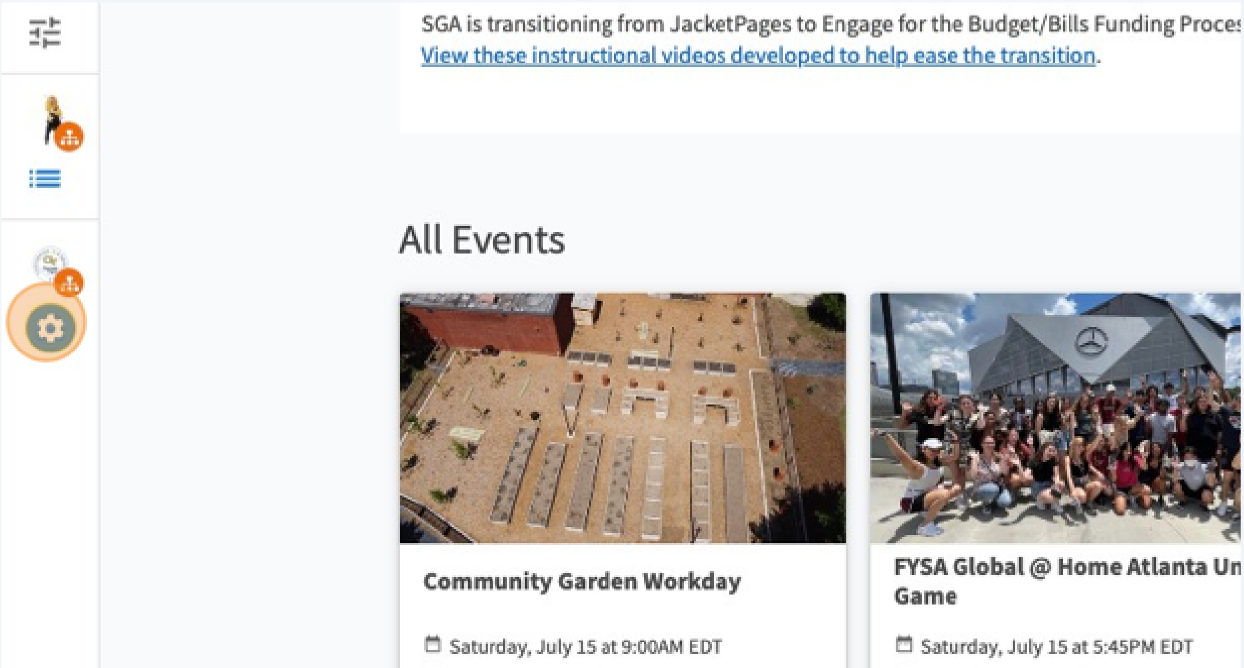
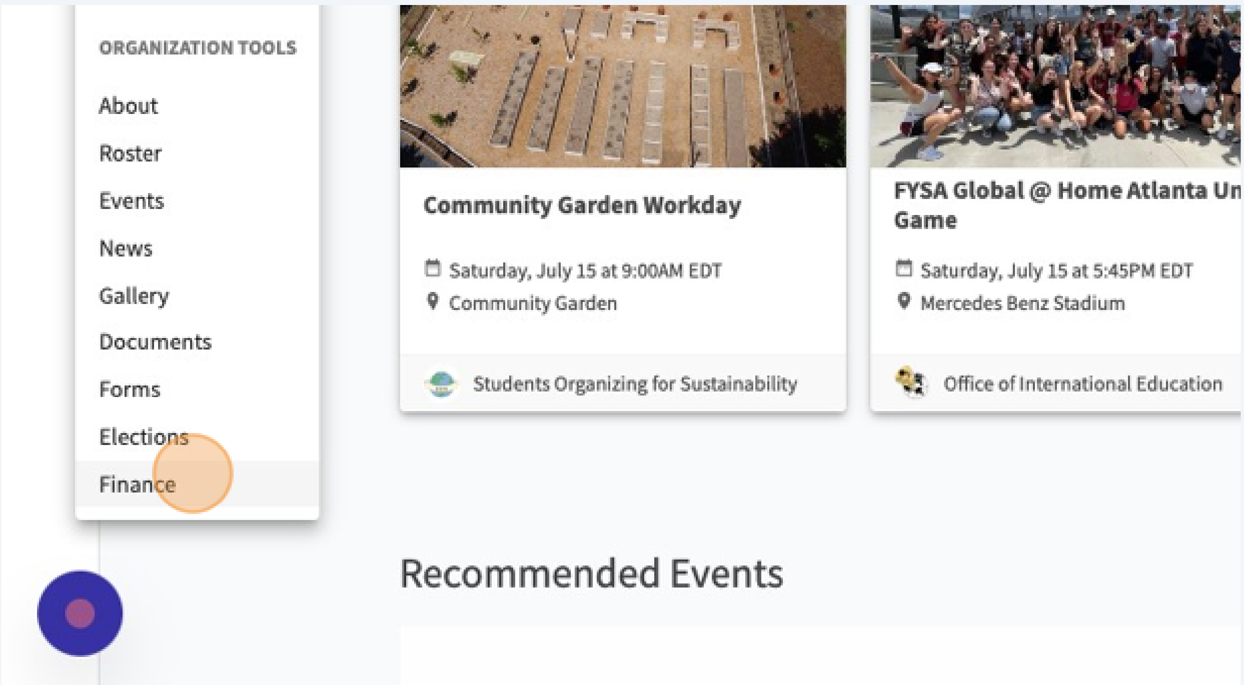
Engage Submission Process by the RSO Financial Officer

