

Introduce yourself in the chat!
What is your institution and
where in the world are you?

*I'm in Philly, but originally from
Birmingham, AL!*

Finance

- Understand finance and its use on the platform.
- Define key terms used in the platform
- Demonstrate the flow from allocation, to expenditure, to reconciliation

*This webinar is suited to those who want
to learn about the flow and use of
Finance on the platform.*

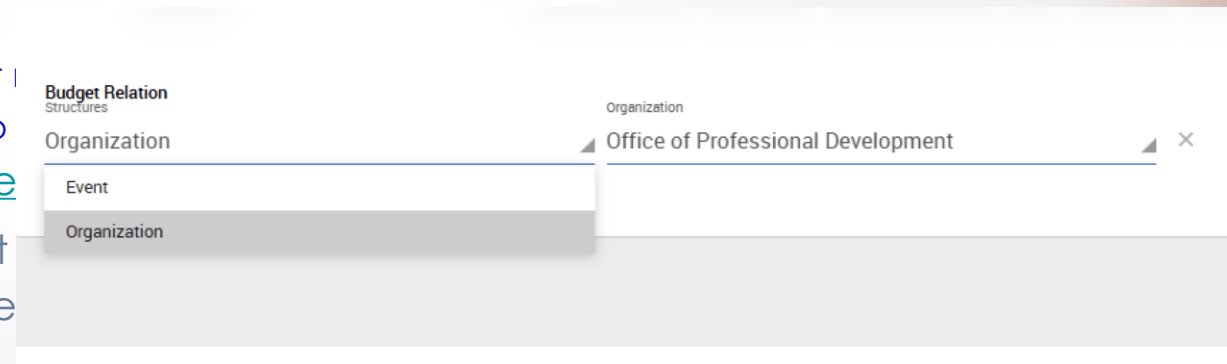
Agenda

1. Intro
2. Finance FAQs
3. Finance Flow
4. Demo
5. Q&A
6. Close



Finance Updates

1. [Finance Tools: Overview](#)
 - a. [Start a new budget cycle](#)
 - i. [Resetting Budgets for a New Budget Cycle](#)
 - ii. [Why can't I clear my budget?](#)
 1. Expenditures that have been approved but i
 - i. Click the approval status on the request tab
 - b. [How can I let budgets have a negative balance](#)
2. You can delete budgets! (make a quick page about a)
 - a. All (Inactive) are at the top, you can delete if ne
 - i. This is PERMANANT
3. Autosorted method, budgets are now in alphabetical order! Yay!
4. [How do I give someone access to a specific budget?](#)
5. Make sure I have something about connecting to an org (budget relation field)
 - a. <https://modernliz.presence.io/admin/Budget/update/jncj4x>
6. Allocation is an OPTIONAL step – if you don't see it, don't worry about it
7. User Permissions – Finance Admin, you can grant this access to other users!



What's new in Finance?

What's new in Finance?

Tools Tab

Clear Your
Budget

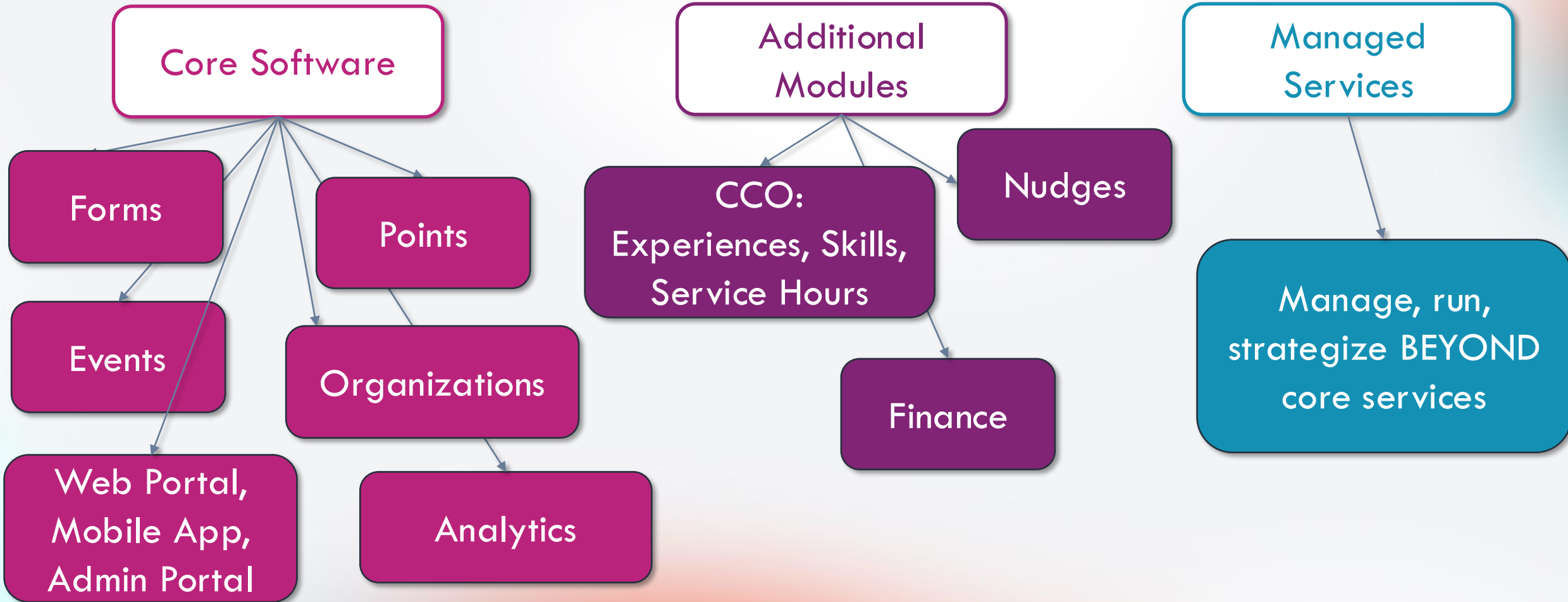
Allow a
Negative
Balance

Delete a
Budget

Budgets in
Alphabetical
Order

Intro to Finance

Modern Campus Involve



Involve Finance

CREATE ▾

Finance

BUDGET
TRANSACTIONS
REQUESTS

\$60,349.18
Available
\$950.82
Spent

AVAILABLE ▾
ALLOCATED ▾

Budget	Available	Allocated	Account
+ Student Organizations	\$11,300.00	\$11,300.00	1111
- CU Office of Campus Life ↗	\$49,049.18	\$50,000.00	2222
- Orientation	\$567.18	\$1,500.00	
Orientation - Food	\$0.00	\$0.00	
Orientation - Entertainment	\$0.00	\$0.00	
Campus Wide Events	\$1,000.00	\$1,000.00	

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Why use Finance?

