STEPS TO SUBMIT A PURCHASE REQUEST FROM YOUR ORGANIZATION’S REVENUE OR CAMPUS RECREATION ACCOUNT

1. From the Organization Home page
   a. Click the three stripe Organization Tools Menu button next to the Org Name

2. From the Organization Tools Menu that appears on the left:
   a. Click the Finance option
   b. From the Finance home page
   c. Click the blue “Create New Request” button in the top right
   d. Click “Create Purchase Request”

3. On the Create Purchase Request page:
   a. Adjust the Subject to align with the request, i.e. Amazon for Fall Event
   b. The Requested Amount is the total purchase estimate
   c. Select the Category that aligns closely with the request

4. Click the Select button under Account to choose your Revenue/ Campus Rec Account

5. You do not need to complete the Payee Information section of the form
Create Purchase Request

**Request Details**
- **Subject**: Adjust the title to reflect the purchase being made.
- **Description**: Fill in the description.
- **Requested Amount**: Enter the amount.
- **Categories**: Select the category.
- **Account**: Click here to select the account. You DO NOT need to complete this section.

**Payee Information**
- **First Name**: Enter the payee's first name.
- **Last Name**: Enter the payee's last name.
- **Street**: Fill in the street address.
- **Street Continued (Optional)**: Enter any additional street information.
- **City**: Enter the city.

Select the correct account you wish to use. FYI Budget= SA funding.

ORG SUPPORT:
orghelp@gwu.edu
GO.GWU.EDU/ORGHELP
6. Select the form associated with the type of request being submitted, complete the form selected and upload into the first upload slot available

7. If everything has been completed and uploaded submit the request

8. Submitted requests can be found and followed on the Finance home page under Purchase Requests

9. Once a request has been approved an email will be sent notifying of this and further directions will be included if necessary

NOTES:
Credit card for multiple purchases on one request: When using the GW Credit Card multiple stores can be included on one request if they are for the same event or purpose. Please list out all stores you expect to purchase from on the GW Credit Card Purchase Request form.

Splitting Between Multiple Accounts: If you plan to split a request between Accounts (SA/Revenue/Campus Rec) and/or Budgets, a request needs to be submitted from each account/budget for the corresponding amount desired.
PURCHASE REQUEST STATUS/STAGE LABELS – Revenue/Campus Rec Requests

All purchases have a Status and Stage associated with them. The Status and Stage indicate where it is in the process and can be followed on the Finance home page under Purchase Requests.

**Unapproved- Finance Desk Review**
Request just submitted by org and placed into the queue for review by SE Finance

**Unapproved- Approved- Fin Desk**
Request has been approved by SE Finance. The individual who submitted the request will receive an email notifying them of the approval and instructions to visit the Finance Desk to complete the purchase

**Unapproved- Approved- No Action Required**
Request has been approved by SE Finance. We do not require anything else to complete the request from the organization

**Approved- Approved- No Action Required**
Request has been completed

**Approved- Approved- Fin Desk**
Request has been completed

**CAMPUS REC REQUESTS ONLY**
**Unapproved- Approved- Fin Desk**-
Request has been approved by SE Finance. The individual who submitted the request will receive an email notifying them of the approval and instructions to visit Athletics to complete the purchase
STEPS FOR SUBMITTING A PURCHASE REQUEST FROM YOUR ORGANIZATION’S STUDENT ASSOCIATION (SA) BUDGET

1. From the Organization Home page
   a. Click the three stripe Organization Tools Menu button next to the Org Name

2. From the Organization Tools Menu that appears on the left:
   a. Click the Finance option

3. From the Finance home page
   a. Click the blue “Create New Request” button in the top right
   b. Click “Create Purchase Request”

4. On the Create Purchase Request page
   a. Click the button Populate from Budget and select the budget from which you’d like to request funds
5. Select the line item from which you are requesting to spend. You can only use one line item per purchase request.
6. Adjust the Subject to align with the request, i.e. Fall Event - Amazon Order
7. The Requested Amount is the total purchase estimate
8. Select the Category that aligns closely with the request
9. You do not need to complete the Payee Information section of the form
10. Click the Select button under Account to choose your SA Budget Account
11. Select the form associated with the type of request being submitted, complete the form selected and upload into the first upload slot available.
12. If everything has been completed and uploaded submit the request
13. Submitted requests can be found and followed on the Finance home page under Purchase Requests
14. Once a request has been approved an email will be sent notifying of this and further directions will be included if necessary

NOTES
Only one-line item can be selected per request submitted

When using the GW Credit Card multiple stores can be included on one request if they are for the same event or purpose. Please list out all stores you expect to purchase from on the GW Credit Card Purchase Request form.

If you plan to split a request between Accounts (SA/Revenue/Campus Rec) and/or Budgets, a request needs to be submitted from each account/budget for the corresponding amount desired.
PURCHASE REQUEST STATUS/STAGE LABELS – SA Requests
All purchases have a Status and Stage associated with them. The Status and Stage indicate where it is in the process and can be followed on the Finance home page under Purchase Requests

Unapproved - Finance Desk Review
Request just submitted by org and placed into the queue for review by SE Finance

Unapproved - SA VPFA Review
Request has been briefly reviewed by the SE Finance sent to the SA VPFA for approval

Unapproved - Final Approval Pending
Request has been approved by the SA VPFA and sent to SE Finance for approval

Unapproved - Approved - Fin Desk
Request has been approved by the SA VPFA and SE Finance. The individual who submitted the request will receive an email notifying them of the approval and instructions to visit the Finance Desk to complete the purchase

Unapproved - Approved - No Action Required
Request has been approved by the SA VPFA and SE Finance. We do not require anything else to complete the request from the organization

Approved - Approved - No Action Required
Request has been completed

Approved - Approved - Fin Desk
Request has been completed