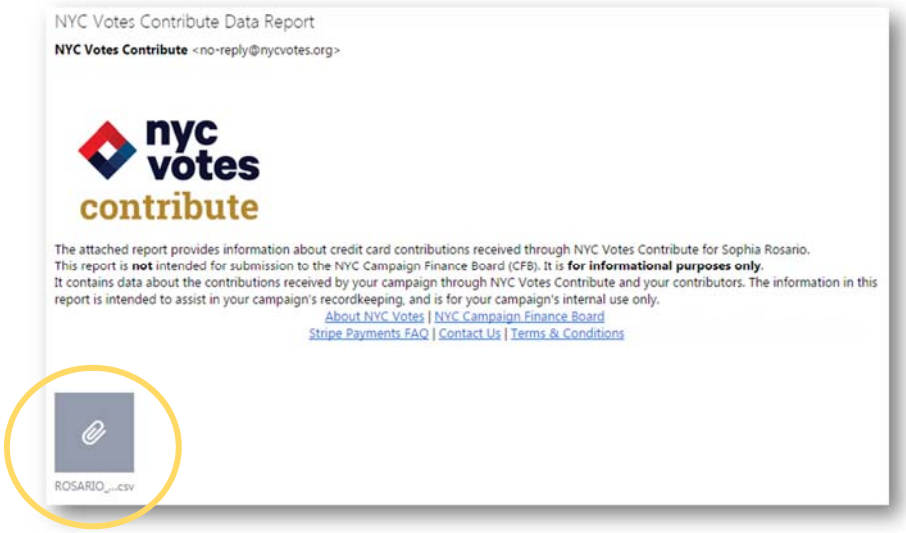
You will see the following message on your Contribute Account page if you have uploaded all contributions to C-SMART:



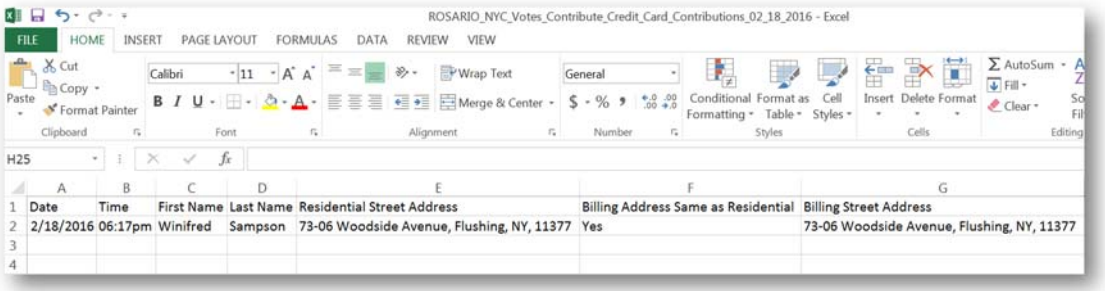
NYC Votes Contribute: Data Report



NYC Votes Contribute: Data Report



NYC Votes Contribute: Data Report



C-SMART: Compliance Reminders

- ❑ Merge duplicate names
  [Admin → Duplicate Name Merge]
- ❑ Review contributions over-the-limit
  [Reports→ Compliance Reports → Aggregate Contributions Over the Limit]
- ❑ Claim eligible contributions for match
- ❑ Enter monthly Stripe fees
  [Transactions → Bills Received/Paid]

Upload all your contribution data to C-SMART via Contribute by the end of each disclosure statement period

Contribute Support

✓For questions regarding committee registration, public disclosure, and compliance with the Campaign Finance Act or CFB Rules:

- o Contact the Candidate Services Unit at 212-409-1800 or CSUmail@nyccfb.info.

✓For questions regarding Stripe:

- o Review Stripe's support site: https://support.stripe.com
- o Contact Stripe at support@stripe.com.

NYC Votes Contribute Account Page

nyc votes contribute

- FIND YOUR POLL SITE
- SEE WHO'S RUNNING
- LEARN ABOUT VOTING
- REGISTER TO VOTE
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NYC Campaign Finance Board

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ACCOUNT

Sophia Rosario
City Council | District 25

CONTRIBUTE

Account Details

Email: csumail@nyccfb.info

CHANGE YOUR PASSWORD

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

Manage Stripe Account

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

Use the button below to disconnect your Stripe account from NYC Votes Contribute and stop collecting contributions through NYC Votes Contribute.

DISCONNECT FROM STRIPE

Before you disconnect from Stripe, you must submit your current contributions to C-SMART.

Embed Contribution Tool

Embed the NYC Votes Contribute Contribution Tool on your own website. Copy and paste the code below into the HTML of your site.

Small embed:

```
<iframe src="https://nycvotes-pre-production.herokuapp.com/campaigns/318/contributions/iframe/new" width='320px' height='500px' frameborder="0"></iframe>
```

Large embed:

```
<iframe src="https://nycvotes-pre-production.herokuapp.com/campaigns/318/contributions/iframe/new" width='800px' height='600px' frameborder="0"></iframe>
```

PLEASE NOTE: the iframe embed will only function properly if you have already configured a Stripe account and linked it to your NYC Votes Contribute account.

