

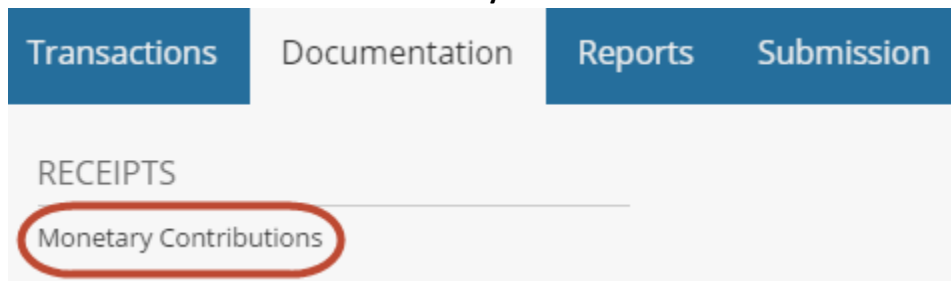
Help Content: Bulk Documentation Upload

You can use this feature to upload multi-page PDF files that include documentation for multiple contributions. Rather than uploading documentation transaction by transaction, you can upload documentation and link it to multiple transactions from one screen. If you prefer to upload documentation on an individual basis, please see [How to Add a Document](#). Once the document is uploaded, you will be able to [view](#) or [delete](#) it at any time until it has been submitted to the CFB.

HOW TO UPLOAD MONETARY CONTRIBUTION DOCUMENTATION

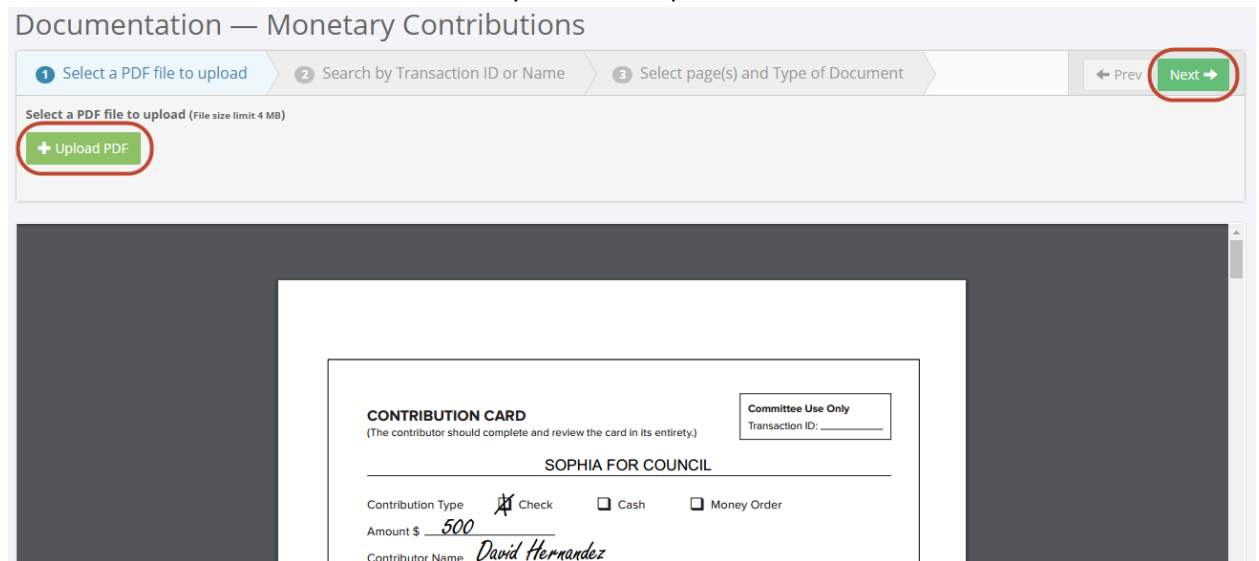
1. Go to Monetary Contributions.

Click **Documentation** and then **Monetary Contributions**.



2. Click Upload PDF.

Click the green **Upload PDF** button and select a PDF file to upload. The file size limit is 4 MB. Review the document to ensure it is what you wish to upload and then click **Next**.



3. Search by Transaction ID or Name.

Search for the transaction to which this documentation corresponds by the Transaction ID or contributor name. When you have selected the transaction, click **Next**.

CANDIDATE SERVICES TIP(S):

- ✓ *The transactions for which you are trying to upload documentation must already be entered in C-SMART.*

- ✓ *If you wish to search only for contributions that you've claimed for match, check the **Contributions with matching amount** box.*
- ✓ *When you begin entering information in the **Transaction ID** or **Last Name or Entity Name** field, C-SMART will provide possible matches to transactions in your database.*

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 ← Prev Next →

Search by Transaction ID or Name

contributions with matching amount

Transaction ID

Last Name or Entity Name

ID:1746; Hernandez, David ; \$500.00; 12/06/2016; Check

CONTRIBUTION CARD
(The contributor should complete and review the card in its entirety.)

Committee Use Only
Transaction ID: _____

SOPHIA FOR COUNCIL

Contribution Type Check Cash Money Order

Amount \$ 500

Contributor Name David Hernandez

4. Select page(s) and type of document.

- **Page(s):** Select the page number(s) of the PDF that correspond to the transaction you selected. You can select multiple pages by using a comma or dash, such as 1-2 or 1,3.
- **Type:** From the drop-down menu, select the type of documentation that you are uploading. The asterisk denotes the minimum backup documentation required for the transaction you selected.

When you have selected the applicable page(s) and document type, click **Complete** to finish linking documentation to the transaction you selected. (You will be able to continue linking documentation to other transactions.)

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 ← Prev Complete

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

Page(s) Type

*Documentation required for this transaction

Trans ID: 1746 Name: Hernandez, David Amount: \$500 Received Date: 12/06/2016 Contribution Type: Check

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CONTRIBUTION CARD
(The contributor should complete and review the card in its entirety.)

Committee Use Only
Transaction ID: _____

SOPHIA FOR COUNCIL

Contribution Type Check Cash Money Order

Amount \$ 500

Contributor Name David Hernandez

5. Repeat Steps 3 & 4 for other transactions.

At this point, C-SMART will inform you that you have successfully linked those pages of the PDF file to the applicable transaction.

✔ Documentation — Monetary Contributions! ✕

You have successfully linked page(s) 1-2 to Transaction ID: 1746

Ok

When you click **OK**, C-SMART will keep the same file queued and you will be able to repeat Steps 3 & 4 for any other transactions with documentation included in the PDF.

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 ← Prev Next →

Search by Transaction ID or Name

contributions with matching amount

Transaction ID Last Name or Entity Name

ID:1747; Rosario, Tanya ; \$50.00; 12/06/2016; Cash

CONTRIBUTION CARD
(The contributor should complete and review the card in its entirety.)

Committee Use Only
Transaction ID: _____

SOPHIA FOR COUNCIL

Contribution Type Check Cash Money Order

Amount \$ 50

Contributor Name Tanya Rosario