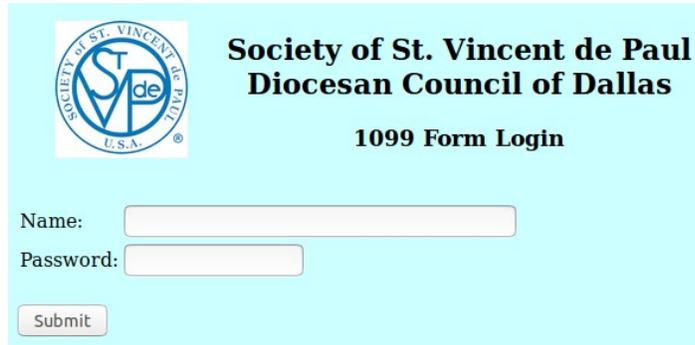


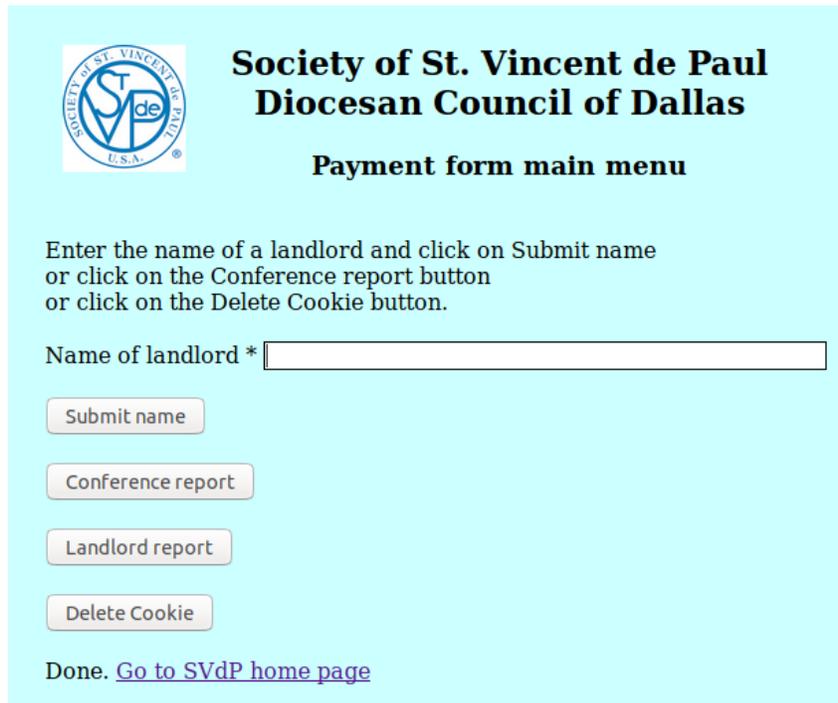
Smart Form Tutorial

The purpose of the smart form is to make it as easy as possible to transfer payment data from a conference to the Council. The form can only be used by those people who have a record already defined in the database – probably the treasurer and / or the president of the conference. Since the treasurer will normally be the person using this form, this document uses the word “treasurer” instead of “user.” The first time a treasurer uses the form the following screen is displayed:



The screenshot shows a light blue background with the Society of St. Vincent de Paul logo on the left. The logo is circular with 'SVPde' in the center and 'SOCIETY OF ST. VINCENT DE PAUL U.S.A.' around the perimeter. To the right of the logo, the text reads 'Society of St. Vincent de Paul Diocesan Council of Dallas' in bold, followed by '1099 Form Login'. Below this, there are two input fields: 'Name:' followed by a long text box, and 'Password:' followed by a shorter text box. At the bottom left, there is a 'Submit' button.