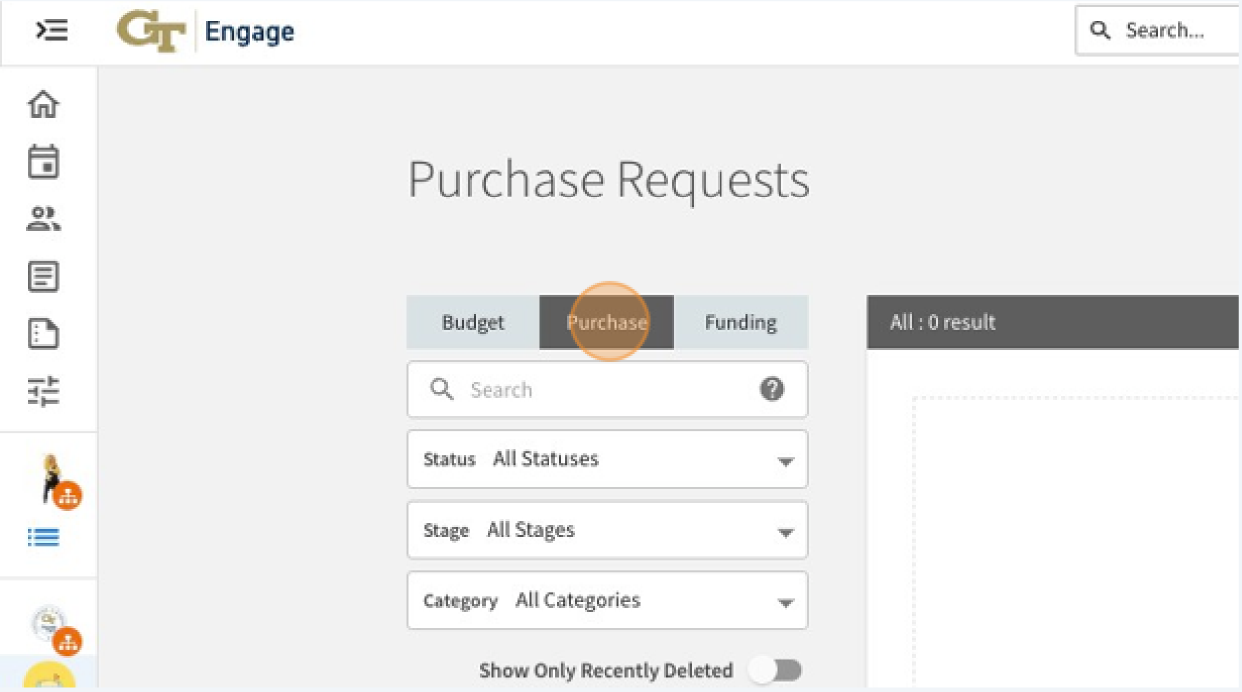
When a Financial Officer wants to submit a finance request to SOFO, they should hover over the relevant organization's profile picture and select the gear icon.



