

# C-SMART HELP

## FORGIVEN BILLS

### HOW TO ADD A FORGIVEN 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.'. The page includes a search bar at the top, a profile section with the vendor's name, address, and borough, and a 'Totals' section showing 'Total Outstanding' of \$575.00, 'Total Payments' of \$0.00, and 'Total Forgiven' of \$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. The search bar contains the text '8374'. A dropdown menu is open below the search bar, showing the selected item '8374 -- Bill'. A red arrow points to this dropdown item. The page header includes the C-SMART logo, the user's name 'Election Cycle 2021 - Sophia Rosario', and a user ID 'srosar1389'.

2. Click **Add Bill Forgiven**.

The screenshot shows the 'Bill Forgiven' form. The form has a header 'Bill Forgiven' and a table with columns for 'Transaction ID', 'Forgiven Date', and 'Amount'. The table currently shows 'No records'. A red arrow points to the 'Add Bill Forgiven' button in the top right corner of the form.

### 3. Enter and save the transaction details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
  - ◆ **Forgiven Date:** Enter the date the vendor forgave the amount.
  - ◆ **Amount:** Enter the amount forgiven.
  - ◆ **Notes:** Enter any additional information. The CFB does not receive the information you enter in this field. Your notes will be saved across all related transactions.
- Then, click **Save**.

Enter Details Invoice Date: 10/16/2018 Amount: \$500.00 Payment: \$0.00 Payment Refund: \$0.00 Forgiven: \$0.00 Outstanding: \$500.00

\*Forgiven Date: 10/18/2018

\*Amount: \$ 500.00

Notes:  
[For Campaign Use Only]

Save Cancel

### Important:

- ◆ If the vendor is an individual, be sure that the forgiven amount does not exceed the contribution limit, including the [Doing Business limit](#) if applicable.
- ◆ Forgiven bills are considered contributions, subject to source restrictions and limits. You may not accept a forgiven bill from any corporations, partnerships, or LLCs. C-SMART will produce a warning message if you try to create a forgiven bill from such a vendor.

**⚠ New Bill Forgiven Warning!**

- A forgiven bill is considered to be a contribution. Candidates may not accept corporate contributions. You may not allow this bill to be forgiven.

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

Yes No

- 4. The forgiven amount has been successfully saved.
  - Once you hit **Save**, C-SMART will return you to the vendor's **Bills** page. The **Totals** box and the 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:	\$0.00
Total Payments:	\$0.00
Total Forgiven:	\$575.00

**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	(\$575.00) 1	\$0.00

**Best practices:** Write the C-SMART **Transaction ID** on copies of any related documentation, such as a letter from the vendor forgiving the bill.

### HOW TO EDIT A FORGIVEN BILL

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

**Bill Forgiven**

Transaction ID	Forgiven Date	Amount
8380	1/30/2019	575.00

OR

NYC **C-SMART** New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

8380

Add Name

8380 -- Bill Forgiven

Bill Forgiven [Back to Bill Detail](#)

Transaction ID: 8380 Statement: N/A [Edit](#) [Delete](#)

Profile	Totals
<b>Name:</b> A-OK Print Shop, Inc. <b>Address:</b> 223 Astoria Blvd. Astoria NY 11102 <b>Boro:</b> Queens Corporation	<b>Total Outstanding:</b> \$0.00 <b>Total Payments:</b> \$0.00 <b>Total Forgiven:</b> \$575.00

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

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

**\*Forgiven Date:** 01/30/2019

**\*Amount:** \$ 500.00

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

Entered By: srosar1389 Date: 01/30/2019 03:01 PM Updated By: srosar1389 Date: 01/30/2019 03:01 PM

[Save](#) [Cancel](#)

3. The forgiven amount has been successfully edited.

✔ Your transaction has been successfully saved.

Bills [Back to Bills](#)

Search by Last Name or Entity Name

Profile	Totals
<b>Name:</b> A-OK Print Shop, Inc. <b>Address:</b> 223 Astoria Blvd. Astoria NY 11102 <b>Boro:</b> Queens Corporation	<b>Total Outstanding:</b> \$75.00 <b>Total Payments:</b> \$0.00 <b>Total Forgiven:</b> \$500.00

**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	(\$500.00) 1	\$75.00

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

## HOW TO DELETE A FORGIVEN BILL

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.'. The page includes a search bar, a profile section with the vendor's name, address, and boro, and a 'Totals' section showing 'Total Outstanding: \$75.00', 'Total Payments: \$0.00', and 'Total Forgiven: \$500.00'. Below this is a table of bills. The first row in the table has 'Transaction ID' 8374, 'Invoice Date' 1/16/2019, 'Documentation' 0, 'Bill Amount' \$575.00, 'Payment' (\$0.00) 0, 'Payment Refund' \$0.00 0, 'Forgiven' (\$500.00) 1, and 'Outstanding' \$75.00. A red circle highlights the '8374' and a red arrow points to it from the left.

OR

The screenshot shows the 'Bill Forgiven' page. It features a table with columns for 'Transaction ID', 'Forgiven Date', and 'Amount'. The first row contains '8416', '10/18/2018', and '500.00'. A red circle highlights the '8416' and a red arrow points to it from the left.

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', the user profile 'Election Cycle 2021 - Sophia Rosario', and a search bar. The search bar contains the text '8380' and a dropdown menu is open, showing the option '8380 - Bill Forgiven' which is highlighted. A red arrow points to this option.

2. Click **Delete** to proceed.

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

The screenshot shows the 'Bill Forgiven' detail page for Transaction ID 8416. It includes a profile section and a 'Totals' section. The 'Totals' section shows 'Total Outstanding: \$0.00', 'Total Payments: \$0.00', and 'Total Forgiven: \$500.00'. In the top right corner, there are '+ Add' and 'Delete' buttons. The 'Delete' button is circled in red and has a red arrow pointing to it.

A yellow confirmation dialog box is displayed with a question mark icon in the top left corner. The text inside the box reads 'Are you sure you want to delete this transaction?'. At the bottom of the box, there are two buttons: 'Cancel' and 'Yes'.

3. The forgiven amount 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.