Entering the name and password, which are both case sensitive, will result in storing a cookie on the treasurer’s device and displaying the following screen:



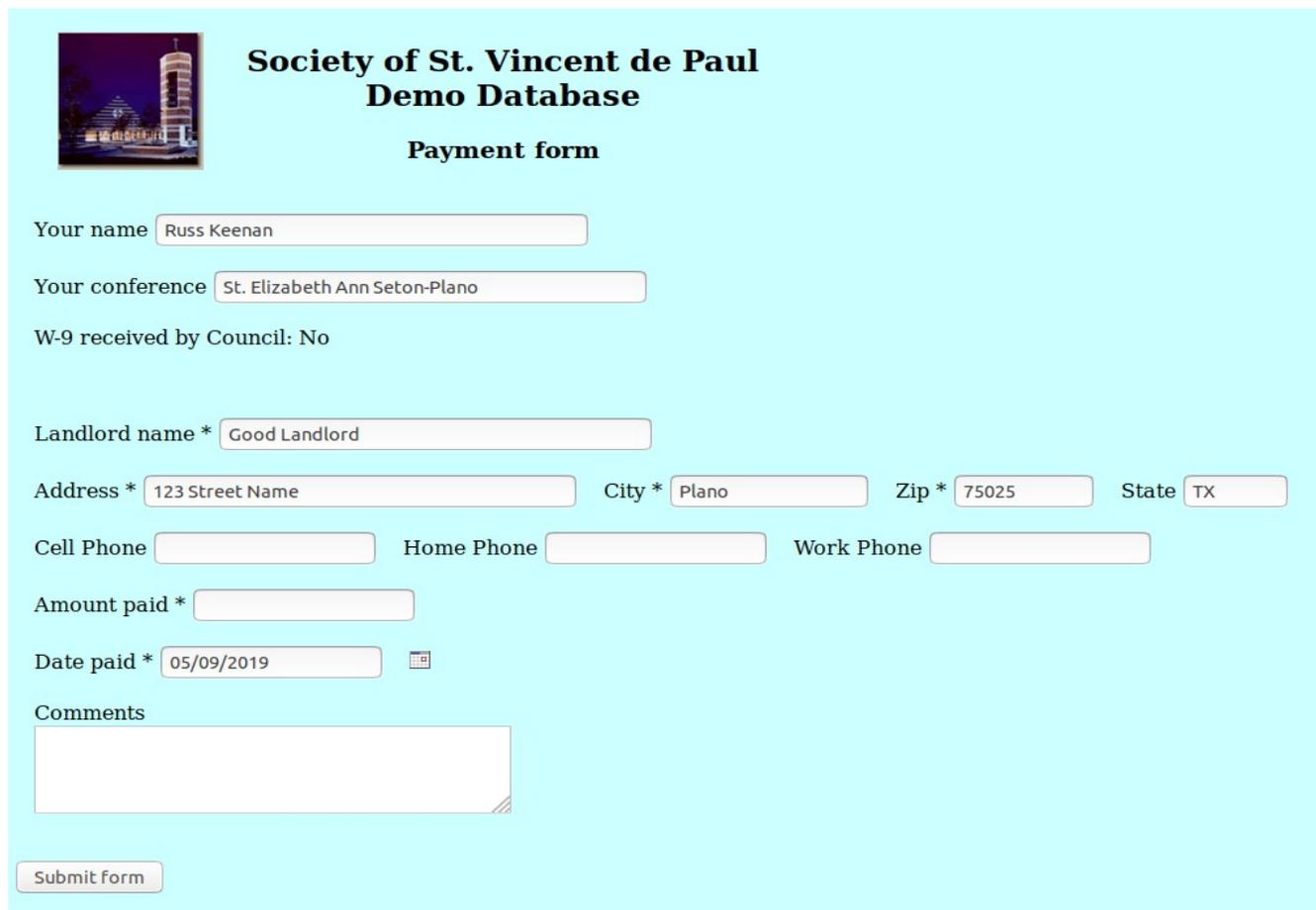
The screenshot shows a light blue background with the Society of St. Vincent de Paul logo on the left. The logo is circular with 'SVPde' in the center and 'SOCIETY OF ST. VINCENT DE PAUL U.S.A.' around the perimeter. To the right of the logo, the text reads 'Society of St. Vincent de Paul Diocesan Council of Dallas' in bold, followed by 'Payment form main menu'. Below this, there is a paragraph of instructions: 'Enter the name of a landlord and click on Submit name or click on the Conference report button or click on the Delete Cookie button.' Below the instructions is a text input field labeled 'Name of landlord *'. Below the input field are four buttons: 'Submit name', 'Conference report', 'Landlord report', and 'Delete Cookie'. At the bottom, there is a link: 'Done. [Go to SVdP home page](#)'.

