

C-SMART HELP

BILL PAYMENTS

HOW TO ADD A BILL PAYMENT

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.

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

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 **Add Payment**.

Bill Payment

Transaction ID	Paid Date	Exempt Amount	Amount
No records			

3. Enter and save the payment details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Paid Date:** Enter the date the payment was made.
 - ◆ **Amount:** Enter the amount of the payment.
 - ◆ **Exempt Amount:** Review Chapter 3 of the [Handbook](#) for more information on exempt expenditures or consult with your Candidate Services liaison.
 - ◆ **Debit/Credit Card/Check Number:** Indicate whether the payment was made with a debit card, credit card, or by check. Enter the check number if a check was used.
 - ◆ **Bank Account:** Select the account from which the payment was made. C-SMART will default to your primary bank account, but you can choose a different one if necessary.
 - ◆ **Notes:** Enter any additional information. The CFB does not receive what you enter in this field. Your notes will be saved across all related transactions.
- Then, click **Save**.

Enter Details Invoice Date: 1/16/2019 Amount: \$575.00 Payment: \$0.00 Payment Refund: \$0.00 Forgiven: \$0.00 Outstanding: \$575.00

*Paid Date: Same as Invoice Date

*Amount: \$ Same as Invoice Amount

Exempt Amount: \$

Debit:


Credit:

Credit Card:

*Check Number:

*Bank Account:

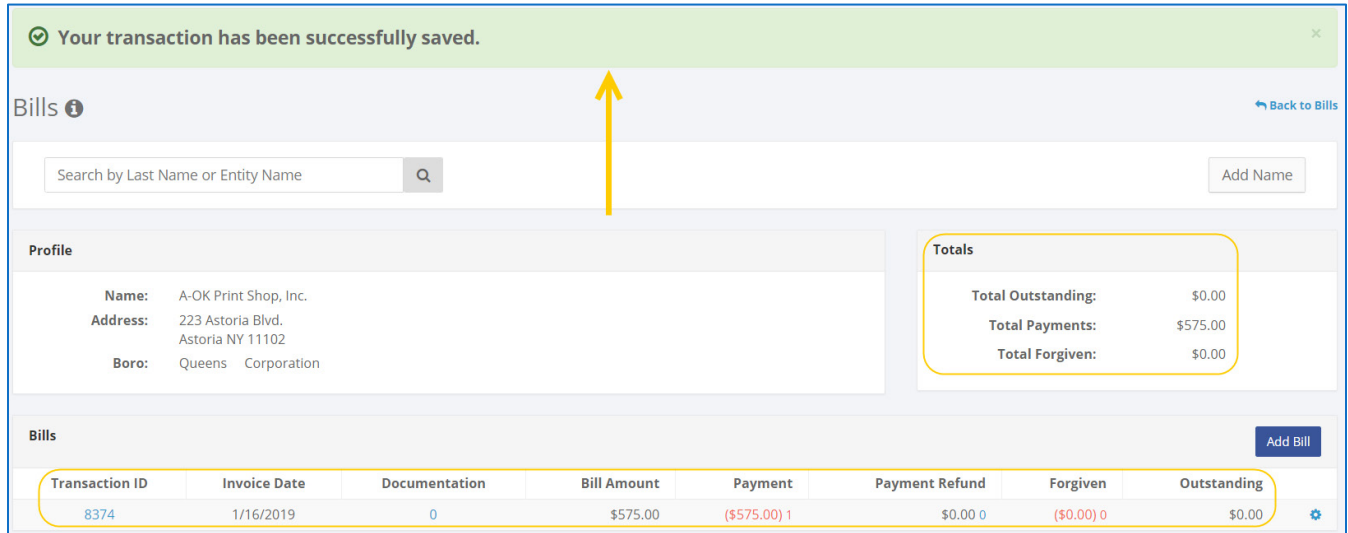
Notes:
[For Campaign Use Only]



Best Practice: If you paid the invoice on the same day you received it, check **Same as Invoice Date**. If you are paying the full amount, check **Same as Invoice Amount**.

4. Complete and save the bill payment.

- Once you hit **Save**, C-SMART will return you to the vendor's **Bills** page. The **Totals** box and list of bills will be updated to reflect the newly saved transaction.



The screenshot displays the C-SMART interface for managing bills. At the top, a green notification bar states "Your transaction has been successfully saved." Below this, the "Bills" section includes a search bar and an "Add Name" button. The vendor profile for "A-OK Print Shop, Inc." is shown, along with a "Totals" box. The "Totals" box contains the following information:

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

Below the profile and totals, the "Bills" section features an "Add Bill" button and a table with the following data:

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

Best Practice: Write the C-SMART **Transaction ID** on the copy of the canceled committee check.

