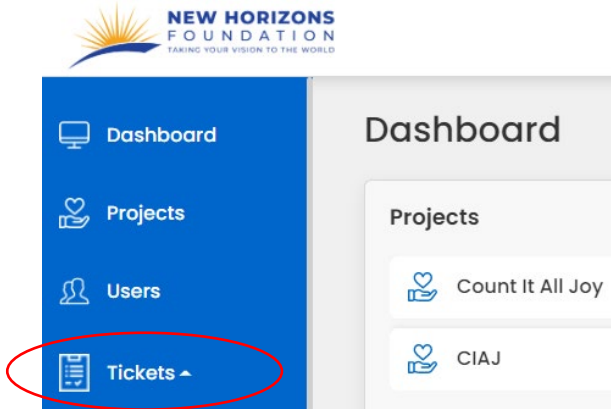
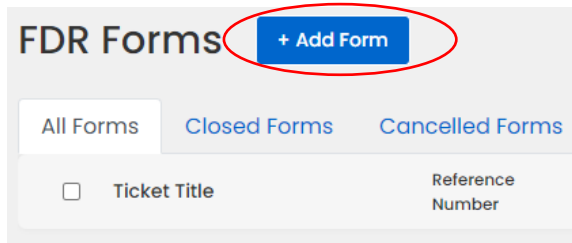


How to Transfer Funds from a Project Account to Another

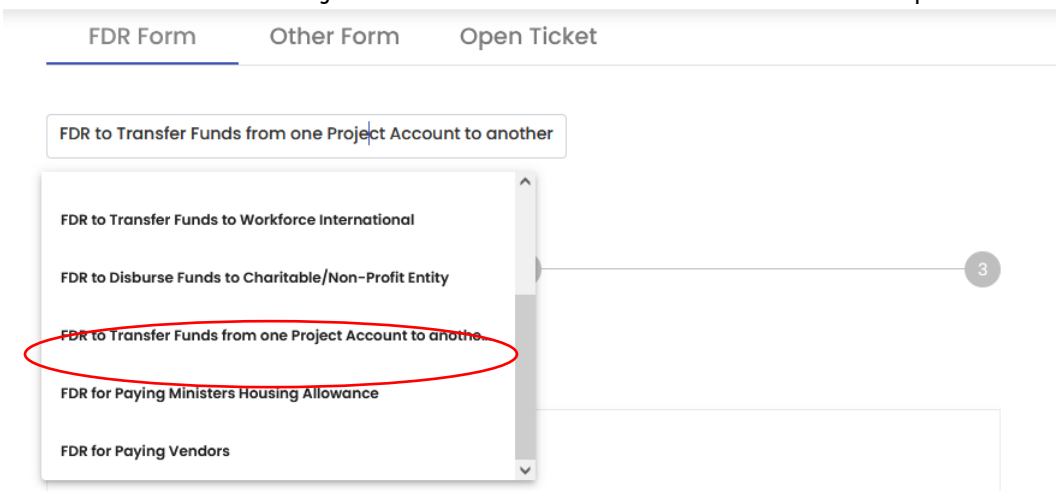
1. Starting from your Project Manager Dashboard, press “Tickets” on the left side of the page.



2. The “Tickets” button will provide a drop-down menu. Press “FDR Forms” from the list.
3. Press the blue “+ Add Form” button.

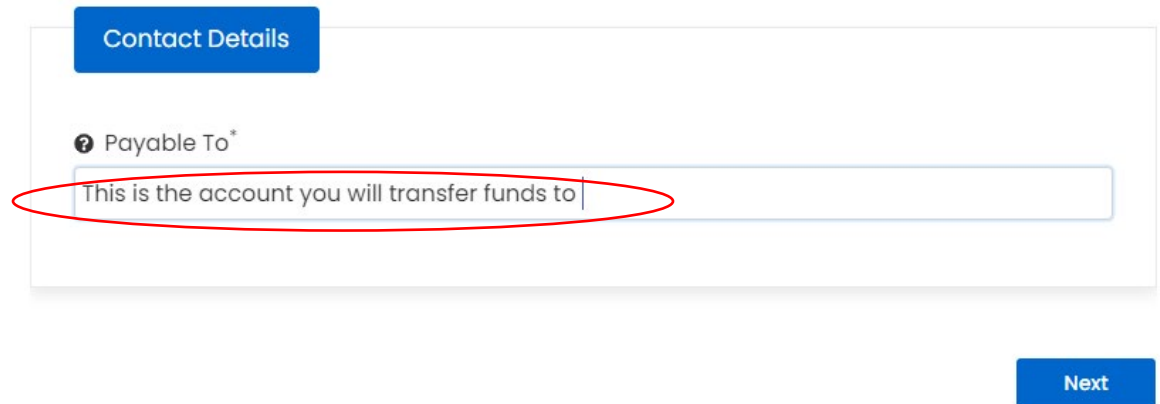


4. Press the “Form Type” box. A drop-down menu will appear. Scroll down to see the “FDR to Transfer Funds from one Project Account to another.” Press this option.



5. Now that you are on the correct form, fill out the “Project Details.”

- Choose the project you will be transferring funds from by selecting “Project Name.”
 - Choose a sub account if applicable.
 - The “Project FE ID” numbers will automatically be filled.
 - Check if the “Mailback Email” is correct.
 - Insert the “Date of Request.”
 - Check whether you want this request to be anonymous.
 - Most of the time you will select, “no.”
6. Fill out “Contact Details.”
- In the “Payable to” box, type the account you are wanting to transfer funds to.



Contact Details

Payable To*

This is the account you will transfer funds to

Next

7. Press “Next.”
8. Now, you will complete the “Breakdown of Request” Form.
- Select the “Category.”
 - Insert the “Amount” in USD you want to transfer.
 - Answer “How does this donation support the charitable purpose of your project?”
 - i. Please be descriptive here, as our auditors want to know how transferring the money to another account is charitable for your project.
 - Check whether this is a recurring amount.
 - i. If it is, please indicate which month it should start, on which date, and if it should go out on the 1st, the 15th, or the 1st and the 15th of each month.
9. Press “Next.”
10. Scroll down, and make sure all the information is correct.
11. Under “Attachments,” you can add any supporting documents, though, it is not necessary for this type of transfer.

12. In the “Additional Instructions or Comments” box, type an extra instructions or information.
13. Type your Name, substituting as a signature.
14. Press “Submit.”