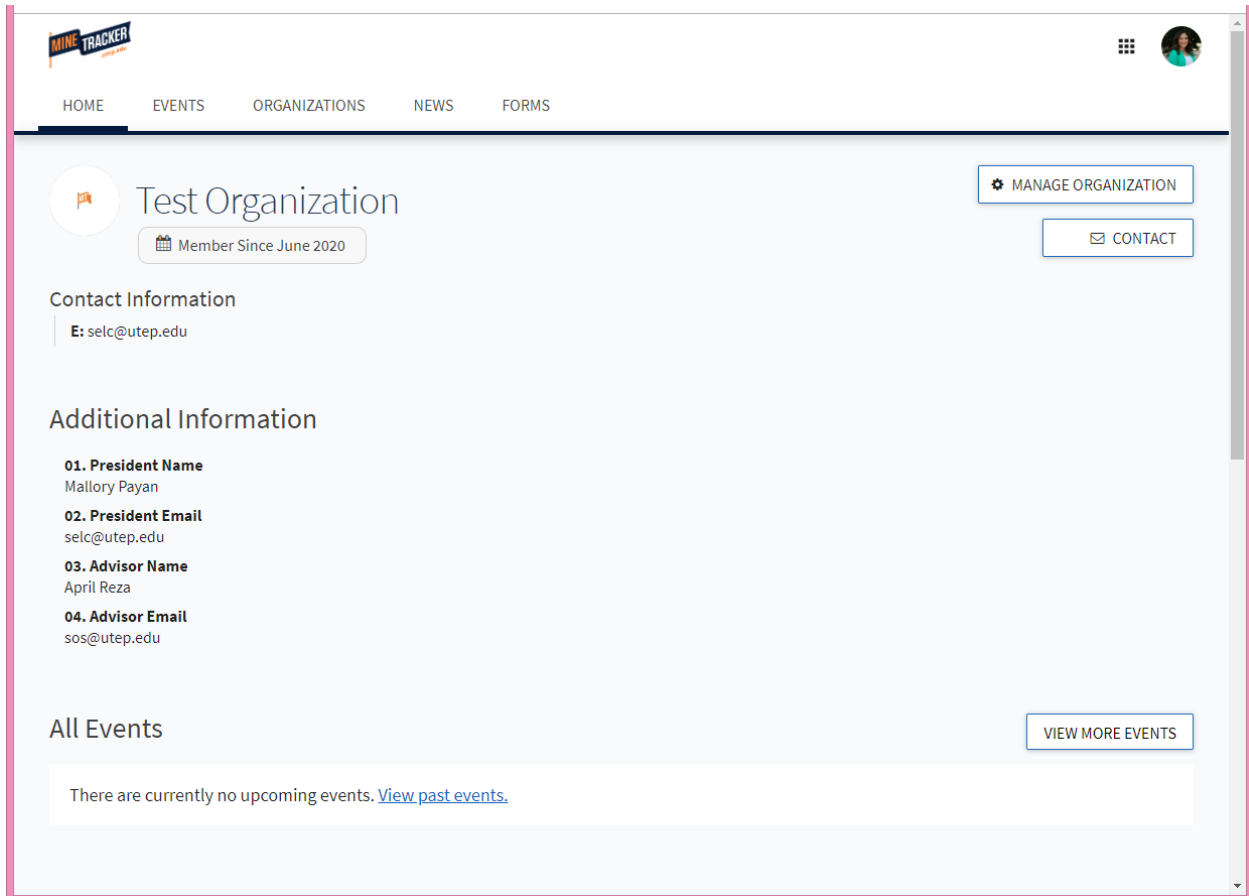


# Student Org Finances on MineTracker

## Resource Guide

Need additional help? Contact our team at [SOS@utep.edu](mailto:SOS@utep.edu)

