

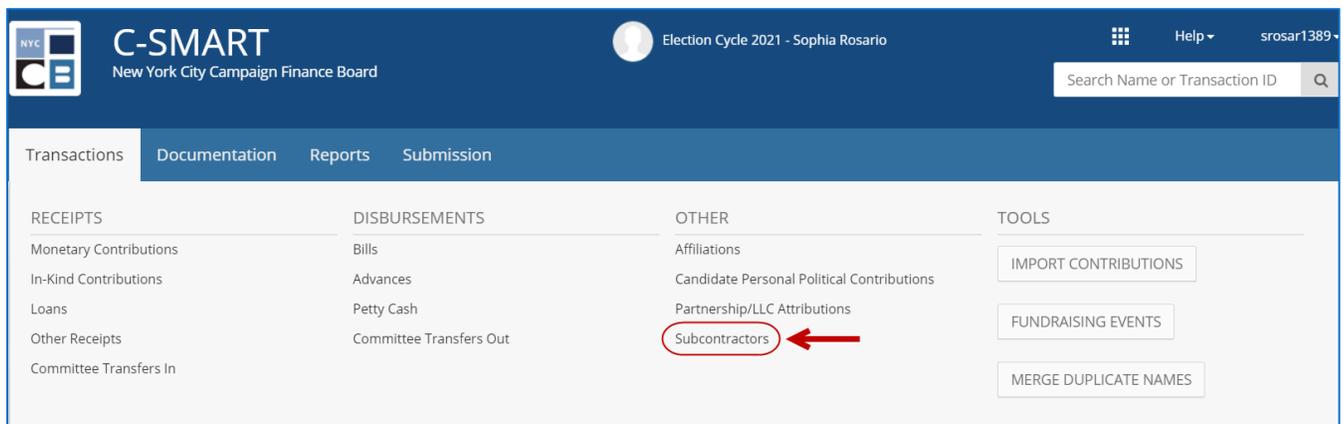
C-SMART HELP

SUBCONTRACTORS

A subcontractor is an individual or entity that takes on some of the work for your vendor. If a vendor pays an individual subcontractor more than \$5,000 over the course of your campaign, you must report and document the name and address of the subcontractor, a description of the goods or services provided by the subcontractor, and the total cost of the subcontract.

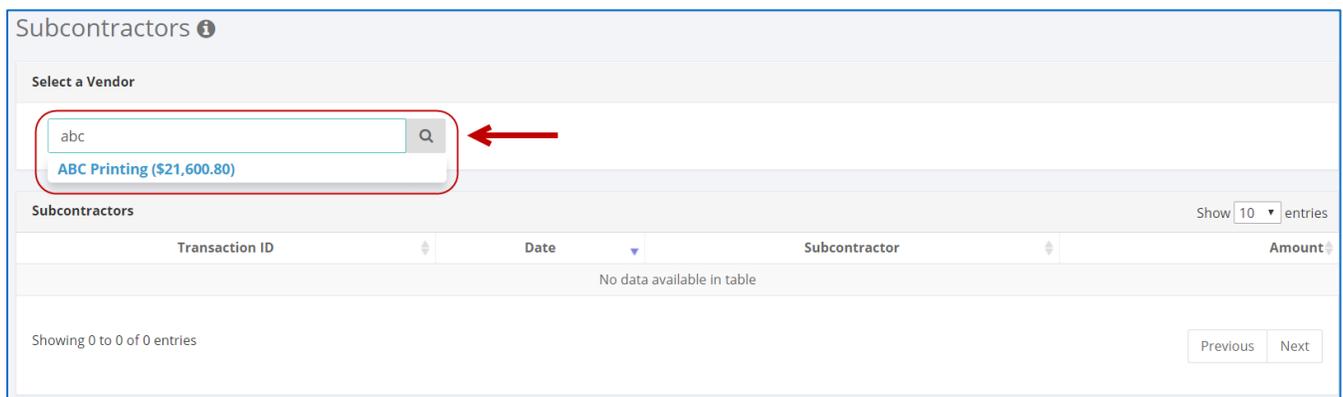
HOW TO ADD A SUBCONTRACTOR

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



The screenshot shows the C-SMART New York City Campaign Finance Board interface. The user is logged in as 'Election Cycle 2021 - Sophia Rosario' with the ID 'srosar1389'. The 'Transactions' menu is open, showing options like RECEIPTS, DISBURSEMENTS, OTHER, and TOOLS. The 'Subcontractors' option under the 'OTHER' category is highlighted with a red circle and a red arrow pointing to it.

