



XLEDGER TRAINING MANUAL

FOR NATIONAL MOVEMENTS

Contents

Log in and Set Up Xledger	2
How to Log in to Xledger's Website	2
If You Have Problems Logging In	3
How to change your Xledger password.....	3
How to change two-factor authentication method	3
Translations into Spanish and French	4
What to Do if You Forget Your Password or Have Failed Login Attempts.....	4
If your account gets locked:	4
Fund Requests.....	5
Submitting a Fund Request.....	5
Approving (or Rejecting) a fund request.....	7
Other Fund Requests, Accounts and Payments	9
Making An Inter-Fund Request	9
Payments To A Non-National Movement Bank Account:	9
Paying An Invoice	9
How To Change Your National Movement's Bank Account	10
Fund Balances and Reports.....	11
Viewing Fund Balances in Xledger.....	11
Reports	11
Contacting finance	11

LOG IN AND SET UP XLEDGER

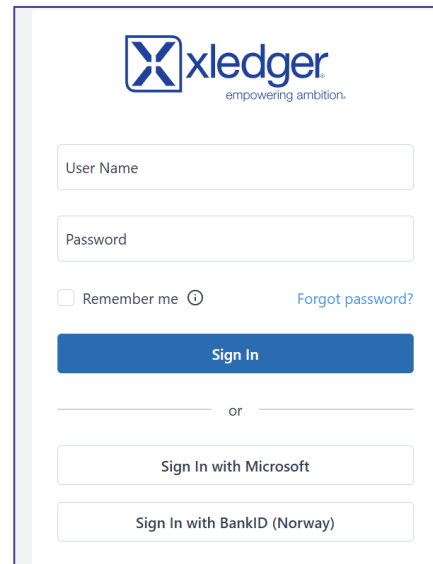
HOW TO LOG IN TO XLEDGER'S WEBSITE

1. **Go to the Xledger website:**

Open this link: <https://www.xledger.net/>

2. **Sign in with your email and password:**

- **Username:** Enter your email address that you registered with IFES
- **Password:** Enter your password (either the initial password you received in the Xledger login email or the one you changed it to)
- If you've forgotten your password, click the "Forgot Password" link on the login screen.



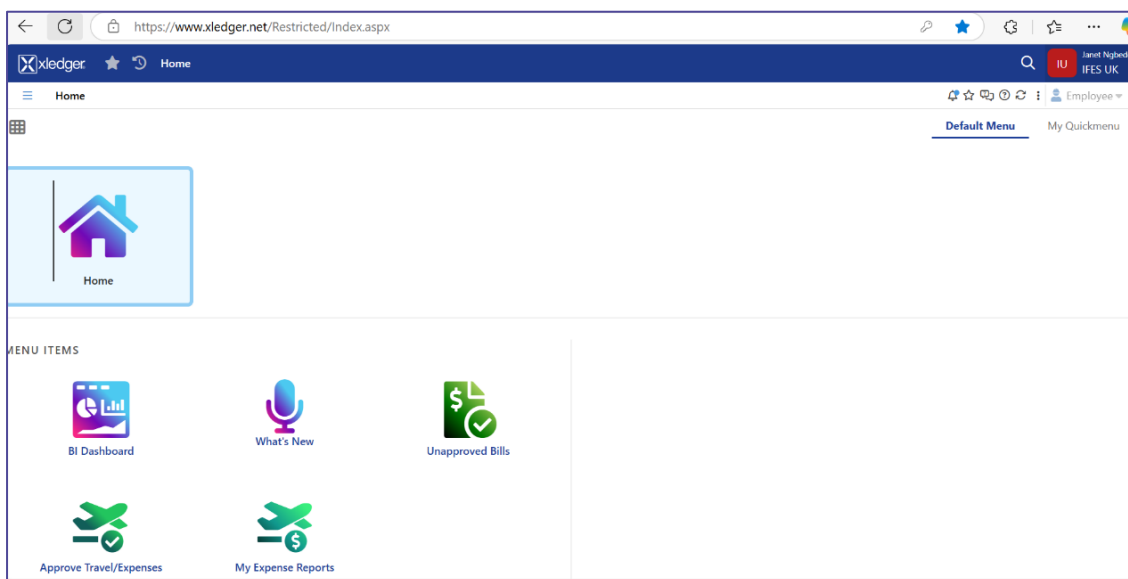
3. **Click "Sign In."**

4. **Enter the Two-Factor Authentication Code:**

- After clicking "Sign In," you will get an email with a special code.
- Open your email, find the code, and enter it into the box. Then click **Submit**.

