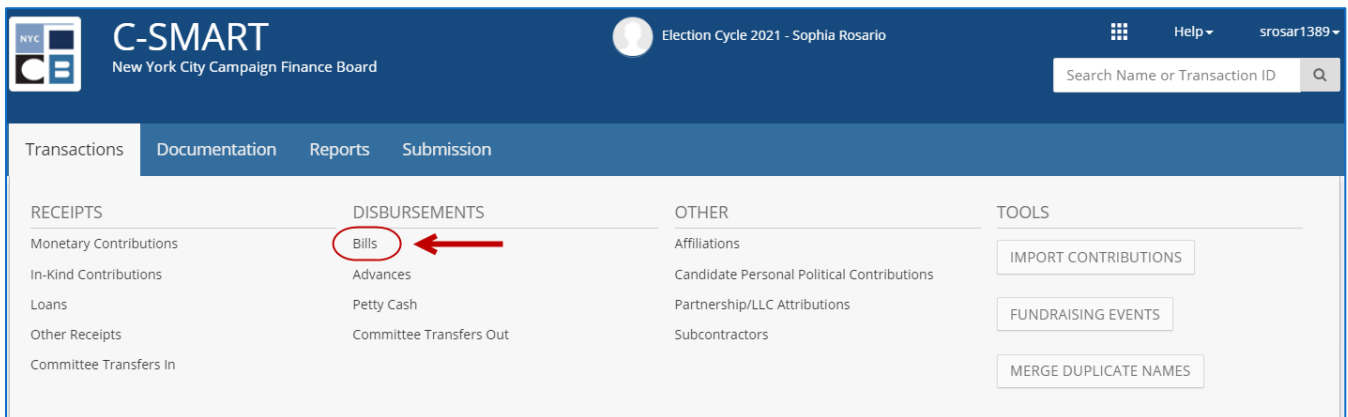


C-SMART HELP

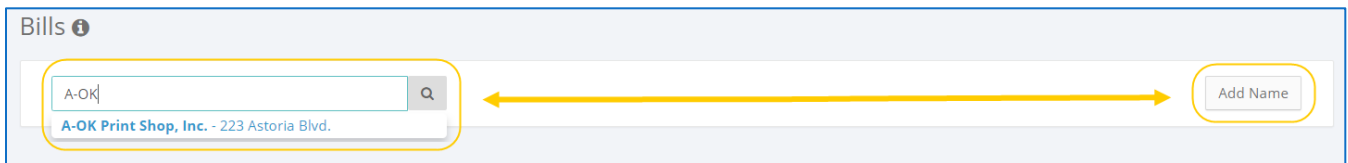
BILLS

HOW TO ADD A BILL

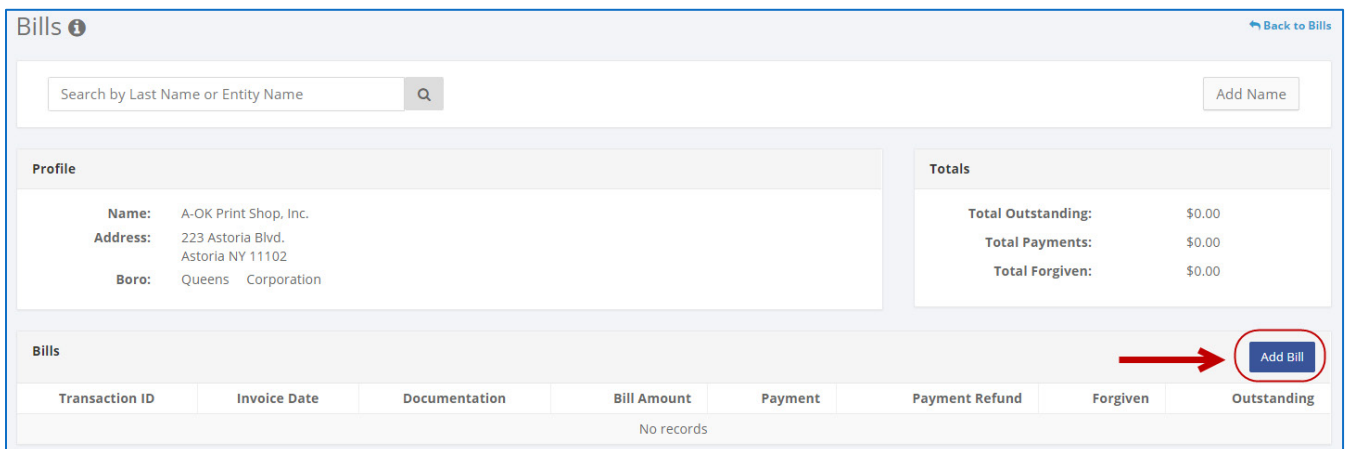
1. Go to **Bills**.
 - Hover your cursor over **Transactions** and click **Bills**.



