BOSO & COOL

Payments

Treasurer Workshop
www.purdue.edu/BOSO
COOL LOG IN

- Log in to My Purdue

[Image of Purdue University's website with various sections including Health & Safety, Academic Success, Student Services, Places to Live, and Announcements.]

- **Health & Safety**
  - Student Health Center (PUSH)
  - Retail Pharmacy
  - Rec Sports Center
  - Counseling Services (CAPS)
  - Safety & Threat Assessment
  - Purdue ALERT: Emergency Warning System

- **Academic Success**
  - Academic Success Center
  - Academic Help Labs
  - Supplemental Instruction
  - Online Writing Lab
  - Purdue Libraries
  - GPA Calculator
  - CODO Requirements

- **Student Services**
  - B-Involved @ Purdue
  - Event Scheduling
  - BOSO/COOL Online
  - Student Government
  - Student Services

- **Places to Live**
  - On Campus
  - Off Campus
  - Fraternity
  - Sorority
  - Cooperative

- **Announcements**
  - Welcome to the new look and feel of myPurdue

- **University Offices**
  - Office of Admissions
  - Office of the Bursar
  - Office of the Dean of Student Division of Financial Aid
  - Housing & Food Services
  - Information Technology @ Purdue
  - International Students and Scholars
  - Office of the Registrar
  - Student Success at Purdue
Choose the Organization Name and Account you wish to use.

Some students are in multiple clubs or have multiple accounts including SOGA, OEG, and/or Scholarships.
To add logo or view account number – click on “paper with pencil” next to generate account statement

I certify that the attached receipts or invoices represent legitimate expenses incurred solely for the benefit of the organization. I also certify that they have not been previously reimbursed for these expenses and the amount is still due.

- Have you attached all your documents, i.e. receipts; vendor invoices?
- Do NOT scan contracts with the Social Security Number or Federal ID number.
- Please deliver to BOSO or Fax to 765-496-2208.
- Does this expenses involve an EPF or TPF?

I certify that the attached receipts or invoices represent legitimate expenses incurred solely for the benefit of the organization. I also certify that they have not been previously reimbursed for these expenses and the amount is still due.
<table>
<thead>
<tr>
<th><strong>Web Name</strong></th>
<th>big brothers big sisters</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name 1</strong></td>
<td>BIG BROTHERS BIG SISTERS</td>
</tr>
<tr>
<td><strong>Name 2</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Organization Type</strong></td>
<td>Recognition/Service</td>
</tr>
<tr>
<td><strong>Date Of Origin</strong></td>
<td></td>
</tr>
<tr>
<td><strong>SOA Number</strong></td>
<td>01067</td>
</tr>
<tr>
<td><strong>Inactive</strong></td>
<td>No</td>
</tr>
<tr>
<td><strong>Allow Members</strong></td>
<td>No</td>
</tr>
<tr>
<td><strong>Address 1</strong></td>
<td>TREASURER BOX #636</td>
</tr>
<tr>
<td><strong>Address 2</strong></td>
<td>STEW</td>
</tr>
<tr>
<td><strong>City</strong></td>
<td></td>
</tr>
<tr>
<td><strong>State</strong></td>
<td></td>
</tr>
<tr>
<td><strong>ZIP Code</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Individual In Organizations**
You may generate an account statement by selecting the Statement area. Input your date range and select view report.

To create a payment select the Banking button in the left center of the page.

I certify that the attached receipts or invoices represent legitimate expenses incurred solely for the benefit of the organization. I also certify that they have not been previously reimbursed for these expenses and the amount is still due.
Scan or include a photo legible copy of the receipt/invoice. If you are dining, an itemized receipt (showing what food/drink was purchased) is required for all restaurants, pizza, fast food, etc. along with the final paid receipt.

*Maximum gratuity allowed for reimbursements is 20%.

Download JPGS or PDF on your laptop where you can attach (like an email attachment) into the system.
Unattached Documents

Download JPGS or PDF on your laptop where you can attach (like an email attachment) into the system.

Select ‘Unattached Documents’

Select the Page Icon with the starburst (add)
Unattached Documents

Browse your system for the document you wish to attach to the payments

Add a brief description, this will make it easier to find the correct document later in the payment to attach.
Overview of the documents that have been uploaded and ready to be attached.

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**Organization**  
ART OF LIVING

**Web Name**  
art of living

**Organization Type**  
Special Interest

**Note**  
PMU:70018348

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I certify that the attached receipts or invoices represent legitimate expenses incurred solely for the benefit of the organization. I also certify that they have not been previously reimbursed for these expenses and the amount is still due.

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### UNATTACHED DOCUMENTS

<table>
<thead>
<tr>
<th>Payment Document</th>
<th>Payment Description</th>
<th>Individual</th>
<th>Create Date</th>
<th>File Name</th>
<th>File Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Reader</td>
<td>Receipt to register for the workshop</td>
<td></td>
<td>11/13/2012</td>
<td>Receipt_zeyi.pdf</td>
<td>.pdf</td>
</tr>
<tr>
<td>Document Reader</td>
<td>Deposit 2 shows Zeyi's 2nd payment $122 (the total reg fee is $125, he paid $3 deposit first; later he paid $122 to fill the reg fee.)</td>
<td></td>
<td>11/13/2012</td>
<td>YesPlus_reg_deposit_02.pdf</td>
<td>.pdf</td>
</tr>
<tr>
<td>Document Reader</td>
<td></td>
<td>Wedding, Pamela M</td>
<td>6/2/2015</td>
<td>\myhome.itap.purdue.edu\myhome\pictures\Incorrect Date.jpg</td>
<td>.jpg</td>
</tr>
</tbody>
</table>
Payments

Listing of all payments that are waiting to be processed.

