

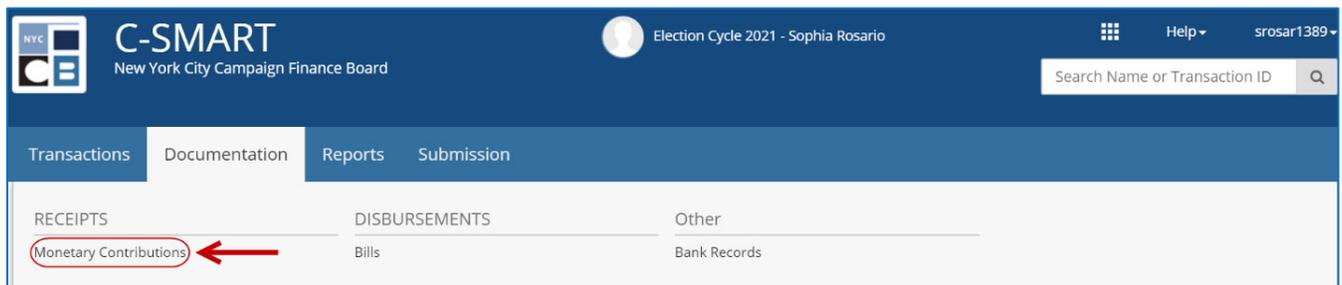
# C-SMART HELP

## CONTRIBUTION DOCUMENTATION UPLOAD (MULTIPLE)

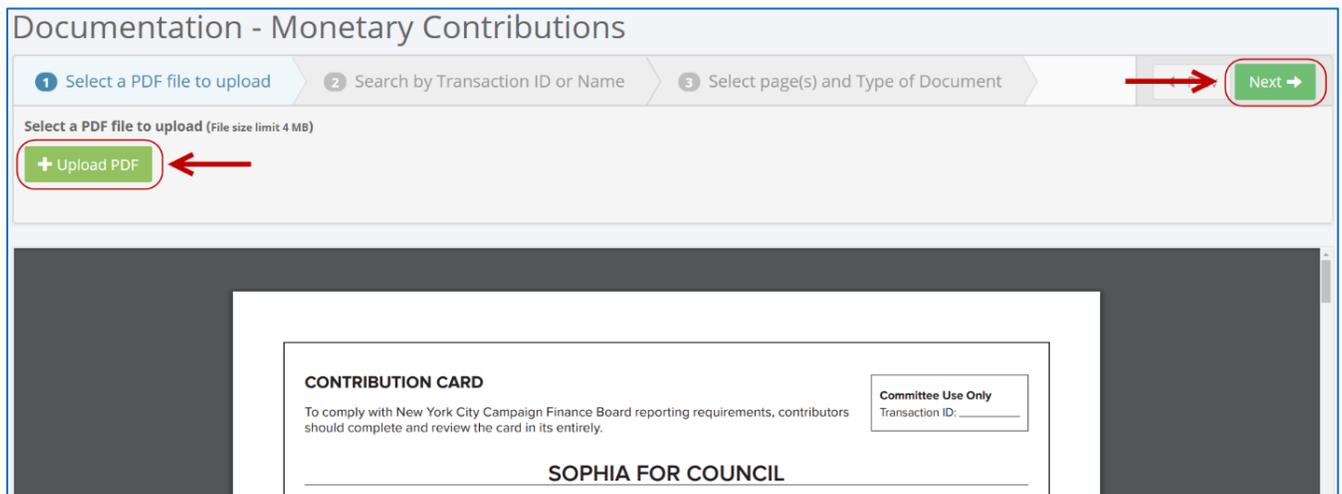
The bulk documentation upload feature allows you to upload contribution backup documentation for multiple contributors that are saved in a single PDF and link it to multiple transactions from one screen.

### HOW TO UPLOAD MONETARY CONTRIBUTION DOCUMENTATION

1. Go to **Monetary Contributions**.
  - Hover your cursor over **Documentation** and then click **Monetary Contributions**.



2. Click **Upload PDF**, select a file from your computer, and click **Next**.



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**Best Practice:**

- ◆ Review the preview on this page to confirm that you have selected the right document.

**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.
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3. Use the **Transaction ID** or **Last Name or Entity** search bar to find the contribution and click **Next**.

Documentation - Monetary Contributions

1 Select a PDF file to upload 2 Search by Transaction ID or Name 3 Select page(s) and Type of Document Next

Search by Transaction ID or Name

contributions with matching amount

Transaction ID: 8363 Last Name or Entity Name: Rosario, Tanya

Trans ID: 8363 Name: Rosario, Tanya Amount: \$50 Received Date: 9/7/2018 Contribution Type: Cash

**CONTRIBUTION CARD**

To comply with New York City Campaign Finance Board reporting requirements, contributors should complete and review the card in its entirety.

**Committee Use Only**  
Transaction ID: \_\_\_\_\_

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**Best Practice:**

- ◆ C-SMART will autofill the **Transaction ID** and **Last Name or Entity Name** fields based on previously entered information.
- ◆ Review the preview on this page to confirm that you have selected the right document.

**Important:**

- ◆ You must have already recorded the transaction before uploading documentation.
  - ◆ You can limit your search to contributions you have already claimed for match by checking the contributions with matching amount box in the top left-hand corner.
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## 4. Enter the document details.

- Complete the following fields:
  - ◆ **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:** From the drop-down menu, select the type of documentation that you are uploading.
- Then, click **Complete**.

### Documentation - Monetary Contributions

1 Select a PDF file to upload   2 Search by Transaction ID or Name   3 Select page(s) and Type of Document   Complete

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

Page(s)	Type
<input type="text" value="1"/>	<input type="text" value="Contribution Card*"/>

\*Documentation required for this transaction

Trans ID: 8363 Name: Rosario, Tanya Amount: \$50 Received Date: 9/7/2018 Contribution Type: Cash

## 5. The documentation has been successfully linked to the transaction.

- A notification window will confirm the linkage. Click **OK** to repeat the process until finished.

### ✔ Documentation - Monetary Contributions!

You have successfully linked page(s) 1 to Transaction ID: 8372

Ok