5. **Change Your Password (First Time Only):**

After logging in for the first time, you must change your password. See below for instructions.

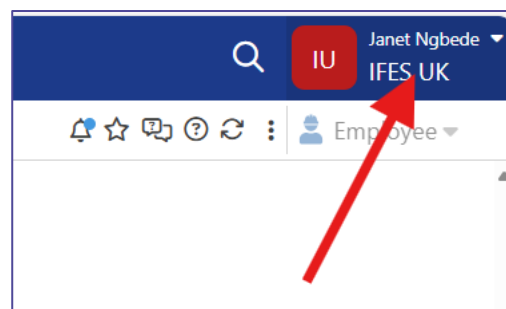


IF YOU HAVE PROBLEMS LOGGING IN

- If you can't log in, email finance@ifesworld.org for help.
- If the fund requester or approver changes:
 - Email finance@ifesworld.org with the name and email of the person being replaced, and the name, email, and role of the new user.
 - Copy the email to your IFES Regional Secretary, your national movements General Secretary (or Board Chair if the General Secretary is the requester/approver), and the current fund requester/approver.
 - After the new user is added, they will receive a login email with their password.

HOW TO CHANGE YOUR XLEDGER PASSWORD

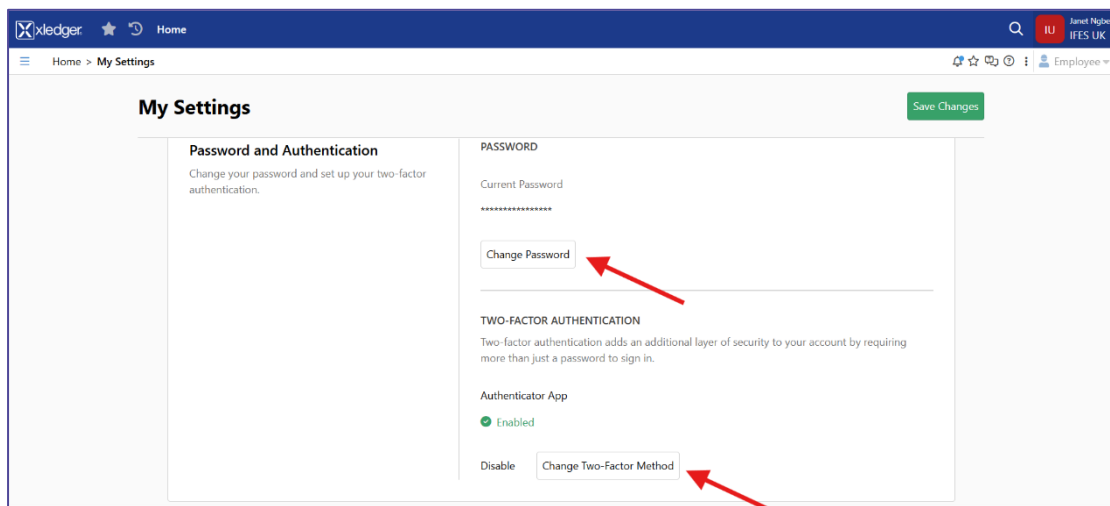
- Click **your name** at the top right corner of the screen.
- From the list that appears, click **My Settings**.
- Click **Change Password** to change your password.



HOW TO CHANGE TWO-FACTOR AUTHENTICATION METHOD

You can choose to change your authentication method, but once you change it, you can't go back to email authentication.