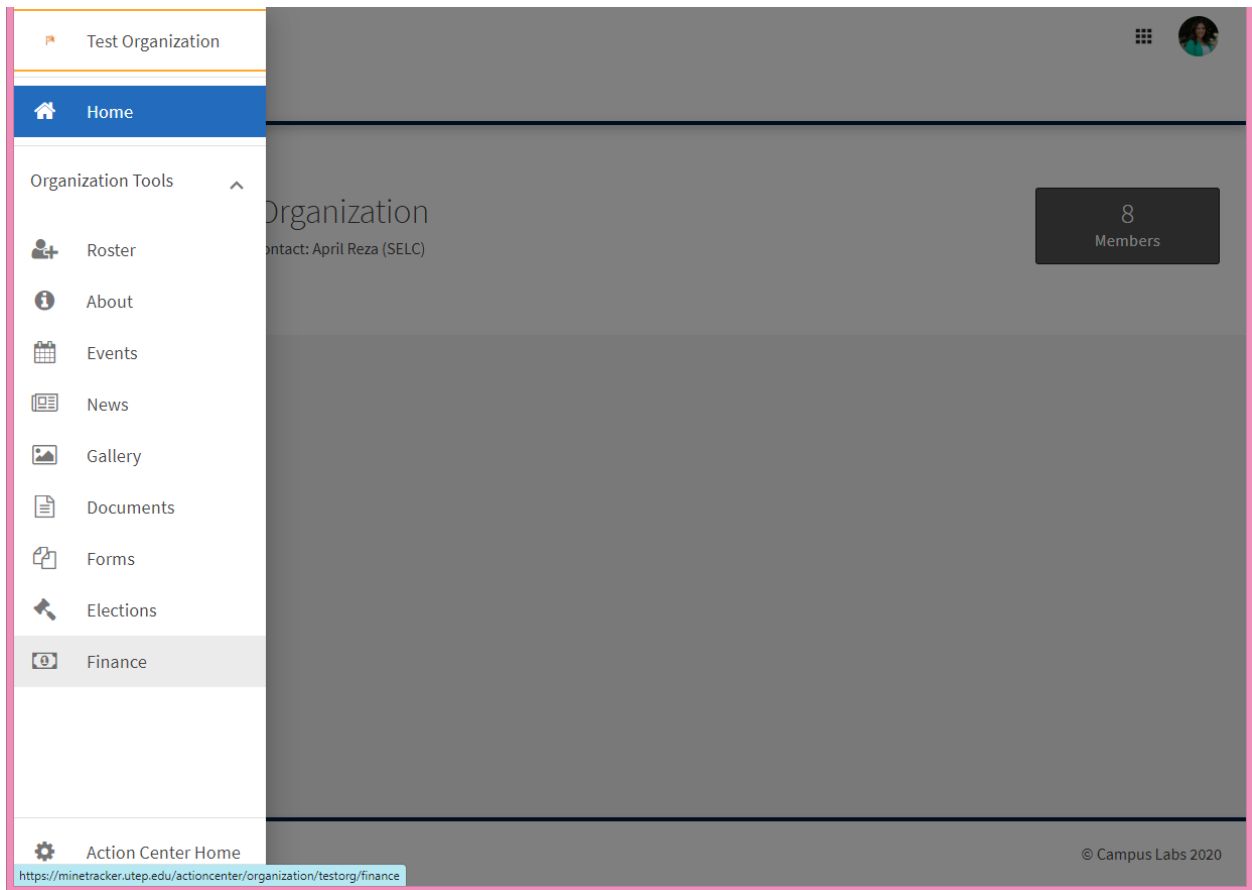


The screenshot displays the MineTracker website interface. At the top, there is a navigation menu with links for HOME, EVENTS, ORGANIZATIONS, NEWS, and FORMS. The main content area is titled 'Test Organization' and includes a profile picture, a 'Member Since June 2020' badge, and buttons for 'MANAGE ORGANIZATION' and 'CONTACT'. Below this, there is a 'Contact Information' section with the email 'E: selc@utep.edu'. An 'Additional Information' section lists four items: 01. President Name (Mallory Payan), 02. President Email (selc@utep.edu), 03. Advisor Name (April Reza), and 04. Advisor Email (sos@utep.edu). At the bottom, there is an 'All Events' section with a 'VIEW MORE EVENTS' button and a message stating 'There are currently no upcoming events. [View past events.](#)'

