

TAMUWake Using the Treasurer

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People Involved: Treasurer, Driver

Viewing Permissions: Admin, Treasurer, Driver

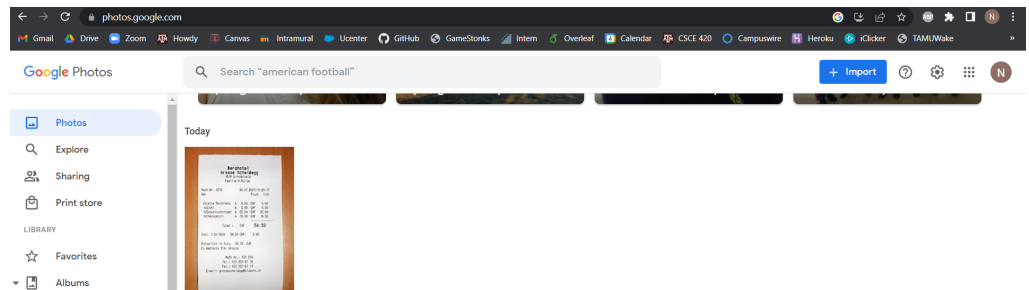
Purpose: A primary feature of the TAMUWake website is the treasury. The treasury can be used by drivers to submit receipts for gas needed to drive the boat, and in turn receive back refunds from the treasury.

Instructions (Driver POV):

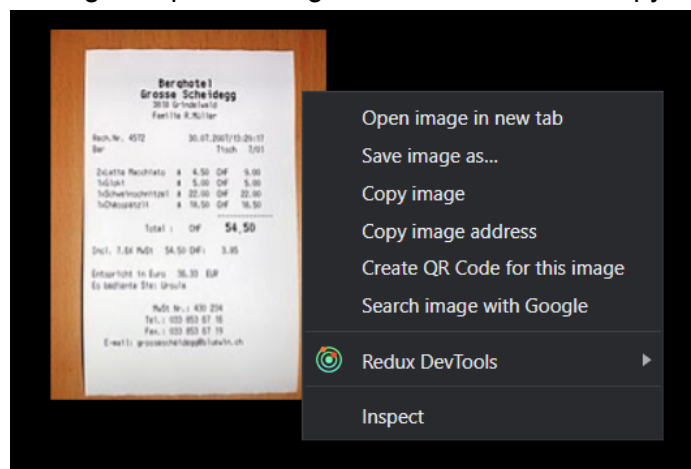
1. Upload Receipt Image

- In order to have the treasurer view your receipt image, you need to upload the receipt to an external website

- There are countless image hosting websites that work, but for this example we will use Google Photos

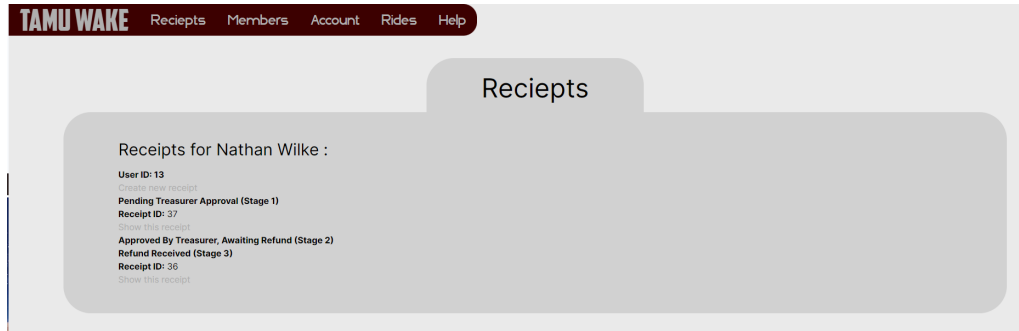


- Once the image is uploaded, right click it and select "Copy image address"