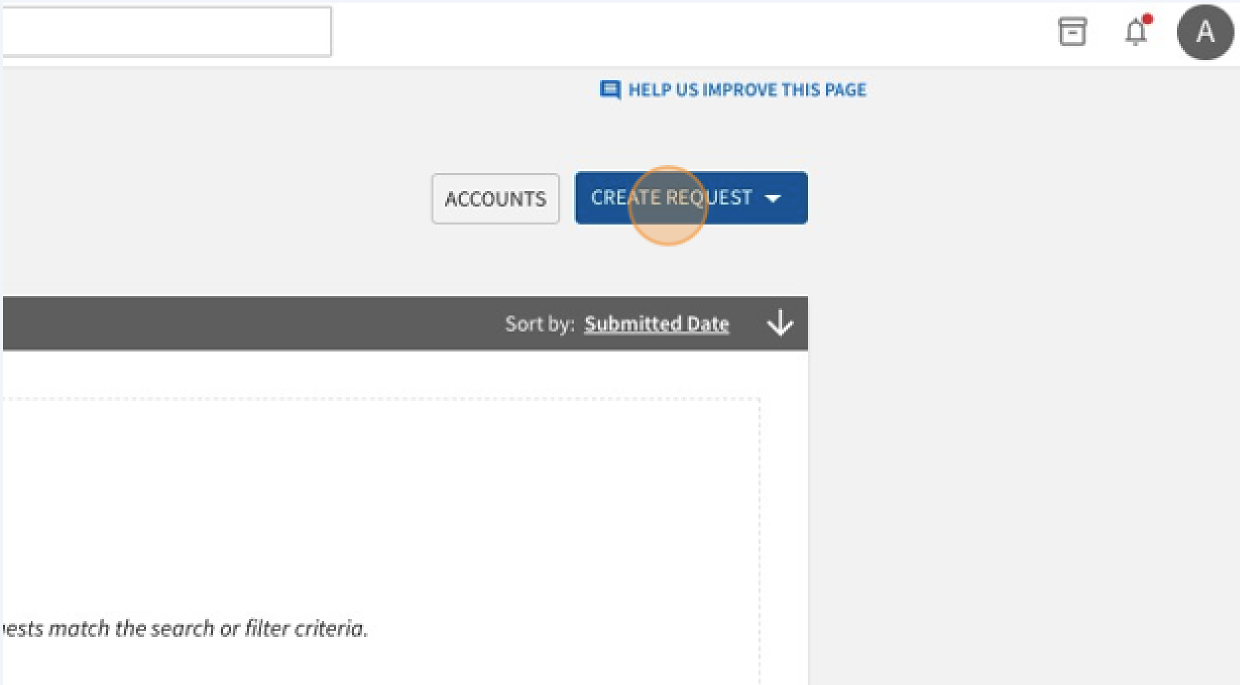
2 After the toolbar appears, students will select "finance".



31 Once brought to the finance tool, students will be focusing on the purchase section, as this is where their submitted SOFO request will appear.



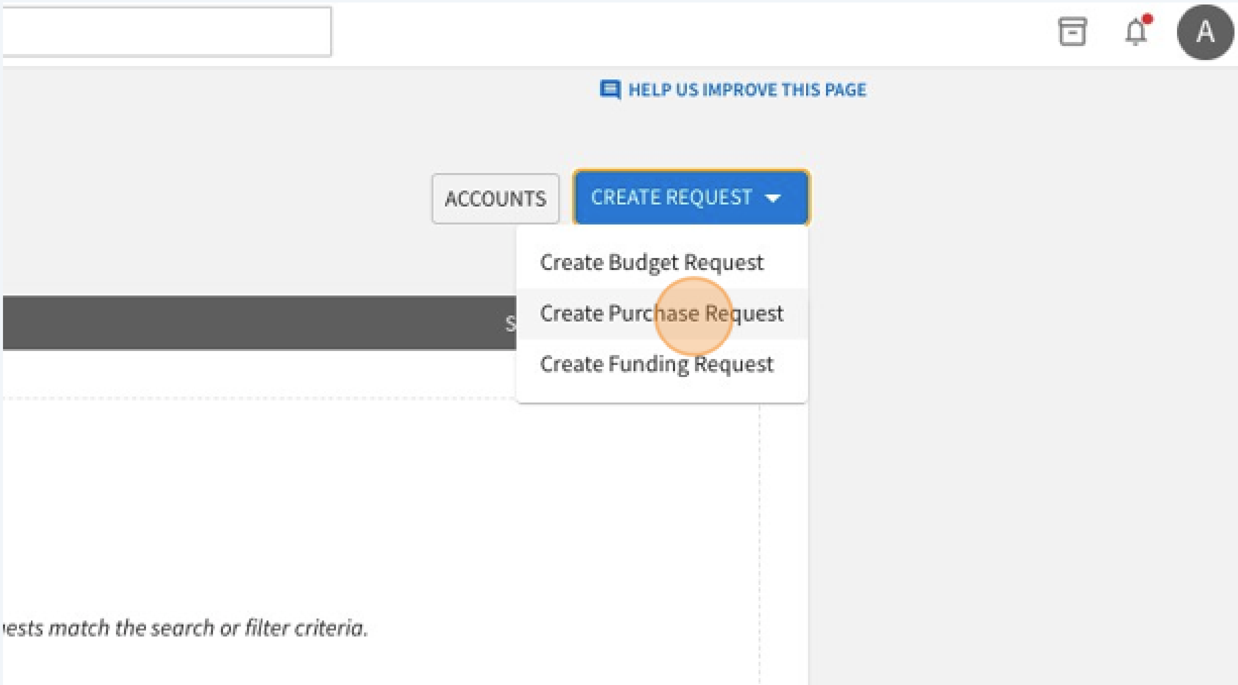
32 To submit a purchase request/reimbursement, students will select the "create request" button.