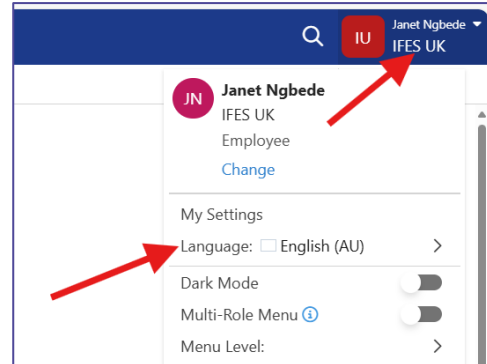
1. Go to **My Settings** (see password change section above).
2. Click on **Set Up Two-factor Authentication**.
3. Choose the method you want to use (SMS, Authenticator App or both).
4. Click **Next** and complete the required information.
5. Click **Enable** to activate your chosen method.



TRANSLATIONS INTO SPANISH AND FRENCH

The Xledger menu items are currently available in English and Spanish; we hope to have them available in French at a later stage. (To translate Xledger menu items):

1. Click on the box with your name at the top right.
2. From the list, click **Language** and choose **Spanish** (or **French**).
3. A pop-up will appear. Click **Reload page**.
4. The menu will change to the selected language.



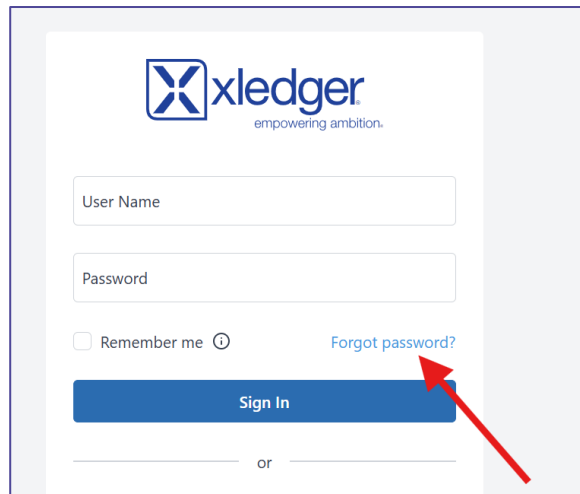
You won't need to change the language again. It will stay the same for future logins.

WHAT TO DO IF YOU FORGET YOUR PASSWORD OR HAVE FAILED LOGIN ATTEMPTS

If you have up to five failed login attempts, use the **Forgot Password** link on the login page to reset your password.

1. Click **Forgot Password?**
2. Enter your login email address and follow the instructions.

You will receive a new password by email. Use it to log in as soon as possible, as it will expire in 24 hours. Once logged in, you will be asked to change the password to one of your choice.



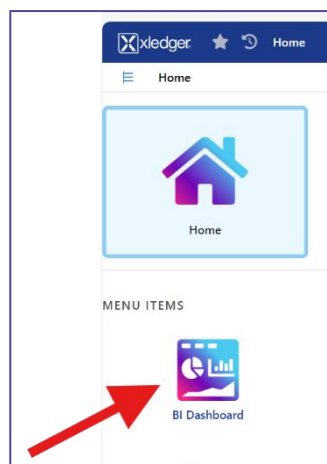
If your account gets locked: Xledger locks accounts after 10 failed login attempts. If this happens, contact finance@ifesworld.org to unlock your account. The finance team will respond within two working days.

FUND REQUESTS

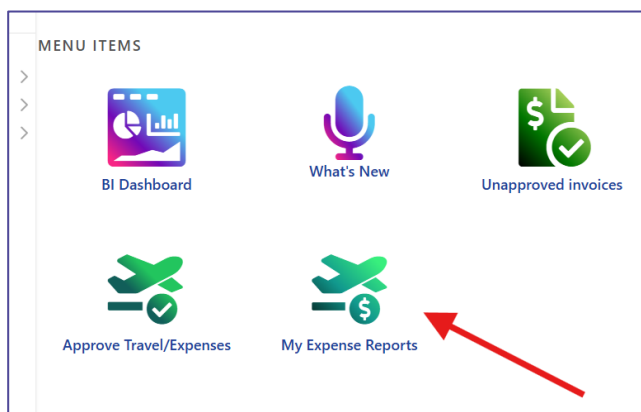
SUBMITTING A FUND REQUEST

How to Submit a Fund Request:

