

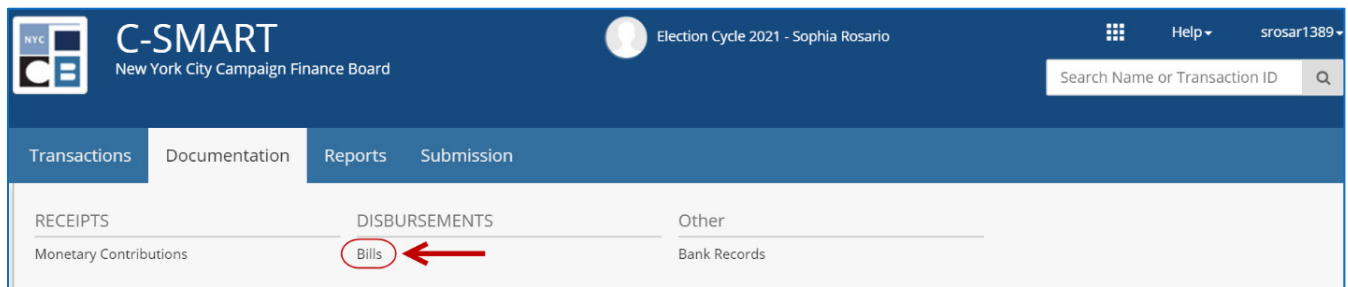
C-SMART HELP

UPLOADING EXPENDITURE DOCUMENTATION (MULTIPLE)

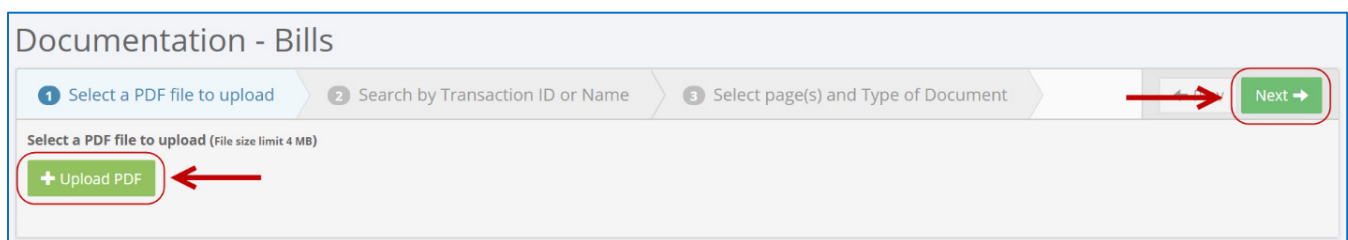
You can upload expenditure (bill) documentation such as invoices, contracts, and leases to include with your disclosure statement submissions. You can delete uploaded documentation until it has been submitted to the CFB.

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**.

The screenshot shows the 'Documentation - Bills' interface. At the top, there are three steps: 1. Select a PDF file to upload, 2. Search by Transaction ID or Name, and 3. Select page(s) and Type of Document. A red arrow points to a 'Next' button. Below the steps, there is a search bar with two fields: 'Transaction ID' (containing '8365') and 'Last Name or Entity Name' (containing 'Rower, Bianca'). Below the search bar, there is a summary line: 'Trans ID: 8365 Name: Rower, Bianca Amount: \$500 Received Date: 9/7/2018 Transaction Type: Bill'. Below this, there is a preview of a document titled 'CONSULTANT AND VENDOR GUIDE — CONTRACT' for 'SOPHIA FOR COUNCIL' at '78-42 NORTHERN BLVD, JACKSON HEIGHTS, NY 11372'.

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**.

Documentation - Bills

1 Select a PDF file to upload 2 Search by Transaction ID or Name 3 Select page(s) and Type of Document Complete

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

Page(s)	Type
1	Contracts

Trans ID: 8365 Name: Rower, Bianca Amount: \$500 Received Date: 9/7/2018 Transaction Type: Bill

CONSULTANT AND VENDOR GUIDE – CONTRACT

SOPHIA FOR COUNCIL
78-42 NORTHERN BLVD, JACKSON HEIGHTS, NY 11372

⚠ Documentation - Bills Warning!

- All documents saved as a lease or contract will be available to be used for future bills. To access the document, choose "Select Existing Document" on the Add Documentation screen for the transaction.

Do you want to save this data without making any changes?

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.

✔ Documentation - Bills!

You have successfully linked page(s) 1 to Transaction ID: 8380