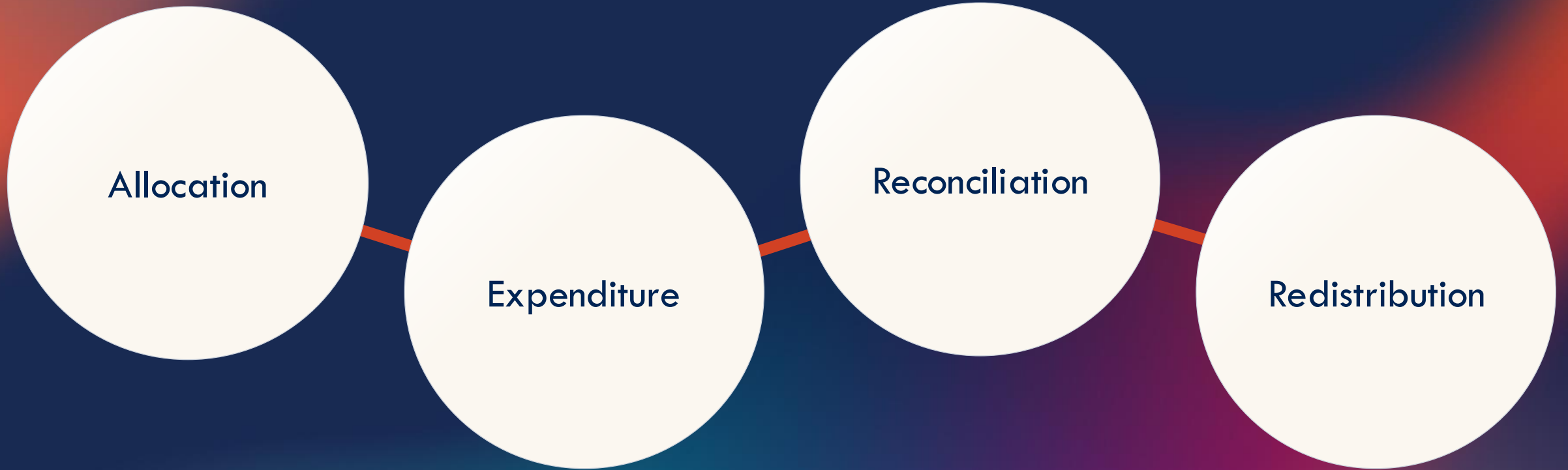
- Student org leaders can track and see their money
- Know how students are spending money
- Pair with event data to evaluate spending
- Eliminate any remaining paper processes

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The screenshot displays the 'Finance' dashboard with a teal header and a green data area. A 'CREATE' dropdown menu is open on the right, listing options: Budget, Allocation, Deposit, Transfer, Expenditure, and Reconciliation. The main data area shows a summary of financial metrics:

\$3,015.99 Request To Allocate	\$6,519,768.29 Available	\$1,976.00 Request To Spend	\$21,334.00 Approved To Spend	\$10.00 Request To Reconcile	\$5,025,639.99 Spent
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Finance Flow



Allocation

We'd like some money for our puzzle club. Can you put some in our budget?

Expenditure

We have a **PLAN** to spend our money on new puzzles. Does this estimate look okay?

Reconciliation

We bought the new puzzles! Here are the receipts for the exact amount we spent!

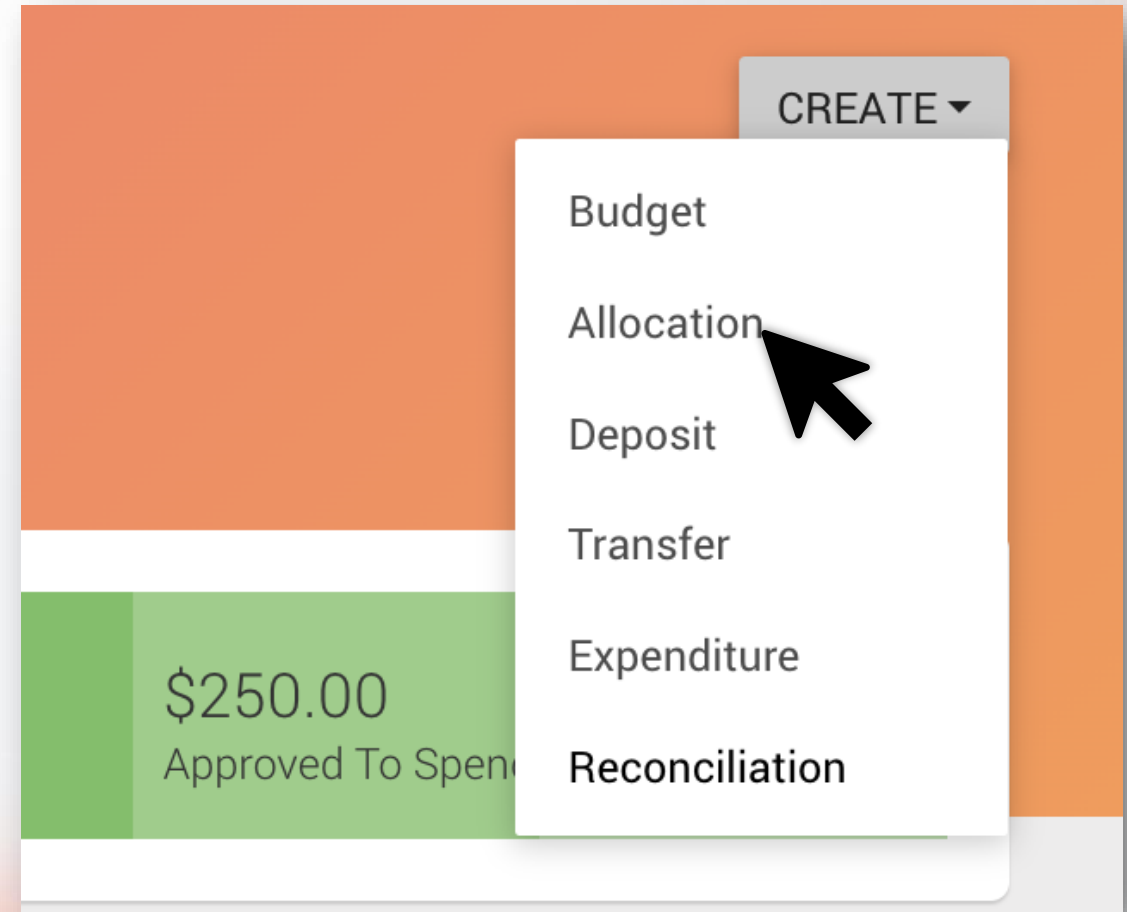
Redistribution

Left over money goes back to the puzzle club budget.

Allocation

I want some money for my organization please!

- Create an Allocation request
- Indicate...
 - What the money is for
 - Where it's coming from
 - How much you need



Create Allocation

SUBMIT FOR APPROVAL

Details

Title *

Puzzler Budget 2025

Description

Requests

ADD

Title *

Puzzler Budget 2025

Memo *

Puzzler Budget 2025

Budget *

Amount * ⚠

<input type="checkbox"/> Student Organization	\$11,200.00	\$11,300.00	1111
Francais s'il vous plait?	\$540.00	\$640.00	
Dog Walkers of CU	\$0.00	\$0.00	
The Creme de Bananas	\$840.00	\$840.00	

Select your club budget! Where do you want the money to go?

