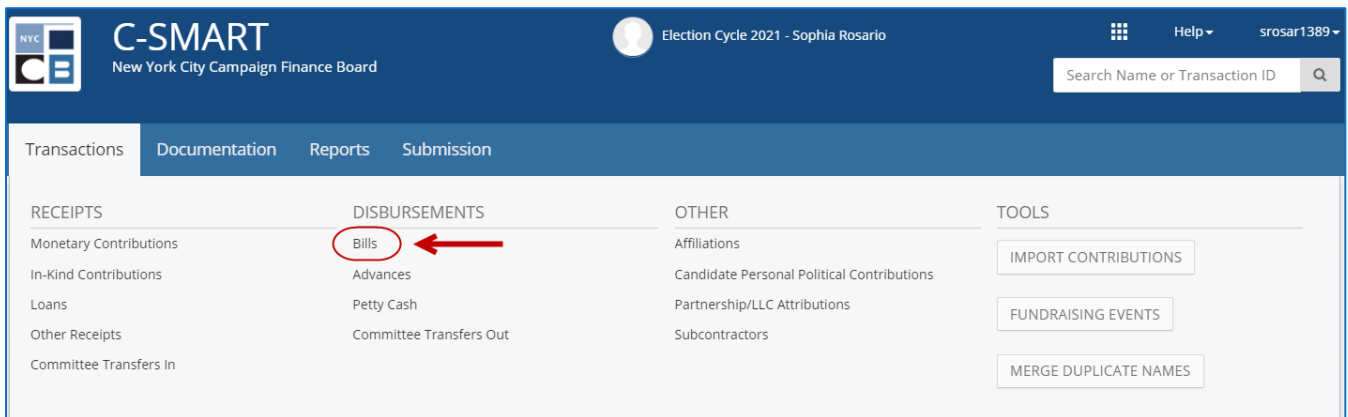


# C-SMART HELP

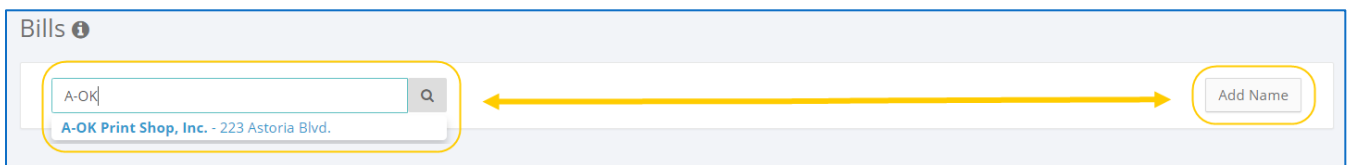
## BILLS

### HOW TO ADD A BILL

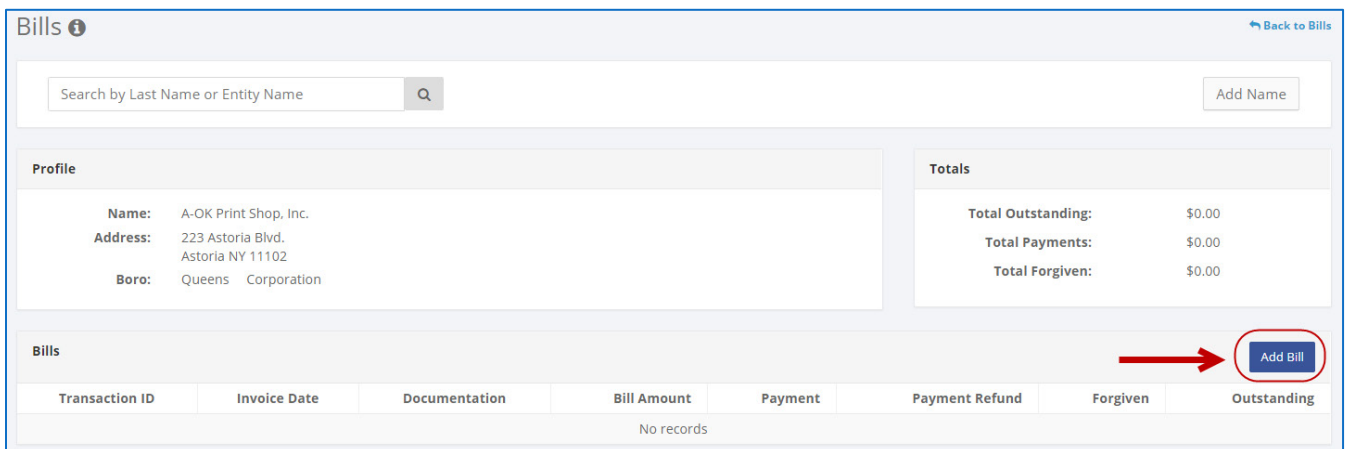
1. Go to **Bills**.
  - Hover your cursor over **Transactions** and click **Bills**.



