



# Fund Advisor Web Portal Guide

Northwest Minnesota Foundation’s (NMF) online web portal provides you with 24/7 access to your fund within our family of funds at NMF. Once logged in, you can review and complete a number of tasks for your fund.

If you are a **Fund Advisor** (Fund Chairperson, Fund Secretary/Treasurer or Fund Contact) with qualified permissions, you can do the following:

- View your fund’s financial records, including fund statements.
- View the fund’s history of gifts and grants.
- **NEW!** Recommend a grant or a fund transfer from your fund.

At this point, you should have already gained access to the NMF Web Portal. If not, please go back to the sign in page and reference the “Registration Portal Guide” for instructions on how to register.

## NAVIGATING THE SITE

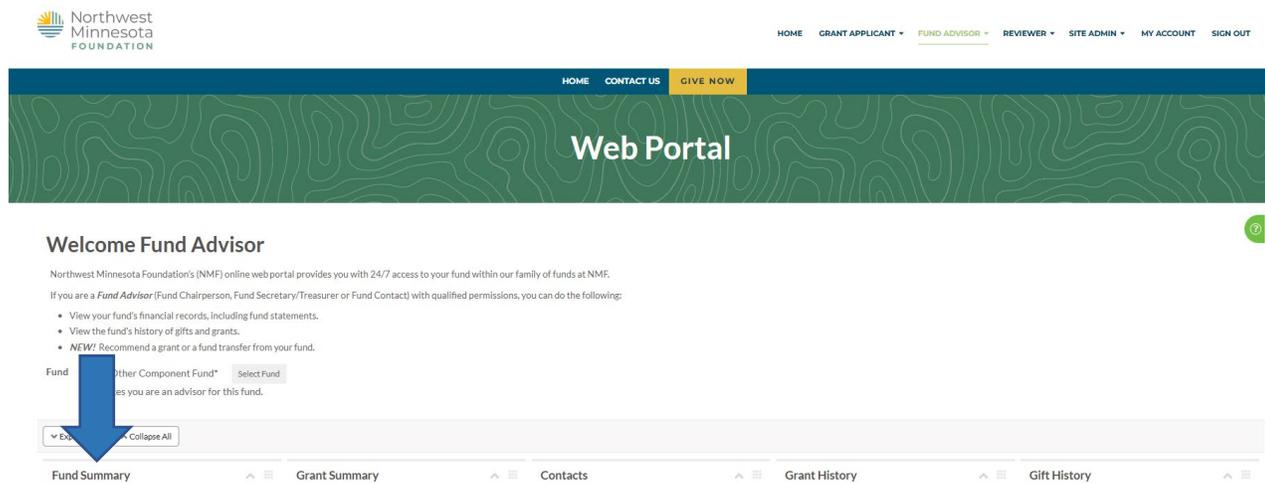
The NMF Web Portal provides an opportunity to do the same task in multiple places. We will be splitting this guide into two sections of the functionality:

1. NMF Web Portal Tiles
2. NMF Web Portal Drop Down List

## 1. NMF WEB PORTAL TILES

*(Found on the home screen of the NMF Web Portal)*

## FUND SUMMARY



The fund summary section gives you a quick view of your **Current Net Assets** (total of non-spendable and spendable) and **Current Available Balance** (spendable).

In addition to checking your fund balance, you may view your fund statements by clicking on **Fund Statements** in the drop-down list or click the hyperlink **View Fund Statement Screen** under Fund Summary.

