

C-SMART HELP

PETTY CASH

HOW TO ADD PETTY CASH DEPOSIT/DISBURSEMENT DOCUMENTATION

- Go to the **Petty Cash** page.
 - Click the deposit's **Transaction ID** OR enter it into the **Search Transaction ID** bar.
 - For a petty cash disbursement, find the disbursement's **Transaction ID**.

Petty Cash ⓘ

Totals				
Total Deposits:	\$150.00			
Total Disbursements:	\$50.00			
Remaining Balance:	\$100.00			

Petty Cash Show 10 entries Add Deposit Add Disbursement

Transaction ID	Date	Vendor	Transaction Type	Amount
8395	12/22/2018	A-OK Print Shop, Inc.	Disbursement	\$50.00
8391	12/19/2018		Deposit	\$150.00

Showing 1 to 2 of 2 entries Previous 1 Next

OR

NYC C-SMART New York City Campaign Finance Board Election Cycle 2021 - Sophia Rosario Help srosar1389

8395

Add Name

8395 -- Petty Cash Disbursement

Transactions Documentation Reports Submission

- Click **Add Document**.

Documentation Add Document

Type	Date Linked	Submit Date	Statement Number
No records			

3. Click **Upload PDF** and choose a file from your computer.

- 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:** Indicate the type of document.
- Then, click **Save** to store the document in C-SMART and link it to the transaction.

Add Documentation

Last Name or Entity Name: N.Y.C. Campaign Finance Board Transaction ID: 8395 Amount: \$60.00 Date: 12/21/2018 Expenditure Type: Petty Cash Disbursement
 File Name: Documentation.pdf

Select a PDF file to upload (File size limit 4 MB)

+ Upload PDF

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

Page(s) Select All Pages Type:

Save

Cancel

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.

Best Practice:

- ◆ You can upload a PDF with more than one type of documentation under one document type.

4. The document has been successfully saved.

✔ You have successfully linked page(s) 1 to Transaction ID: 8395

Petty Cash Disbursement

Transaction ID: 8395 Statement: N/A

[Back to Petty Cash](#)

+ Add Edit Delete

Totals	
Total Deposits:	\$150.00
Total Disbursements:	\$60.00
Remaining Balance:	\$90.00

- At this point, C-SMART will return you to the **Monetary Contribution Refund** page. The document is now linked to the transaction.

5. You can return to this page anytime and click **View PDF** to review your upload.

Documentation Add Document				
	Type	Date Linked	Submit Date	Statement Number
View PDF	Invoices/Receipts	12/21/2018		Delete

HOW TO DELETE PETTY CASH DEPOSIT/DISBURSEMENT DOCUMENTATION

- Go to the **Petty Cash** page.
 - From the **Petty Cash** page, click on the deposit or disbursement's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

Petty Cash Totals

Total Deposits:		\$150.00
Total Disbursements:		\$50.00
Remaining Balance:		\$100.00

Petty Cash Show 10 entries Add Deposit Add Disbursement

Transaction ID	Date	Vendor	Transaction Type	Amount
8395	12/22/2018	A-OK Print Shop, Inc.	Disbursement	\$50.00
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Showing 1 to 2 of 2 entries Previous 1 Next

OR

C-SMART
New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

[Transactions](#)
[Documentation](#)
[Reports](#)
[Submission](#)

Add Name
8395 -- Petty Cash Disbursement

2. Click **Delete** to proceed.

Documentation Add Document				
	Type	Date Linked	Submit Date	Statement Number
View PDF	Invoices/Receipts	12/21/2018		Delete

- 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 screenshot shows a web application interface. At the top, a green notification bar contains the text "The document has been successfully deleted." with a checkmark icon on the left and a close icon on the right. Below this, the main content area is titled "Petty Cash Disbursement" and includes the text "Transaction ID: 8395 Statement: N/A". To the right of the title, there is a "Back to Petty Cash" link and three buttons: "+ Add", "Edit", and "Delete". A yellow arrow points from the "Delete" button up to the notification bar. In the bottom right corner, there is a "Totals" table.

Totals	
Total Deposits:	\$150.00
Total Disbursements:	\$60.00
Remaining Balance:	\$90.00

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