2. Use the Search by Last Name or Entity Name bar to find the vendor OR click [Add Name](#) to create a new record.



3. Click **Add Bill**.



4. Enter and save the details of the bill.

- C-SMART will alert you if you leave out required information. Complete the following fields:
  - ◆ **Invoice Date:** Enter the date the bill was received.
  - ◆ **Amount:** Enter the total amount of the bill.
  - ◆ **Purpose Code:** Choose the purpose code that best represents the expenditure. Refer to the [C-SMART Purpose Codes Guide](#) for further information on purpose codes.
  - ◆ **Explanation:** Enter a brief description of the expenditure.
  - ◆ **Exempt Code:** Review Chapter 3 of the [Handbook](#) for more information on exempt expenditures or consult with your Candidate Services liaison.
  - ◆ **Committee:** Select the committee incurring the expenditure. C-SMART will default to your principal committee, but you may choose a different one if necessary.
  - ◆ **Event:** If the purchase was related to a [fundraising event](#), indicate which one.
  - ◆ **Segregated:** Indicate if the expenditure was made from a segregated bank account. See Chapter 6 of the [Handbook](#) for more information on segregated bank accounts.
  - ◆ **Runoff/Rerun:** Check this box if the contribution was for an expected runoff or court-ordered rerun. Accepting contributions for a runoff is allowed only if the CFB confirms one is expected. Review [Runoff Guidance](#) for more information.
  - ◆ **Vendor Reference Number:** If the vendor provided an identifying number or code, such as on the invoice, you may enter it here.
  - ◆ **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**.

---

**Best Practice:**

- ◆ Use the tab key to navigate between fields.

**Important:**

- ◆ Upon clicking Save, if a warning message pops up, read it. It might refer to a potentially urgent compliance issue.
-

**Enter Details**

\*Invoice Date: 01/16/2019

\*Amount: \$ 500.00

\*Purpose Code: Campaign Workers

\*Explanation: Canvassers

Exempt Code:

\*Committee: Sophia for Council

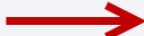
Event:

Segregated:

Runoff / Rerun:

Vendor Reference Number:

Notes:  
[For Campaign Use Only]

 Save Cancel

5. The bill has been successfully saved.

- 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.

✔ 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: \$500.00  
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	\$500.00	(\$0.00) 0	\$0.00 0	(\$0.00) 0	\$500.00

**Best Practice:** Write the C-SMART **Transaction ID** on each invoice, receipt, or other related documentation.

## HOW TO EDIT A BILL

1. Go to the vendor's **Bills** page.
  - Click the **gear** next to the bill and then **Edit** OR enter the **Transaction ID** into the **Search Name or Transaction ID** bar and click **Edit**.

Bills								Add Bill
Transaction ID	Invoice Date	Documentation	Bill Amount	Payment	Payment Refund	Forgiven	Outstanding	
8374	1/16/2019	0	\$500.00	(\$0.00) 0	\$0.00 0	(\$0.00) 0	\$500.00	

Edit

Add Document

Add Payment

Add Payment Refund

Add Bill Forgiven

OR

C-SMART New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

8374

Add Name

8374 -- Bill

Bills

Transaction ID: 8374

Back to A-OK Print Shop, Inc.

Edit Delete Print Letter Send Email

**Profile**

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

**Totals**

**Total Outstanding:** \$500.00  
**Total Payments:** \$0.00  
**Total Forgiven:** \$0.00

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

**Edit Details**

**\*Invoice Date:**

**\*Amount:** \$

**\*Purpose Code:**

**\*Explanation:**

**Exempt Code:**

**\*Committee:**

**Event:**


**Segregated:**

**Runoff / Rerun:**

**Vendor Reference Number:**

**Notes:**  
[For Campaign Use Only]

Entered By: srosar1389 Date: 01/30/2019 12:34 PM Updated By: srosar1389 Date: 01/30/2019 12:34 PM



**Important:** The timestamp at the bottom will be updated to show who last modified the transaction.

2. The bill 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:** \$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

## HOW TO DELETE A BILL

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 for a vendor named 'A-OK Print Shop, Inc.'. At the top, there is a search bar with the text 'Search by Last Name or Entity Name' and a search icon. Below the search bar, the vendor's profile information is displayed, including Name, Address, and Boro. To the right, a 'Totals' section shows 'Total Outstanding: \$575.00', 'Total Payments: \$0.00', and 'Total Forgiven: \$0.00'. Below this is a table of bills. The first row in the table has the Transaction ID '8374' circled in red, with a red arrow pointing to it. The table columns are Transaction ID, Invoice Date, Documentation, Bill Amount, Payment, Payment Refund, Forgiven, and Outstanding.

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

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, it says 'Election Cycle 2021 - Sophia Rosario'. On the right, there is a search bar containing the number '8374'. Below the search bar, a dropdown menu is open, showing the selected item '8374 -- Bill'. A red arrow points to this dropdown menu.

2. Click **Delete** to proceed.

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

The screenshot shows the 'Bills' page for a specific transaction with ID '8374'. At the top right, there are buttons for '+ Add', 'Delete', 'Print Letter', and 'Send Email'. The 'Delete' button is circled in red, with a red arrow pointing to it. Below the buttons, the vendor's profile information and 'Totals' section are visible, matching the information in the first screenshot.

3. The bill has been successfully deleted.

The screenshot displays a web interface for managing bills. At the top, a green notification bar states "Your Transaction has been successfully deleted." with a close button. Below this is the "Bills" section, which includes a search bar, a "Back to Bills" link, and a "Profile" card for "A-OK Print Shop, Inc." with its address and boro information. To the right of the profile is a "Totals" box showing "Total Outstanding: \$0.00", "Total Payments: \$0.00", and "Total Forgiven: \$0.00". At the bottom, a table with columns for Transaction ID, Invoice Date, Documentation, Bill Amount, Payment, Payment Refund, Forgiven, and Outstanding is shown, with the text "No records" centered below the columns. A yellow arrow points from the notification bar to the search bar area.

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