2. Use the **Search by Last Name or Entity Name** bar to find the vendor OR click **Add Name** to create a new record.



3. Click **Add Bill**.



4. Enter and save the bill details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Invoice Date:** Enter the date the bill was received.
 - ◆ **Amount:** Enter total amount of the bill.
 - ◆ **Purpose Code:** Choose the purpose code that best represents the expense. Use the [C-SMART Purpose Codes Guide](#) for more information on purpose codes.
 - ◆ **Explanation:** Enter a brief description of the expense.
 - ◆ **Exempt Code:** Review Chapter 3 of the [Handbook](#) for more information on exempt expenditures or consult with your Candidate Services liaison.
 - ◆ **Committee:** Indicate the committee incurring the expense. C-SMART will default to your principal committee, but you can select a different one if necessary.
 - ◆ **Event:** If the bill was related to a [fundraising event](#), indicate which one.
 - ◆ **Runoff/Rerun:** Check this box if the expense was for an expected runoff or court-ordered rerun. Expenditures for a runoff are allowed only if the CFB confirms one is expected. Review [Runoff Guidance](#) for more information.
 - ◆ **Segregated:** Indicate if the expense involves a segregated bank account. See Chapter 6 of the [Handbook](#) for more information on segregated bank accounts.
 - ◆ **Vendor Reference Number:** If the vendor provided an identifying number or code, such as on the invoice, you may enter it here.
 - ◆ **Notes:** Enter any additional information. The CFB does not receive what you enter in this field. Your notes will be saved across all related transactions.
- Then, click **Save**.

Best Practice:

- ◆ Use the tab key to navigate between fields.

Important:

- ◆ If a warning appears on clicking **Save**, read it. It might refer to a compliance issue.
 - ◆ The **Childcare Services** purpose and exempt codes must be used together.
-

Enter Details

*Invoice Date: 01/16/2019

*Amount: \$ 500.00

*Purpose Code: Campaign Workers

*Explanation: Canvassers

Exempt Code:

*Committee: Sophia for Council


Event:

Segregated:

Runoff / Rerun:

Vendor Reference Number:

Notes:
[For Campaign Use Only]

 Save Cancel

5. The bill has been successfully saved.

- At this point, C-SMART will return you to the vendor's **Bills** page. The **Totals** box and list of bills will be updated to reflect the newly saved transaction.

✔ Your transaction has been successfully saved.

Bills [Back to Bills](#)

Search by Last Name or Entity Name

Profile

Name: A-OK Print Shop, Inc.
Address: 223 Astoria Blvd.
Astoria NY 11102
Boro: Queens Corporation

Totals

Total Outstanding: \$500.00
Total Payments: \$0.00
Total Forgiven: \$0.00

Bills


Transaction ID	Invoice Date	Documentation	Bill Amount	Payment	Payment Refund	Forgiven	Outstanding
8374	1/16/2019	0	\$500.00	(\$0.00) 0	\$0.00 0	(\$0.00) 0	\$500.00

Best Practice: Write the C-SMART **Transaction ID** on each invoice, receipt, or other related documentation.

HOW TO EDIT A BILL

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

- Click the **gear** and then **Edit** OR enter the **Transaction ID** into the **Search Name or Transaction ID** bar and click **Edit**.

Transaction ID	Invoice Date	Documentation	Bill Amount	Payment	Payment Refund	Forgiven	Outstanding	
8374	1/16/2019	0	\$500.00	(\$0.00) 0	\$0.00 0	(\$0.00) 0	\$500.00	

Edit

Add Document

Add Payment

Add Payment Refund

Add Bill Forgiven

OR

C-SMART New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389





Add Name

8374 -- Bill

Bills

Transaction ID: 8374

Back to A-OK Print Shop, Inc.