Upload Your Contribution Data to C-SMART

Upload your NYC Votes Contribute contribution data directly into C-SMART for disclosure.

ENTER C-SMART ENCRYPTION KEY

After uploading your data from NYC Votes Contribute, you must log in to C-SMART to claim contributions for match and merge any duplicate name records prior to filing the next disclosure statement.

Note: Contribution backup documentation will be automatically transferred to C-SMART upon successful upload.

UPLOAD

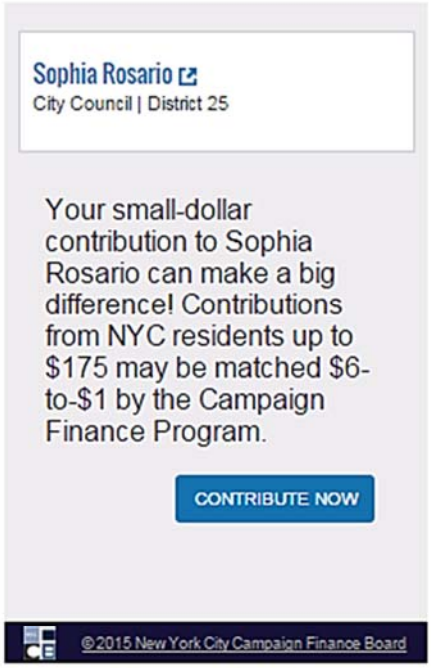
NYC Votes Contribute Data Report

NYC Votes Contribute will provide 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. Use the button below to send the NYC Votes Contribute Data Report to your registered email address.

