



Applications Portal

Financial and Organisational Management

November 2022 (V1.0)

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Introduction

New Features are now available in relation to managing access to Organisational records and financial transactions.

As an Administrator for an Organisation, you can now view and download:

- Previous transactions; *and*
- Current Account Balance,

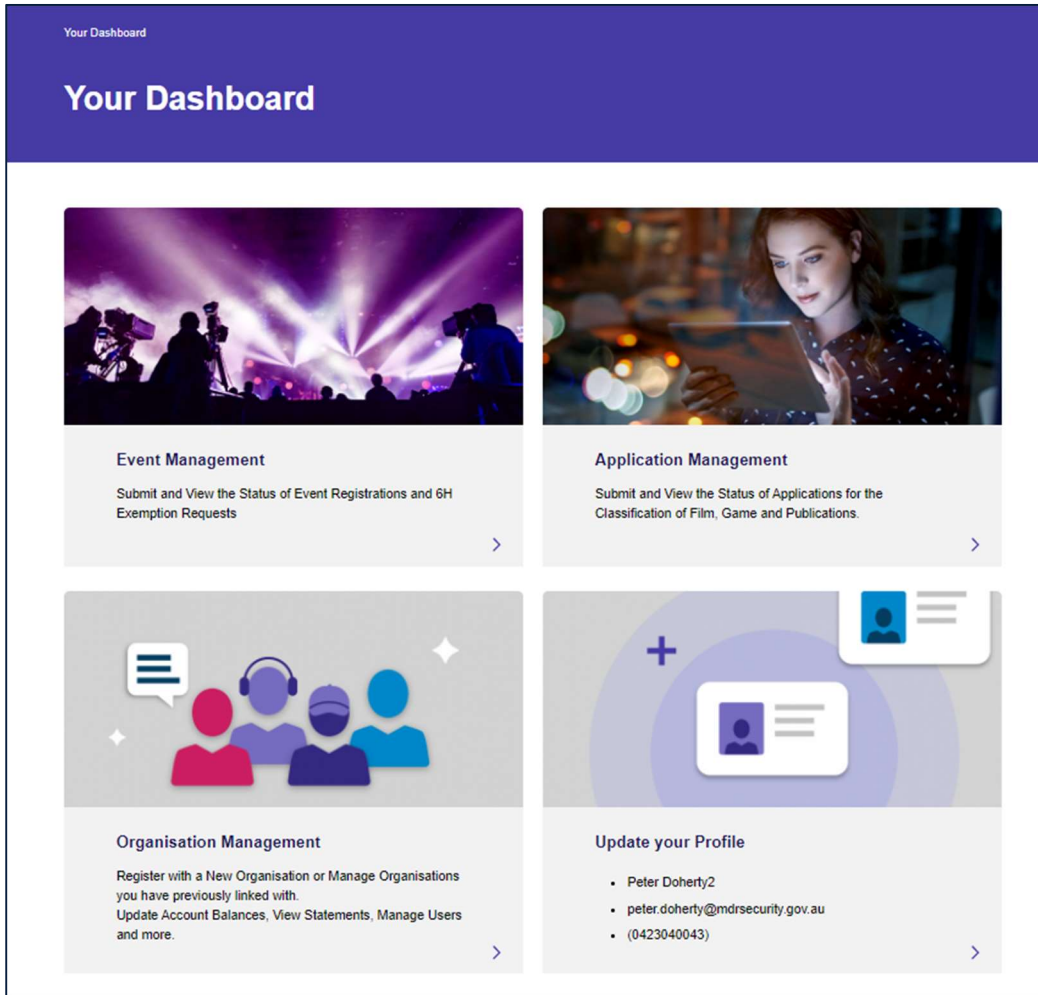
You can also:

- Apply advanced filters to transactions – by Transaction and within a date range; *and*
- Manage users and their access to organisational information.

Viewing Financial Transactions

Step 1

- Navigate to "Organisation Management on the lower left of the main Dashboard:




Step 2

Click on the name of the Organisation you wish to view details for:

[Your Dashboard](#) > [Profile](#) > [Representing Organisations](#)

Representing Organisations



- My Information
- Representing Organisations
- Training

Download >
Add Another Organisation >


Organisation ↑	ABN	Role	Contact Types	Status	Balance
[Redacted]		Administrator	Secondary Contact / Manager	Active	\$26,750.00

Click on “Finance and Accounting” from the list on the left:

[Your Dashboard](#) > [Profile](#) > [Representing Organisa...](#) > [Manage](#)

Manage Organisation

- Contact Information
- Manage Users
- Finance & Accounting
- Add Funds To Organisation



Dairy Road Moooooovies

Info

Step 3

That’s it! You now can see a list of transactions for the selected Organisation.

From here, you can also use advanced Filters to view specific transactions

Filtering Transactions

Click on the downward facing chevron to the upper right of the transaction list and across from the word “Filters”.

Select a transaction type from the list if needed and/or enter a date range as shown below. You can edit the Date Range field directly.

Filters

Transaction Type: [Dropdown menu with options: Payment, Application Fee, Adjustment]

Date Range: 17/10/2022 - 24/11/2022

Buttons: Clear all, Apply, Download Transactions

Transaction Date	Transaction Type	Description	Transaction Reference Number	Online Receipt No	PPF	Amount	Balance
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Managing Users

Step 1

Choose “Manage Users” from the Managing Organisation page:

Manage Users

Users of this Organisation

Buttons: Download

Status	First Name	Last Name	Role	Contact Types
Active	[Redacted]	[Redacted]	Administrator	Primary Contact
Active	[Redacted]	[Redacted]	Administrator	Secondary Contact / Manager
Active	[Redacted]	[Redacted]	Administrator	Primary Contact

If you want to update user details, press on the downward facing chevron to the right of the user's name and you'll be able to add or remove access via the subsequent screen:

Update User

Requesting User

User Information

First Name

Last Name *

Email *

Primary Phone

Provide a telephone number

Alternate Phone

Provide a telephone number

Select User Roles

Please select the access levels required. Please note that all accounts are able to add funds to your organisation's account.

Select all that apply:

Standard Account

Finance

Administrator

Select User Contact Types

This information is used only if we need to contact your organisation. If appropriate, please nominate if this account is a contact point.

Select all that apply:

Manager

Primary Contact

Secondary Contact

Cancel Remove Access > Save Changes >

As an administrator, when approving another user to access your organisation, you must select appropriate roles. These are:

Standard Account – Given by default when a person requests access to an organisation – this allows the user to view applications submitted by their organisation and to submit applications on behalf of their organisation.

Finance - This role gives a user access to the 'Finance & Accounting' area of the organisation on the portal and allows them to view and download transactions.

Administrator- This role allows a user to manage requests for access to their organisation and manage existing users access levels. This role also is able to submit applications and access the 'Finance & Accounting' area.

Note: All access levels are able to add funds to an organisation.

Contact Types:

These are simply an attribute of a contact and they provides no additional functionality. They serve purely as a way to reference who the best contact person is in an organisation.