- Navigate to your organization page
- Click the “Manage Organization” button
  - a. *\*\*You will only see the Manage Organization button if you are listed as an officer on the roster.*

The screenshot displays the 'Test Organization' page in the MINE TRACKER application. At the top left, the 'MINE TRACKER' logo is visible. Below it, a navigation menu icon (three horizontal lines) is highlighted with an orange box, and the text 'Test Organization' is displayed next to it. In the top right corner, there is a grid icon and a user profile picture. The main header area contains a circular profile picture of a person, the text 'Test Organization', and 'Primary Contact: April Reza (SELC)'. To the right of this header is a dark grey button with the number '8' and the word 'Members' below it. The central part of the page is a large, empty grey rectangle. At the bottom, there is a footer with links for 'Privacy', 'Support', and 'Marketing Kit' on the left, and '© Campus Labs 2020' on the right.

- This the page you will see next
- Click in the top left 3 lines to open your organization’s “Action Center”



- On this menu in the “Action Center” you will see the various tabs you can use to manage your organization
- Click on “Finance” to open the Finance Tool

MINE TRACKER

Test Organization

Preview a new version of this page OFF

## Finance

Submit financial requests for organization funding or purchases made. Please note that these requests are not tied to actual monies and are for information only.

PURCHASE REQUESTS FUNDING REQUESTS ACCOUNTS

CREATE NEW REQUEST

Search

Subject	Approved Amount	Date Approved	Status	Stage	Action
There is no data available.					

Privacy Support Marketing Kit

© Campus Labs 2020

- This is an old version of this page.
- When you first access this tab make sure to turn on the “New View” to “ON” so that you can see the new look!

HOME EVENTS ORGANIZATIONS NEWS FORMS

Help us improve this page Preview new version of this page ON

# Finance Requests PREVIEW

ACCOUNTS CREATE REQUEST

Purchase Funding

Search purchase requests

Status All Statuses

Stage All Stages

Category All Categories

All: 0 result

Sort by Submitted Date

No Requests match the search or filter criteria.

Privacy Support Marketing Kit

© Campus Labs 2020

- When you turn “ON” the new version of this page it will look like this.
- This is where any pending requests (funding or payment) will be and you can check the status here on this page.
- Use the top right buttons to access the two main features of this tool
  - Use **ACCOUNTS** to access your account info, transactions, and more
- Use the blue **CREATE REQUEST** button to submit a monetary request
  - These include cash withdrawal, member reimbursements, and payments to vendors/businesses

**Finance** CREATE NEW REQUEST ▾

Submit financial requests for organization funding or purchases made. Please note that these requests are not tied to actual monies and are for information only.

PURCHASE REQUESTS   FUNDING REQUESTS   ACCOUNTS

Name	Description	Parent	Balance	Available
Old Account		Fraternity & Sorority Life	\$0.00	\$0.00
OLD Account - TEST		Fraternity & Sorority Life	\$0.00	\$0.00
Test Org Finance Account			\$10,000.00	\$10,000.00

Showing 1 - 3 of 3

Privacy Support Marketing Kit © Campus Labs 2020

- When you click on ACCOUNTS this is what you will see
- You can click your account name on the left side to open up more details about your account
- Most organizations only have 1 account
  - *There are a few exceptions where organizations have more than one account.*

**\*\*If your account number does not show up here, contact our team at [SOS@utep.edu](mailto:SOS@utep.edu) so we can fix it!**

[← BACK TO ACCOUNTS](#)

## Account Details

Test Org Finance Account

Description			
Parent Account			
Organization	<a href="#">Test Organization</a>		
External Account ID	11111111		
	<b>\$10,000.00</b>	<b>\$0.00</b>	<b>\$10,000.00</b>
	BALANCE	ENCUMBERED FUNDS	AVAILABLE FUNDS

[REQUESTS](#) [TRANSACTIONS](#)

Subject	Amount	Approved Amount	Date Approved	Status	Action
There is no data available.					