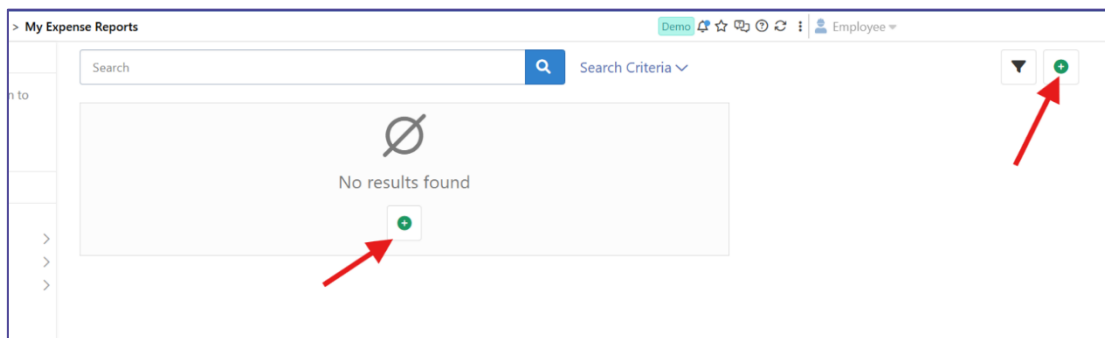
1. **Log in to Xledger** as the fund requester.
2. **Check fund balances** to make sure there's enough money for your request. Click on the **BI Dashboard** icon on the home screen to view balances.



3. Once you confirm there's enough balance, click on the **My Expense Reports** icon on the home screen.



4. On the **My Expense Reports** page, click on the green **plus icon** to add a new fund request.



5. **Complete the form:**

- **Purpose:** Write the name of your National Movement and the word "grant request".
- **Date:** Enter the date of your request.
- **Project:** Turn on the "Project" option (the circle should turn blue) to select a project reference.
- **Project reference:** Choose the fund code you are requesting from.

Purpose: UCCF Grant Request
 Date*: 13/01/2025
 Project:
 Project reference: ★ student ministry in Great Britain

6. Click the \$ sign for **'National Movement Grant Funds'** to add an expense line to your fund request. **National Movement Grants Funds** is the only expense type option that National Movements should use when making fund request.

Project:
 Project reference: ★ student ministry in Great Britain

+ 📄 📄 ⌵ **\$**

7. **Fill out the details in the pop-up form:**

- **Receipts:** Supporting documents are not required for national movement fund requests
- **Text:** Write the description.
- **Currency Amount:** Select the currency and enter the amount you are requesting.

\$ NATIONAL MOVEMENT GRANT FUNDS

Receipts:

Text*:

Project:

