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 – short description of the transaction
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 – Date of Transaction
- Memo – short description of the transaction
- Payee/Source – Name of the Organization