- This is the screen you will see with the details on your account
- This page shows any “purchase requests” that have been submitted within this cost center

[HOME](#)   [EVENTS](#)   [ORGANIZATIONS](#)   [NEWS](#)   [FORMS](#)

[← BACK TO ACCOUNTS](#)

## Account Details

Test Org Finance Account

Description  
 Parent Account  
 Organization [Test Organization](#)  
 External Account ID 11111111

**\$10,000.00**  
 BALANCE

**\$0.00**  
 ENCUMBERED FUNDS

**\$10,000.00**  
 AVAILABLE FUNDS

[REQUESTS](#)   [TRANSACTIONS](#)

Trans #	Type	Date	Amount	Available	Memo	Req #
000134	Deposit	8/10/2020 11:57 PM	\$10,000.00	\$10,000.00	Fake Deposit - For Testing	

Showing 1 - 1 of 1

[Privacy](#)   [Support](#)   [Marketing Kit](#)

© Campus Labs 2020

- This is the other screen you will see with the details on your RSO account
- This page shows any transactions within this cost center

# Creating A Purchase Request

For the time being, we will only be using the “Purchase Request” option to get money from your organization cost center.

Options with the ‘Funding Request’ will come at a later date!

The screenshot shows the MINE TRACKER website's Finance Requests section. The page has a navigation bar with links for HOME, EVENTS, ORGANIZATIONS, NEWS, and FORMS. A user profile icon is visible in the top right. Below the navigation, there are options to 'Help us improve this page' and 'Preview new version of this page' (which is turned ON). The main heading is 'Finance Requests PREVIEW'. On the left, there are tabs for 'Purchase' and 'Funding', with 'Purchase' selected. Below the tabs is a search bar labeled 'Search purchase requests' and three dropdown menus for 'Status' (All Statuses), 'Stage' (All Stages), and 'Category' (All Categories). On the right, there is a 'Sort by' dropdown and a 'Submit' button. A blue 'CREATE REQUEST' button is also present, which has a dropdown menu with options for 'Create Purchase Request' and 'Create Funding Request'. The main content area shows 'All : 0 result' and a large dashed box containing the text 'No Requests match the search or filter criteria.' The footer includes links for 'Privacy', 'Support', and 'Marketing Kit', and a copyright notice for '© Campus Labs 2020'.

- Click on the blue **CREATE REQUEST** button to submit a request for
  - **Cash Withdrawal** (getting money out of your account)
  - **Member Reimbursement** (refunding a member for something they bought/paid for)
  - **Vendor Payment** (paying a check to a business or a vendor for something you ordered/used)