Project reference: ERUKI_GRANT - student ministry in Great Britain

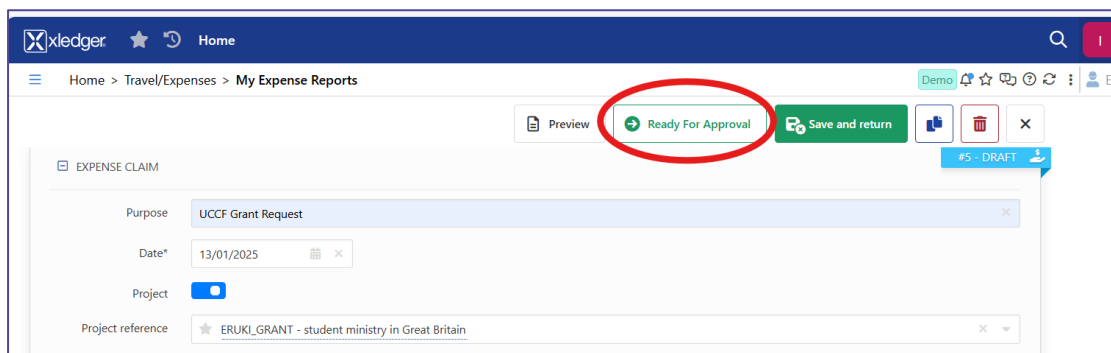
AMOUNT

Currency Amount: 0.00 USD

Save and return

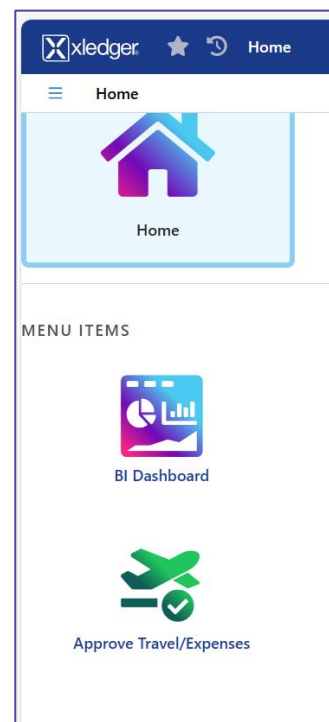
8. Click **Save and Return** when done.
9. If needed, click the green **plus icon** again (step 4) to add another fund request from a different fund code. Do not add multiple lines from the same fund code.
10. When finished, click **Ready for Approval** to send your request to the approver.

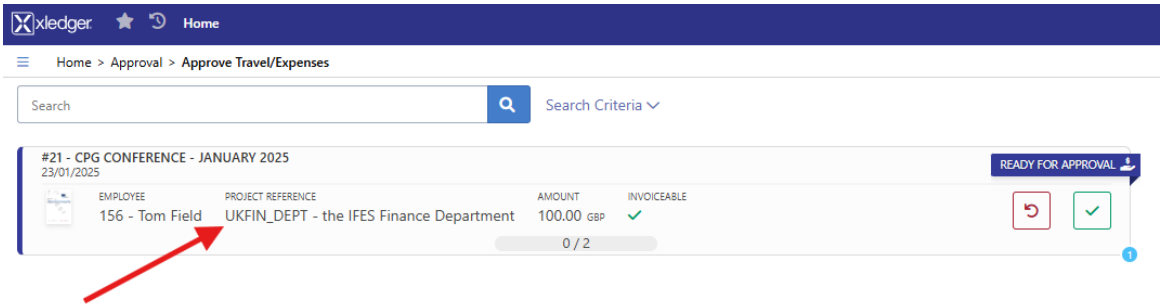
APPROVING (OR REJECTING) A FUND REQUEST



How to Approve or Reject a Fund Request:

1. **Fund approvers will receive an email** when a fund request needs approval. Click the link in the email to go directly to the fund request and approve it. Please note, Xledger sends out system notifications three times a day, so if an urgent fund request has been submitted, the requester should notify the approver at the time they submit the request. The approver can then login to Xledger to approve the request without having to wait for the notification.
2. Alternatively, **log in to Xledger** and click on the **Approve Travel/Expenses** icon on the home page to see the fund request.
3. Click on the fund request to review it.

