Section 1: How to Access the Finance Module

1. Go to your organization’s home page and select Manage Organization in the right corner.
   a. Note: You must be in an officer role to manage your organization. This can be either “All Access” or “Limited Access” with View/Full access to the Finance module. For more information on managing positions, see the “Change Administrative Access for Existing Positions” section one of this guide (in Rosters).
2. **Click the toolbar on the left, then select Finance.**

3. **Click Accounts.**

4. **Click the account you want to access.** There will most likely be only one account listed, and it will be titled your organization name.
You should now be at a screen that looks similar to the following:

**Note: The “External Account ID” is your Anchor Link Organization ID AND your Task Number in Oracle.**

5. You can view your organizations “Requests” and “Transactions”. Click on Transactions (there will be nothing listed under requests). Here, you will see the following information:

- Trans # – This is a unique number assigned to the transaction within Anchor Link
- Type
  - Payment – money that your organized used to pay for a product or service
  - Deposit – money that has been added to your account
  - Allocation – money that has been
- Date – date the transaction was imported into Anchor Link
- Amount – dollar value of transaction (payments will be in parentheses)
- Available – dollar value available at that transaction date (parentheses indicates a negative value)
- Memo – who was paid/who deposited funds
Additional Transaction Details

1. To view additional details about a transaction, click on the blue transaction number.

- **Trans #** – This is a unique number assigned to the transaction within Anchor Link
- **Amount** – dollar value of transaction (payments will be in parentheses)
- **Originating Acct** – not utilized at this time
- **Date** – date the transaction was imported into Anchor Link
- **Transaction** – type of transaction
- **Type** – budget type assigned to the transaction by Vanderbilt
- **Category** – budget category assigned to the transaction by Vanderbilt
- **Memo** – who was paid/who deposited funds
- **Payee/Source** – date of the transaction