

**Help Content: Subcontractors**

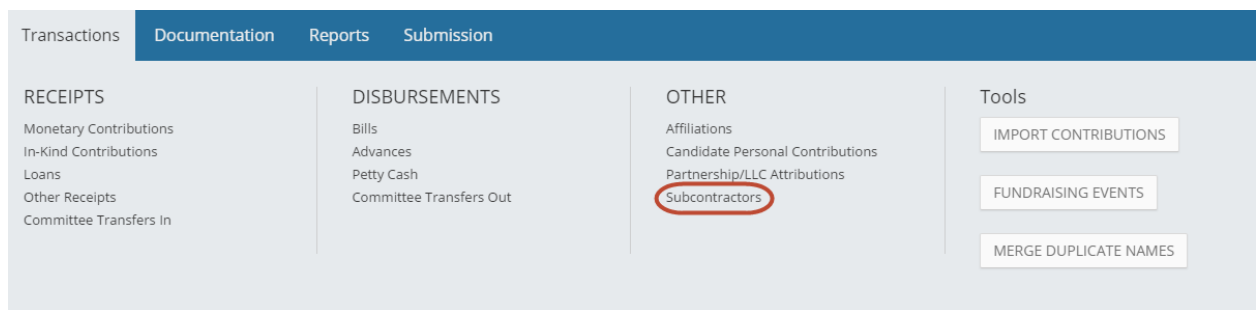
**HOW TO ADD A SUBCONTRACTOR**

**CANDIDATE SERVICES TIP(S):**

- ✓ Use the Subcontractors function in C-SMART to disclose vendors whom the campaign has contracted and who have subcontracted more than \$5,000 to another vendor (the subcontractor).
- ✓ Before you add a subcontractor, the vendor and the bill(s) must already be entered in C-SMART. For assistance, see the instructions for [Bills](#).

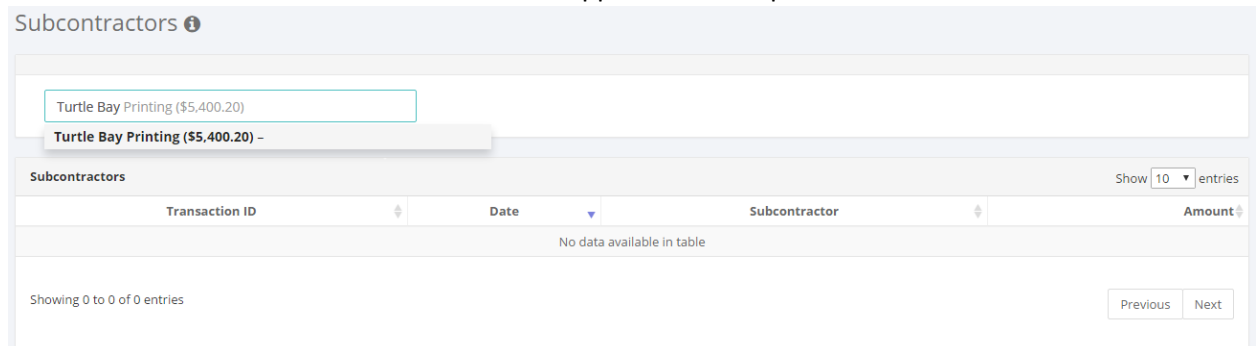
**1. Go to Subcontractors.**

Click **Transactions** and then **Subcontractors**.



**2. Search for the vendor.**

You are now on the **Subcontractors** screen, which will display all subcontractors disclosed in C-SMART. Search for the vendor and click on the applicable bill to proceed.



**3. Click Add Subcontractor.**

You are now on the vendor’s **Subcontractors** page, which will include the total amount billed, the total amount subcontracted, and all subcontractors for this particular vendor. Click **Add Subcontractor** to proceed.

