

C-SMART HELP

OTHER RECEIPT DOCUMENTATION

HOW TO ADD OTHER RECEIPT DOCUMENTATION

1. Go to the **Other Receipts** page.
 - Click the other receipt's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

Other Receipts ⓘ [Back to Other Receipts](#)

Search by Last Name or Entity Name

Profile

Name: Smart Savings Bank
Address: 123 Broadway
New York NY 10006
Boro: Manhattan Corporation

Totals

Total Other Receipts: \$0.99

Other Receipts

Transaction ID	Date Received	Receipt Type	Amount
8475	10/29/2018	Interest/Dividends	\$0.99

OR

NYC C-SMART New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

Transactions Documentation Reports Submission

8475

Add Name

8475 -- Other Receipts

2. Click **Add Document**.

Documentation

Type	Date Linked	Submit Date	Statement Number
No records			

Best Practice: As a shortcut, you can click the **gear** on the contributor's page next to the **Transaction ID** and then **Add Document**.

3. Enter and save the document details.

- Click **Upload** and then complete the following fields:
 - ◆ **Page(s):** Use a dash to select a page range (3-4) or a comma to select non-consecutive page numbers (1, 3). You also can choose **Select All Pages**.
 - ◆ **Type:** Select an option from the drop-down menu. **Supporting Documentation** will be the default choice.
- Then, click **Save**.

Add Documentation

Last Name or Entity Name: Smart Savings Bank **Transaction ID:** 8475 **Amount:** \$0.99 **Date:** 10/29/2018 **Other Receipt Type:** Interest/Dividends
File Name: Other Receipt Documentation.pdf

Select a PDF file to upload (File size limit 4 MB) **Select page(s) and Type of Document** (Indicate multiple pages by comma or dash)

+ Upload PDF

Page(s) Select All Pages Type: Supporting Documentation

Save Cancel

4. This document is now stored in C-SMART and linked with this transaction.

✔ You have successfully linked page(s) 1 to Transaction ID: 8475

Other Receipts

Transaction ID: **8475** Statement: **N/A** ➤ Back to Smart Savings Bank

+ Add ✎ Edit 🗑 Delete

<p>Profile</p> <p>Name: Smart Savings Bank Address: 123 Broadway New York NY 10006 Boro: Manhattan Corporation</p>	<p>Totals</p> <p>Total Other Receipts: \$0.99</p>
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5. You can return to this page any and click **View PDF** to review your upload.

Documentation Add Document				
	Type	Date Linked	Submit Date	Statement Number
View PDF	Supporting Documentation	10/29/2018		✕ Delete

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.

HOW TO DELETE OTHER RECEIPT DOCUMENTATION

1. Go to the **Other Receipts** page.
 - Click the other receipt's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

Transaction ID	Date Received	Receipt Type	Amount
8475	10/29/2018	Interest/Dividends	\$0.99

OR

8475

8475 -- Other Receipts

2. Click **Delete** under **Documentation** to proceed.

Type	Date Linked	Submit Date	Statement Number
Supporting Documentation	10/29/2018		

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

Are you sure you want to delete this document?

Cancel Yes

3. The document has been successfully deleted.

✔ The document has been successfully deleted. ✕

Other Receipts

Transaction ID: 8475 Statement: N/A ➔ Back to Smart Savings Bank

+ Add ✎ Edit 🗑 Delete

Profile	Totals
<p>Name: Smart Savings Bank Address: 123 Broadway New York NY 10006 Boro: Manhattan Corporation</p>	<p>Total Other Receipts: \$0.99</p>

Important: You cannot delete documentation after it has been submitted to the CFB.
