

# C-SMART HELP

## SUBCONTRACTOR DOCUMENTATION

### HOW TO ADD SUBCONTRACTOR DOCUMENTATION

- Go to the vendor's **Subcontractors** page.
  - Click the expenditure's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

Subcontractors Back to Subcontractors

Select a Vendor

Search Vendor

**Profile**

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

**Totals**

**Total Billed:** \$10,400.20  
**Total Subcontracted:** \$5,001.00  
**Total Remaining:** \$5,399.20

**Subcontractors** Add Subcontractor

Transaction ID	Date	Subcontractor	Amount
8393	12/21/2018	Bayside Printing, Inc.	\$5,001.00

OR

NYC C-SMART New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

8393

Add Name

8393 -- Subcontracts

Transactions Documentation Reports Submission

- Click Add Document.

Documentation Add Document

Type	Date Linked	Submit Date	Statement Number
No records			

**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.

### Add Documentation

Last Name or Entity Name: ABC Printing    Transaction ID: 8393    Amount: \$5,051.00    Date: 12/21/2018    Transaction Type: Subcontractor    File Name: Subcontractor 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

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

✔ You have successfully linked page(s) 1 to Transaction ID: 8393

### Subcontractors

Transaction ID: 8393    Statement: N/A

[Back to ABC Printing](#)

+ Add    Edit    Delete

Profile	Totals						
<p><b>Name:</b> ABC Printing</p> <p><b>Address:</b> 223 Astoria Boulevard Flushing NY 11358</p> <p><b>Boro:</b> Queens Corporation</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: right;"><b>Total Billed:</b></td> <td style="text-align: right;">\$10,400.20</td> </tr> <tr> <td style="text-align: right;"><b>Total Subcontracted:</b></td> <td style="text-align: right;">\$5,051.00</td> </tr> <tr> <td style="text-align: right;"><b>Total Remaining:</b></td> <td style="text-align: right;">\$5,349.20</td> </tr> </table>	<b>Total Billed:</b>	\$10,400.20	<b>Total Subcontracted:</b>	\$5,051.00	<b>Total Remaining:</b>	\$5,349.20
<b>Total Billed:</b>	\$10,400.20						
<b>Total Subcontracted:</b>	\$5,051.00						
<b>Total Remaining:</b>	\$5,349.20						

### 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.

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

Documentation <span style="float: right;">Add Document</span>				
	Type	Date Linked	Submit Date	Statement Number
<a href="#">View PDF</a>	Subcontractor	12/21/2018		<a href="#">Delete</a>

## 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.

The screenshot shows the 'Subcontractors' page for a vendor named 'ABC Printing'. It includes a search bar, a profile section with address and boro information, and a 'Totals' section. Below is a table of subcontractors with columns for Transaction ID, Date, Subcontractor, and Amount. The Transaction ID '8393' is circled in red with an arrow pointing to it.

OR

The screenshot shows the top navigation bar of the C-SMART system. The search bar contains the text '8393'. A dropdown menu is open below the search bar, and the option '8393 -- Subcontracts' is highlighted with a red arrow.

2. Click **Delete** to proceed.

Documentation <span style="float: right;">Add Document</span>				
	Type	Date Linked	Submit Date	Statement Number
<a href="#">View PDF</a>	Subcontractor	12/21/2018		<a href="#">Delete</a>

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

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to delete this document?'. There are two buttons: 'No' and 'Yes'. The 'Yes' button is circled in red with an arrow pointing to it.

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
<p><b>Name:</b> ABC Printing <b>Address:</b> 223 Astoria Boulevard Flushing NY 11358 <b>Boro:</b> Queens Corporation</p>	<p><b>Total Billed:</b> \$10,400.20 <b>Total Subcontracted:</b> \$5,051.00 <b>Total Remaining:</b> \$5,349.20</p>

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