Subcontractors [Back to Subcontractors](#)

Profile	Totals
<p><b>Name:</b> Turtle Bay Printing</p> <p><b>Address:</b> 223 Astoria Blvd. Flushing NY 11358</p> <p><b>Boro:</b> Queens Limited Liability Company</p>	<p><b>Total Billed:</b> \$5,400.20</p> <p><b>Total Subcontracted:</b> \$0.00</p> <p><b>Total Remaining:</b> \$5,400.20</p>

Subcontractors [Add Subcontractor](#)

Transaction ID	Date	Subcontractor	Amount
No records			

**4. Enter the details of the subcontractor and click Save.**

C-SMART will alert you if you leave out required information. Complete the fields as follows:

- **Subcontractor’s Name:** Select the subcontractor from the drop-down list. If the name is not there, click [Add Name](#).
- **Date:** Enter the date of the subcontract.
- **Amount:** Enter the subcontracted amount.
- **Purpose Code:** From the options available in the drop-down list, select the purpose that most closely represents the purpose of the expenditure. See the [C-SMART Purpose Codes Guide](#) for further assistance.
- **Notes:** Enter any additional notes related to this transaction.  
*Important: Information entered and saved in this field is intended for use by the campaign only and is not part of any data submitted to the Campaign Finance Board during any submission process.*

Enter Details

\*Subcontractor's Name:  [Add Name](#)

\*Date:

\*Amount: \$

\*Purpose Code:

Notes:

[For Campaign Use Only]

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

**CANDIDATE SERVICES TIP(S):**

- ✓ Upon clicking **Save**, if a warning message pops up, read it. It might notify you of a potential compliance issue that you need to address immediately.

**5. The subcontractor has been successfully saved.**

At this point, C-SMART will go to the vendor’s **Subcontractors** page. The Totals box and the list of subcontractors will be updated to reflect the subcontracted transaction that you just entered.

**Subcontractors** Back to Subcontractors

Search Vendor

**Profile**

**Name:** Turtle Bay Printing  
**Address:** 223 Astoria Blvd.  
 Flushing NY 11358  
**Boro:** Queens Limited Liability Company

**Totals**

**Total Billed:** \$5,400.20  
**Total Subcontracted:** \$5,100.00  
**Total Remaining:** \$300.20

**Subcontractors** Add Subcontractor

Transaction ID	Date	Subcontractor	Amount
1323	9/29/2016	Bayside Printing, Inc.	\$5,100.00

**CANDIDATE SERVICES TIP(S):**

- ✓ Notice that the transaction now has a **Transaction ID**. Write this number on any corresponding documentation (the [subcontractor disclosure form](#), invoices, receipts, etc.) for audit and recordkeeping purposes.

**HOW TO EDIT A SUBCONTRACTOR**

**1. Click the Transaction ID.**

From the vendor’s **Subcontractors** page, click on the Transaction ID of the subcontracted transaction you wish to modify.

**Subcontractors** Back to Subcontractors

Search Vendor

**Profile**

**Name:** Turtle Bay Printing  
**Address:** 223 Astoria Blvd.  
 Flushing NY 11358  
**Boro:** Queens Limited Liability Company

**Totals**

**Total Billed:** \$5,400.20  
**Total Subcontracted:** \$5,100.00  
**Total Remaining:** \$300.20

**Subcontractors** Add Subcontractor

Transaction ID	Date	Subcontractor	Amount
1323	9/29/2016	Bayside Printing, Inc.	\$5,100.00

**2. Click Edit.**

Once you are on the page for the subcontracted transaction you wish to modify, click **Edit**.

Subcontractors [Back to Turtle Bay Printing](#)

Transaction ID: 1323 Statement: N/A [+ Add](#) [Edit](#) [Delete](#)

**Profile**

**Name:** Turtle Bay Printing  
**Address:** 223 Astoria Blvd.  
Flushing NY 11358  
**Boro:** Queens Limited Liability Company

**Totals**

**Total Billed:** \$5,400.20  
**Total Subcontracted:** \$5,100.00  
**Total Remaining:** \$300.20

**Vendor's Details**

**Subcontractor:** Bayside Printing, Inc.  
Corporation  
**Address:** 223 Astoria Blvd.  
Flushing NY 11358  
**Boro:** Queens  
**Date:** 9/29/2016  
**Amount:** \$5,100.00  
**Purpose Code:** Fundraising  
**Notes:**

**3. Update and click Save.**

Modify, add, or remove the applicable fields and then click **Save**.

**Edit Details**

**\*Subcontractor's Name:** Bayside Printing, Inc. ▼

**\*Date:** 09/29/2016

**\*Amount:** \$ 5,010.00

**\*Purpose Code:** Fundraising ▼

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

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Entered By: Admin Date: 11/18/2016 10:07 AM Updated By: Admin Date: 11/18/2016 10:07 AM

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

**4. The subcontracted transaction has been successfully edited.**

**HOW TO DELETE A SUBCONTRACTOR**

**1. Click the Transaction ID.**

From the vendor's **Subcontractors** page, click on the Transaction ID of the subcontracted transaction you wish to delete.