Create Allocation

SUBMIT FOR APPROVAL

Details

Title *

Puzzler Budget 2025

Description

Requests

ADD

Title *

Puzzler Budget 2025

Memo *

Puzzler Budget 2025

Budget *

Puzzlers

Amount * ▲

\$1,000.00

Allocation Attachment

Upload File



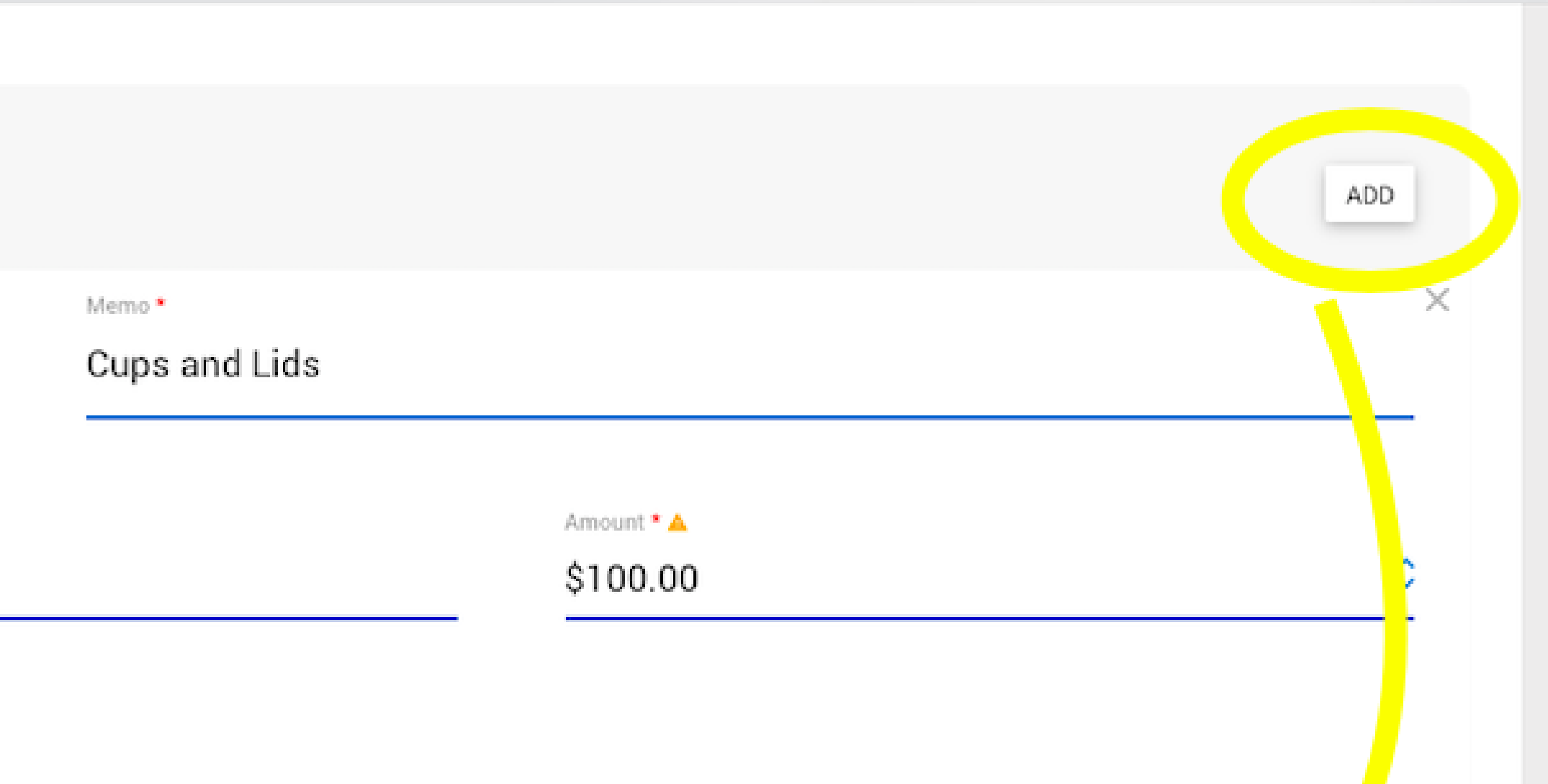
Allocation Total ▲

\$1,000.00



How much money do you want in the pot?

You can make multiple requests at once!




A screenshot of a web form for creating a request. At the top right, there is a grey button labeled "ADD" which is circled in yellow. Below the button is a form with a "Memo" field containing the text "Cups and Lids" and an "Amount" field containing "\$100.00". A yellow arrow points from the "ADD" button down towards the form fields. The form has a light grey header bar and blue horizontal lines separating the fields.

ADD

Memo ▾

Cups and Lids

Amount ▾ 

\$100.00

Final Approver!

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Create Allocation SUBMIT FOR APPROVAL

Approval Prompt Response

Choose Budget(s) to Debit
Select budget(s) to fulfill the request(s).

Budget	Amount	Debit Budget
Student Organizations >> Puzzlers	\$1,000.00	

Debit Budget dropdown options:

- Student Organizations \$11,200.00 \$11,300.00 1111

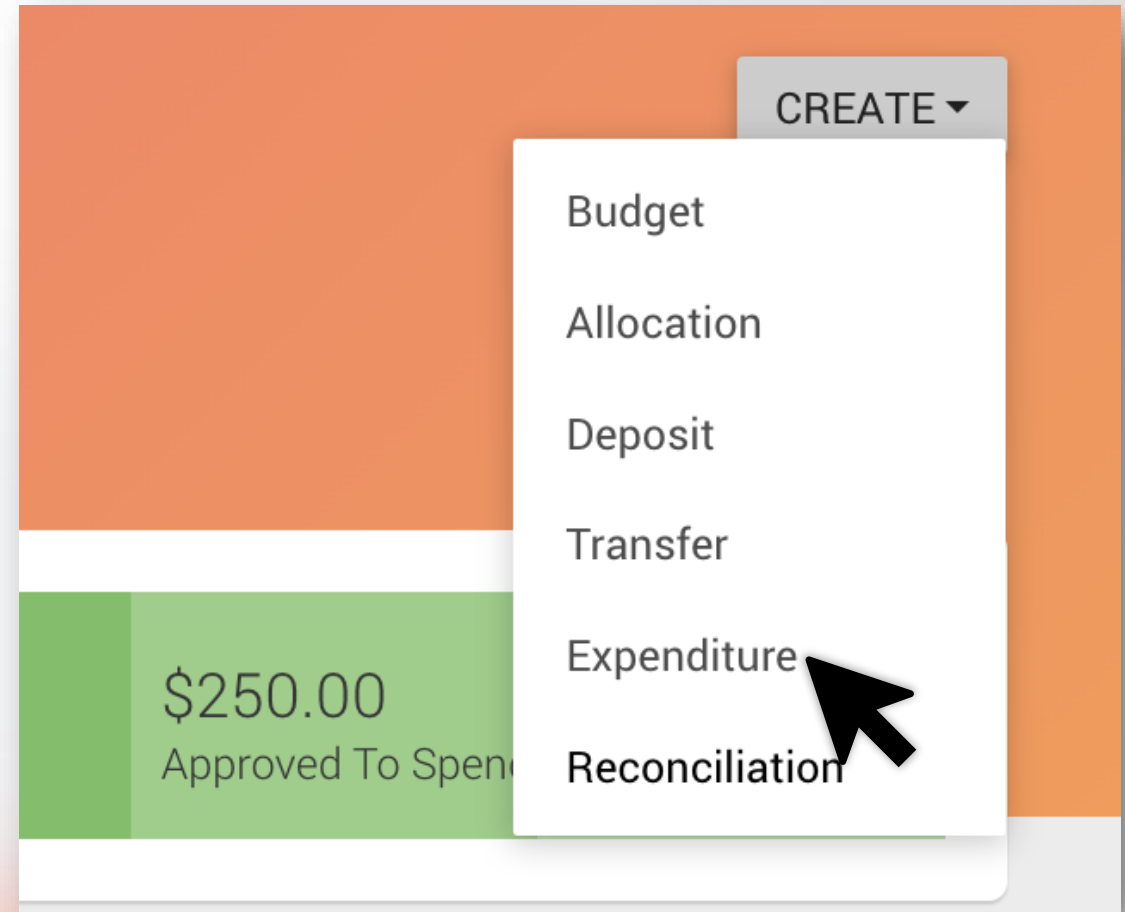
CLOSE **APPROVE**

Make sure to select the debit account before approving!