 Edit  Delete  Print Letter  Send Email

Profile	
Name:	A-OK Print Shop, Inc.
Address:	223 Astoria Blvd. Astoria NY 11102
Boro:	Queens Corporation

Totals	
Total Outstanding:	\$500.00
Total Payments:	\$0.00
Total Forgiven:	\$0.00

2. Modify the necessary fields and click **Save**.

Edit Details

***Invoice Date:**

***Amount:** \$

***Purpose Code:**

***Explanation:**

Exempt Code:

***Committee:**

Event:


Segregated:

Runoff / Rerun:

Vendor Reference Number:

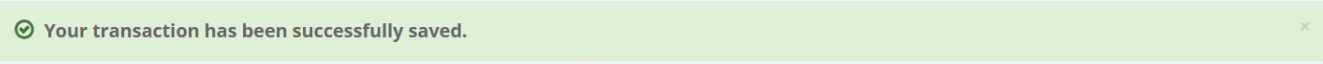
Notes:
[For Campaign Use Only]

Entered By: srosar1389 Date: 01/30/2019 12:34 PM Updated By: srosar1389 Date: 01/30/2019 12:34 PM



Important: The timestamp at the bottom will be updated to show who last modified the transaction.

3. The bill has been successfully edited.



Bills Back to Bills

Search by Last Name or Entity Name

Profile

Name: A-OK Print Shop, Inc.
Address: 223 Astoria Blvd.
Astoria NY 11102
Boro: Queens Corporation

Totals

Total Outstanding: \$575.00
Total Payments: \$0.00
Total Forgiven: \$0.00

Bills

Transaction ID	Invoice Date	Documentation	Bill Amount	Payment	Payment Refund	Forgiven	Outstanding
8374	1/16/2019	0	\$575.00	(\$0.00) 0	\$0.00 0	(\$0.00) 0	\$575.00

HOW TO DELETE A BILL

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

The screenshot shows the 'Bills' page for a vendor named 'A-OK Print Shop, Inc.'. At the top, there is a search bar labeled 'Search by Last Name or Entity Name' and an 'Add Name' button. Below this, the 'Profile' section lists the vendor's name, address (223 Astoria Blvd., Astoria NY 11102), and boro (Queens Corporation). To the right, the 'Totals' section shows: Total Outstanding: \$575.00, Total Payments: \$0.00, and Total Forgiven: \$0.00. At the bottom, a table lists bills. The first row has the Transaction ID '8374' circled in red with a red arrow pointing to it. Other columns include Invoice Date (1/16/2019), Documentation (0), Bill Amount (\$575.00), Payment (\$0.00), Payment Refund (\$0.00), Forgiven (\$0.00), and Outstanding (\$575.00). There is an 'Add Bill' button in the top right of the table area.

OR

The screenshot shows the top navigation bar of the C-SMART system. It includes the NYC logo, the text 'C-SMART New York City Campaign Finance Board', the user name 'Election Cycle 2021 - Sophia Rosario', and a 'Help' dropdown menu. A search bar on the right contains the text '8374'. Below the search bar, a dropdown menu is open, showing '8374 -- Bill' as the selected option, indicated by a red arrow.

2. Click **Delete** to proceed.

The screenshot shows the 'Bills' page for a specific transaction with ID '8374'. At the top right, there are buttons for '+ Add', 'Delete', 'Print Letter', and 'Send Email'. The 'Delete' button is circled in red with a red arrow pointing to it. Below the buttons, the 'Profile' and 'Totals' sections are visible, identical to the previous screenshot.

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

The screenshot shows a yellow confirmation dialog box with a question mark icon in the top left corner. The text inside the box asks, 'Are you sure you want to delete this transaction?'. At the bottom right, there are two buttons: 'Cancel' and 'Yes'.

3. The bill has been successfully deleted.

The screenshot displays a web application interface. At the top, a green notification bar with a checkmark icon contains the text "Your Transaction has been successfully deleted." and a close button (X). Below this, the page title "Bills" is followed by an information icon (i) and a "Back to Bills" link. A search bar with the placeholder "Search by Last Name or Entity Name" and a search icon (Q) is present, along with an "Add Name" button. The main content area is divided into two sections: "Profile" and "Totals".

Profile

- Name:** A-OK Print Shop, Inc.
- Address:** 223 Astoria Blvd.
Astoria NY 11102
- Boro:** Queens Corporation

Totals

Total Outstanding:	\$0.00
Total Payments:	\$0.00
Total Forgiven:	\$0.00

Below the profile and totals, there is a "Bills" section with an "Add Bill" button. A table header is visible with columns: Transaction ID, Invoice Date, Documentation, Bill Amount, Payment, Payment Refund, Forgiven, and Outstanding. The table body is empty, displaying "No records". A yellow arrow points from the "Bills" section up to the notification bar.

Important: You should generally only delete a transaction if it was entered in error.