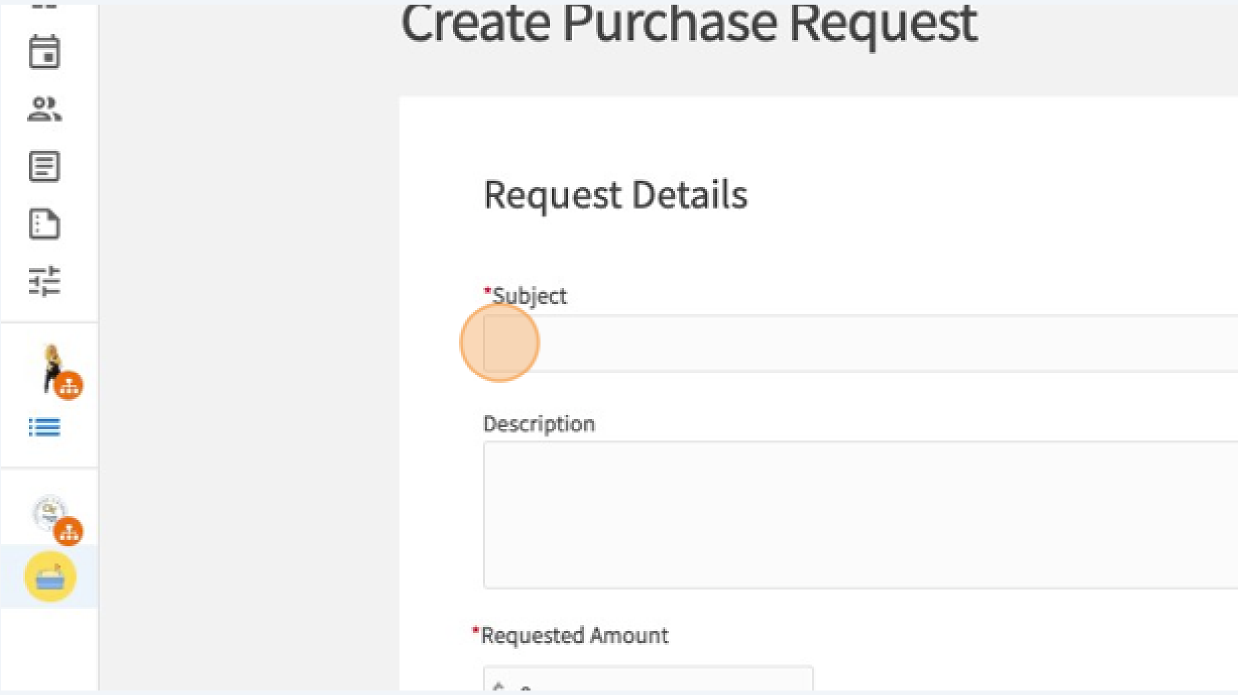
33 For SOFO Purchases and Reimbursements, students will click "Create Purchase Request".

The "Budget Request" button is what students will select when submitting a bill to SGA, parents fund, or the student foundation.