2. Navigate to Receipts Page

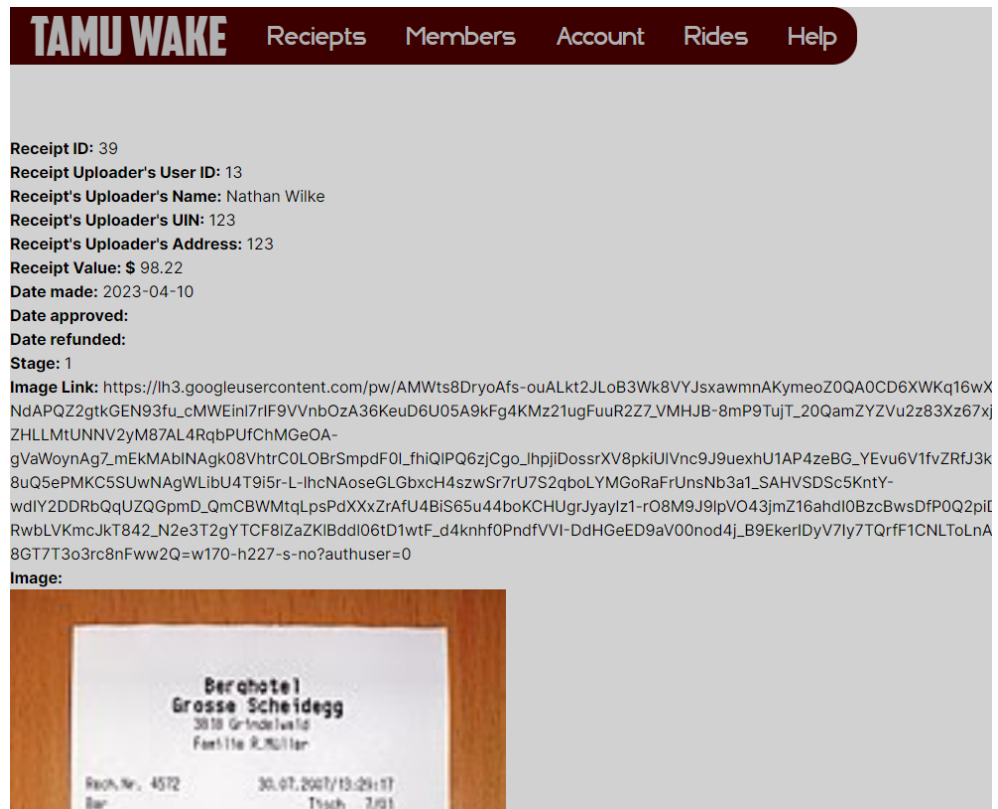
- Do so by clicking on "Receipts"
- This page will show all submitted receipts and their current status



c.

3. Create a New Receipt

- Click on "Create new receipt"
- Fill out all fields, including value, date made, and image link
 - Image link will contain the image address you copied in step 1
- Receipt should be successfully uploaded



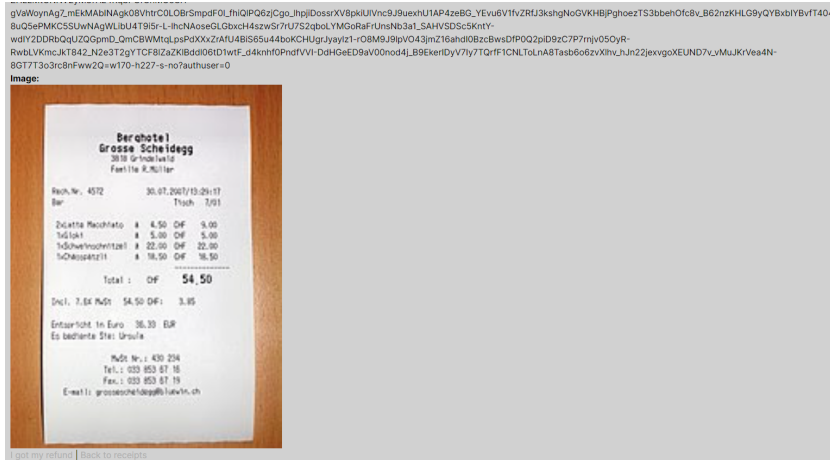
i.

4. Wait for treasurer to approve your refund request

- Your receipt should be under the Pending Treasurer Approval (Stage 1) section on the Receipts page
- Once it moves to the Approved By Treasurer, Awaiting Refund (Stage 2) section on the Receipts page, you know that the treasurer has approved the refund and sent the necessary paperwork with it to SOFC
- Now all you have to do is wait to receive your refund in the bank

5. Update the receipt when you receive your refund

- a. Once you receive your refund for the receipt in the bank, simply find the associated receipt, click “show this receipt,” and click “I got my refund”



- i.
- b. Fill out the day you received your refund and click “Update Receipt”
- c. Your final updated receipt should be under the Refund Received (Stage 3) section on the Receipts page, indicating that the entire refund process is complete

Instructions (Treasurer POV):

1. Look for receipt uploaded by driver

- a. Navigate to the “Receipts” page
- b. If there are any receipts under the “Pending Treasurer Approval (Stage 1)” section, click on “Show this receipt” to update its information

2. Accept/Reject receipts

- a. If you wish to reject the receipt and not send a request for it, click “Destroy this receipt”
- b. If you wish to approve the request, click “Edit this receipt”
- c. Inside the edit the receipt form, change the status section from “Pending Treasurer Approval (Stage 1)” to “Approved by Treasurer, Awaiting Refund (Stage 2).” Once this is done, click “Update Receipt”
- d. Once this is done, send the necessary paperwork to SOFC to continue the refund process

TAMU WAKE Receipts Members Account Rides Help

Editing receipt

User ID
13

Value
98.22

Date made
04/14/2023

Date approved
04/20/2023

Date refunded
mm/dd/yyyy

Status
Approved By Treasurer, Awaiting Refund (Stage 2)

Image Link
<https://www.snopes.com/tact>

Update Receipt

[Show this receipt](#) | [Back to receipts](#)

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3. Further notes

- a. As the treasurer, you have permission to edit any current or old receipts from all drivers. In the event that a driver wants to change some information on a receipt, they must tell you, in which case you can alter whatever information needs it.
- b. As the treasurer, you can also create receipts from scratch, changing any of their necessary fields from scratch. Make sure you enter in a valid User ID, as inputting a wrong one will result in an error screen.