

WILLIAM & MARY TribeLink

How To Submit a Purchase Request

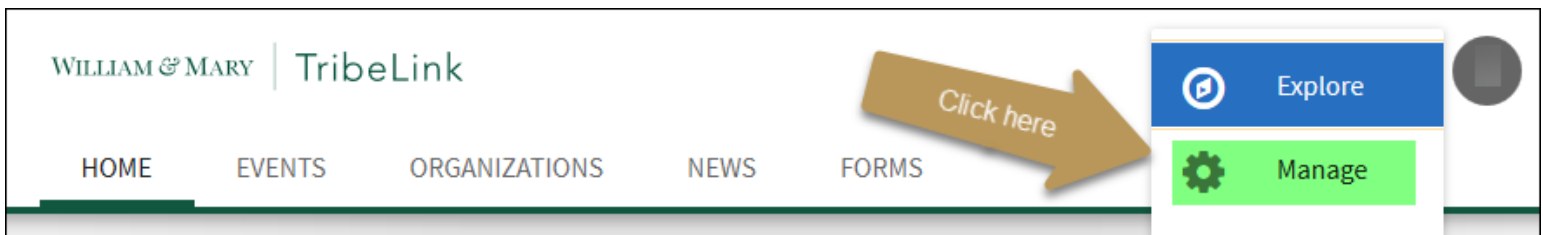
The TribeLink Finance module allows organizations who receive funding from the Student Assembly to submit purchase requests AND to track their budgets. This system allows for more effective processing of spending as well as allowing organizations to better understand their own financial situation over 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 submit a Purchase Request, you will first need to access the organization's Finance page within TribeLink.

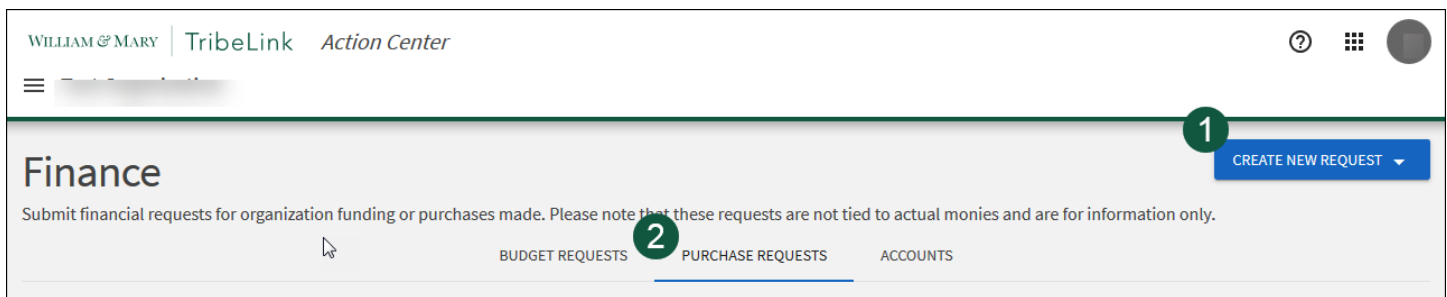
- 1) Log into TribeLink (tribelink.wm.edu)
- 2) Select "Manage" using the grid shaped icon in the top right corner of the screen - this will take you to the Action Center



- 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 Purchase Request." You can view the status and comments of already submitted Purchase Requests by clicking the "Purchase Request" tab (2).



Submitting a Purchase Request

Here are some helpful tips/explanations to help make the request/approval process smoother.

Please submit your purchase requests as far in advance as possible, so there is ample time to review your request, and to make the purchase. Plan on allowing additional time for shipping if necessary.

Allow additional time for performers or service providers requiring a contract, as there is additional paperwork including contract review/signature and tax forms.

Request Details

Subject (A) - This is the name of the specific event/activity for which you are requesting funding and/or the goods/services being purchased.

Populate from Budget (B) - Click this button and select the budget from which the funds for this purchase should come from. From the selected budget, click on the corresponding line item. For example, select "General Printing," if the Purchase Request is for copies.

Description (C) - The more clear and detailed the description, the better; be sure to include WHAT you are purchasing, WHY it is needed, WHERE it is being purchased from, and WHEN it is needed.

Requested Amount (D) - Your requested amount must not exceed the allocated line item amount. If you wish to verify your line item allocations, you can review your transactions under accounts (see the how to ["Manage Your Organization's Finances"](#) guide for details). Note: when requesting funding for items that must be ordered from a vendor, make sure to include shipping/handling fees in your request.

Categories (E) - Please select the category that best describes your purchase. If you have multiple purchases in different categories, you will need to submit separate requests. For example, if submitting a purchase request for Food and Decorations, you must submit one for Food and another for Decorations. This will be helpful to your long-term tracking of expenditures.

Account (F) - Select the account from which you want to spend money (Annual Budget, Activity & Event, Competition, One Time)

Payee Information

Name - Identify the vendor from whom items/services are being purchased. If the purchase is being made online, please list the website.

Additional Payee Information - If the payee is an individual/brick and mortar store, please list the address.

Additional Information

Event Purchase Information - Please provide some additional information about the event; this section includes questions about additional sources of funding for your event (if applicable).

Vendor Information - To ensure payment to the vendor as quickly as possible, please provide some information about the Vendor.

Invoice Information - Occasionally, the total amount on the invoice will exceed the approved allocation, and only a portion of the invoice will be paid out of the allocation. Please provide specific information about the actual payment amount and upload a copy of the invoice.

Acknowledgement of Responsibility - Organization leaders are responsible for reviewing and understanding the established financial regulations and policies. You can find the Financial Manager's Guide Book on the [SA Fee Funding Guidelines](#) page of the Student Leadership Development website.

After You've Submitted a Purchase Request

***DO NOT purchase goods, sign contracts, make any payments. Once a Purchase Request is approved, the Financial Operations Specialist will coordinate purchase/payment on your behalf. ***

After submitting your purchase request, the individual who submitted the Purchase Request will receive an email with approval or denial of the request. Any member of the organization with Finance access can log in and view the status of a purchase request. Please allow 3-5 business days for review.

Be sure to check "comments" to see if additional information is needed in order to process your payment or to approve your request. Often these comments will include additional action by the organization required in order to move forward.

If your purchase involves a contract for services (speakers, performers, etc.) there are additional steps/review that must take place, as well as additional paperwork. Please allocate additional time for this.

When the purchased items are available for pick-up, a comment will be added to your Purchase Request with additional information regarding when and where to pick-up the items.

It is the responsibility of the organization to periodically check the Purchase Request for status updates and comments.

After the Purchase Request is approved AND completed, the transaction will move from the "Purchase Request" section in Finances to "Transactions" and will be reflected in the organization's remaining balance.

Additional Questions?

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

