Student Financial Advising (SFA) presents:

CREATING AN FTF
(Financial Transaction Form)
What is an FTF?

- For detailed information on the “FTF” (Financial Transaction Form) and the FTF process, please see Club Finance 411
  - Found at: http://www.studentaffairs.columbia.edu/comdev/resources/clubfinancetraining
Creating an FTF

- To access LionLink go to: https://lionlink.columbia.edu/; click on “Log In”
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- Click on Organizations
- Type your group’s name into the Search box
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- Click on the link for your group
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- Create an FTF by clicking on “Finance” from the menu
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- Click on “Create Purchase Request”
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Complete **ALL** information requested in the FTF

- If fields are left blank your request won’t submit
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Input your event name or information about the purchase if it isn’t associated with an event in the “Subject” field.
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Indicate the total amount requested for the purchase
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Include a brief overview about the program/event or the purchase

[Image of a screenshot showing a form titled 'Create Purchase Request' with fields for Subject, Requested Amount, Description, Account, and Categories]
Creating an FTF

Click the “Select” button under “Account”
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The account for your group will appear
Click the “Select” button in the dialog box to choose the Account
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Click the dropdown arrow under “Categories” then click on the appropriate purchase type from the menu.
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DO NOT COMPLETE THIS PAYEE INFORMATION SECTION (this is a standard delivered section that we could not customize to remove)
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Instead, complete the “Payee Information” under “Additional Information”
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Click on the dropdown arrow from the “Payee/Vendor Name” list
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For direct purchases from the list of vendors who accept an FTF you will always select the vendor from the dropdown list.
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For purchase orders the vendor may also be on the vendor list (Promotional items must now be purchased via purchase order from the vendor list – see “Promotional Items” in the dropdown list)
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For internal purchases the vendor may also be in the vendor list
See “Internal Vendor” in the dropdown list
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For other purchase types where the vendor doesn’t appear in the vendor list, select “Other” from the bottom of the list.
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If the vendor was in the dropdown list, you do not need to complete the section below indicating contact information for vendor. (All fields are blank below because we chose a vendor from the list.)
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If “Other” was selected from the vendor list you must complete the appropriate section below; complete only 1 section.
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From the “Department #/Governing Board” section, select the option under which your group falls.
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From the “Where is money being spent from” section, you must now select the appropriate response (allocation vs. revenue or both)
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You must also now fill in the appropriate dollar amount coming from allocation and/or revenue.
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Enter event name, date/time and location (or “N/A” if the purchase is not associated with an event)
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Under “Business Purpose” select the appropriate response and type N/A in the box. If you select “Other” as the business purpose you must write the details as requested in the box. Be specific; Accounts Payable will ask!
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From the “Items to Purchase” section, select the appropriate response
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If you chose “Other” under “Items to Purchase” you will again need to indicate more information
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If 10 or fewer are estimated to attend and you are purchasing food/food supplies you must list attendees by name; if more than 10 then indicate the number.

OR

More than 10 attendees (indicate the estimated number of attendees below)

PAYER INFORMATION (This is the individual/group making the purchase)

Contact’s Name (required)
Sarah Nguyen

Contact’s Telephone #: (XXX-XXX-XXXX) (required)
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Enter your contact information in the “Payer Information” section; name, telephone, email; if you are an ABC group also indicate your EAF #
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Select your group’s advisor from the dropdown list
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The “Billing Contact Information” section is provided for the vendor.
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Check the box to acknowledge the terms of use

TERMS OF USE

Please check this box before submitting your request to acknowledge the following statement:

This form is being used to conduct legitimate business on behalf of a student organization or administrative group. If found otherwise, I, the submitter, will be held personally accountable. This purchase is in line with my organization's mission and goals. (required)
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Click the “Submit Request” button
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WHAT HAPPENS NOW?

• If a field is missing the form will not submit. Scroll through the form and find the red highlighted box and complete the missing data
• If the form is completely filled out you will be returned to the “Finance” page and see your pending FTF
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The purchase request has been created and is awaiting approval.

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

End of Semester Board Meeting

Showing 1 - 1 of 1
Creating an FTF

Note that your request stage is “Submitted/Awaiting Approval”
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WHO WILL APPROVE MY REQUEST?

• The advisor of your group can access and approve your FTF’s
• Your advisor will regularly review pending FTF’s received for his/her areas
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WHAT HAPPENS WHEN MY REQUEST IS APPROVED?

• You’ll receive an email notification
• Use the hyperlink in the email to access your approved FTF
  – Print two copies of the form
    • Copy for the vendor
    • Copy to submit with the purchase receipts
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Email notification; click on hyperlink to go to approved FTF:

Your purchase request was approved by Sallee Spearman. see the changes here.
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Purchase Request: 010485

Organization: Student Engagement Financial Advising
Contact: Sallee Spearman
Subject: End of Semester Board Meeting
Account: Undergraduate Student Life
Category: Direct Purchase from Vendor / Vendor List
Description: Working lunch for last mtg of semester
Requested Amount: $50.00
Status: Approved

Payee Information
Approved Amount: $50.00
WHAT IF I ACCIDENTALLY DELETE THE EMAIL?

- Navigate back to “Organizations” again and search for your group’s page
- Select “Finance” from the left-side menu
- Find your approved FTF
- Select the print icon
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The Search box can be used to search for your specific FTF. You can also search by date and amount.
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WHAT ELSE DO I NEED TO KNOW?

• FTF’s may only be used once!
• They each include a unique request number to prevent multiple use
• Requests should still be submitted in a timely manner
• Submit a request for **ALL** purchases
• Please refer to Club Finance for FTF execution procedures
Student Financial Advising
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