Subcontractors Back to Subcontractors

Search Vendor

**Profile**

Name: Turtle Bay Printing  
Address: 223 Astoria Blvd.  
Flushing NY 11358  
Boro: Queens Limited Liability Company

**Totals**

Total Billed: \$5,400.20  
Total Subcontracted: \$5,010.00  
Total Remaining: \$390.20

**Subcontractors** Add Subcontractor

Transaction ID	Date	Subcontractor	Amount
1323	9/29/2016	Bayside Printing, Inc.	\$5,010.00

2. Click Delete.

Once you are on the page for the subcontracted transaction you wish to delete, click **Delete**.

Subcontractors Back to Turtle Bay Printing

Transaction ID: 1323 Statement: N/A + Add Edit Delete

**Profile**

Name: Turtle Bay Printing  
Address: 223 Astoria Blvd.  
Flushing NY 11358  
Boro: Queens Limited Liability Company

**Totals**

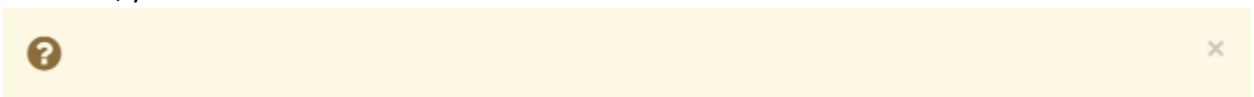
Total Billed: \$5,400.20  
Total Subcontracted: \$5,010.00  
Total Remaining: \$390.20

**Vendor's Details**

Subcontractor: Bayside Printing, Inc.  
Corporation  
Address: 223 Astoria Blvd.  
Flushing NY 11358  
Boro: Queens  
Date: 9/29/2016  
Amount: \$5,010.00  
Purpose Code: Fundraising  
Notes:

3. Click Yes.

Once you have reviewed the transaction and are positive that this was entered in error and did not occur, you can click the **Yes** button.



Are you sure you want to delete this transaction?

Cancel Yes

**4. The subcontracted transaction has been successfully deleted.**

*CANDIDATE SERVICES TIP(S):*

- ✓ *In most cases, you should delete a transaction only if you are sure it was entered or saved in error and did not actually occur.*

## HOW TO ADD SUBCONTRACTOR DOCUMENTATION

### 1. Click on the Transaction ID or search by Transaction ID.

From the vendor's **Subcontractors** page, click on the transaction ID for the subcontracted transaction. Or, if you already know the transaction ID, use the **Search Name or Transaction ID** bar.

The screenshot shows the 'Subcontractors' page. At the top, there is a 'Select a Vendor' section with a search bar. Below this, the 'Profile' section for 'ABC Printing Inc.' is displayed, including the address and 'Boro: Queens Corporation'. To the right, a 'Totals' box shows: Total Billed: \$110.00, Total Subcontracted: \$100.00, and Total Remaining: \$10.00. At the bottom, a table lists subcontractors with columns for Transaction ID, Date, Subcontractor, and Amount. The first entry has Transaction ID '2189' (circled in red), Date '11/1/2017', Subcontractor 'Bayside Printing, Inc.', and Amount '\$100.00'. An 'Add Subcontractor' button is visible in the top right of the table area.

OR

The screenshot shows a search bar with '2189' entered. A dropdown menu is open below the search bar, showing 'Add Name' and '2189 -- Subcontracts'.

### 2. Click Add Document.

Click the blue **Add Document** button to proceed.

**Vendor's Details**

**Subcontractor:** Bayside Printing, Inc. Corporation

**Address:**

**Boro:**

**Date:** 11/1/2017

**Amount:** \$100.00

**Purpose Code:** Print Ads

**Notes:**

Entered By: Admin Date: 11/28/2017 01:22 PM Updated By: Admin Date: 11/28/2017 01:22 PM

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**Documentation** Add Document

	Type	Date Linked	Submit Date	Statement Number
No records				

**CANDIDATE SERVICES TIP(S):**

- ✓ *As a shortcut, you can click on the blue gear icon corresponding to the transaction ID on the vendor's Subcontractors page and then click **Add Document**.*

**3. Enter the details of the document and click Save.**

- **Select a PDF document to upload:** Click **Upload PDF** to select the file from your computer or other device. The file size cannot exceed 4 MB. Once you select the file, it will be displayed in the PDF Preview field.
- **Select page(s) and type of document:**
  - Enter the page number(s) of the PDF that is/are associated with the transaction. You can 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 if all pages of the PDF correspond to the transaction.
  - From the drop-down list for Type, select Subcontractor Disclosure Form or Other.
- **Save:** Click **Save** to store the document in C-SMART and link it to the transaction.