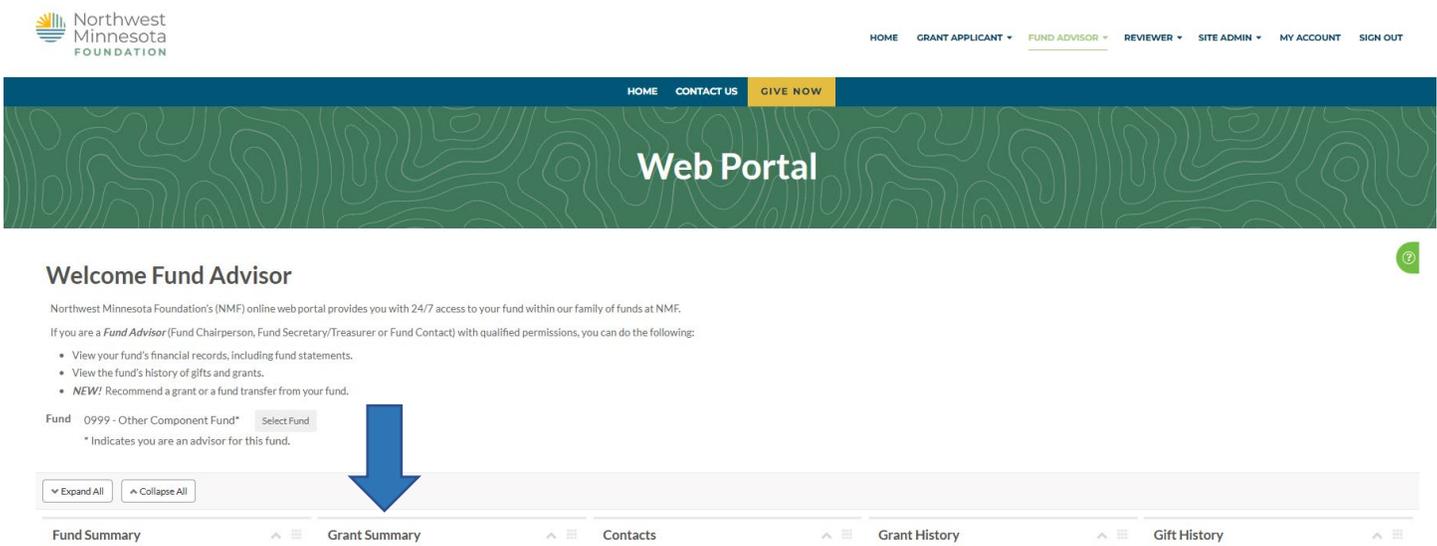
The **Fund Statement** allows you to select a custom reporting period. Click on **View Report** after you have chosen your start and end date.

## Fund Statement



After you view the fund statement, you may download the statement in a variety of file formats. You must first download the statement in order to print it from your computer.

## GRANT SUMMARY



The grant summary tile allows you to:

- Make a grant recommendation.
- View pending grant recommendations.
- View your grant history.

### **NEW!** How to recommend a grant using the NMF Web Portal

To make a grant recommendation, you have three options.

1. To make a grant recommendation to a previous grantee:

- Click on grant history.
- Find the grantee on the list of previous grantees.
- Click on the green box that says “Regrant” in the columns next to the previous recipient OR click on the previous grantee and choose the “Regrant All Selected” option above grant

history



- Click on **Submit Requests** and **Create a Grant Recommendation**.
- Under the Grant Information tab, edit the amount, grant purpose, etc. and click Save.

- **NOTE:** Email the committee/board minutes to [chrisb@nwmf.org](mailto:chrisb@nwmf.org) that correspond with the online grant recommendation. Donor Advised Funds do not need to provide any additional supporting documentation.
2. To make a grant recommendation to a new or previous grantee:
- On the **Grant Summary** tile, click on **Make a Grant Recommendation**.
  - Complete the information on the following three tabs:
    - Recipient
    - Grant Information
    - Acknowledgement and Submission
  - **NOTE:** Email the committee/board minutes to [chrisb@nwmf.org](mailto:chrisb@nwmf.org) that correspond with the online grant recommendation. Donor Advised Funds do not need to provide any additional supporting documentation.

