WILLIAM & MARY

TribeLink

# How To Manage Your Organization's Finances

The TribeLink Finance module allows organizations who receive funding from the Student Assembly to submit purchase requests AND to track their budgets. This system allows for more effective processing of spending as well as allowing organizations to better understand their own financial situation over the course of the year. Additionally, TribeLink retains transactional information each year, allowing organizations to benchmark their spending/programming over time.

Only members of the organization with access to the Finance function will be able to submit /view purchase requests and view account balances and transactions. Make sure your positions have been created and assigned to grant access to the appropriate members. You can learn more about creating and assigning positions through the TribeLink "[Manage Your Roster]" Guide.

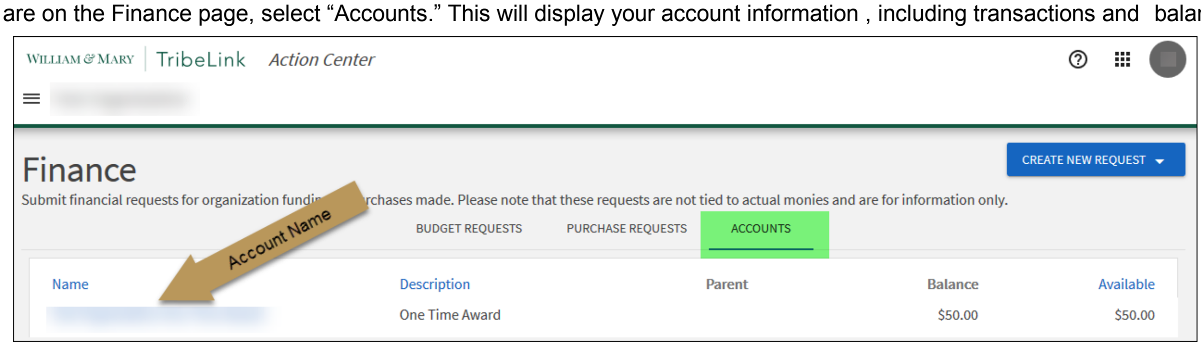
## General Information to Access Finance in TribeLink

To manage your organization's finances, you will first need to access the organization's Finance page within TribeLink.

1) Log into TribeLink (www.tribelink.wm.edu)
2) Select "Manage" using the grid shaped icon in the top right corner of the screen - this will take you to the Action Center


3) In the Action Center, select the organization you would like to manage
4) Once you are on the organization's home page, you will use the menu on the left hand of the screen to access the various management functions you have
5) Select "Finance"


Once you are on the Finance page, select "Accounts." This will display your account information , including transactions and balances.




## Understanding and Viewing Your TribeLink Account

Organization funds are loaded into TribeLink each year in August/September; totals are determined by the amount allocated to the organization through the Executive Appropriation Committee (EAC) process. Funds allocated through the Activity and Event Funding or SA Bills will be loaded into TribeLink upon approval.

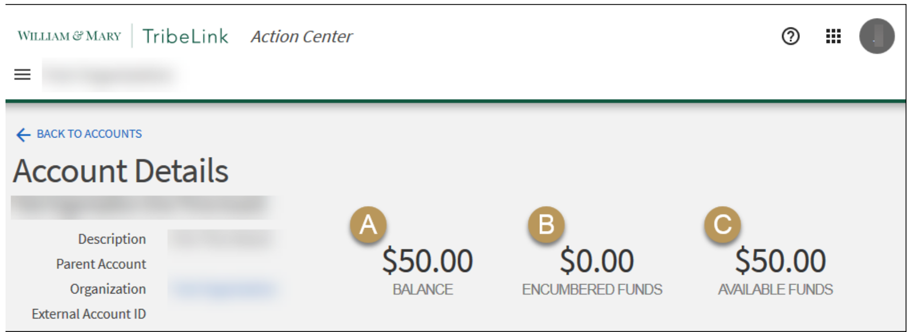
To access funds, at least one representative of the organization MUST complete the Banner training and attend a Budget Distribution Session. We recommend this representative be the Financial Manager or the Primary Contact.

Only accounts/funds administered or managed by Student Leadership Development will be visible/accessible in TribeLink.

Click on your account name to view account details.

# Account Details

The top section of the Account Detail page provides you a current snapshot of what's going on with your account for the current funding year.