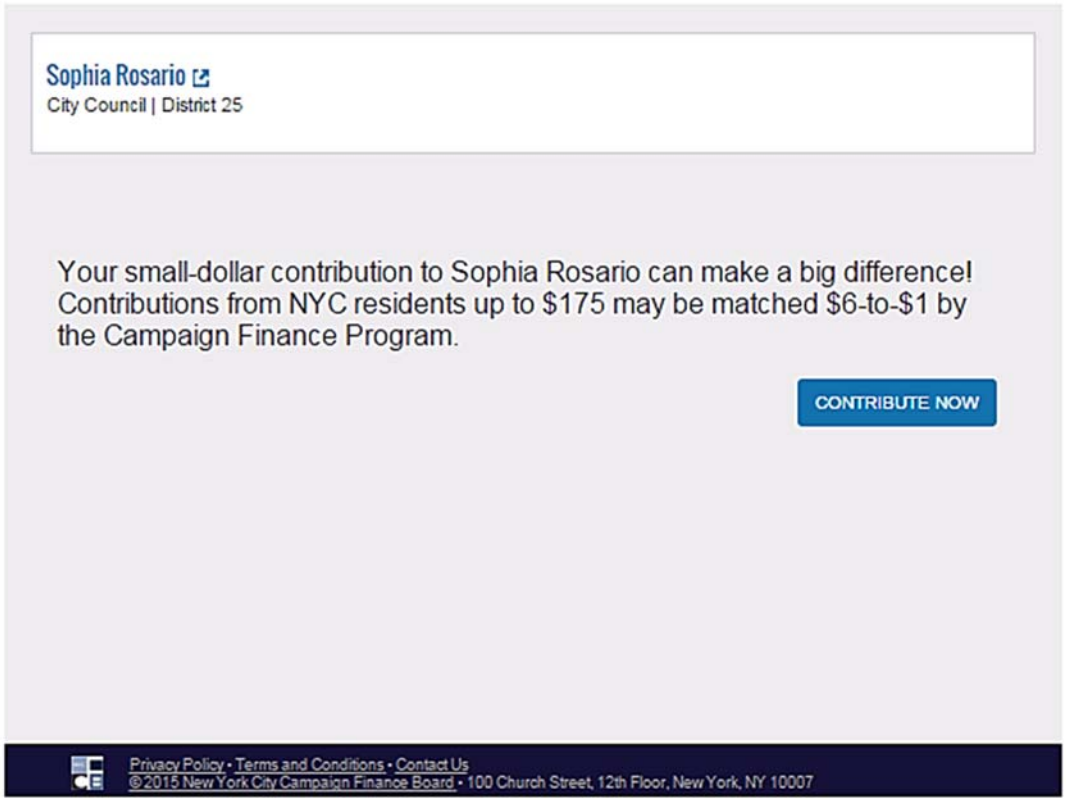
EMAIL CONTRIBUTION REPORT

Contribute Embed Options

SMALL



LARGE



C-SMART NYC Votes Contributions Report

C-SMART

NYC Votes Contributions

www.nycvotes.org

Committee Name: Sophia for Council

Election: 2017

Ordered By Import Date and Time

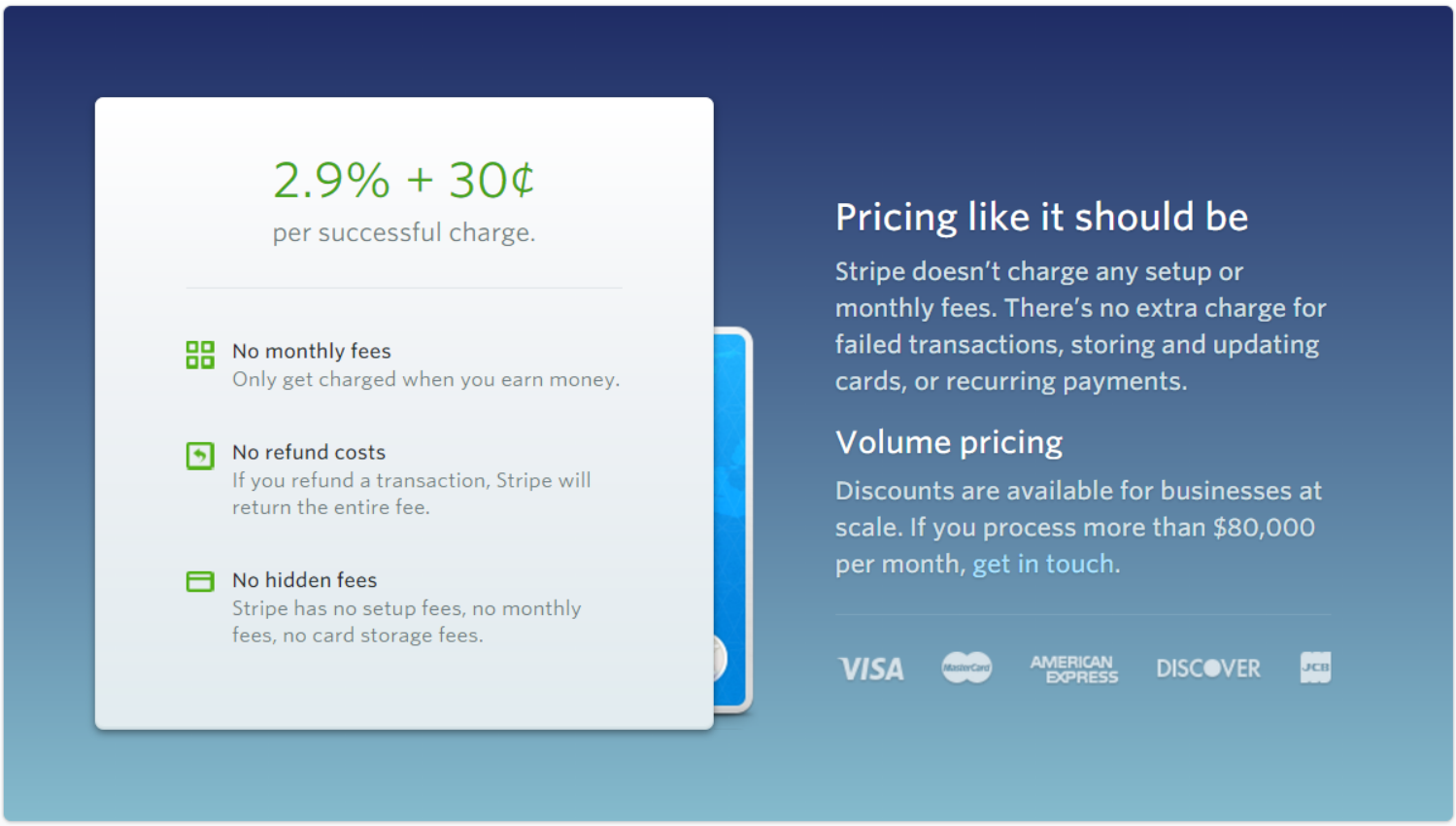
Selection Criteria: Date = All Dates; Amount = All Amounts

Contributor, Address	Employment Information	Stmt	Trans ID	Date Received	Amount	Matching Amount	Status
Import Date: 2/18/16 18:21	**NYC Votes User: csumail@nyccfb.info**						
Sampson, Winifred 73-06 Woodside Avenue Flushing, NY 11377 (Boro: Q) IND	Student		743	02/18/2016	10.00	10.00	Matching Amount Updated
				Total Records for Import Date:		**1**	
				Total Amount for Import Date:		**10.00**	
Import Date: 1/20/16 15:34	**NYC Votes User: csumail@nyccfb.info**						
Davis, Alexis 100 Church Street 12 New York, NY 10007 (Boro: M) IND	Homemaker		732	01/14/2016	100.00	0.00	-
				Total Records for Import Date:		**1**	
				Total Amount for Import Date:		**100.00**	

Stripe Fees & Contact Information

stripe

Headquarters
3180 18th St
San Francisco, CA 94110



For Stripe Support:

Email	Website
support@stripe.com	https://support.stripe.com/

Fees as of February 2016
Source: https://stripe.com/us/pricing