## Create Purchase Request

### Request Details

\*Subject

Description

\*Requested Amount

\*Categories

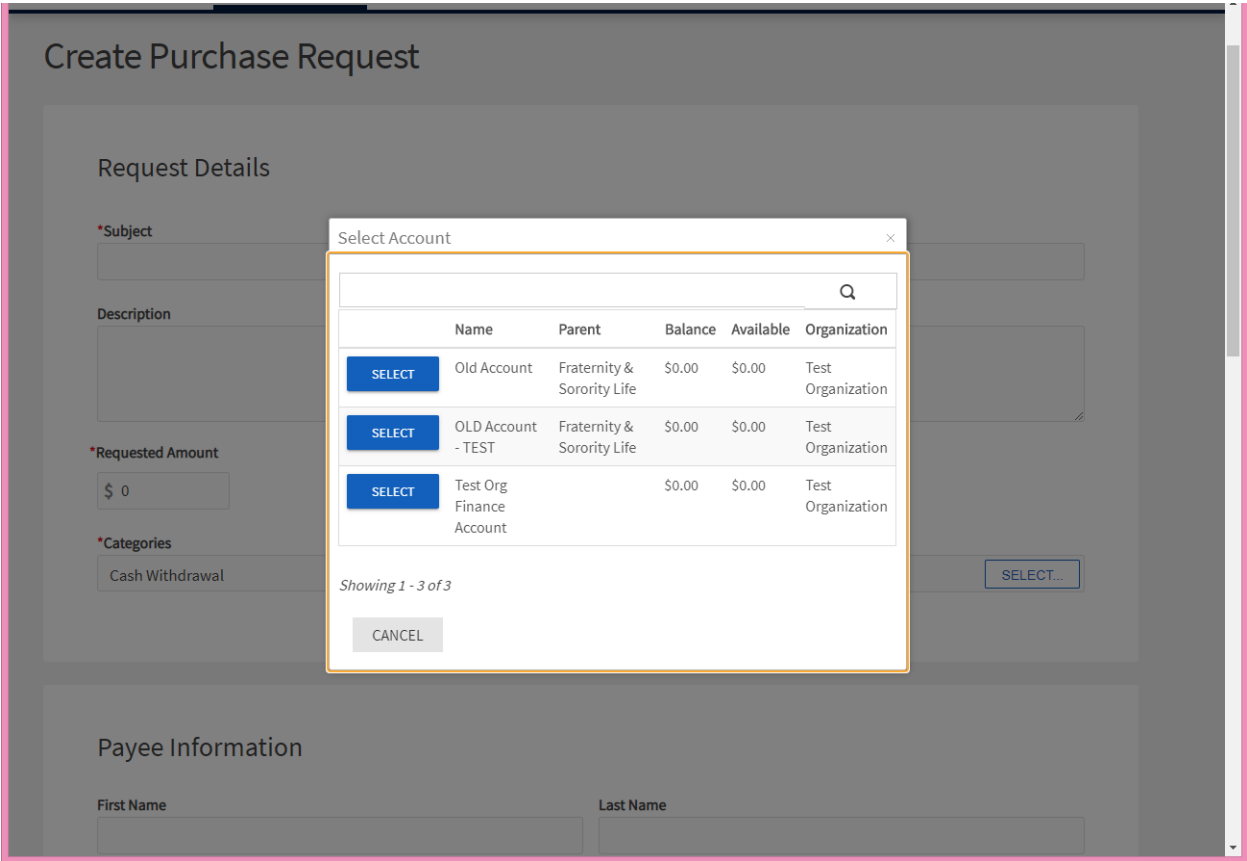
---- Select Category ----  
---- Select Category ----  
Admin - Zero Acct.  
Advancement Fund  
Cash Withdrawal  
Correction  
Deposit into Account  
Member Reimbursement  
Vendor Payment Request

\*Account

First Name

Last Name

- This is the first section of the form
- **Subject** – explain what this purchase is
- **Description** – be as descriptive as possible
- **Requested amount** –
- **Categories** –
  - **Cash Withdrawal:** use this to take money out of your organization cost center before an event or a purchase is made
    - *For the time being, all cash withdrawals will be processed in the form of a check written to a member of the organization*
  - **Member Reimbursement:** use this category to request a check to pay back any members for things they bought/paid for
  - **Vendor Payment Request:** use this to request a check to pay any vendor/business you have ordered from or owe money to
- **Account** – click select to select your RSO cost center
  - See next page



- This is what you will see when you click select on the Account option
- You will be able to select your organization's account

The screenshot shows a web form with the following sections:

- Requested Amount:** A text input field containing "\$ 0".
- Categories:** A dropdown menu currently showing "Cash Withdrawal".
- Account:** A text input field containing "Test Org Finance Account" and a "SELECT..." button.
- Payee Information:** A section with the following fields:
  - First Name
  - Last Name
  - Street
  - Street Continued (Optional)
  - City
  - State/Province
  - ZIP/Postal Code

- The next section is the Payee Information
  - Use this to complete the information for the person who will be receiving the check. When the check is processed it will be written to the person listed in this section.
- Examples of Payees:
  - **Cash Withdrawal:** use the information for the member who will be using the funds to purchase what is needed
    - ***For the time being, all cash withdrawals will be processed in the form of a check written to a member of the organization***
  - **Member Reimbursement:** use the information for the member who needs to be reimbursed
    - **Please note:** The member's UTEP student ID will be needed. Please include it below
  - **Vendor Payment Request:** use the information for the business, company or entity who needs to be paid by your organization

## Additional Information

\* In the space below, please provide a description of your request (purpose, event details, how funds were used, etc.):

\* Where was this purchase made or who is the vendor?