Expenditure

I'm ready to spend the money now!

- Create an Expenditure request
- Indicate...
 - What the money is for
 - Where it's coming from
 - How much you need



Expenditure Requests Notes

- You **CANNOT** indicate more money that is **ALREADY** in the budget!
 - Need more?
 - Make another Allocation request!
- Once this money is approved it is **LOCKED** and cannot be used for other expenses.

Budget *
Budget

Francais s'il vous plait?

Amount Available ⚠

\$640.00



Create Expenditure

SUBMIT FOR APPROVAL

Details

Title *

New Puzzles

Description

Expenditure Items

ADD

Title *

Puzzles

Memo *

10 New Puzzles

Budget *

Budget

Expenditure Attachment

Upload File



Amount *

Amount ▲

Itemized View

Vendor

Name

Description

Address

City

State

Contact

Email

Phone

Student Organizations	\$11,200.00	\$11,300.00
Francais s'il vous plait?	\$540.00	\$640.00
Dog Walkers of CU	\$0.00	\$0.00
The Creme de Bananas	\$840.00	\$840.00
Friends of Dorothy	\$0.00	

Help

Where is the money coming from?

You will have any money that you have already requested to allocate!

Details

Title *

New Puzzles

Memo *

10 New Puzzles

Expenditure Attachment

Upload File



Amount *

Amount

Itemized View

Vendor

Name

Description

Address

City

State

Contact

Email

Phone

CU Methodists	\$0.00	\$0.00
(Inactive) Roller Derby	\$0.00	\$0.00
Puzzlers	\$1,000.00	\$1,000.00
Francais s'il vous plait?	\$0.00	\$0.00
CU Office of Health and Wellness	\$0.00	\$0.00



Create Expenditure

SUBMIT FOR APPROVAL

- Preview Response
- Save as Draft
- Submit Without Approval

Details

Title *

New Puzzles

Description

Expenditure Items

ADD

Title *

New Puzzles

Memo *

10 New Puzzles

Budget *

Budget

Puzzlers

Amount Available ▲

\$1000.00

Expenditure Attachment

Upload File



Amount *

Amount ▲

\$150.00

Itemized View

Vendor

Name

Description

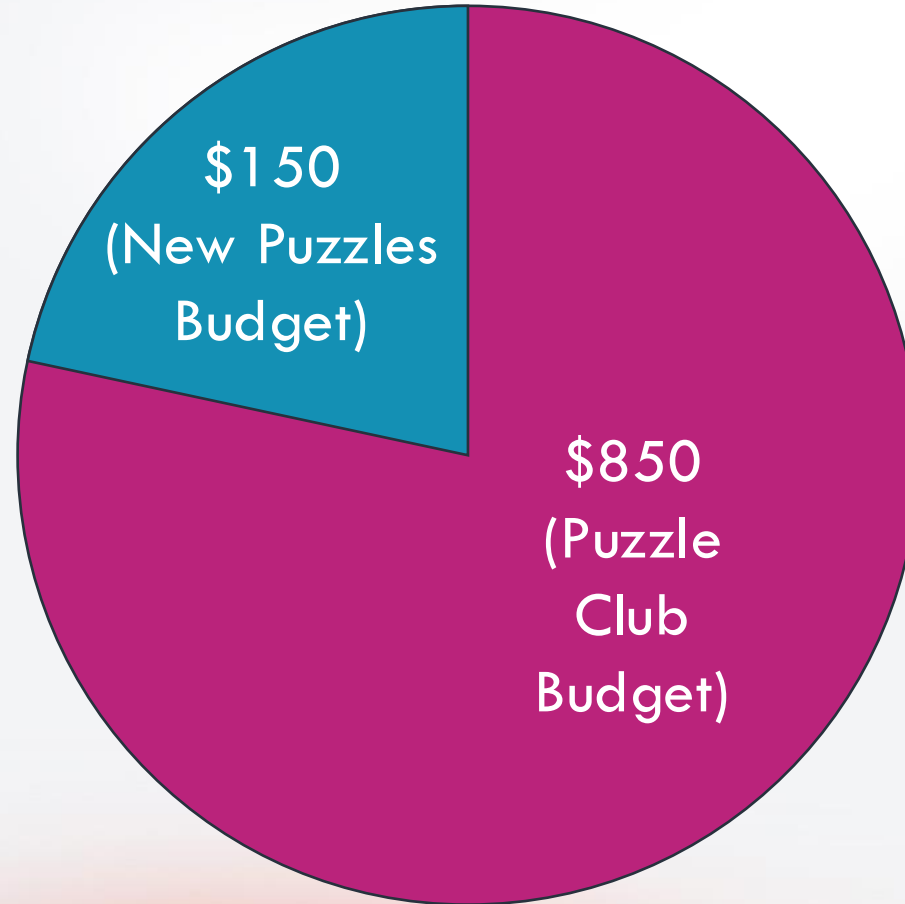
Submit!