**Balance (A)** - The total amount of money currently remaining in the organization's account; this amount does not include outstanding purchase requests. *This is the money you currently have.*

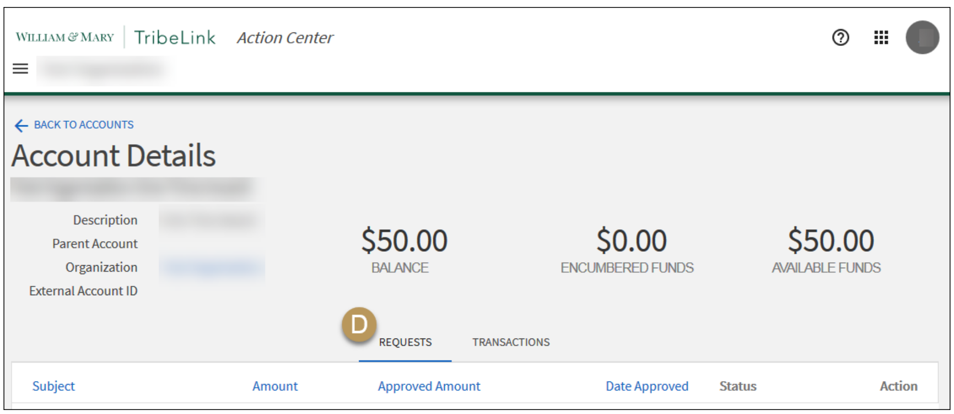
**Encumbered Funds (B)** - The total dollar amount of Purchase Requests pending completion. *This is the amount you requested through current/pending Purchase Requests*. Approved purchase requests are accounted for in encumbered until actual payment is processed.

**Available Funds (C)** - The total amount remaining in the account, minus encumbered funds. *This is your current balance minus encumbered funds; you can still submit Purchase Requests for these available funds.* Note: you may see a variance between "amount" and "amount approved;" the amount approved is based on your original approved budget and/or available balance.

# Requests and Transactions History

Previous years' financial information, like Purchase and Budgeting Requests, as well as transactions are retained within TribeLink for organizational financial management/historical purposes.

**Requests (D)** - The listing of the organization's Purchase Requests AND Budget Requests. Here you can check the status (approved, denied, unapproved, and completed). To see details of the request, click on the request subject.

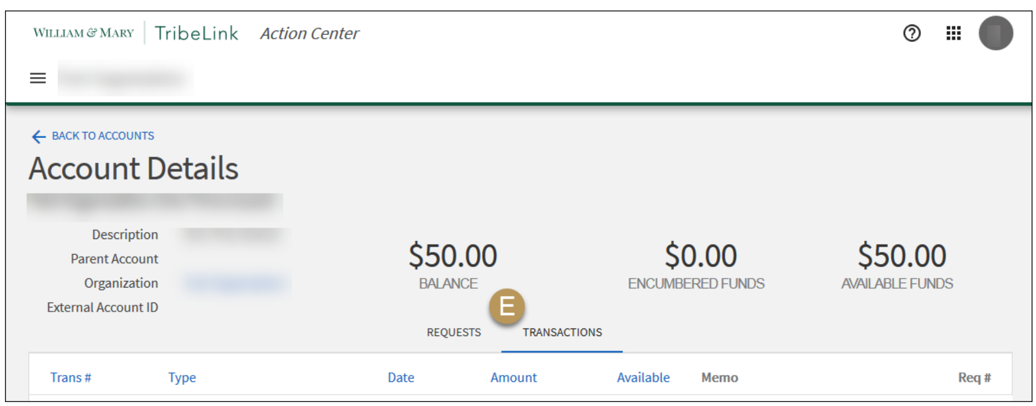



Purchase Requests are used throughout the year to utilize the funds already allocated to the organization. To learn more about submitting a purchase request, please review the "Submit a Purchase Request" guide.

Budget Requests are used to request an allocation, like Activity & Event Funding or Competition Funding, in addition to an Annual Budget To learn more about submitting a budget request, please review the "Submit a Budget Request" guide.

**Transactions (E)** - The itemized list of all transactions. This section shows all payments, transfers, deposits, and allocation.

Each August the organization's allocations will be loaded, after completing required training. After the end of each fiscal year (June 30), the organization's account will be zeroed out. Unused funds do not roll over from one year to the next.




## Additional Questions?

If there are any questions/potential discrepancies, please contact the Financial Operations Specialist at ctspady@wm.edu.

Version August 2019