C-SMART HELP

UPLOADING EXPENDITURE DOCUMENTATION (MULTIPLE)

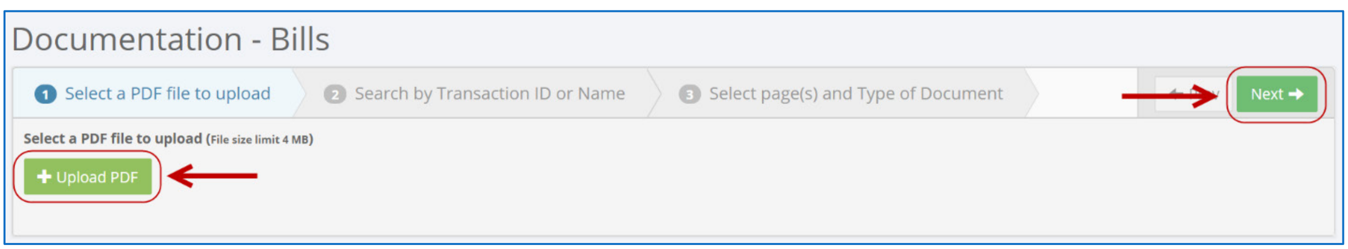
You can upload expenditure (bill) documentation such as invoices, contracts, and leases to include with your disclosure statement submissions. You can delete uploaded documentation until it has been submitted to the CFB.

HOW TO UPLOAD BILL EXPENDITURE DOCUMENTATION

1. Go to **Bills**.

   ➢ Hover your cursor over **Documentation** and click **Bills.**

2. Click **Upload PDF**, select a file from your computer, and click **Next**.

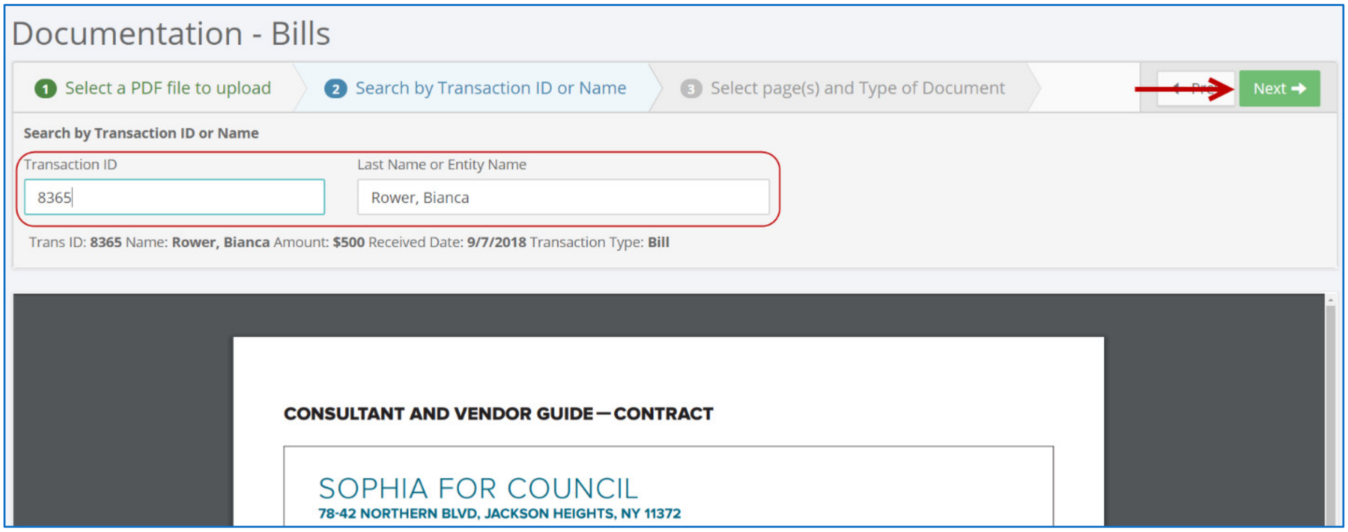


Important:

- 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.

---

3. Use the **Transaction ID** OR the **Last Name or Entity Name** search bar to find the bill and click **Next**.



Best Practice:

- Review the preview on this page to confirm that you have selected the right document.