Puzzler Club Budget



Puzzler Club
Budget,
\$1,000

After Expenditure Approval



After Expenditure Reconciled



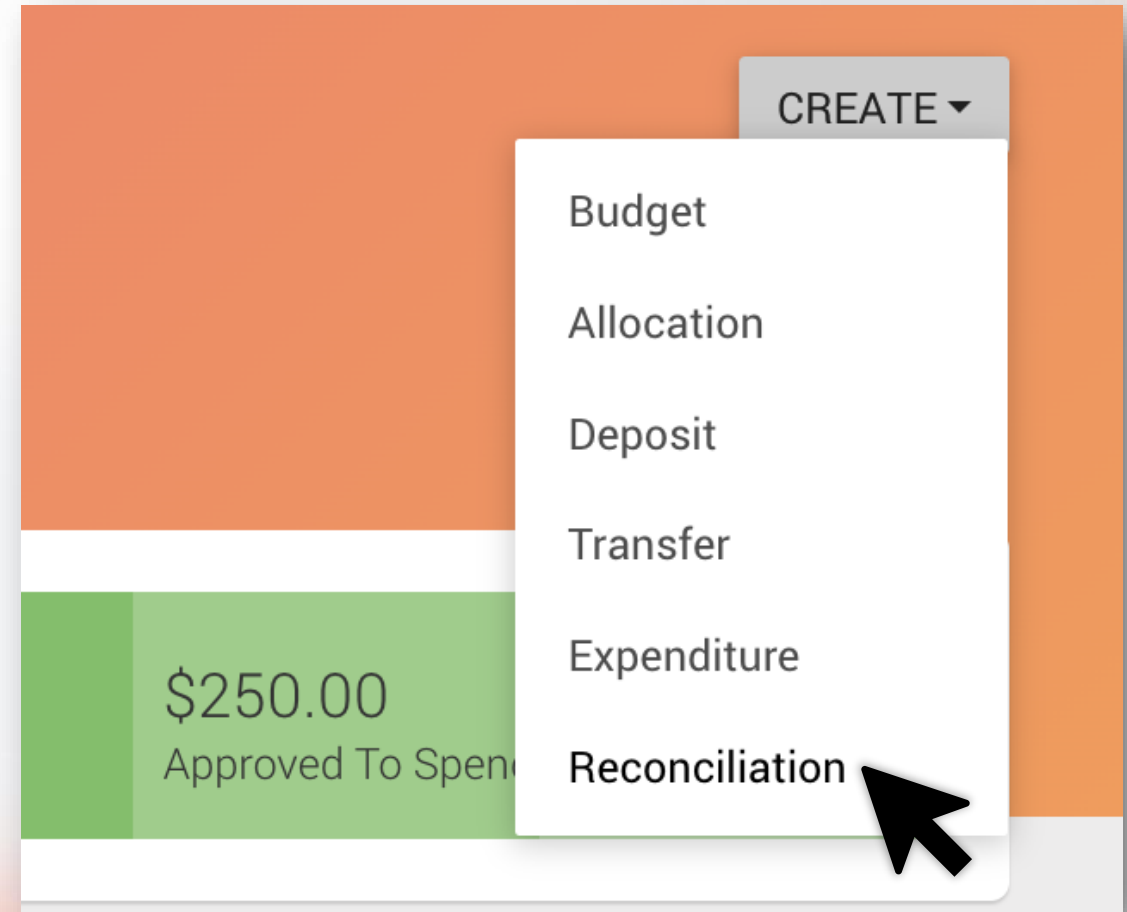
Puzzler Club
Budget
\$850

Reconciliation

Reconciliation

- Create a Reconciliation request
- Indicate...
 - The EXACT amount spent
 - What was purchased
 - Receipts etc.

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Create Reconciliation

Details

Title *

Notes

Anything else?

ADD

Reconciliation Items

Approved Expenditures *

Actual Amount Spent *

Budget

Memo *

Reconciliation Attachment

Upload File

What did you buy?

How much?

Which approved expenditure?

30

Create Reconciliation

SUBMIT FOR APPROVAL

Details

Title *

New Puzzlers

Notes

Reconciliation Items

Approved Expenditures *
Budget

Actual Amount Spent * ▲

\$0.00

Puzzlers

Expenditures

Francais s'il vous plait?	\$540.00	\$640.00
Puzzlers	\$850.00	\$1,000.00

Reconciliation Attachment

Upload File

ADD

Select your club budget! Where did you spend the money for?



Create Reconciliation

SUBMIT FOR APPROVAL

Details

Title *

New Puzzles

Notes

Reconciliation Items

Approved Expenditures *
Budget

Puzzlers

Expenditures

New Puzzles

Actual Amount Spent * ▲

\$0.00

ADD

Memo *

Reconciliation Attachment

Upload File



You will ONLY be able to select from approved expenditures!

Create Reconciliation

SUBMIT FOR APPROVAL

Details

Title *

New Puzzles

Notes

Reconciliation Items

Approved Expenditures *

Budget

Expenditures

Amount ▲

Actual Amount Spent * ▲

\$140.00

Puzzlers

New Puzzles

\$150.00

Memo *

Reconciliation Attachment

Upload File

How much did you ACTUALLY spend?

After Reconciliation Approval



\$860
(Chess Club
Budget)

Finance Platform Demo

Demo – we use a two step process

- Create an expenditure
- Create a reconciliation
- Create another expenditure

What's new in Finance?

Tools Tab

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Finance

BUDGET TRANSACTIONS REQUESTS TOOLS

Start New Budget Cycle

Starting a new budget cycle will reset all budgets and all sub-budgets.

RESET & START CYCLE

Allow Negative Balances

When enabled, budgets will be able to have a negative balance prior to new allocations being approved.

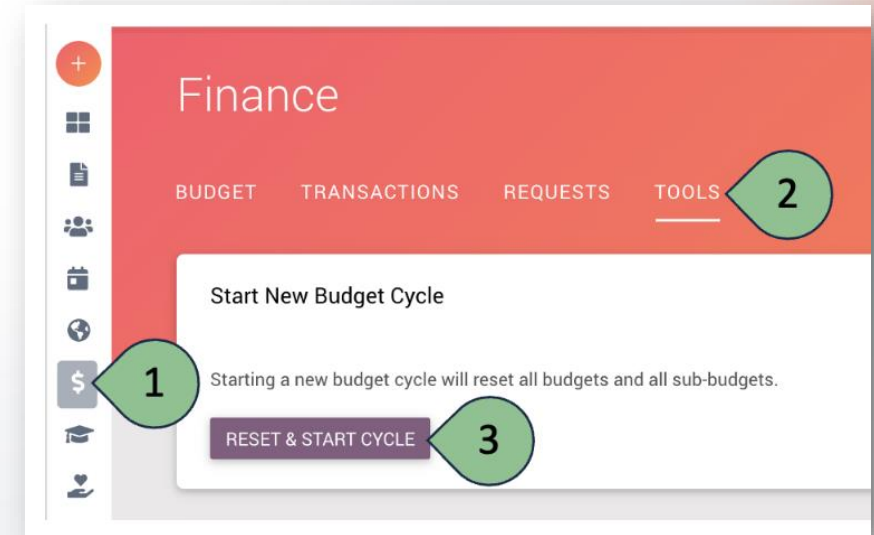
UPDATE

Help

Reset Budget to \$0

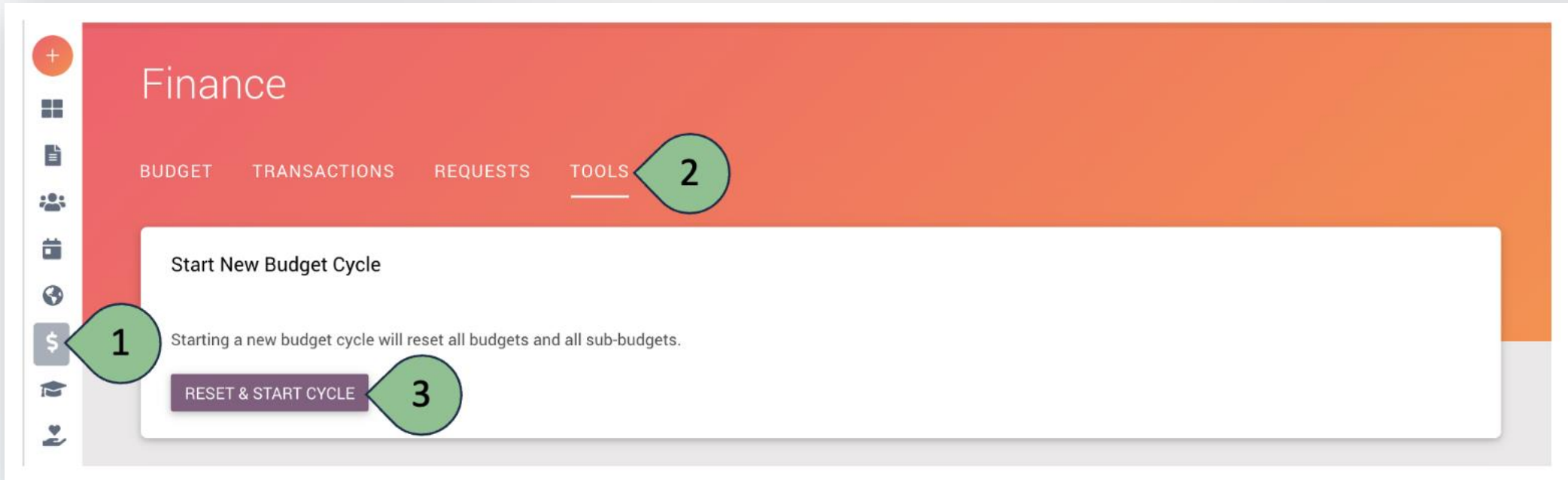
End-of-Year Budget Reset: Set Budgets to \$0

- Budget Reset clears **approved** budget balances.
- Use Budget Reset to start a new budget cycle with clean balances, especially during year-end close (often June or July) or when transitioning to a new fiscal period.
- **You cannot reset budgets if you have pending finance submissions.** Any pending items must be resolved before you can run the reset.