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Transfer</th>
<th>Payee/Organization</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/2/2015</td>
<td>No</td>
<td>Art of Living Foundation</td>
<td>$25.00</td>
</tr>
</tbody>
</table>
Payee Search

Type the name of Payee in the box and click ‘Search For’ (this will search the club database). If the payee shows up continue with the payment.

If not select ‘Add Payee’ and search the BOSO database.

If payee exists, but has a different address, you don’t need to create the payee again.
Checking / Adding Payees

Type in the name and choose ‘Check Payee’

If the payee exists ‘Select Existing Payee’ if they are not listed Select ‘Request New Payee’
New Payee

Reminder;

Please include Apartment #

Only check ‘Campus Mail’ if sending to a Residence Hall.

Purdue Email is very helpful.

If payee exists, but has a different address you don’t need to create the payee again. You will provide new information on the payment request screen.

After information is entered select Continue then check information and click Save.
To continue with the payment, select ‘Hold for Pickup’ if you want to pick up the check in BOSO. This is the quickest way to get your check.

If your payee has a new address you may provide that information in the NOTES section. Any additional information BOSO may need in regard to payment can be submitted here in ‘NOTES’ ie; Why you are paying a different amount from receipts/invoices etc.

Fill in the remaining blanks. If you have to add lines for additional income codes or receipts select the ‘Add A Line’ icon. The page with a starburst. You don’t have to request multiple checks to the same person.

Click Save
Attaching Documents

Attach documents, invoices, receipts, itemized receipts.

I certify that the attached receipts or invoices represent legitimate expenses incurred solely for the benefit of the organization. I also certify that they have not been previously reimbursed for these expenses and the amount is still due.
Select Documents & Save

Next to the document that needs to be sent with the payment.

Select the box next to the receipt.

Click Save

Save Payment

Click Okay

I certify that the attached receipts or invoices represent legitimate expenses incurred solely for the benefit of the organization. I also certify that they have not been previously reimbursed for these expenses and the amount is still due.
# Created Payment

## ORGANIZATION ACCOUNT

<table>
<thead>
<tr>
<th>Student Organization</th>
<th>BIG BROTHERS BIG SISTERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Chase - Checking</td>
</tr>
<tr>
<td>Date Of Origin</td>
<td>7/1/1994</td>
</tr>
<tr>
<td>Beginning Balance</td>
<td>$145.10</td>
</tr>
<tr>
<td>Approval Required Count</td>
<td>0</td>
</tr>
<tr>
<td>Current Balance</td>
<td>$2,866.49</td>
</tr>
<tr>
<td>Student Account Name</td>
<td></td>
</tr>
</tbody>
</table>

## PAYMENTS IN PROCESS

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Transfer</th>
<th>Payee/Organization</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/22/2014</td>
<td>No</td>
<td>Peppermint Patty</td>
<td>$32.95</td>
</tr>
<tr>
<td>12/5/2014</td>
<td>No</td>
<td>gage moll</td>
<td>$25.00</td>
</tr>
<tr>
<td>11/24/2014</td>
<td>No</td>
<td>lisa Green</td>
<td>$123.00</td>
</tr>
<tr>
<td>11/13/2014</td>
<td>No</td>
<td>Underground Graphics</td>
<td>$123.00</td>
</tr>
<tr>
<td>11/13/2014</td>
<td>No</td>
<td>Glenwood Cooperative</td>
<td>$280.00</td>
</tr>
<tr>
<td>11/11/2014</td>
<td>No</td>
<td>Tammy Smiley</td>
<td>$30.00</td>
</tr>
<tr>
<td>9/19/2014</td>
<td>No</td>
<td>Freckles Graphics Inc</td>
<td>$550.00</td>
</tr>
<tr>
<td>9/3/2014</td>
<td>No</td>
<td>Diane Greenberg</td>
<td>$89.00</td>
</tr>
<tr>
<td>8/27/2014</td>
<td>No</td>
<td>Roger Green</td>
<td>$100.35</td>
</tr>
</tbody>
</table>
Approving A Payment

Officer will log into Cool and select the Red Check next to the payment needing approved.

Officer will then click ‘Approve, Reject, or Cancel’.
How to Check if a Payment is Completed

If your check is ready to be picked up or if it has been mailed, go to the ‘Payments’ Tab.

If your check is listed with a document number, that means your transaction has been audited and printed. Check can be picked up in BOSO Krach Rm 365 if ‘hold for pickup’ was checked on payment request. If ‘hold’ wasn’t selected, check will be mailed to the address we have been provided.

Checks are ready for pick up or mail out within 2 business days, unless transaction was reset for missing or incomplete documents.

We do not send emails when transactions are complete.
Reasons your payment would be reset by BOSO

- Missing receipts, or receipt not itemized.
- Can’t read, attachments are too small and or blurry.
- You put in a payment to yourself and we are waiting for a second officer approval.
- Scholarship Form has not been delivered to BOSO.
- Activity Form is not found on Boilerlink.
- Payment is missing proof of payment (i.e. copy of credit slip or bank statement)
- Your merchandise comes from a unlicensed vendor if it has Purdue trademarks or logos on it. Include a picture of the item with payment.
- Missing Awards, Prizes and Gifts Form.
- IRS W-9 signed forms for Awards. Prizes and Gifts has not been delivered to BOSO.

These are some of the most common reasons why payments are reset by BOSO, but there can be other reasons too.
Boiler Up

Thank you