

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**.

The screenshot shows the 'Bills' page for a vendor. At the top, there is a search bar labeled 'Search by Last Name or Entity Name' and an 'Add Name' button. Below this is the 'Profile' section for 'A-OK Print Shop, Inc.' with address '223 Astoria Blvd. Astoria NY 11102' and 'Boro: Queens Corporation'. To the right is a 'Totals' section showing 'Total Outstanding: \$575.00', 'Total Payments: \$0.00', and 'Total Forgiven: \$0.00'. Below is a table of bills with columns: Transaction ID, Invoice Date, Documentation, Bill Amount, Payment, Payment Refund, Forgiven, and Outstanding. The first row has Transaction ID '8374' circled in red with a red arrow pointing to it, Invoice Date '1/16/2019', Documentation '0', Bill Amount '\$575.00', Payment '(\$0.00) 0', Payment Refund '\$0.00 0', Forgiven '(\$0.00) 0', and Outstanding '\$575.00'. There is an 'Add Bill' button in the top right of the table.

OR

The screenshot shows the C-SMART header for 'Election Cycle 2021 - Sophia Rosario'. It includes the NYC logo, 'C-SMART New York City Campaign Finance Board', and user information 'srosar1389'. A search bar contains '8377' and has a dropdown menu open showing '8377 -- Bill Payment' selected, indicated by a red arrow.

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

2. Click **Add Document**.


The screenshot shows the 'Documentation' table with columns: Type, Date Linked, Submit Date, and Statement Number. The table is currently empty with the text 'No records'. An 'Add Document' button is circled in red with a red arrow pointing to it.

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.)

Add Documentation

Last Name or Entity Name: A-OK Print Shop, Inc. Transaction ID: 8377 Amount: \$575.00 Date: 1/30/2019 Expenditure Type: Bill Payment File Name: Sample Bill and Bill Payment.pdf


Select a PDF file to upload (File size limit 4 MB) Select page(s) and Type of Document (Indicate multiple pages by comma or dash)

+ Upload PDF 

Page(s) Select All Pages Type

Save Cancel


PDF Preview



List of Existing Documents ✕

Select the document you would like to link this transaction to.

	Type	Upload Date	Submit Date	Linked
View PDF	Lease Agreements	10/19/2018		<input checked="" type="checkbox"/>

 Save Cancel

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:** Indicate the type of document. 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)

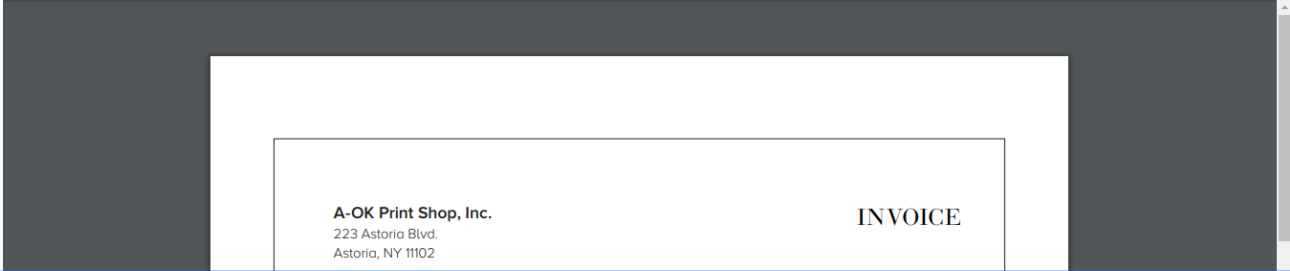
OR

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

Page(s) Select All Pages

Page(s): Type:

PDF Preview



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

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

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 <input type="button" value="Add Document"/>				
	Type	Date Linked	Submit Date	Statement Number
<input type="button" value="View PDF"/>	Canceled Committee Checks	1/30/2019		<input type="button" value="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**.

Bills Back to Bills

Search by Last Name or Entity Name

Profile

Name: A-OK Print Shop, Inc.
Address: 223 Astoria Blvd.
Astoria NY 11102
Boro: Queens Corporation

Totals

Total Outstanding: \$575.00
Total Payments: \$0.00
Total Forgiven: \$0.00

Bills

Transaction ID	Invoice Date	Documentation	Bill Amount	Payment	Payment Refund	Forgiven	Outstanding
8374	1/16/2019	0	\$575.00	(\$0.00) 0	\$0.00 0	(\$0.00) 0	\$575.00

OR

NYC **C-SMART**
New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

8374

Add Name

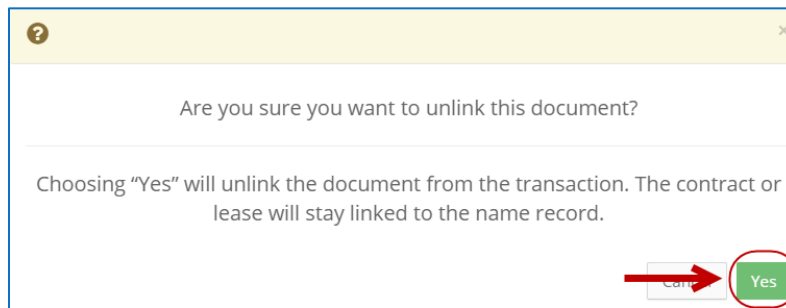
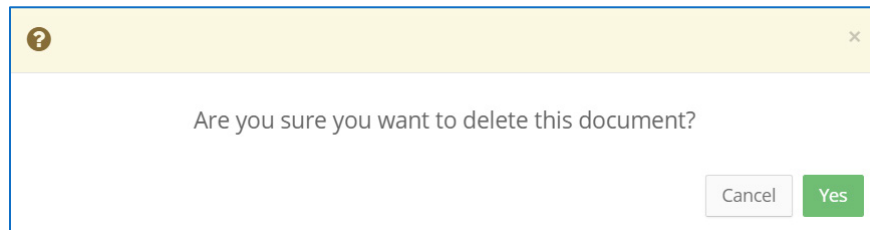
8374 - Bill

Transactions Documentation Reports Submission

2. Click **Delete** under **Documentation** to proceed.

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.



3. The document has been successfully deleted/unlinked.

✔ The document has been successfully deleted.

Bills
Transaction ID: 8374

[Back to A-OK Print Shop, Inc.](#)

+ Add Edit Delete Print Letter Send Email

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