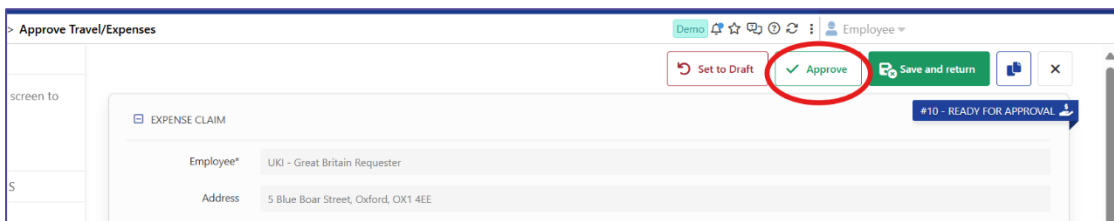




4. **Check the available balance:**

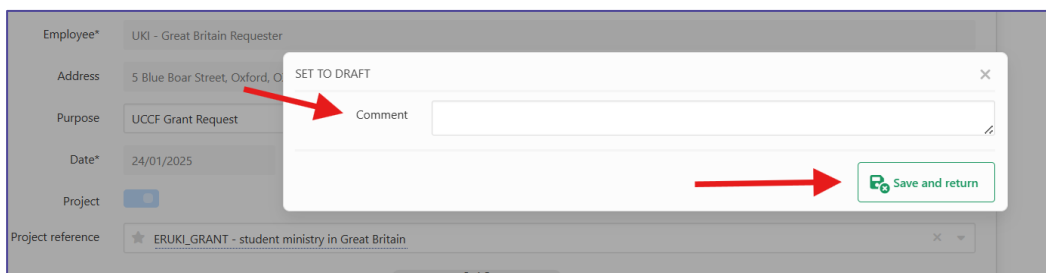
- Confirm the fund balance from the weekly report that will be sent to you or from the fund requester, as the requester is able to see fund balances on their **BI Dashboard** report.
- Only approve if there are enough funds.

5. To approve, click the **Approve** button at the top.



6. If you need to **reject** the request, click the **Set to Draft** button.

- A pop-up will appear.
- Enter the reason for rejection in the **Comment** field, then click **Save and Return**.
- This will send the request back to the fund requester.



OTHER FUND REQUESTS, ACCOUNTS, AND PAYMENTS

Making An Inter-Fund Request

1. **Download the Interfund Request Form:**
 - Click the link to download the form: [Internal Fund Request Form.xlsx](#)
 - After downloading, click **Save As** to save it to your device.
2. **Complete the Interfund Transfer Request Form.**
 - Please include:
 1. The fund you are transferring **from** and **to**.
 2. The amount and purpose of the transfer.
 3. Supporting documents (optional).
 - The form must be signed by both the fund requester and fund approver.
 - Email the completed form to invoices@ifesworld.org.
3. **Finance will process the transfer** once they receive the request

Payments To a Non-National Movement Bank Account:

1. **Email invoices@ifesworld.org** with the following details:
 - Fund code you want the payment to be made from.
 - Beneficiary name and purpose.
 - Beneficiary bank details (if this is a new beneficiary not paid by IFES before).
 - Supporting documents, such as a receipt, an invoice or an official document that gives information of what the payment is for and the bank details for making the payment.
2. IFES Finance will enter the payment into Xledger.
3. The **fund requester** will receive an email to approve the payment.
4. After the requester approves, the **fund approver** will receive an email to approve it as well.
5. Once both approvals are complete, **IFES Finance will process the payment.**

Paying An Invoice

IFES can pay an invoice on behalf of your National Movement from your fund.

1. The **fund requester** should email the invoice to invoices@ifesworld.org with the fund code the payment should come from.
2. **Finance** will upload the invoice to Xledger.
3. The **fund requester** will get an email to approve the invoice.

4. After the requester approves, the **fund approver** will get an email to approve it.
5. Once both approvals are done, **Finance** will process the payment.

How To Change Your National Movement's Bank Account

1. **Email** finance@ifesworld.org to request a bank account change.
2. Include the following in your email:
 - Supporting documents for the new bank account.
 - The reason for the change.
3. **Copy** the email to the National Movement General Secretary and Board Chair, as well as the IFES Regional Secretary and the fund requesters and approvers. This process is to help minimize the risk of fraud.

FUND BALANCES AND REPORTS

VIEWING FUND BALANCES IN XLEDGER

Fund requesters can view balances by clicking on the **BI Dashboard** in Xledger.

REPORTS

Regular reports showing all transactions will be sent out as:

- **Monthly reports** (with all transactions for the month).
- **Weekly interim statements.**

CONTACTING FINANCE

We are happy to help! If you have any questions, please send an email to finance@ifesworld.org.