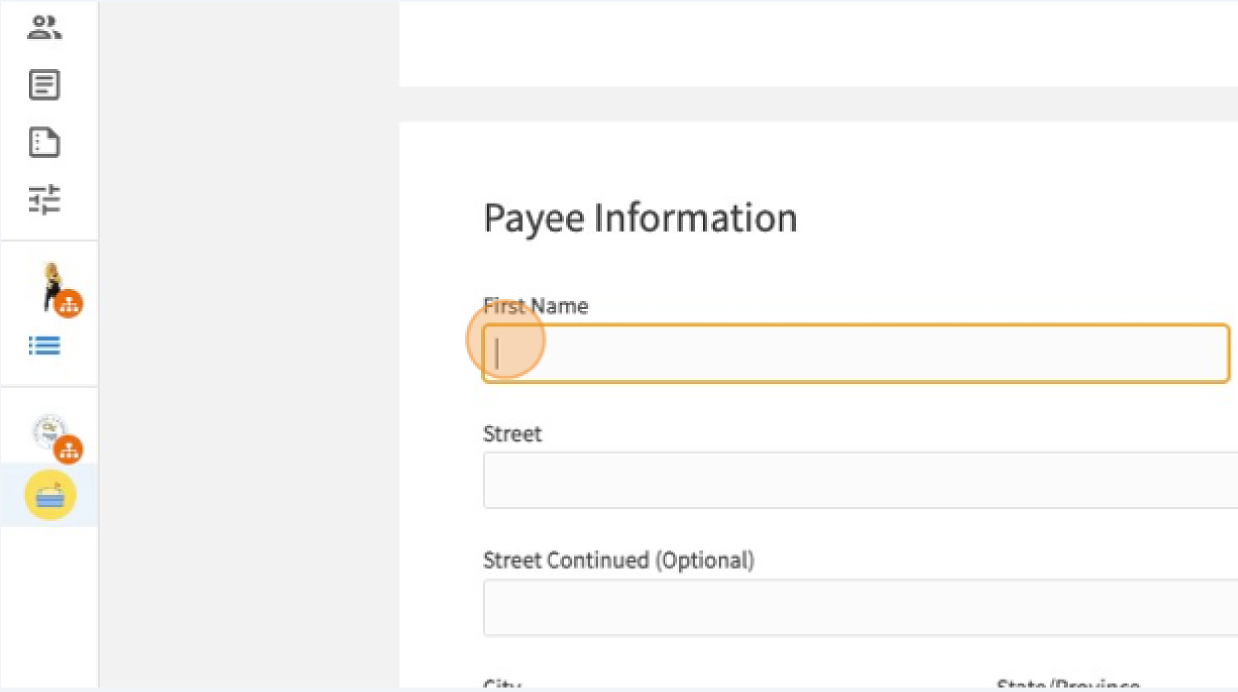
The "Funding Request" button would be used for an organization that wanted to request money be moved into their account (ex. hosted a fundraiser and needs to add funds).



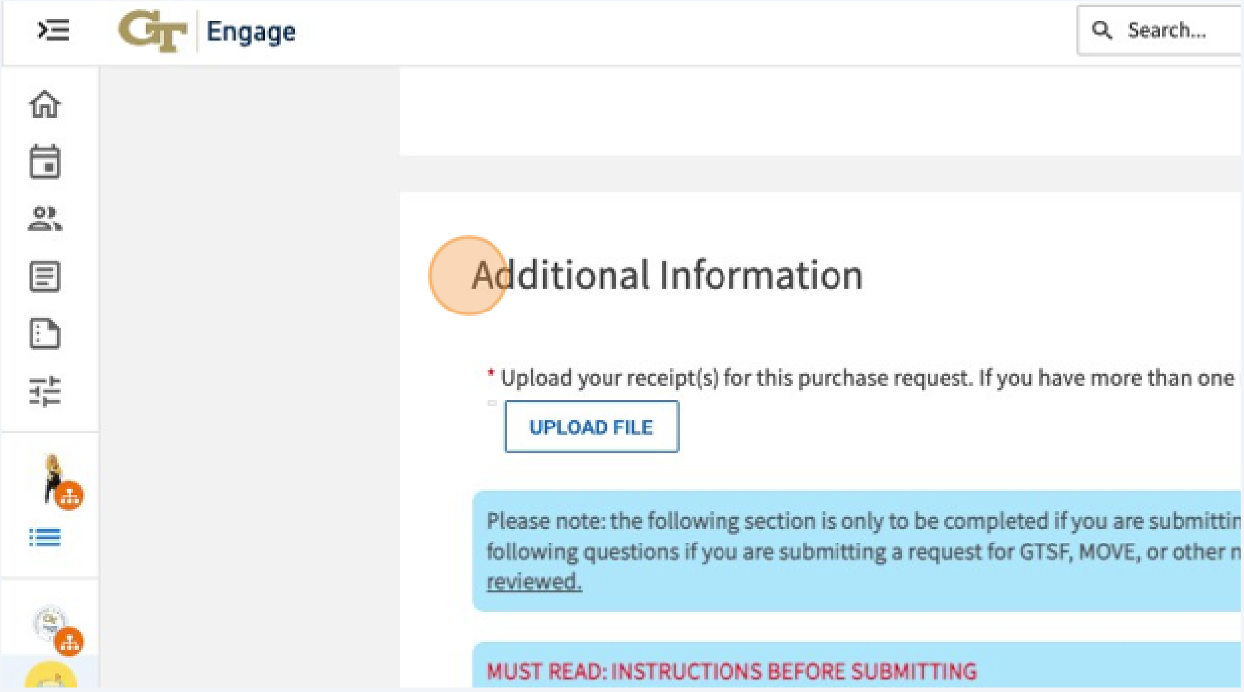
34 Once they begin the purchase request, they will be able to fill in any and all relevant details.