2. Use the **Search by Last Name or Entity Name** bar to find the name of the vendor.



The screenshot shows the 'Subcontractors' search interface. A search bar is highlighted with a red circle and a red arrow pointing to it, containing the text 'abc'. Below the search bar, a search result is displayed: 'ABC Printing (\$21,600.80)'. The interface also shows a table with columns for Transaction ID, Date, Subcontractor, and Amount, and a 'No data available in table' message.

Important: Before you can add a subcontractor, the vendor and the bill(s) must already be entered in C-SMART. For assistance, see [C-SMART Help: Bills](#).

3. Click **Add Subcontractor**.

The screenshot shows the 'Subcontractors' page. At the top, there is a 'Select a Vendor' section with a search bar. Below that is a 'Profile' section for 'ABC Printing' with the following details:

- Name: ABC Printing
- Address: 223 Astoria Boulevard, Flushing NY 11358
- Boro: Queens Corporation

To the right of the profile is a 'Totals' section:

Total Billed:	\$21,600.80
Total Subcontracted:	\$0.00
Total Remaining:	\$21,600.80

At the bottom, there is a table with columns: Transaction ID, Date, Subcontractor, and Amount. The table is currently empty, showing 'No records'. A red arrow points to a blue 'Add Subcontractor' button in the bottom right corner of the table area.

4. Enter and save the subcontractor details.

- C-SMART will alert you if you leave out required information. Complete the fields below:
 - ◆ **Subcontractor's Name:** Select the subcontractor or click [Add Name](#) to create the record.
 - ◆ **Date:** Enter the date of the subcontract.
 - ◆ **Amount:** Enter the subcontracted amount.
 - ◆ **Purpose Code:** Select the purpose code best represents the expenditure. Review the [C-SMART Purpose Codes Guide](#) for more information.
 - ◆ **Notes:** Enter any additional information. The CFB cannot review what you enter in this field. Your notes will be saved across all related transactions.
- Then, click Save.

The screenshot shows the 'Enter Details' form. A red box highlights the following fields:

- *Subcontractor's Name:** Clark, Patty (dropdown menu) with an 'Add Name' button.
- *Date:** 12/11/2018
- *Amount:** \$ 5,000.00
- *Purpose Code:** Campaign Mailing (dropdown menu)
- Notes:** [For Campaign Use Only] (text area)

At the bottom of the form, there are two buttons: 'Save' and 'Cancel'. A red arrow points to the 'Save' button.

Best Practice: Use the tab key to navigate between fields.

Important: Upon clicking **Save**, if a warning message pops up, read it. It might refer to a potentially urgent compliance issue.

5. The subcontractor has been successfully saved.

The screenshot displays the 'Subcontractors' page in C-SMART. At the top, a green notification bar states 'Your Transaction has been successfully saved.' Below this, the page title 'Subcontractors' is shown with an information icon and a 'Back to Subcontractors' link. A 'Select a Vendor' section contains a search bar with the text 'Search Vendor' and a magnifying glass icon. The 'Profile' section for the selected vendor, ABC Printing, lists the address as 223 Astoria Boulevard, Flushing NY 11358, and the borough as Queens Corporation. To the right, a 'Totals' box shows: Total Billed: \$21,600.80, Total Subcontracted: \$5,000.00, and Total Remaining: \$16,600.80. At the bottom, a table lists subcontractors with columns for Transaction ID, Date, Subcontractor, and Amount. The first entry is Transaction ID 8438, Date 12/11/2018, Subcontractor Clark, Patty, and Amount \$5,000.00. An 'Add Subcontractor' button is located in the top right of the table area.

Transaction ID	Date	Subcontractor	Amount
8438	12/11/2018	Clark, Patty	\$5,000.00

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

Best Practice: Write the C-SMART **Transaction ID** on any related documentation, including the subcontractor disclosure form, invoices, receipts, etc.

