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.

When To Use The Tool

Because your project is an online project this year, there will only be one scenario for you needing to record a transaction on the Tool. This will happen in the 5 stages detailed below:

1. You will be given a budget and asked to make a purchase.
2. You will make the purchase using your own money (e.g. *buying a meal*), making sure you keep a receipt (preferably a Tax Receipt) or screen shot the proof of purchase when making an online purchase.
3. You will then record a transaction on the Finance Tool, including a photo pf the receipt/proof of purchase.
4. You will need to email the Finance Officer your bank details and a copy of the receipt/proof of purchase.
5. The Finance Officer will then approve your transaction, make a bank transfer to reimburse you for the purchase you made and save your receipt/proof of purchase.

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. (e.g. you are purchasing a meal at a store or UberEats). 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.

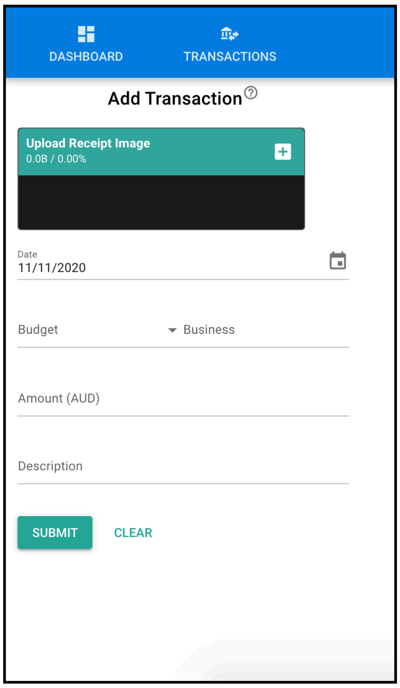
For example, you will be reimbursed for a meal that you have purchased if one of the above listed missionaries has let you know that you can purchase the meal (and likely given you a budget to stay within) or you have sought permission from them prior to the purchase.

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 Tool (you should be able to see the following - Add Transaction).



2. Receipt: Upload a photo of the relevant receipt/proof of purchase. 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/proof of purchase).
4. Budget: Select the relevant budget for the transaction (e.g. *lunch)*
5. Business: Enter the name of the place where the money is being spent (*e.g. Aldi, McDonalds, Uber Eats etc.*).
6. Amount: Enter the exact amount spent (as seen on the receipt).
7. Description: One sentence description detailing what the money was spent on (*e.g 'food for celebration dinner', 'lunch for …<student/missionary name>…' 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.

You will now need to email your Project Finance Officer with a copy of the receipt/proof of purchase screen shot and your bank details so that they can reimburse you for your purchase.