HOW TO EDIT A BILL PAYMENT

1. Go to the vendor's **Bills** page.
 - Click the bill's **Transaction ID**, scroll down to **Bill Payment**, click the **gear** next to the payment and then **Edit Payment**. You can also use the **Search Name or Transaction ID** bar.

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

Bill Payment

Transaction ID	Paid Date	Exempt Amount	Amount
8383	1/16/2019	\$0.00	\$575.00

OR

NYC **C-SMART** Election Cycle 2021 - Sophia Rosario Help srosar1389

New York City Campaign Finance Board

Transactions Documentation Reports Submission

8383

Add Name

8383 -- Bill Payment

Bill Payment Back to Bill Detail

Transaction ID: 8383 Statement: N/A

Profile

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

Totals

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

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

Edit Bill Payment Details Invoice Date: 1/16/2019 Amount: \$575.00 Payment: \$575.00 Payment Refund: \$0.00 Forgiven: \$0.00 Outstanding: \$0.00

*Paid Date: 01/16/2019

*Amount: \$ 555.00

Exempt Amount: \$ 0.00

Debit:

Credit:

Credit Card:

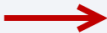
*Check Number: 321

*Bank Account: Smart Savings Bank(****3522)

Void Check: Void Date:

Notes:
[For Campaign Use Only]

Entered By: srosar1389 Date: 01/30/2019 01:15 PM Updated By: srosar1389 Date: 01/30/2019 01:15 PM

 **Save** Cancel

Important:

- ◆ The timestamp at the bottom will be updated to show who last modified the transaction.

Best practices:

- ◆ If the check was voided, click Void Check and enter the void date. This will also void the Bill Payment transaction.
- ◆ If you issue a new check, you must create a new Bill Payment

3. The payment has been successfully edited.

✔ Your transaction has been successfully saved.

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: \$20.00
Total Payments: \$555.00
Total Forgiven: \$0.00

Bills

Transaction ID	Invoice Date	Documentation	Bill Amount	Payment	Payment Refund	Forgiven	Outstanding
8374	1/16/2019	0	\$575.00	(\$555.00) 1	\$0.00 0	(\$0.00) 0	\$20.00

HOW TO DELETE A BILL PAYMENT

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

- Click the bill's **Transaction ID**, scroll down to **Bill Payment**, and click the payment's **Transaction ID**. You can also use the **Search Name or Transaction ID** bar.

The screenshot shows the 'Bills' interface. At the top, there is a search bar labeled 'Search by Last Name or Entity Name' and an 'Add Name' button. Below this is a '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: \$0.00', 'Total Payments: \$575.00', and 'Total Forgiven: \$0.00'. Below the profile is a 'Bills' table 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. Below the Bills table is a 'Bill Payment' table with columns: Transaction ID, Paid Date, Exempt Amount, and Amount. The first row has Transaction ID '8383' circled in red with a red arrow pointing to it.

OR

The screenshot shows the top navigation bar of the C-SMART system. It includes the NYC logo, 'C-SMART New York City Campaign Finance Board', 'Election Cycle 2021 - Sophia Rosario', and user information 'Help' and 'srosar1389'. A search bar contains the text '8383'. A dropdown menu is open below the search bar, showing '8383 -- Bill Payment' selected, with a red arrow pointing to the selection.

2. Click **Delete** to proceed.

The screenshot shows the 'Bill Payment' detail page for Transaction ID '8414'. It includes a 'Profile' section for 'A-OK Print Shop, Inc.' and a 'Totals' section showing 'Total Outstanding: \$0.00', 'Total Payments: \$500.00', and 'Total Forgiven: \$0.00'. In the top right corner, there are '+ Add' and 'Delete' buttons. The 'Delete' button is circled in red with a red arrow pointing to it.

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

The screenshot shows a confirmation dialog box with a yellow header and a question mark icon. The text inside the dialog asks 'Are you sure you want to delete this transaction?'. At the bottom right, there are two buttons: 'Cancel' and 'Yes'.

3. The payment has been successfully deleted.

The screenshot displays a web interface with a green notification banner at the top stating "Your Transaction has been successfully deleted." Below this, the "Bills" section includes a search bar, a profile card for "A-OK Print Shop, Inc.", a "Totals" summary box, and a table of bills. A yellow arrow points from the notification banner to the search bar. The "Totals" box and the first row of the "Bills" table are highlighted with yellow circles.

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

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