To access purchase requests, switch to the *Manage* view of your organization, open up the organization tool drawer (3 horizontal lines), and select *Finance.* This option will only appear for you if you hold a position in your organization with organization-level access to Finance.
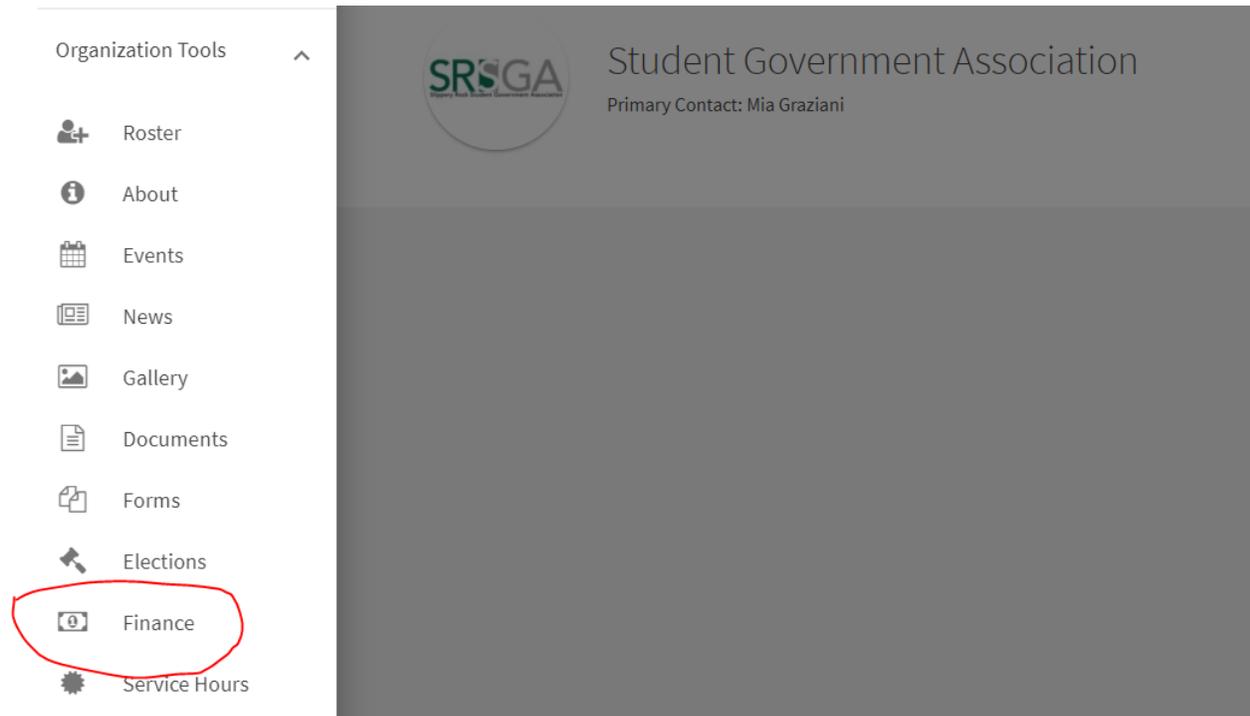
A purchase request (aka "payment request") is a record of money that is being spent from your organization's SGA approved budget account. To submit a purchase request, once you have accessed your organization finance page, click the blue *Create Request* drop-down followed by "Create Purchase Request."
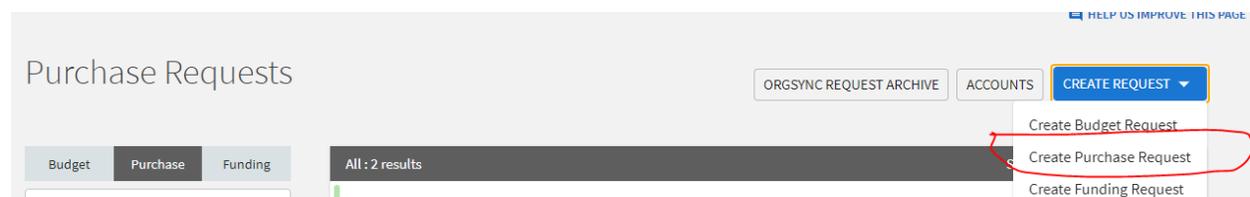
To create your purchase request, please follow the instructions in the "Additional Information" field at the bottom of the page. Please note, you cannot submit a request unless you follow the instructions and all required fields are populated.