How to Reset Your Budget

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Handle Pending Transactions

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The screenshot shows the 'Finance' section of the Modern Campus system. The navigation menu includes 'BUDGET', 'TRANSACTIONS', 'REQUESTS', and 'TOOLS'. The 'Start New Budget Cycle' section contains a warning message: 'Starting a new budget cycle will reset all budgets and all sub-budgets.' Below this, a red box states: 'You are unable to start a new budget cycle. There are pending transactions that must be resolved:'. A bulleted list shows 'Expenditures'. Below the list, it says 'The requests can be found [here](#).' A blue arrow points to the 'here' link. At the bottom left of the section is a button labeled 'RESET & START CYCLE'.

Clear Approval Status Filter

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The screenshot shows the 'Finance' dashboard with the 'REQUESTS' tab selected. It features five summary cards: Total Requests (1), Deposit Requests (\$0), Expenditure Requests (\$0), Expenditures Approved (\$50), and Reconciliation Requests (\$0). Below these is a search bar with the text 'Search Requests'. To the right of the search bar is a filter dropdown menu labeled 'APPROVAL STATUS' with a 'FILTER' button. A blue arrow points from the search bar area to the 'APPROVAL STATUS' dropdown. Below the search bar, a message reads: 'We couldn't find any. Try changing your search.'

Ensure Expenditures and Requests are cleared

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Finance

BUDGET TRANSACTIONS REQUESTS TOOLS

1

Total Requests

\$0

Deposit Requests

\$0

Expenditure Requests

\$50


Expenditures
Approved

\$0

Reconciliation
Requests

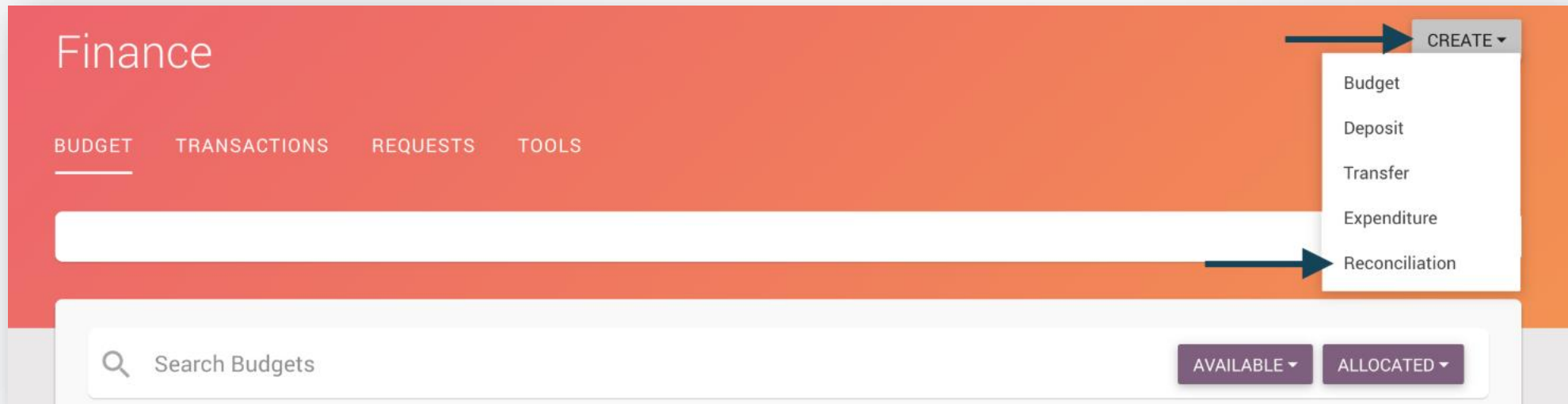
🔍 Search Requests FILTER ▾

Request	By	Budget	Amount	Date	Type	Approval Status	⚙️
Snack	Kelsey Seale	Francais s'il vous plait?	(\$-50.00)	03/27/2026 - 12:54 pm	Expenditure	Approved	⋮



Create and Approve Reconciliation for Expenditures

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Budget Reset Key Takeaway

- A budget cannot be reset until **all transactions are fully complete.**
 - Pending expenditures must be approved
 - **Approved expenditures must still be reconciled**
- If you see an approved expenditure in the **Requests** tab, it means the transaction is not finished yet.

Allow a Negative Balance

Go Negative

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The screenshot displays the 'Finance' section of the Modern Campus interface. The top navigation bar includes 'BUDGET', 'TRANSACTIONS', 'REQUESTS', and 'TOOLS', with 'TOOLS' highlighted and circled with a green '2'. On the left sidebar, the 'Finance' icon (a dollar sign) is circled with a green '1'. The main content area features two panels. The first panel, titled 'Start New Budget Cycle', contains the text 'Starting a new budget cycle will reset all budgets and all sub-budgets.' and a 'RESET & START CYCLE' button. The second panel, titled 'Allow Negative Balances', contains the text 'When enabled, budgets will be able to have a negative balance prior to new allocations being approved.' and an 'UPDATE' button. A toggle switch for 'Allow Negative Balances' is located on the right side of this panel and is circled with a green '3'.

Delete a Budget

Delete a Budget

This is a PERMANENT action!

50

Budget	Available	Allocated	
- CU Office of Campus Life 🔗	\$0.00	\$0.00	2222
Campus Wide Events	\$0.00	\$0.00	
- Orientation	\$0.00	\$0.00	
Orientation - Entertainment	\$0.00	\$0.00	
Orientation - Food	\$0.00	\$0.00	
+ Student Organizations	\$0.00	\$0.00	1111

- Edit
- View
- Transactions
- Requests
- Delete Budget
- Transfer

Demo

- **Tools**
 - Clear budget
 - Add a negative balance
- **Delete a budget**

Finance FAQs

Is this this real money?

