How to add or mark a user as the Finance Contact for your organisation on The Good Exchange

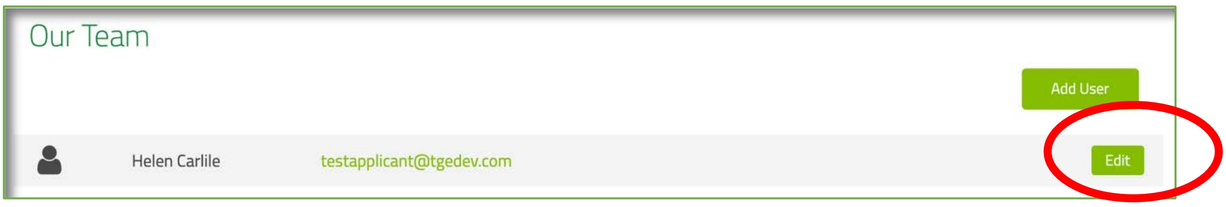
We need to know who within your organisation is responsible for financial matters so that we can contact them with regard to payment of fees and collection of Gift Aid (if your organisation is eligible for Gift Aid).

To facilitate the collection of **fees due** for grants and/or donations disbursed to your organisation via the platform, a primary authorised representative (e.g. from your finance/accounts team or the organisational treasurer) who can complete the direct debit authorisation process must be registered on your fundraising account.

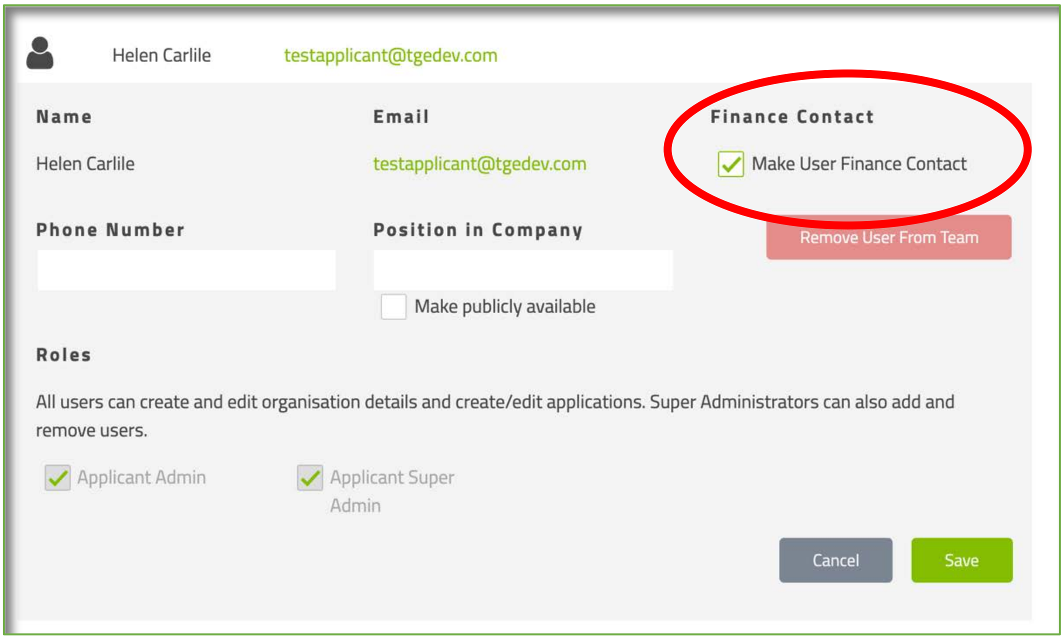
After the first donation or grant has been paid to your organisation's fundraising project(s) via The Good Exchange, the nominated finance contact will be sent an automated email from the Sage/GoCardless system with instructions on how to complete the direct debit authorisation process. NOTE: A fee is only collected on any funds (e.g. from donations and/or grants) raised through The Good Exchange platform - if no funds are raised no fees are due.

1. **To start the process:**

    i. Login to the Good Exchange, you will see your **Applicant Dashboard**
    ii. Click on the **'Organisation'** tab and scroll down to **'Our Team'**
    iii. If the person responsible for finance within your organisation is already a registered user on your Good Exchange account, you will see their name listed. Simply hover over their name until you see the green **'Edit'** button.



    iv. Click the **'Edit'** button to view the options.
    v. Tick the **'Make User Finance Contact'** box:
    vi. Once the box is ticked and your organisation starts to receive donations and/or grants, your nominated finance contact will be sent an automated email from the Sage/GoCardless platform with instructions on how to complete the authorisation process.



NOTE: If your primary finance contact (the person who has authority to sign direct debit mandates etc) is not currently a user of The Good Exchange, their name will not be listed.

In this case, please add them via the **'Add User'** button. They will then receive an email inviting them to join your organisation on The Good Exchange. Once they have accepted the invitation, you will be able to edit their role as described in Step iii. above

If you are unable to **'Add User'** or see the **'Make User Finance Contact'** tick box, your admin permissions will need to be upgraded to **'Super User'.** To facilitate this, please do one of the following:

- Contact the main user on your account on The Good Exchange and ask them to make you a Super User **or**
- Ask your Super User to tick the **'Make User Finance Contact'** box next to your name **or**
- Email **support@thegoodexchange.com** for assistance

If at any time you need to change the designated finance contact simply untick the **'Make User Finance Contact'** box and assign the role to a different user.

2. What if my organisation needs two finance contacts?

You can only nominate one platform user to be the main finance contact. If you require more than one signatory to sign up for a direct debit mandate or to nominate The Good Exchange to **collect gift aid** on behalf of your organisation this will be accommodated later in the process.

3. Account Activity Reports

All users can access and run an **'Activity Report'** which lists all financial activity (grants/donations/gift aid etc) on The Good Exchange for all projects.

4. Fees and Charges

The Good Exchange is owned by a charity **(Greenham Trust**) and works on a non-profit-making **'no win, no fee'** basis with no set up, monthly subscription or separate financial transaction costs.

We charge a platform service fee of 5% + VAT on monies raised via the platform, in order to make The Good Exchange sustainable and increase its potential to further develop and grow the platform to bring greater benefit to its users. These fees are collected monthly by direct debit only after monies have been disbursed or deducted before disbursement where no active direct debit is in place.

Information about The Good Exchange's fees and charges policies is **available here**.

Please refer to our **Help and Support** page for more articles, help videos, answers to FAQs and access to further support.