Using the Summer Project Finance Tool

Your Access

This year we are blessed to be using a great tool to record finances on your Summer Project. It is an easy to understand, easy to use tool that will allow you to enter your own transactions into the tool using your mobile phone (or other digital device), without having to wait for the Finance Officer to do so for you.

You will be given access to the Summer Project Finance Tool using the email address you supplied during the application process for your Project (or Missionaries, it will be your powertochange.org.au email address). You will need to check your email to find the link to the tool. Once you have been given access, we recommend saving the URL for the tool as a 'favourite' on your phone or laptop. [https://sp-finance.web.app/]

When To Use The Tool

There are two scenarios in which you will record a transaction in the tool. Firstly, you are spending your own money on behalf of the project and will later be reimbursed by the Finance Officer. This will happen in the 5 stages detailed below:

1. You will need to seek permission to spend money on behalf of the project (unless it was budgeted for. E.g. you are needing to buy decorations for celebration dinner and the Community Area Leader tells you that you have X-amount of money to spend).
2. You will spend money on something on behalf of the project (*e.g. groceries, decorations, follow up meals etc.*), making sure you ask for a receipt (preferably a Tax Receipt).
3. You will then record a transaction on the Finance Tool, including a photo pf the receipt.
4. You will go to the Finance Officer with your physical receipt and ask for a reimbursement.
5. The Finance Officer will collect your physical receipt, approve your transaction and then give you an envelope with the cash for the reimbursement in it.

The second scenario is one where you are given cash from the Finance Officer and asked to purchase something on behalf of the project:

1. You will be given cash by the Finance Officer in an envelope.
2. You will spend the cash you were given, making sure you ask for a receipt (preferably a Tax Receipt) and holding onto any remaining cash.
3. You will then record a transaction on the finance tool, including a photo pf the receipt.
4. You will go to the Finance Officer with your physical receipt and any remaining cash, all kept nicely in the envelope.
5. The Finance Officer will collect your physical receipt and any remaining cash and then approve your transaction.

All transactions entered into the tool by you will be recorded as Expense Transactions. Expense transactions are entered into the tool when money is being spent outside of the Project. (i.e. you are paying for something using the project cash card, the cash you were given from the Finance Officer, or your own money that the Finance Officer will later reimburse you for). Before you spend money on behalf of the project (therefore wanting a reimbursement), you will need to get permission from your Missionary Area Leader, Project Leader or the Finance Officer. If you have not previously sought permission from one of these three individuals, the Finance Officer is not liable to reimburse you.

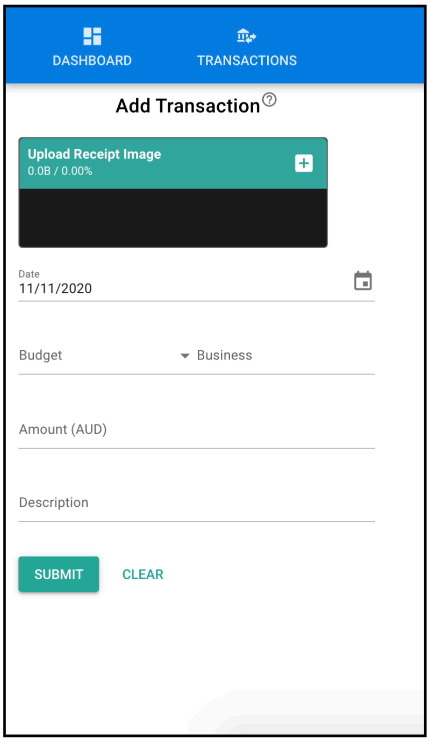
For example, if you are needing to buy resources for prayer on your project, you will need to ask the missionary overseeing the area of prayer on your project, if there is no missionary overseeing the area, you will need to check with your Project Leader or Finance Officer. In another example, if you are going to meet someone for a follow up lunch, you will need to check how much the project will reimburse you by asking your Project Leader or Finance Officer before you leave for the follow up. If in doubt, always check!

If you need help and don't have this manual with you, click on the FINANCE MANUAL button on the top of your screen and then select your State. This will open this manual on your device.

To record a transaction on the tool, you will need to follow the instructions outlined below.

How To Use The Tool

1. Click on the link to the tool (you should be able to see the following - Add Transaction).



2. Receipt: Upload a photo of the relevant receipt. If you were able to get a TAX Receipt, make sure the photo includes the business information (ABN number) and the total cost.
3. Date: Ensure the date is correct (the date from the receipt).
4. Budget: Select the relevant budget for the transaction.
5. Business: Enter the name of the place where the money is being spent (*e.g. Aldi, McDonalds, News Agent, etc.*).
6. Amount: Enter the exact amount spent (as seen on the receipt). The tool may round the transaction up or down so that the Finance Officer can give you a reimbursement, please don't round it up or down yourself.
7. Description: One sentence description detailing what the money was spent on (*e.g. 'food for celebration dinner', 'groceries for welcome bbq', 'week 1 groceries room …' etc.*).
8. Click SUBMIT.
9. Click TRANSACTIONS (at the top of your screen)
10. Review your transaction. Do this by checking that all of the details you have entered are correct and make sure that the receipt was uploaded.
11. You will now need to go to the Finance Officer on your Project with a copy of your receipt and request a reimbursement.