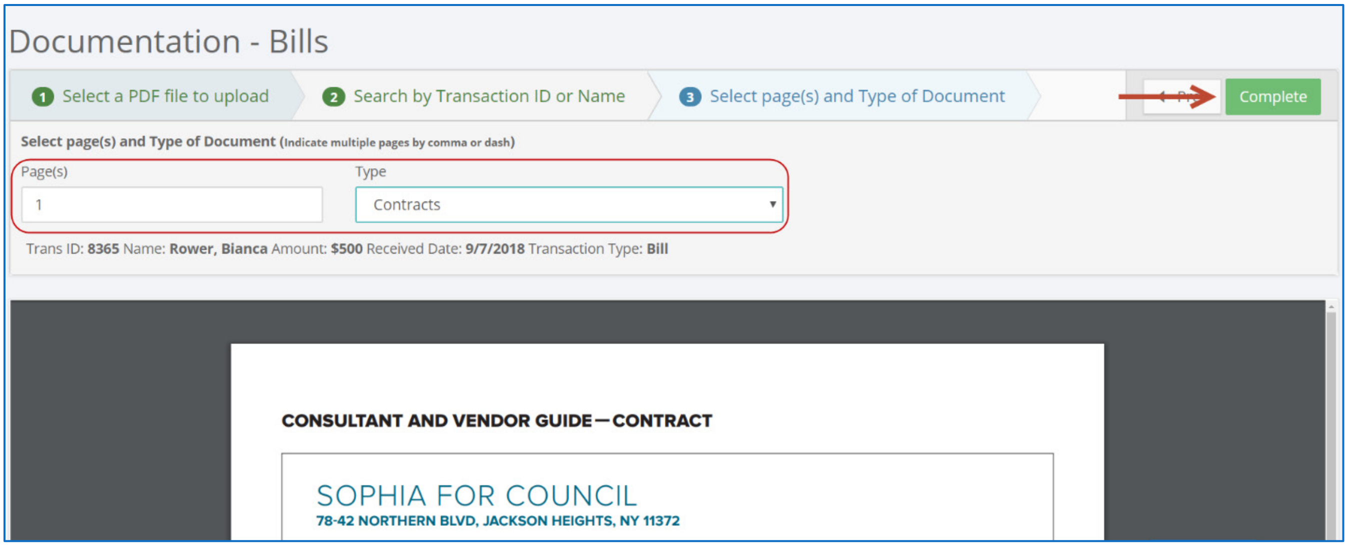
Important:

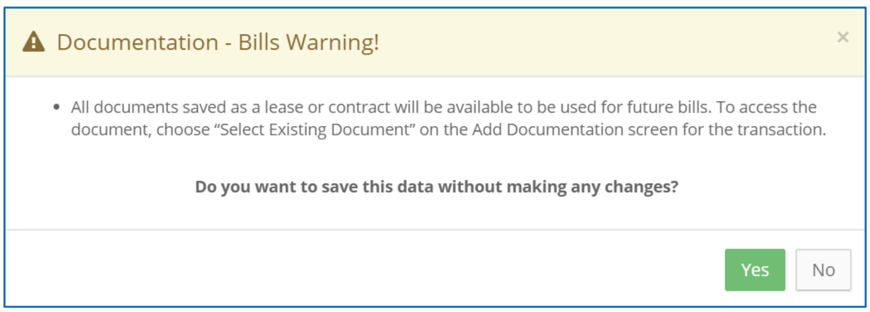
- You must have already recorded the transaction before uploading expenditure documentation.
- C-SMART will autofill the **Transaction ID** and **Last Name or Entity Name** fields based on previously entered information.

---

4. Enter the document details.

   - Complete the following fields:
     - **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 an option from the drop-down menu.
     - Previously uploaded leases and contracts can be selected by clicking **Select Existing Document** on the **Add Documentation** page.
   - Then, click **Complete**.





5. The documentation has been successfully linked to the transaction.

➢ A window will open confirming that the file was successfully linked. Click **OK** to repeat the process until the PDF has been linked to all related bills.