- This is NOT connected to a bank, debit, or credit card
- Finance is for tracking
- Transparency for student leaders and account admin



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+

Finance

CREATE ▾

BUDGET
TRANSACTIONS
REQUESTS

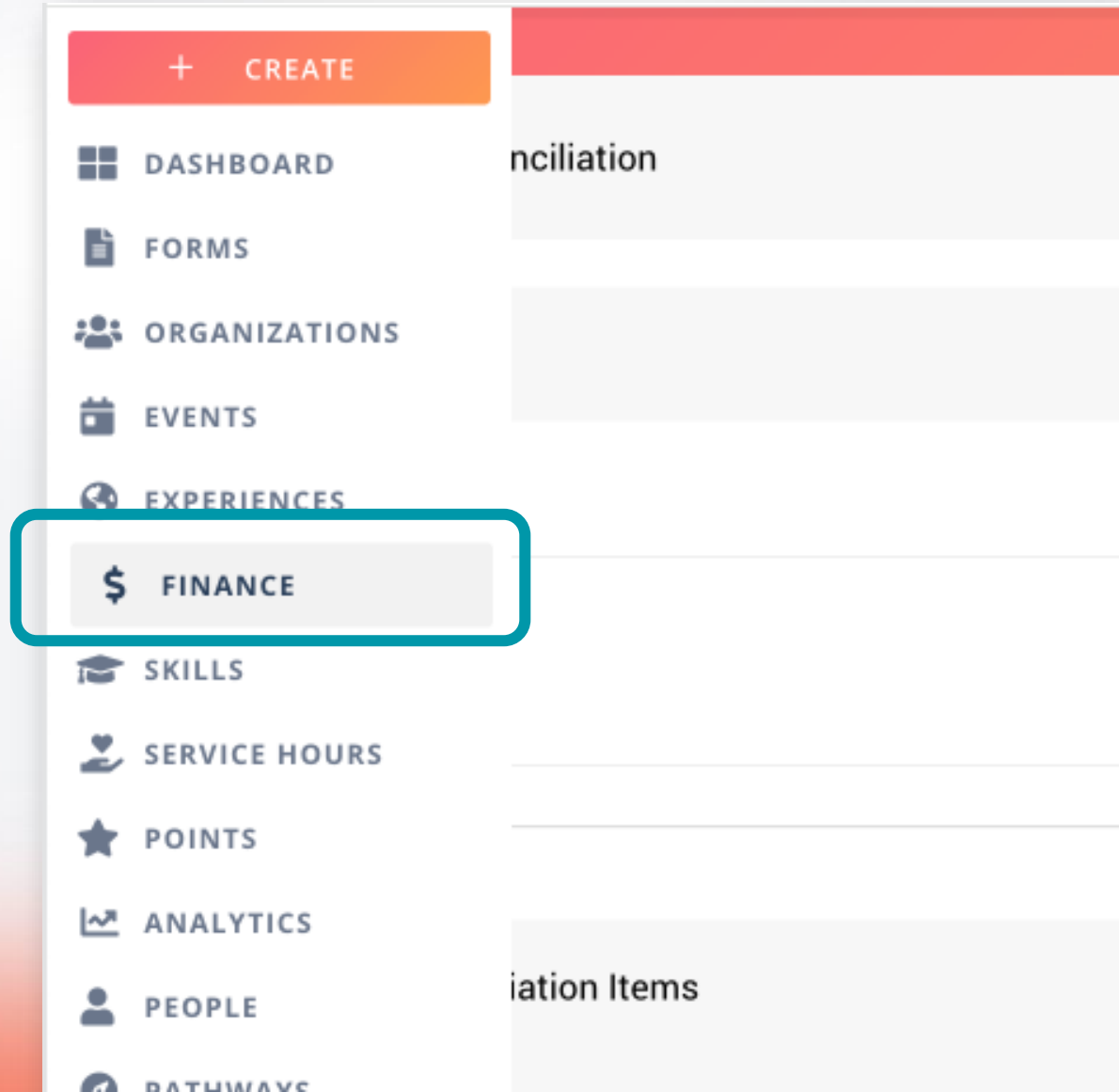
\$3,015.99 <small>Request To Allocate</small>	\$6,519,768.29 <small>Available</small>	\$1,976.00 <small>Request To Spend</small>	\$21,334.00 <small>Approved To Spend</small>	\$10.00 <small>Request To Reconcile</small>	\$5,025,639.99 <small>Spent</small>
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- Budget
- Allocation
- Deposit
- Transfer
- Expenditure
- Reconciliation

Does everyone have Finance?

- Not everyone has Finance!
- Interested? Speak with your account manager.

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How do I request to spend money?

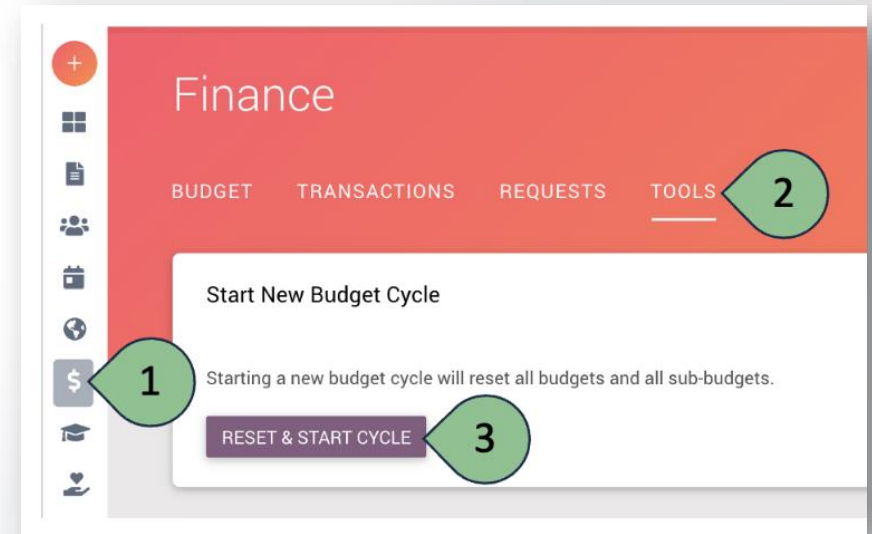
The screenshot shows the 'Finance' section of the Modern Campus system. The 'REQUESTS' tab is selected, and the user is viewing the 'SGA Allocation' page. A yellow arrow points to the 'CREATE TRANSACTION' dropdown menu, which is open and shows options: Allocation, Deposit, Transfer, and Expenditure. The interface displays a total allocated amount of \$1,000 and 2 requests. A green bar at the bottom indicates \$994.00 is available.

55

Can I reset my budget?

You can now reset your budget from the new Tools tab.

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Quick Tips

Money can only move from “parent” to “child” budgets.

