C-SMART HELP

BILL DOCUMENTATION

HOW TO ADD BILL/BILL PAYMENT/BILL PAYMENT REFUND/BILL FORGIVEN DOCUMENTATION

1. Go to the vendor's **Bill's** page.

    ➢ Click the bill's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

    ➢ For a bill payment, bill payment refund, or forgiven bill, use that **Transaction ID**.

OR

Important: Bill payments, refunds, and forgiven bills are each assigned separate transaction IDs.

2. Click **Add Document**.

3. Upload a new document or select a previously uploaded one.

   ➢ If you are uploading a new document, click **Upload PDF** and select a file from your computer.

   ➢ Clicking **Select Existing Document** will open a list of all previously uploaded contracts or leases for the name record you have selected. Check the **Linked** box and click **Save** to add the document to the transaction and return to the **Bills** screen. (This will skip Step 4.)

4. Enter and save the document details.

   ➢ Select page(s) and type of document:

      ◆ **Page(s):** Use a dash to select a page range (3-4) or a comma to select non-consecutive pages (1, 3). You also can choose **Select All Pages**.

      ◆ **Type:** Select the document type. All documents saved as a contract or lease will be available for future bills.

   ➢ Then, click **Save** to upload the document to C-SMART and link it to the transaction.

Add Documentation

Last Name or Entity Name: A-OK Print Shop, Inc.   Transaction ID: 8409   Amount: $500.00   Date: 10/16/2018   Expenditure Type: Bill   File Name: Number 13A 08-20-18.pdf

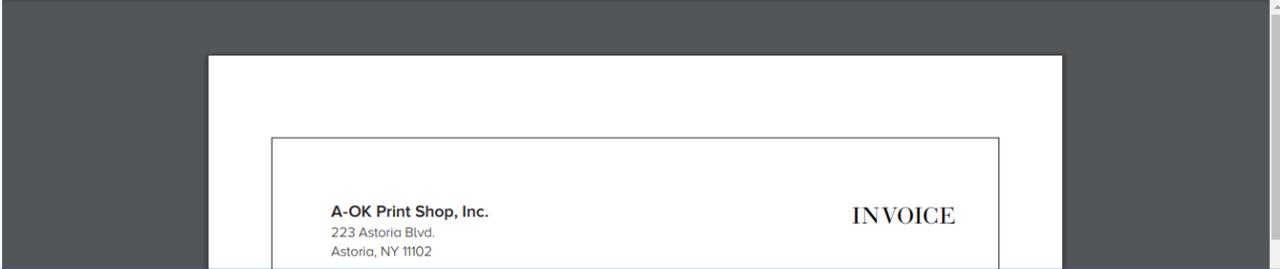**Select a PDF file to upload** (File size limit 4 MB)

+ Upload PDF

—— OR ——

Select Existing Document

Select page(s) and Type of Document (Indicate multiple pages by comma or dash)

◉ Page(s) ○ Select All Pages   Type

1   Invoices/Receipts ▾

Save Cancel

PDF Preview

A-OK Print Shop, Inc.
223 Astoria Blvd.
Astoria, NY 11102   INVOICE

5. The document has been successfully uploaded.

⊘ **You have successfully linked page(s) 1 to Transaction ID: 8377**   ✕

Bill Payment   ↩ **Back to Bill Detail**
Transaction ID: **8377** Statement: **N/A**   **+ Add** **✎ Edit** **⊘ Delete**

Profile		**Totals**	
Name:	A-OK Print Shop, Inc.	**Total Outstanding:**	$0.00
Address:	223 Astoria Blvd.	**Total Payments:**	$575.00
	Astoria NY 11102	**Total Forgiven:**	$0.00
Boro:	Queens Corporation		

Important:

◆ The maximum allowable file size is 4MB and only PDFs can be uploaded. For help with larger files, contact your Candidate Services liaison.

◆ The CFB does not receive uploaded documents until the underlying transaction is submitted in a disclosure statement or an amendment.

6. You can return to this page anytime and click **View PDF** to review your upload.

Documentation					**Add Document**
	Type	**Date Linked**	**Submit Date**	**Statement Number**	
View PDF	Canceled Committee Checks	1/30/2019			✖ Delete

HOW TO DELETE BILL/BILL PAYMENT/BILL PAYMENT REFUND/BILL FORGIVEN DOCUMENTATION

1. Go to the vendor's **Bills** page.

    ➢   Click the bill's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

    ➢   For a bill payment, bill payment refund, or forgiven bill, use that **Transaction ID.**

OR

2. Click **Delete** under **Documentation**.

Documentation					Add Document
	Type	Date Linked	Submit Date	Statement Number	
View PDF	Invoices/Receipts	1/30/2019			✖ Delete

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

❓	✕
Are you sure you want to delete this document?	
	Cancel Yes

❓	✕
Are you sure you want to unlink this document?	
Choosing "Yes" will unlink the document from the transaction. The contract or lease will stay linked to the name record.	
	Cancel Yes
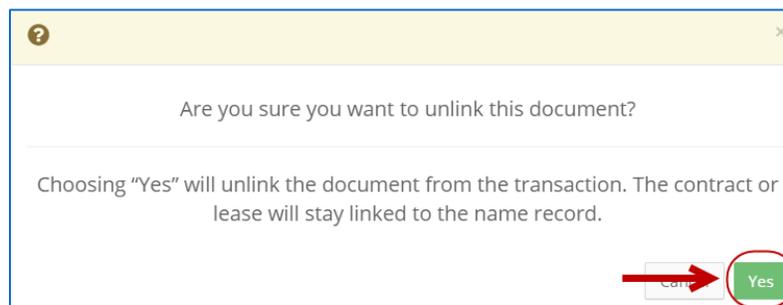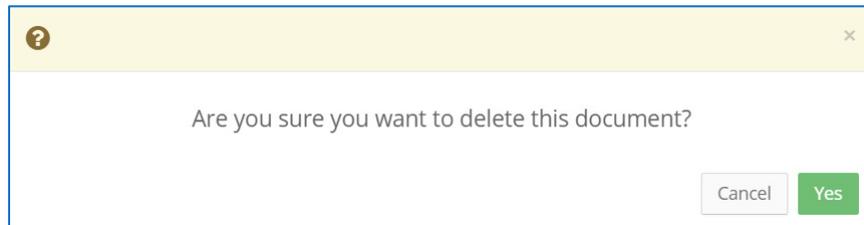
3. The document has been successfully deleted/unlinked.

> ✅ **The document has been successfully deleted.**   ✕
>
> **Bills**   ↩ Back to A-OK Print Shop, Inc.
> Transaction ID: **8374**   ＋Add   ✐ Edit   ⊗ Delete   🖨 Print Letter   ✉ Send Email

Important: You cannot delete documentation after it has been submitted to the CFB.