Additional Information

To begin, click "Populate from Budget" and select the approved budget and budget line for your request. If a budget line does not exist, you will need to request a line item transfer before you can submit further. Your approved budget line will populate the subject field, description field, and <u>total amount</u> allocated to that budget line. You can edit the description field to be specific to the expense item you are requesting. Please be as detailed as possible. You will also need to change the "amount" to match what you are requesting. Please note, you cannot request more than the approved line. Next, select a category (line item) from the drop down that matches the expense. Finally, choose your account-this will be your organization's budget account.

The payee information should be filled out completely. If you are seeking a reimbursement or payment to an individual, please include first and last name. If paying a company, please include the full company name in the "first name" field along with complete address.

Finally, you must upload all receipts, invoices, or other supporting documentation before you can submit your request. Also, please indicate if you are picking up your check or if you would like our office to mail it for you.

Create Purchase Request

Request Details

POPULATE FROM BUDGET

*Subject

Description

*Requested Amount

$ 0

*Categories
---- Select Category ----

*Account

SELECT...

Request Details

CANCEL

🔍 Search Budgets

Select a Budget

Showing 1-2 of 2

Homecoming Budget 2021-2022
Process: 2021-2022 Budget Request *Date Approved:* Friday, April 9th 2021

$37160.00

BUDGET SELECTED:

Homecoming Budget 2021-2022
Process: 2021-2022 Budget Request *Date Approved:* Friday, April 9th 2021

Select a line item to continue.

Section: Operating

Spirit Board Supplies	$900.00
Spirit Board Party Food	$300.00
Posters, information packets, Snapchat filters...	$950.00

You can edit the "description" field to be specific to your request. Please provide as much detail as possible!

You will need to change the "requested amount" field to match your actual request. The category you choose from the drop down list must match the expense type/line item in your budget and your "account" is your organization's approved SGA budget.

Selected Budget	Selected Line Item (if applicable)	✕
Homecoming Budget 2021-2022	Spirit Board Supplies	

*Subject

Spirit Board Supplies

Description

Supplies for Spirit Board painting including various paint colors and brushes of varying sizes

*Requested Amount

$ 900.00 $0.00 remaining of $900.00 approved total

*Categories

---- Select Category ----

*Account

SELECT...

Please fill out all payee information, including full address. If you are paying a company/vendor, please fill in the company name in the "First Name" field.

Payee Information

First Name

Last Name

Street

Street Continued (Optional)

City

State/Province

ZIP/Postal Code

You must upload copies of all invoices, receipts, or other supporting documents for your request. Incomplete requests will **NOT** be approved.

* Upload a copy of your invoice/receipt here

UPLOAD FILE

* Please Choose From the Following:

...

SUBMIT REQUEST   CANCEL

If your purchase request is approved, no further action is necessary and the payment will be completed. If any additional information is needed, your request will be denied and instructions provided to recreate your request.

SGA Budget Accounts

There is a tab on the Finance page for your organization that displays information about your SGA budget account.
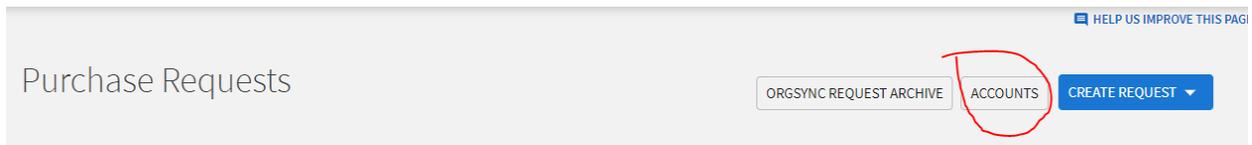
The Available Funds amount changes when purchase requests are approved for the account. **The Available Funds are what decisions should be based off of when making finance requests.**

The Balance will change when Payments are attached to the finance requests.