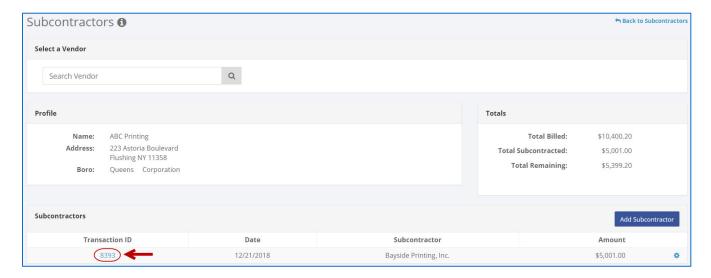# C-SMART HELP

SUBCONTRACTOR DOCUMENTATION

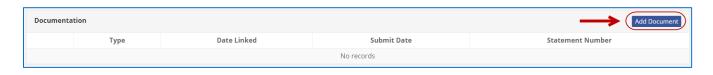### HOW TO ADD SUBCONTRACTOR DOCUMENTATION

1. Go to the vendor's **Subcontractors** page.

    ➢ Click the expenditure's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.
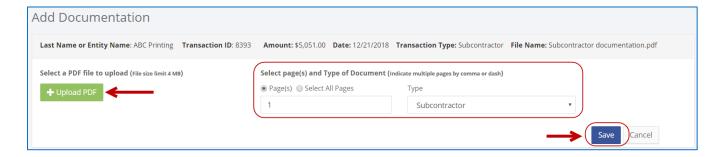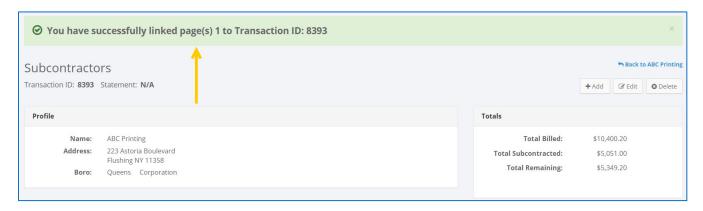

OR

2. Click Add Document.

Best Practice: As a shortcut, you can click the **gear** next to the transaction and then **Add Document**.

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

   ➢ Complete the fields below:

      ◆ **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:** Indicate the type of document (select **Subcontractor Disclosure Form** or **Other**).

   ➢ Then, click **Save** to store the document in C-SMART and link it to the transaction.

4. The document has been successfully linked to the transaction.

Important:

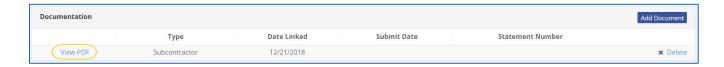   ◆ The maximum allowable file size is 4MB and only PDFs can be uploaded. For help with larger files, contact your Candidate Services liaison.

   ◆ The CFB does not receive uploaded documents until the underlying transaction is submitted in a disclosure statement or an amendment.
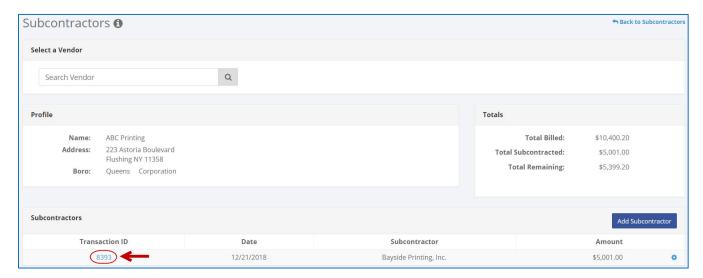
Best Practice:

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

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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	Subcontractor	12/21/2018			✖ Delete

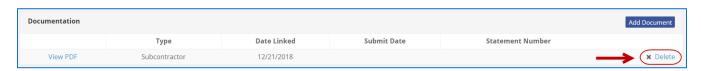## HOW TO DELETE SUBCONTRACTOR DOCUMENTATION

1. Go to the vendor's **Subcontractors** page.

    ➤ Click the subcontracted expenditure's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

Subcontractors ❶				↩ Back to Subcontractors
Select a Vendor				
Search Vendor	🔍			

Profile		Totals	
Name: ABC Printing		**Total Billed:**	$10,400.20
Address: 223 Astoria Boulevard Flushing NY 11358		**Total Subcontracted:**	$5,001.00
Boro: Queens Corporation		**Total Remaining:**	$5,399.20

Subcontractors			Add Subcontractor
Transaction ID	**Date**	**Subcontractor**	**Amount**
8393 ⬅	12/21/2018	Bayside Printing, Inc.	$5,001.00 ⚙

OR

C-SMART New York City Campaign Finance Board	Election Cycle 2021 - Sophia Rosario	▦ Help ▾ srosar1389 ▾
		8393 🔍
		Add Name
Transactions Documentation Reports Submission		➤ 8393 -- Subcontracts

2. Click **Delete** to proceed.

Documentation					Add Document
	Type	Date Linked	Submit Date	Statement Number	
View PDF	Subcontractor	12/21/2018			➤ ✖ Delete

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

❓	✖
Are you sure you want to delete this document?	
	➤ Yes

3. The document has been successfully deleted.

⊘ **The document has been successfully deleted.**   ✕

Subcontractors   ↰ **Back to ABC Printing**

Transaction ID: **8393**   Statement: **N/A**   [**+ Add**] [**☑ Edit**] [**⊗ Delete**]

Profile	**Totals**

Profile

Name:	ABC Printing
Address:	223 Astoria Boulevard Flushing NY 11358
Boro:	Queens Corporation

Totals

Total Billed:	$10,400.20
Total Subcontracted:	$5,051.00
Total Remaining:	$5,349.20

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