## Grant Recommendation

Donor Name	Chloe Keprios	Recipient	Source Fund	
Donor Email	chlock@nwmf.org	Amount	Available Balance*	\$0.00
Status	NEW		Pending Grants & Payments	\$0.00

\* As of 1/7/2022 9:59 PM CST

 Delete  Go to Saved Recommendations

Please select each tab to view/edit your Grant Request details. Please e-mail your grant recommendations and/or committee minutes identifying that grants have been approved to Chris Bell, [chrisb@nwmf.org](mailto:chrisb@nwmf.org). We are working on a feature within the portal so that you may upload your minutes. This will be available within the year. Donor Advised Funds do not need to provide any additional supporting documentation.

**Fund Details** Recipient Grant Information Acknowledgement Submission

 Edit

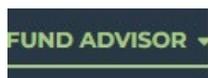
Source Fund \*

Available Balance*	\$0.00
Pending Grants & Payments	\$0.00

\* As of 1/7/2022

**Next Tab**

## VIEW PENDING GRANT RECOMMENDATION



- Home
- Documents
- Fund Statement
- Gift History
- Grant History
- Grant Opportunities
- Grants in Process 
- Recommend Grant
- Recommend Transfer

If you are unable to complete an online grant recommendation in one sitting, you can access it later by selecting **Grants in Process** from the drop-down menu or click on **Grant Recommendations** on the **Grant Summary** tile. Check this section anytime to make sure that you completed your grant recommendations and they were submitted for payment. Please note: you will only see them in the pending section if you used the NMF Web Portal to submit them.

Saved Recommendations **0** **Grants in Process** **0** Processed Recommendations **0** Recurring Recommendations **0**

Search     Rec Count: 0 Rec Limit  Items Per Page

Recipient	Add	City & State	Status	Status Date	Amount
					

# GRANT HISTORY

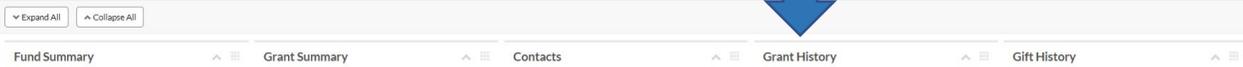


## Welcome Fund Advisor

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Fund 0999 - Other Component Fund\*   
\* Indicates you are an advisor for this fund.



The **Grant History** tile provides quick glance (via a bar graph) of the fund's grant history. Also provides a **Grant History** hyperlink to quick access a list of fund's previous grantees. From the **Grant History** page, you can export, filter and sort:

- You may search by grantee name or use the filter function to narrow your search.
- You may choose the columns that will show in the list by clicking on the column icon.



- To download the data, click on the export button and choose the format you wish to use.



# GIFT HISTORY



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Fund 0999 - Other Component Fund\*   
\* Indicates you are an advisor for this fund.



The **Gift History** tile provides quick glance (via a bar graph) of the fund's gift history. Also provides a **Gift History** hyperlink to quick access a list of fund's gift history with donor information. From the **Gift History** page, you can export, filter and sort:

- You may search by donor name or use the filter function to narrow your search.
- You may choose the columns that will show in the list by clicking on the column icon.

Search



- To download the data, click on the export button and choose the format you wish to use.

Search



Rec Limit

1000

Items Per Page

10

## OTHER NMF WEB PORTAL TILES

### Contacts

Provides contact information if you need assistance with the NMF Web Portal or any questions regarding your fund or fund balance.

### Fund Advisors

Provides a list of your committee Fund Advisors that are on file with NMF. **REMINDER:** Fund Advisors must sign an annual [Code of Conduct](#) as a part of NMF's Governance policies. Failure to do so could impact your fund's ability to do grantmaking. If you see that this list needs updating, please contact your philanthropy officer or email [giving@nwmf.org](mailto:giving@nwmf.org).

### Documents

Where NMF can upload documents for Fund Advisors to view or reference.