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Parent

Child

Transfer

Amount *

Budget Amount Available

Student Organizations \$9820.00 ×

↑↓

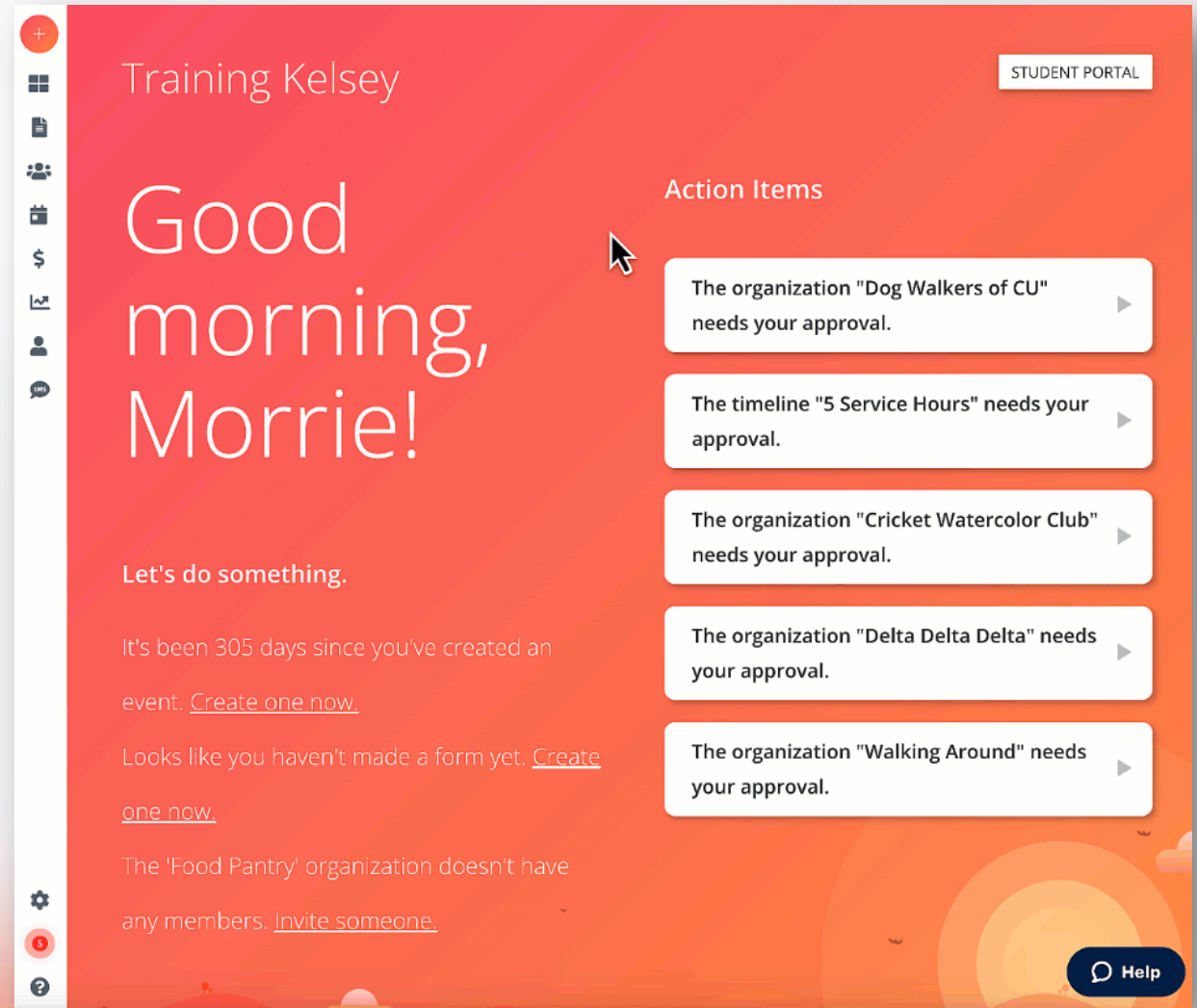
Transfer To *

<input checked="" type="checkbox"/>	Student Organizations	\$11,300.00	\$11,300.00	1111
<input type="checkbox"/>	Francais s'il vous plait?	\$640.00	\$640.00	
<input type="checkbox"/>	Dog Walkers of CU	\$0.00	\$0.00	
<input type="checkbox"/>	The Creme de Bananas	\$840.00	\$840.00	
<input type="checkbox"/>	Friends of Dorothy	\$0.00	\$0.00	
<input type="checkbox"/>	Trashy Cricketinis	\$0.00	\$0.00	
<input type="checkbox"/>	(Inactive) Walking Around	\$0.00	\$0.00	

Assign Finance Permissions

- Admin
 - Turn on in user profile
- Student Org Leader
 - Assign in user profile
 - Rights will transfer during transition/registration

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Finance Admin Permissions

- See all budgets
- Transfer funds between budgets

Role REMOVE

Role
Campus Administrator

Additional Rights

- Create Categories
- Create Organizations
- Edit Organizations

Finance Admin Permissions

- See all budgets
- Transfer funds between budgets
- Approve requests

- Add Attendees via Web
- Add Bulk Attendees via Web
- Add Members Without Invite
- Set Event Dates in the Past
- Edit Feature Settings
- Manage Finance
- Edit Finance
- Download Smart Transcript

Student Org Leader Permissions

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Role REMOVE

Role

Organization Administrator

Organizations

Bird Watching Club

Additional Rights

- Edit Organizations
- Create Events
- Delete Events
- Event Approval
- Create Users

Student Org Leader

- Submit requests
- *Do NOT need “Edit Finance” access

- Event Approval
- Create Users
- View Person Profiles
- View Student Numbers
- Add Attendees via Web
- Add Bulk Attendees via Web
- Add Members Without Invite
- Set Event Dates in the Past
- Manage Finance
- Edit Finance
- Download Smart Transcript

Quick Tips – Share Permissions

Share Permissions

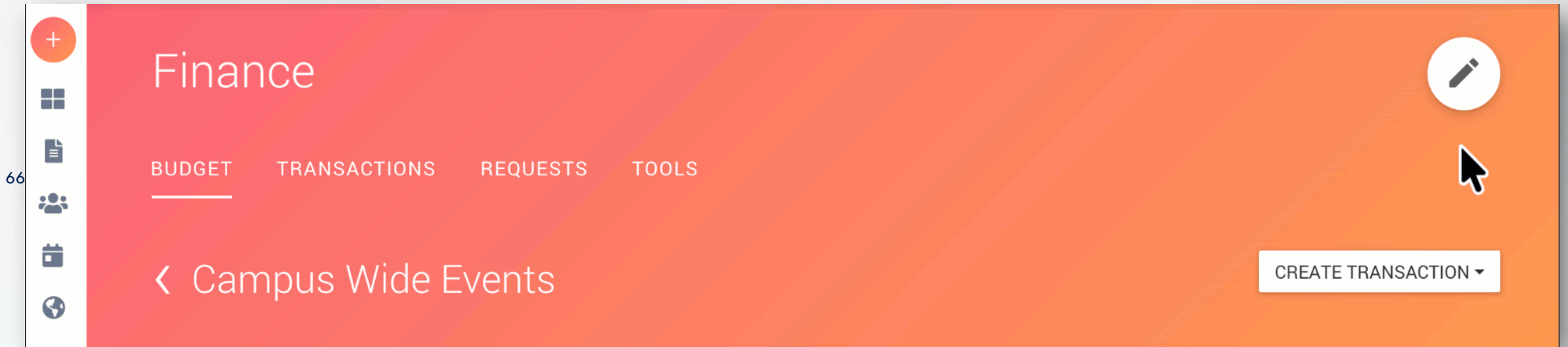
Like forms, budget permissions don't share automatically

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Budget	Available	Allocated	Account	
- CU Office of Campus Life ↗	\$0.00	\$0.00	2222	⋮
Campus Wide Events	\$0.00	\$0.00		⋮
- Orientation	\$0.00	\$0.00		⋮
Orientation - Entertainment	\$0.00	\$0.00		
Orientation - Food	\$0.00	\$0.00		
+ Student Organizations	\$0.00	\$0.00	1111	

- Edit
- View
- Transactions
- Requests
- Delete Budget
- Transfer

Hover over the pencil and select the lock icon



Add Permissions for Users or Roles

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The screenshot displays the 'Budget Access' configuration page in the Modern Campus system. On the left, a red sidebar contains the 'Finance' menu with options for 'BUDGET', 'TRANSACTIONS', and 'REQUESTS'. Below the menu, a card shows '\$0 Total Allocated'. The main content area is titled 'Budget Access' and includes the instruction 'Control who can access and edit this budget.' It features a 'Who' dropdown menu and an 'Owner' section with the description 'The best access known to anyone.' A user named 'Kelsey Seale' is listed as the 'Owner' with a dropdown arrow and a close icon.

Demo

1. Add admin permission to a user
2. Share access to a budget

Q&A

Please put your questions in the Q&A box.
I'll get to as many as possible and follow up via
email if more research is needed!

Thank You

See you next month!