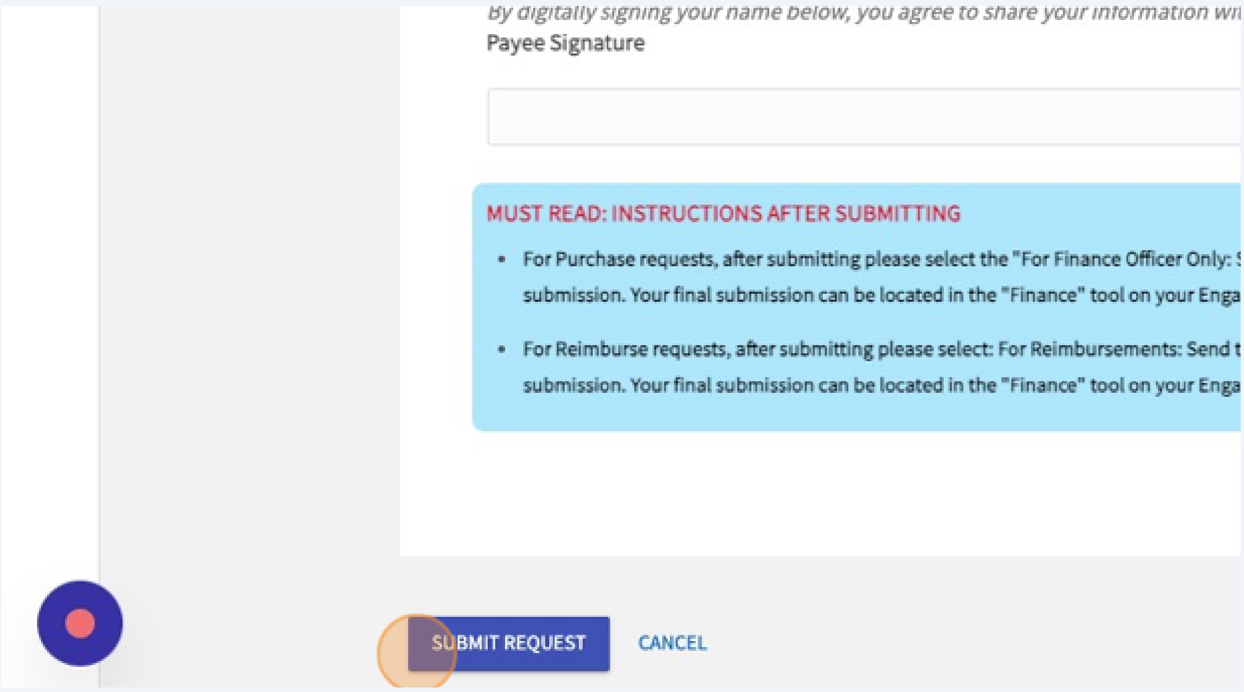
35 This includes payee information.



36 It also includes any required SOFO questions in the additional information section.



3 To submit a request, the RSO **Financial Officer** will hit the "submit request" button. Submitted requests will appear in the purchase section of the RSOs finance tool. After requests are submitted, the stage must be changed to notify the next person.



After submitting the request, the Financial Officer Should make sure to change the stage of the request from "Submitted" to "Send to SOFO Accountant". This task can aonly be completed by the person who has the Finacila Officer role of the RSO. Failure to change the stage will result in your reuest not being submitted to SOFO.