(Example: Hobby Lobby, Walmart, Zoom, Amazon)

In the space below, please include the Student ID of the member who is receiving the funds:

Please upload an invoice or receipt showing payment for your purchase or expense.

**\*\*NOTE: This is required for Member Reimbursements & Vendor Payment Requests.**

UPLOAD FILE

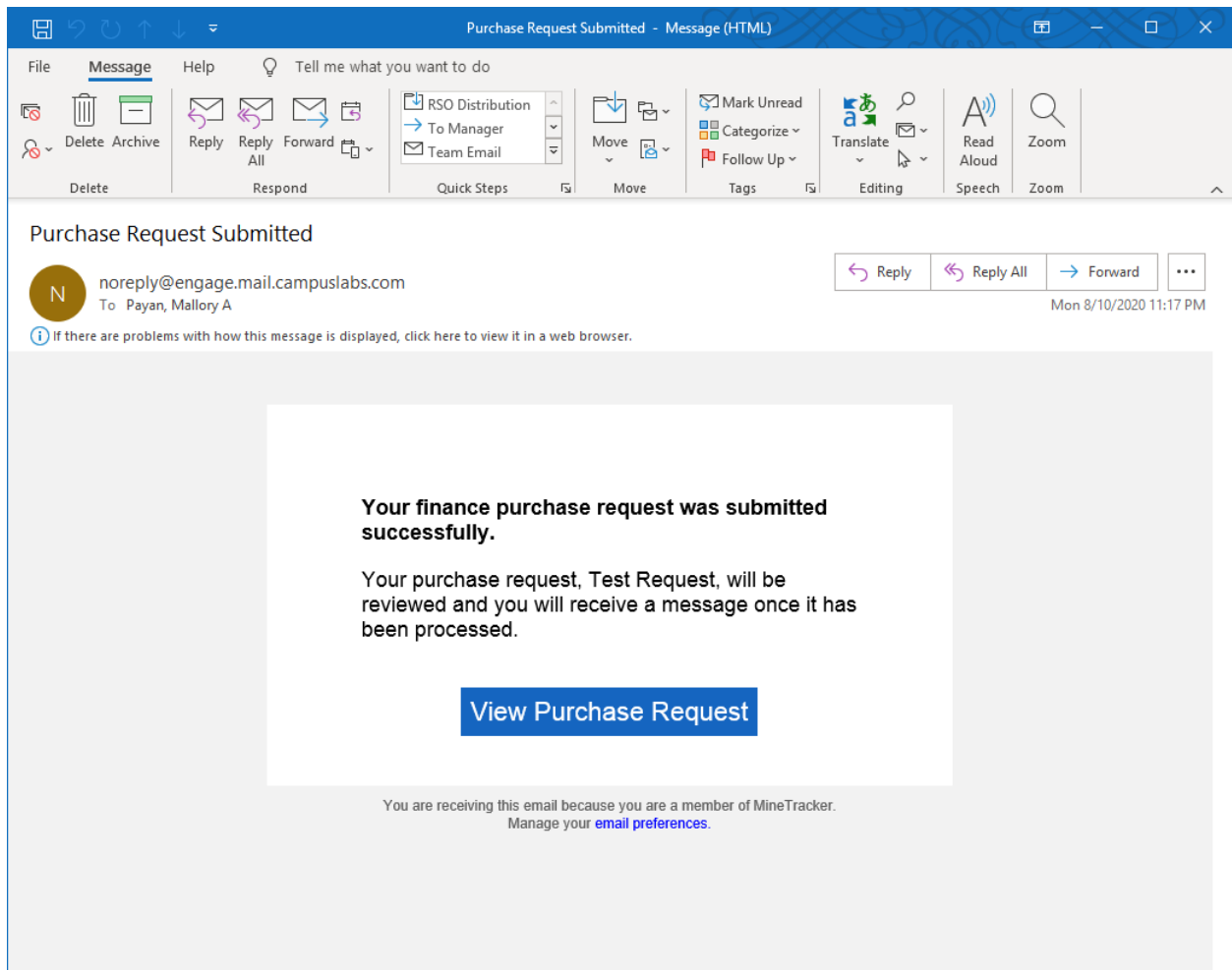
\* Required

I affirm that the funds requested were used only for the purposes outlined above. I understand that if additional funds were used for anything not listed above, I must contact the SELC immediately.

SUBMIT REQUEST

CANCEL

- This additional information is very important in order to help ensure the timely processing of the document.
- **Student ID:** this is important for Member Reimbursements and Cash Withdrawals.
- **File Upload:**
  - This is important for reimbursements and/or vendor payments
  - Reimbursements will require some sort of receipt
  - Vendor payments will require some sort of invoice or quote



- You will receive an e-mail confirmation like the one above once you have submitted your request.

The screenshot displays the 'Finance Requests' interface. At the top, there is a navigation bar with 'HOME', 'EVENTS', 'ORGANIZATIONS', 'NEWS', and 'FORMS'. A user profile icon is visible in the top right. Below the navigation bar, there are links for 'Help us improve this page' and 'Preview new version of this page' (ON). The main heading is 'Finance Requests' with a 'PREVIEW' label. On the right, there are buttons for 'ACCOUNTS' and 'CREATE REQUEST'. The interface is divided into two tabs: 'Purchase' (selected) and 'Funding'. A search bar is present with the text 'Search purchase requests'. Below the search bar are filters for 'Status' (All Statuses), 'Stage' (All Stages), and 'Category' (All Categories). A 'Sort by' dropdown is set to 'Submitted Date'. The results section