

WILLIAM & MARY TribeLink

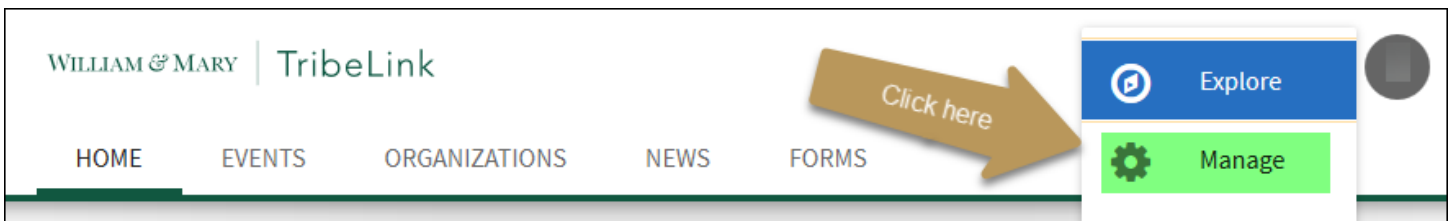
How To Submit a Budget Request

The TribeLink Budgeting module allows organizations to request funding from the Student Assembly or Student Leadership Development. This system allows for better organization of budgets and streamlines the review/approval process. Only members of the organization with access to the Finance function will be able to submit/view budget requests. 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.

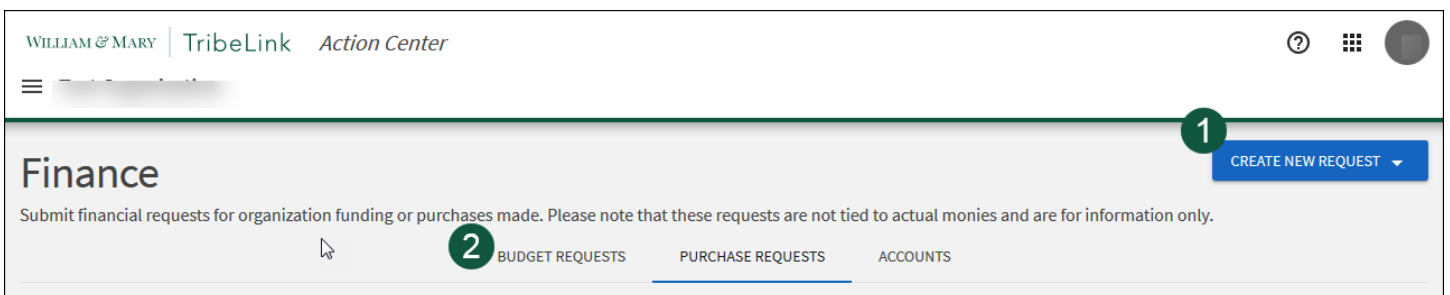
General Information to Access Finance in TribeLink

To submit a Budget Request, you will first need to access the organization's Finance page within TribeLink.

- 1) Log into TribeLink (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, use the menu on the left side of the screen to access the various management functions
- 5) Select "Finance"



On the Finance page, click on the "Create New Request" button (1) and from the drop down, select "Create Budget Request." You can view the status and comments of already submitted Budget Requests by clicking the "Budget Request" tab (2).

Submitting Your Budget Request

Select a Process or Budget to start your request. By scrolling down, you'll be able to select a process that is currently available and accepting request.

Request Details

- Request Title - Provide a concise/descriptive name for your request, this should include the name of the event/competition, or general purpose of the request. Make this a title that will be easy to identify in the future, example, include the year on an annual request.
- Description - Provide a general explanation/justification for your request

Additional Information

Each process requires additional information, which will vary between the different processes. Please answer all of the "Additional Information" questions to the best of your ability. Incomplete information may result in delay of processing or denial of the request.

REQUEST	ADDITIONAL INFORMATION	BUDGET
Budget Name		
Requested Total		\$125.00
Reviewer Adjusted Total		\$125.00
Sections (4)	# of Line Items (2)	Amount
Contracted Services	2	\$125.00
Event Management	0	\$0.00
Venue	0	\$0.00
Vendor Payment	0	\$0.00

1
Budget Section:
Contracted Services
Speaker/ Performer Travel fees (train, airfare, bus, etc) should be included in contracted costs.

2 + ADD ITEM
+ ANOTHER "CONTRACTED SERVICES" SECTION

Budget Section:
+ ANOTHER "CONTRACTED SERVICES" SECTION

Vendor Payment
Purchase needs that require a payment to a vendor.

+ ADD ITEM
+ ANOTHER "VENDOR PAYMENT" SECTION

FINISH LATER < PREVIOUS SUBMIT

Budget

The Budget tab will include the total amount you are requesting, the total adjusted amount (after it has been reviewed). As you add line items to your budget, the top section will keep a running total of your request, separated by sections.

Using and Customizing Sections:

Sections are groupings or categories of spending for related line items. Examples of sections include: Event Management, Operations, Travel, etc.. You should edit the name of sections to match the name of your event, trip, or activity.

If you have multiple events, trips, or activities, you can add additional sections; you should not "lump sum" multiple events/trips/activities in one section. This allows you to customize the budget request to better represent your organization's needs.

For example, the organization is requesting funding for a fall speaker and a spring speaker. Create one event section and edit the name to "Fall Speaker," then add another section and name it "Spring Speaker". Under each section add line items for that specific event.

Adding Line Items:

(1) Find the section of the budget that corresponds with what you need funding for.

(2) Click the "+Add Item" button to add a line item to your budget request; this will open a pop-up window

- Line Item Category - Select an option from the dropdown menu.
- Name - identify the item/service you are requesting funding for
- Description - Provide a description of why the item/service is relevant to your request, please include the vendor/service provider information if applicable (additional information will be required in the Purchase Request submission)
- Quantity and Cost - Itemize the expense
- Support Document - upload supporting documentation (optional)

(3) Repeat the process above as many times as you need in order to complete your Budget Request.

(4) If you need to come back and work on the Budget Request later, just click "Finish Later." Don't forget to SUBMIT when you are done!

New Line Item

* Line Item Category (Required Field)

* Name (Required Field)

Description

* Quantity * Cost = Total

1 X \$ = **Cost must be a number.**

Upload Support Document (10MB max)

Browse... No file selected.

CANCEL SAVE



Additional Questions?

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