HOW TO EDIT A SUBCONTRACTOR

1. Go to the vendor's **Subcontractors** page.
 - Click the subcontracted expenditure's **Transaction ID**.

The screenshot shows the 'Subcontractors' page for a vendor named 'ABC Printing'. At the top, there is a search bar and a 'Back to Subcontractors' link. Below is a 'Profile' section with the vendor's name, address (223 Astoria Boulevard, Flushing NY 11358), and boro (Queens Corporation). To the right is a 'Totals' section showing: Total Billed: \$10,400.20, Total Subcontracted: \$5,001.00, and Total Remaining: \$5,399.20. At the bottom is a table of subcontractors with columns for Transaction ID, Date, Subcontractor, and Amount. The first row has Transaction ID 8393, Date 12/21/2018, Subcontractor Bayside Printing, Inc., and Amount \$5,001.00. A red circle highlights the Transaction ID '8393' and a red arrow points to it from the left.

2. Click **Edit**.

This screenshot shows the 'Subcontractors' page for Transaction ID 8393. The 'Profile' and 'Totals' sections are visible. In the top right corner, there are two buttons: 'Edit' and 'Delete'. The 'Edit' button is circled in red, and a red arrow points to it from the left.

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

The screenshot shows the 'Edit Details' form. A red box highlights the following fields: '*Subcontractor's Name' (Bayside Printing, Inc.), '*Date' (12/21/2018), '*Amount' (\$ 5,051.00), and '*Purpose Code' (Campaign Mailing). Below these is a 'Notes' field with the text '[For Campaign Use Only]'. At the bottom of the form, there is a 'Save' button and a 'Cancel' button. A red arrow points to the 'Save' button.

Entered By: srosar1389 Date: 12/21/2018 01:12 PM Updated By: srosar1389 Date: 12/21/2018 01:12 PM

4. The transaction has been successfully edited.

✔ Your Transaction has been successfully saved.

Subcontractors ⓘ [Back to Subcontractors](#)

Select a Vendor

Search Vendor

Profile

Name: ABC Printing
Address: 223 Astoria Boulevard
Flushing NY 11358
Boro: Queens Corporation

Totals

Total Billed: \$10,400.20
Total Subcontracted: \$5,051.00
Total Remaining: \$5,349.20

Subcontractors

Transaction ID	Date	Subcontractor	Amount
8393	12/21/2018	Bayside Printing, Inc.	\$5,051.00

HOW TO DELETE A SUBCONTRACTOR

- Go to the vendor's **Subcontractors** page.
 - Click the expenditure's **Transaction ID** OR enter it into the **Search Transaction ID** bar.

Subcontractors ⓘ [Back to Subcontractors](#)

Select a Vendor

Search Vendor

Profile

Name: ABC Printing
Address: 223 Astoria Boulevard
Flushing NY 11358
Boro: Queens Corporation

Totals

Total Billed: \$10,400.20
Total Subcontracted: \$5,001.00
Total Remaining: \$5,399.20

Subcontractors

Transaction ID	Date	Subcontractor	Amount
8393	12/21/2018	Bayside Printing, Inc.	\$5,001.00

OR

NYC **C-SMART**
New York City Campaign Finance Board

Election Cycle 2021 - Sophia Rosario

Help srosar1389

8393

Add Name

8393 -- Subcontracts

Transactions Documentation Reports Submission

2. Click **Delete** to proceed.

The screenshot shows the 'Subcontractors' page for a transaction with ID 8393. The profile information for ABC Printing is displayed, including their address and corporation name. To the right, a 'Totals' section shows: Total Billed: \$10,400.20, Total Subcontracted: \$5,001.00, and Total Remaining: \$5,399.20. In the top right corner, there are '+ Add' and 'Delete' buttons. A red arrow points to the 'Delete' button, which is also circled in red.

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

A confirmation dialog box is shown with the text 'Are you sure you want to delete this transaction?'. At the bottom right, there are 'Cancel' and 'Yes' buttons. A red arrow points to the 'Yes' button, which is circled in red.

3. The subcontracted transaction has been successfully deleted.

The screenshot shows the 'Subcontractors' page after a successful deletion. A green message bar at the top reads 'Your Transaction has been successfully deleted.' A yellow arrow points to this message. The 'Totals' section now shows: Total Billed: \$10,400.20, Total Subcontracted: \$0.00, and Total Remaining: \$10,400.20. Below this is a table with columns for Transaction ID, Date, Subcontractor, and Amount. The table is currently empty, showing 'No records'. A yellow box highlights the 'Totals' section and the empty table. A yellow arrow also points to the 'Add Subcontractor' button in the top right corner.

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