

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.

The screenshot shows the 'Bills' page interface. At the top, there is a search bar labeled 'Search by Last Name or Entity Name' with a magnifying glass icon and an 'Add Name' button. Below the search bar, there are two sections: 'Profile' and 'Totals'. The 'Profile' section lists: Name: A-OK Print Shop, Inc.; Address: 223 Astoria Blvd., Astoria NY 11102; Boro: Queens Corporation. The 'Totals' section shows: Total Outstanding: \$575.00; Total Payments: \$0.00; Total Forgiven: \$0.00. Below these sections is a table of bills. The table has columns: Transaction ID, Invoice Date, Documentation, Bill Amount, Payment, Payment Refund, Forgiven, and Outstanding. The first row of the table has the following values: 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, Outstanding: \$575.00. There is an 'Add Bill' button in the top right corner of the table area.

OR

The screenshot shows the top navigation bar of the C-SMART system. On the left is the NYC logo and the text 'C-SMART New York City Campaign Finance Board'. In the center, there is a user profile icon and the text 'Election Cycle 2021 - Sophia Rosario'. On the right, there is a search bar containing the text '8374' and a magnifying glass icon. Below the search bar is a dropdown menu with the text 'Add Name' and a selected item '8374 -- Bill'. A red arrow points to the '8374 -- Bill' item in the dropdown menu. Below the search bar, there are navigation links: Transactions, Documentation, Reports, and Submission.

2. Click **Add Payment**.

The screenshot shows the 'Bill Payment' table. The table has columns: Transaction ID, Paid Date, Exempt Amount, and Amount. Below the columns, it says 'No records'. In the top right corner of the table area, there is a blue button labeled 'Add Payment' which is circled in red. A red arrow points to the 'Add Payment' button.

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 payment date.
 - ◆ **Amount:** Enter the payment amount.
 - ◆ **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 check. Enter the check number if one was used.
 - ◆ **Bank Account:** Indicate the account the payment was made from. C-SMART will default to your primary bank account, but you can select 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: 1/16/2019 Same as Invoice Date

*Amount: \$ 575.00 Same as Invoice Amount

Exempt Amount: \$ 0.00

Debit:


Credit:

Credit Card:

*Check Number:

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

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.

Important:

- ◆ If a warning appears on clicking **Save**, read it. It might refer to a compliance issue.
- ◆ For **Childcare Services**, you must claim the full payment amount as exempt.

4. Your payment has been successfully saved.

- At this point, 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 a vendor's bills. At the top, a green notification bar states "Your transaction has been successfully saved." Below this is the "Bills" section with a search bar and an "Add Name" button. The vendor profile is shown with the following details:

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

The "Totals" box shows the following summary:

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

The "Bills" table below contains one entry:

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** 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

C-SMART New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

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

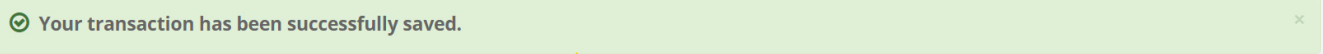
Important:


- ◆ 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 payment. If you issue a new check, you must create a new payment in C-SMART.

3. The payment has been successfully edited.



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' page for a vendor named 'A-OK Print Shop, Inc.'. It includes a search bar, a profile section with address and boro information, and a 'Totals' section. Below these is a table of bills. The first row in the table has a 'Transaction ID' of 8374, which is circled in red with a red arrow pointing to it. Below this table is a 'Bill Payment' table. The first row in this table has a 'Transaction ID' of 8383, also 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, the text 'C-SMART New York City Campaign Finance Board', and the user's name 'Election Cycle 2021 - Sophia Rosario'. On the right side, there is a search bar containing the text '8383'. Below the search bar, a dropdown menu is open, showing the option '8383 -- Bill Payment' with a red arrow pointing to it.

2. Click **Delete** to proceed.

The screenshot shows the 'Bill Payment' detail page for Transaction ID 8414. It includes a profile section and a 'Totals' section. In the top right corner, there are two buttons: '+ Add' and 'Delete'. 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 box reads 'Are you sure you want to delete this transaction?'. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Yes'.

3. The payment has been successfully deleted.

✔ Your Transaction has been successfully deleted. ×

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

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