

## Campus Organizations Accounting- Clover Flex Device Request

The Campus Organizations Accounting Office maintains a limited number of Clover Flex devices. The devices may only be used to accept in-person payments by credit card. Because there are a limited number of devices to be shared by all organizations, the Clover Flex may be borrowed for no more than 5 days, and check out and check in times must be scheduled. The guide below shows how a treasurer can make a request to borrow a device. Once approved, the COA office will schedule additional training, including an overview of the policies related to the machine, with the treasurer.

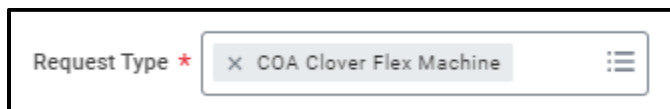
### Initiating the Request

The treasurer will:

1. Log to Workday
2. Access *Create Request* through either the *Requests* application icon on the Global Navigation menu (red arrow below), or by searching for the task “create request” in the search bar.



3. Select *COA Clover Flex Machine* in the list of requests, or type “clover flex” in the *Request Type* box.



The request form will appear. All fields are required. A list of the fields with detailed descriptions of what to put in each is below:

**Describe the Request:** Please add a short description of the reason the request is needed.

**Overview of Payment Card Security Procedures:** Review the policies

**COA Rental Policy and Terms:** Review the policies

**Student Organization Name:** Write in your organization name with no abbreviations

**Student Org Program Worktag:** Write in your organization Program Worktag in the format “PGXXXXXX”

**Date the device will be picked up:** Use the calendar to identify a date in the future

**Date the device will be returned:** Use the calendar to identify the date the device will be returned

**Describe Your Event:** Please describe what your organization is selling, and the event tied to the sale

**Date the Event Begins:** Use the calendar to identify the date your event or sale begins

**An Event Authorization has been submitted and approved?:** Please mark whether or not you have approval for your event. Contact Student Engagement for assistance with the Event Authorization system

**Treasurer email and phone number:** Please list both the email and phone number of the requestor

**Name of Advisor:** Write in the name of the organization advisor who should approve this request if needed. If you have more than one advisor, please only write in one name, as only one advisor will approve the request.

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## Request Routing and Approvals:

Once submitted, the request will route to:

1. The COA student accountants, who will review the form for completeness and accuracy
2. The organization advisor who will approve the request
3. COA manager for final approval and to close the request
4. The treasurer will receive notification when the request is fully approved. The COA student accountants will contact the requestor to arrange for pick-up/in-person training/review of the policies

**Request Process : COA Clover Flex Machine :**

4 second(s) ago


Your request for use of the Clover Flex machine from 08/02/2022 to 08/04/2022 has been approved. Please work with the COA staff, [coa@iastate.edu](mailto:coa@iastate.edu) to arrange a time for pick up and training.

[Details](#) [Request Process : COA Clover Flex Machine :](#)

You may check the status of your request at any time by using the *ISU My Requests* report in Workday.

If your request is sent back for correction or adjustment, you will receive Workday notification, and will be able to see comments and make corrections before resubmitting through your Workday inbox. Any request or transaction that needs correction will be available through the inbox, and will have send back comments at the bottom of the form.

**Awaiting Your Action**

 **Request Process : COA Clover Flex Machine :**  
Inbox - 1 minute(s) ago