shows 'All: 1 result'. The single result is a 'Test Request' for 'Mallory Payan (SELC)' with 'No. 14', 'Submitted Aug 10, 2020', 'Status: Unapproved', and 'Stage: RSO President Approval'. The amount is '\$100.00'. Below the result, there is a green checkmark icon and the text 'All Results Loaded'. At the bottom, there are links for 'Privacy', 'Support', and 'Marketing Kit', and a copyright notice '© Campus Labs 2020'.

- The RSO president and advisor will need to review the request in order to have it processed. You will see any pending requests on this page within your organizations action center. As long as your advisor is updated on your roster they will also be able to see this page.
- To get here click on:
  - Your organization > Manage Organization > Top left corner lines (to open menu) > Finance

The screenshot shows a web browser window with multiple tabs. The active tab is 'mineTracker.utep.edu/actionCenter/organization/testorg/finance/purchaseRequest/937670'. The page features a navigation bar with 'HOME', 'EVENTS', 'ORGANIZATIONS', 'NEWS', and 'FORMS'. Below the navigation, there is a 'Purchase Request: 000014' section with a 'CHANGE STAGE' button. The 'Organization' section lists details such as 'Test Organization', 'Mallory Payan (SELC)', and 'Cash Withdrawal'. The 'Payee Information' section lists 'Mallory Payan' and a test address. The 'Additional Information' section has a text area with the word 'Test' entered.

- This is where you will move the request to the next reviewer.
- Click “Change Stage” to move it up to the next person who needs to review:
  - Stage 1: RSO President
  - Stage 2: Advisor
  - Stage 3: SELC Staff
  - Stage 4: VPBA Staff
    - *(the SELC team will forward the request to the appropriate people to review and process your request)*

**Need additional help? Contact our team at [SOS@utep.edu](mailto:SOS@utep.edu)**