



## Student BullsConnect Instructions: Submit a Purchase Request

Use these instructions to submit a purchase request for your organization.

### Step One: Go to your Accounting Book

Find your group under My Groups on the left navigation. This will take you to your student organization's dashboard. Find the "Accounting Book" Tile or click on Money > Accounting Book on the left navigation.

| Budget                              | Allocations/Reversals | Expenses      | Balance           |
|-------------------------------------|-----------------------|---------------|-------------------|
| 2021-2022 Seneca-Manatee ABS Budget | \$4,866.00            | \$0.00        | \$4,866.00        |
| Group Funds                         | \$0.00                | \$0.00        | \$0.00            |
| <b>Total</b>                        | <b>\$4,866.00</b>     | <b>\$0.00</b> | <b>\$4,866.00</b> |

  

| # | Item Name                            | Entered By | Source                              | Payee / Vendor | Category   | Payment Method                      | Receipts | Status   | Credit     | Debit |
|---|--------------------------------------|------------|-------------------------------------|----------------|------------|-------------------------------------|----------|----------|------------|-------|
| 1 | Allocation - 40472271<br>(at 5/2021) | Kim Mikes  | 2021-2022 Seneca-Manatee ABS Budget |                | Allocation | Payment into Online Payment Gateway |          | Approved | \$4,866.00 |       |

### Step Two: Request Payment

There is a gray "Request Payment" button on the right in the Transactions section. Click on that to start the purchase request process.

**Budget**: 2021-2022 Seneca-Manatee ABS Budget

**DETAILS**

**Payment Type**: Purchasing/Spending

**Description**: Catering for Homecoming Event  
Ex: food, marketing materials, travel expenses, etc

**AMOUNT**

**Revenue/Expense**: Expense

**From Allocated**: \$ 216.00  
Numbers only

**From Group Funds**: \$ 0  
Numbers only  
Use funds from your group money balance

**ADDITIONAL INFORMATION**

**Receipts**: Upload

**Payee / Vendor**:  
Who is being paid or who is making the deposit (ex: a vendor name, a student name, etc)

**Additional Notes**

Complete the information under Details and Amount sections.

### Details

- Always select Purchasing/Spending as the Payment Type.
- The description should be a short description of the purchase. (i.e. Catering for Homecoming Event, Decorations for Appreciation Dinner, Club T-Shirts, Club Tablecloth)

### Amount

- Choose Expense. Student organizations do not make revenue that is deposited into the A&S accounts.
- Include the total of the purchase in the "From Allocated" section.
- Leave the "From Group Funds" blank. We do not use this feature.

Leave the Additional Information sections blank, you will provide this information later on. Click **NEXT** to move on to the next step.

Provide us with information about yourself as the submitter. All students must be authorized and trained in order to submit purchase requests.

The screenshot shows a web form titled "Budget & Payment Request Details". At the top left, there is a progress indicator showing "0%". Below this is a section titled "Purchase Request Form" with a "DRAFT" status. To the right of this title are three buttons: "Edit", "Copy Link", and "Manage".

The main section is titled "Submitter Information" and includes the instruction "Please tell us a little more about yourself." Below this are three questions:

- 1. "What is the best phone number we can use to contact you? \*": A text input field contains the number "9413594268". Below the field is a red error message: "Please enter a valid number."
- 2. "Are you authorized to make purchases on behalf of your organization? \*": A radio button is selected for "Yes", and "No" is unselected.
- 3. "Have you completed finance training? \*": A radio button is selected for "Yes", and "No" is unselected.

At the bottom of the form, there are two buttons: "Save As Draft" on the left and "Next >>" on the right.

Choose your organization's home campus and let us know if the purchase is for an event/project or general organization supplies.

**Budget & Payment Request Details**

25%

**Purchase Request Form** **DRAFT** [Edit](#) [Copy Link](#) [Manage](#)

### Organization & Purchase Purpose Information

What is your organization's home campus? \*

Tampa

St. Petersburg

Sarasota-Manatee

Is this purchase for an organization event/project or general organization supplies? \*

Event or Project

General Organization Supplies

General Organization Supplies can include general marketing items, office supplies, or items you will use for multiple events like a cooler, speaker, etc.

[← Back](#) [Save As Draft](#) [Next →](#)

If your purchase is for an event, you will need to provide us with some information regarding your event. Answer all questions fully. You must submit your BullsConnect event link, so plan ahead and complete that first! To find the link for your event, go to your group's manage page, click on Events, and find the event. From there you can just copy and paste the URL of the event!

If your request is for general organization supplies, this step will be skipped.

**Budget & Payment Request Details**

50%

**Purchase Request Form** **DRAFT** [Edit](#) [Copy Link](#) [Manage](#)

### Event or Project Information

Please tell us more about your event or project.

**Name of Event or Project \***

**Please provide a brief description of event or project. \***

**Please provide us with a link to your BullsConnect event. \***

Provide us the information for the vendor you are working with. The name of the vendor and mailing address are required, but we recommend including all contact information you have so we can complete your purchase efficiently.

**Budget & Payment Request Details**

75%

**Purchase Request Form** **DRAFT** [Edit](#) [Copy Link](#) [Manage](#)

### Vendor Information

Please tell us about the vendor you would like items purchased from.

This is the final page of this form. Please ensure of the information is correct before hitting submit below.

What is the name of the vendor you are working with? \*

What is the vendor's mailing address? \*

What is the vendor's phone number?

What is the vendor's email address?

What is the vendor's website?

What is the name of your point of contact with the vendor?

Let us know if you will be picking up the purchase or if it will be delivered to the University. Please note – student organizations are responsible for picking up items that are unable to be delivered.

Upload an itemized list for the purchase. There is a excel spreadsheet document for you to complete for this step. Include a description, price, and quantity for every item purchased. The document will total it for you, so you do not need to add the amounts yourself.

If you have a quote from the vendor (NOT an invoice), please upload it here as well.

Is the vendor delivering or are you picking up the item(s)? \*

Delivery

Pick-Up

Student organizations are responsible for picking up items that are unable to be delivered to the University.

Please upload a full list of items for this purchase. Please use the attached file as a template. \*

[Upload file](#)

Document: [Purchase\\_Request\\_Itemized\\_List](#)

Please upload a quote for your purchase, if applicable. This should NOT be an invoice.

[Upload file](#)

How should the order be paid for? \*

Purchase Order / Check

USF Department Transfer

Credit Card online

Credit Card over the phone

Unknown

[Back](#) [Save As Draft](#) [Submit](#)

### Step Three: Submit Your Request & Track Progress

Click the gray submit button on the bottom of the page. If you want to save this and return to it at any point, you may click the Save as Draft button.

After you have submitted it, you can track its progress in your Accounting Book page.

| # | Item Name  | Entered By   | Source                                | Payee / Vendor | Category   | Payment Method                      | Receipts | Status           | Credit     | Debit    |
|---|--|--|---------------------------------------|----------------|------------|-------------------------------------|----------|------------------|------------|----------|
| 1 | Catering for Homecoming Event - #24722-90<br>Jul 1, 2021 | Kim Moore<br>Eas Office Bldg (Sarasota-Manatee campus) | 2021-2022 Sarasota-Manatee A&S Budget | -              | -          | Payment into Online Payment Gateway | -        | Pending Approval | -          | \$216.05 |
| 2 | Allocation - #2472275<br>Jan 1, 0001                     | Kim Moore<br>Eas Office Bldg (Sarasota-Manatee campus) | 2021-2022 Sarasota-Manatee A&S Budget | -              | Allocation | Payment into Online Payment Gateway | -        | Approved         | \$4,866.00 | -        |