## 2. NMF WEB PORTAL DROP DOWN LIST

(Found on the home screen in the banner of NMF Web Portal. Many of these functions can be done within the NMF Web Portal tiles)



HOME GRANT APPLICANT **FUND ADVISOR** REVIEWER SITE ADMIN MY ACCOUNT SIGN OUT

HOME CONTACT US GIVE NOW

## Web Portal

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Fund Summary   Grant Summary   Contacts   Grant History   Gift History

## Documents

Where NMF can upload documents for Fund Advisors to view or reference.

## Fund Statement

See additional tile section above for how to pull a fund statement.

## Gift History

View a list of the fund's gift history.

## Grant History

View a list of the fund's grant history.

## Grant Opportunities

If there were any grant opportunities available to apply for through NMF, they would be listed here.

## Grants in Process

See additional tile section above for how to view grants in process.

## Recommend Grant

See additional section above for options on how to recommend a grant.

## Recommend Transfer

See next section below for how to recommend a transfer from one NMF fund to another.



Home

Documents

Fund Statement

Gift History

Grant History

Grant Opportunities

Grants in Process

Recommend Grant

Recommend Transfer

## Recommend a Transfer

To make a grant recommendation for an interfund transfer to another fund at Northwest Minnesota Foundation (e.g. Northwest Minnesota Foundation Women's Fund):

- Use the drop-down menu and select **Recommend Transfer**.
- Complete the information on the following three tabs:
  - Recipient
  - Grant Information
  - Submission

## Fund Transfer Recommendation



Donor Name	Kari Cooper	Target Fund
Donor Email	kari@nwmf.org	Amount
Status	NEW (8/11/2020 9:53 AM)	

 Delete  Save

Please select each tab to view/edit your Fund Transfer Request details.

<b>Fund Details</b>	Recipient	Grant Information	Acknowledgement	Submission
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 Edit

Source Fund \*

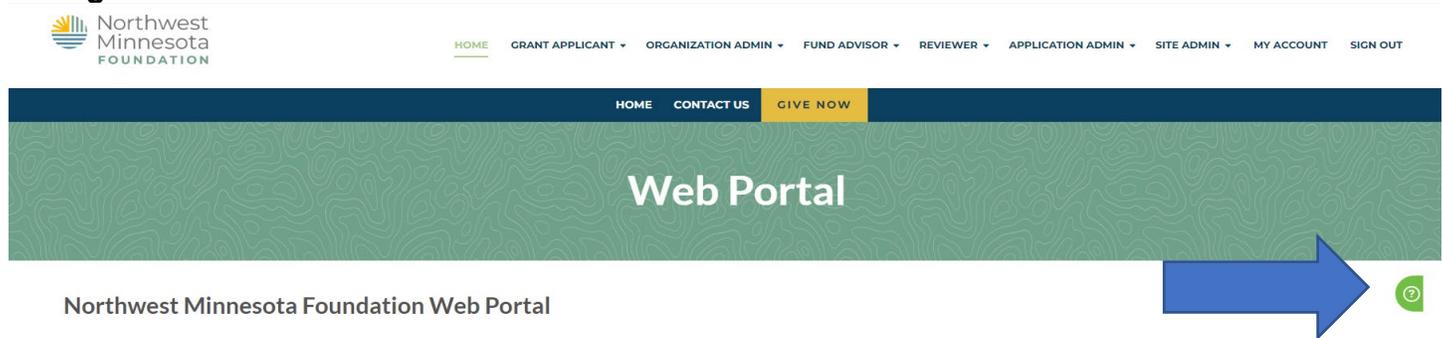
Cash Available	\$0.00
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As of 6/25/2020 12:00 AM

**Next Tab**

## ADDITIONAL RESOURCES

- To change your password or edit contact information, click on **My Account** from the navigation bar at the top of your home screen.
- Each page on the portal has help topics to answer your questions. Click on the green half circle on the upper right-hand side of your screen for additional information.
- If you forgot your password, click on the **Send password hint** or **Reset password** below the blue **Sign In** button.



If you have any questions or need assistance with NMF Web Portal, please contact us at 218-759-2057 or email [giving@nwmf.org](mailto:giving@nwmf.org)