

Help Content: Subcontractors

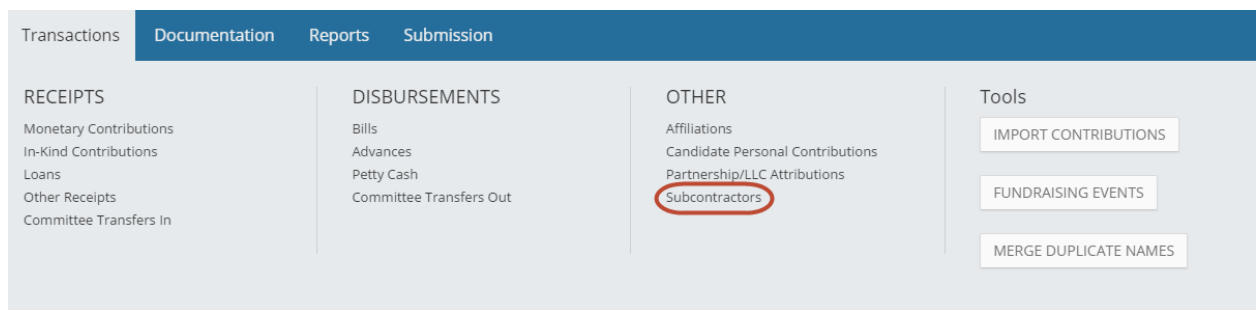
HOW TO ADD A SUBCONTRACTOR

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](#).

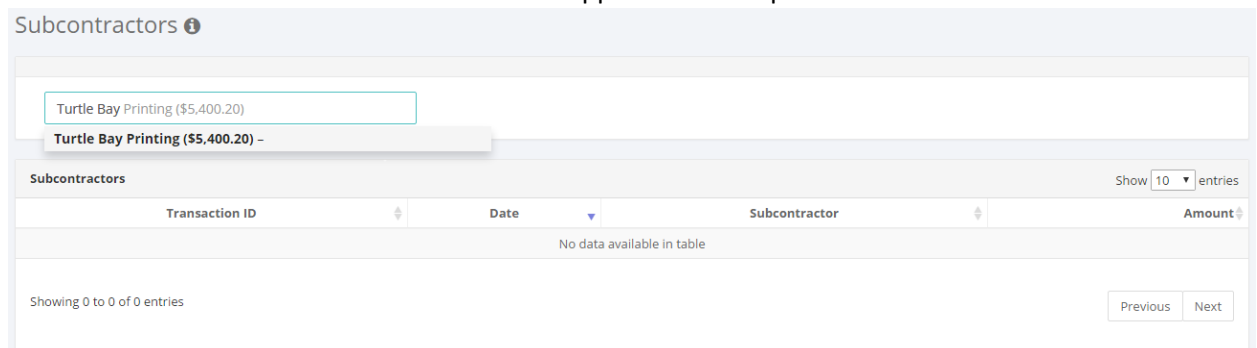
1. Go to Subcontractors.

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](#)

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: \$0.00
Total Remaining: \$5,400.20

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		Totals	
Name:	Turtle Bay Printing	Total Billed:	\$5,400.20
Address:	223 Astoria Blvd. Flushing NY 11358	Total Subcontracted:	\$5,100.00
Boro:	Queens Limited Liability Company	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: ▼

*Date:

*Amount: \$

*Purpose Code: ▼

Notes:
[For Campaign Use Only]

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?



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 for a vendor. At the top, there is a 'Select a Vendor' section with a search bar. Below this, the 'Profile' section displays the vendor's details: Name: ABC Printing Inc., 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. The first entry has a Transaction ID of 2189 (circled in red), a Date of 11/1/2017, a Subcontractor of Bayside Printing, Inc., and an Amount of \$100.00. An 'Add Subcontractor' button is located in the top right of the table area.

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'. The search bar also includes a search icon and a placeholder text 'Add Name'.

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

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

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 Add Document				
	Type	Date Linked	Submit Date	Statement Number
View PDF	Subcontractor Disclosure Form	11/28/2017		Delete

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 Add Subcontractor			
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 Add Document				
	Type	Date Linked	Submit Date	Statement Number
View PDF	Subcontractor Disclosure Form	11/28/2017		Delete

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

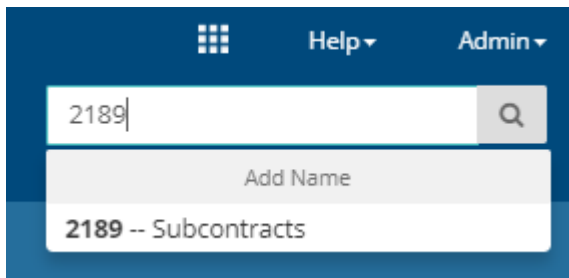
Totals

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

Subcontractors Add Subcontractor

Transaction ID	Date	Subcontractor	Amount
2189	11/1/2017	Bayside Printing, Inc.	\$100.00

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 Add Document				
	Type	Date Linked	Submit Date	Statement Number
View PDF	Subcontractor Disclosure Form	11/28/2017		Delete

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.*