Smart Form Tutorial

The normal way to enter data is to type the name of the landlord and click on the Submit name button or hit the Enter key. The following screen is then displayed. If the landlord is already defined, the address information is displayed. If not, the address data becomes required data fields as well as the payment data.

It may be a good idea to run the Landlord report to see if the landlord is already defined or to make sure the landlord name is correct. “Legacy Apartments” is not the same as “The Legacy Apartments”.

As you can see from the display, the name of the treasurer and conference are displayed as well as the status of the W-9 form. The user can click on the calendar icon to select a payment date or modify the date in the Date paid field. The comment would normally be used to enter a check number, so the treasurer can tie the payment data to the check register.



The screenshot shows a web form on a light blue background. At the top left is a small image of a building. The title is "Society of St. Vincent de Paul Demo Database" and the subtitle is "Payment form". The form contains several input fields: "Your name" with the value "Russ Keenan"; "Your conference" with the value "St. Elizabeth Ann Seton-Plano"; "W-9 received by Council: No"; "Landlord name *" with the value "Good Landlord"; "Address *" with the value "123 Street Name"; "City *" with the value "Plano"; "Zip *" with the value "75025"; "State" with the value "TX"; "Cell Phone", "Home Phone", and "Work Phone" fields, all empty; "Amount paid *" field, empty; "Date paid *" with the value "05/09/2019" and a calendar icon; and a "Comments" text area, empty. At the bottom left is a "Submit form" button.

Smart Form Tutorial

When the form has been submitted, a confirmation is returned. If the user has made a mistake, they will have to contact the Council to have the mistake fixed in the database.



Society of St. Vincent de Paul Diocesan Council of Dallas

Landlord form

If you see an error, please send the correct information to: support@svdpdallas.org

Database record for Good Landlord.

Address: 1234 Some Street
City: Plano
ZIP: 75023
State: TX
Cell phone:
Home phone:
Work phone:

Record ID	27
Added by	Russ Keenan
Conference	St. Elizabeth Ann Seton - Plano
Amount	300.00
Date	02/21/2019
Comments	This is for record 1200

Smart Form Tutorial

Clicking on the Conference report button allows the treasurer to see the payment data entered for the conference.



Society of St. Vincent de Paul Demo Database

Conference Report

Conference is **St. Elizabeth Ann Seton-Plano**

Payments are sorted by payment date.

Clicking on the Landlord title will sort the table by Landlord name.

Landlord	Submitted by	Payment Date	Amount	Comments
Good Landlord	Russ Keenan	01/30/2019	350.00	check # 1553
Bad Landlord	Russ Keenan	01/30/2019	400.00	Check # 1556
Shouldbe Rich	Russ Keenan	02/02/2019	200.00	2345
Good Landlord	Russ Keenan	02/20/2019	250.00	check # 1555
Shouldbe Rich	Russ Keenan	02/20/2019	300.00	1235
New One	Russ Keenan	04/27/2019	350.00	did this one work?
Bad Landlord	Good Treasurer	05/02/2019	200.00	test fix effort 2

[Return to 1099 form](#)

Smart Form Tutorial

Clicking on the Landlord report will display all the landlords entered so far in the Council database. It is possible for a different conference to have already defined a record if a landlord has different properties that span conferences. It is also possible that a landlord (like an apartment) is a corporation which means a 1099 form and not required, and therefore no payment data is required. Until the W-9 form is received and the data entered, the status is unknown and therefore payment data is required.



Society of St. Vincent de Paul Demo Database

Landlord Report

A value of "No" in the second column means that the Council has received a W-9 form and the landlord is a corporation, so no more payment data is required.

Landlord	W-9 Received	Form Required
Bad Landlord	No	Yes
Good Landlord	No	Yes
New One	No	Yes
Shouldbe Rich	Yes	No

Number of landlord records is 4.

Number of received W-9 forms is 1.

[Return to 1099 form](#)

Clicking on the Delete Cookie button will delete the cookie from the device being used. The user will have to log in again to access the smart form.

Cookie has been deleted.

[1099 Form](#)

Smart Form Tutorial

As you can see, this smart form is easy to use. If you want to try it out, log in as Treasurer with a password of Demo on the following web address:

https://parishplus.com/cgi-bin/FM_1099.cgi?P=Demo