**Add Documentation**

Last Name or Entity Name: ABC Printing Inc. Transaction ID: 2189 Amount: \$100.00 Date: 11/28/2017 Transaction Type: Subcontractor File Name: cfb-rules.pdf

**Select a PDF Document 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

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**PDF Preview**

**CANDIDATE SERVICES TIP(S):**

- ✓ *If your PDF contains more than one type of documentation, you can upload them together under a single document type.*



- ✓ *Even if a document is stored in C-SMART and linked to a transaction, it is not submitted to the CFB when uploaded. The documentation will be submitted when the underlying transaction is submitted in a disclosure statement or an amendment.*

**4. The document has been successfully saved.**

At this point, C-SMART will go back to the transaction’s page and you will see that the transaction will show that it has documentation linked to it.

Documentation <span style="float: right;">Add Document</span>				
	Type	Date Linked	Submit Date	Statement Number
<a href="#">View PDF</a>	Subcontractor Disclosure Form	11/28/2017		<a href="#">Delete</a>

## HOW TO VIEW SUBCONTRACTOR DOCUMENTATION

**1. Click on the Transaction ID or search by Transaction ID.**

From the vendor’s **Subcontractors** page, click on the transaction ID for the subcontracted transaction. Or, if you already know the transaction ID, use the **Search Name or Transaction ID** bar.

The screenshot shows the 'Subcontractors' page for a vendor named 'ABC Printing Inc.'. It includes a search bar, a profile section with address and borough information, a 'Totals' summary, and a table of transactions. The transaction ID '2189' is highlighted with a red circle.

Subcontractors <span style="float: right;">Add Subcontractor</span>			
Transaction ID	Date	Subcontractor	Amount
2189	11/1/2017	Bayside Printing, Inc.	\$100.00

OR

The screenshot shows a search bar with the text '2189' entered. Below the search bar, a dropdown menu is open, displaying the option '2189 -- Subcontracts'.

**2. Click View PDF.**

In the **Documentation** section, click **View PDF**.

Documentation <span style="float: right;">Add Document</span>				
	Type	Date Linked	Submit Date	Statement Number
<a href="#">View PDF</a>	Subcontractor Disclosure Form	11/28/2017		<a href="#">Delete</a>

## HOW TO DELETE SUBCONTRACTOR DOCUMENTATION

### 1. Click on the Transaction ID or search by Transaction ID.

From the vendor's **Subcontractors** page, click on the transaction ID for the subcontracted transaction. Or, if you already know the transaction ID, use the **Search Name or Transaction ID** bar.

**Subcontractors** Back to Subcontractors

Select a Vendor

Q

**Profile**

Name: ABC Printing Inc.  
Address:  
Boro: Queens Corporation

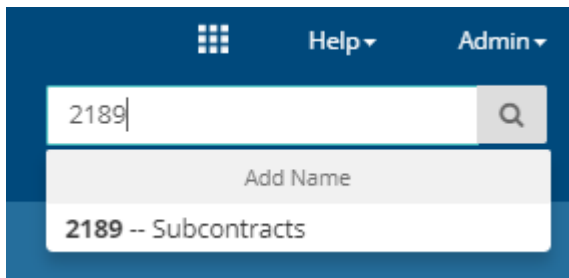
**Totals**

Total Billed: \$110.00  
Total Subcontracted: \$100.00  
Total Remaining: \$10.00

**Subcontractors** Add Subcontractor

Transaction ID	Date	Subcontractor	Amount	
<a href="#">2189</a>	11/1/2017	Bayside Printing, Inc.	\$100.00	<a href="#">Delete</a>

OR



### 2. Click Delete.

Once you have reviewed the saved document and are positive that this was added in error and should not be linked to the transaction, you can click the **Delete** button in the **Documentation** section.

Documentation <span style="float: right;">Add Document</span>				
	Type	Date Linked	Submit Date	Statement Number
<a href="#">View PDF</a>	Subcontractor Disclosure Form	11/28/2017		<a href="#">Delete</a>

### 3. The document has been successfully deleted.

*CANDIDATE SERVICES TIP(S):*

- ✓ *Once the documentation has been submitted to the CFB, you will no longer be able to delete it.*