



Fund Advisor Viewer 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 committee member **Fund Advisor** (a person who serves on the Fund Advisory committee but is not one of: Fund Chairperson, Fund Secretary/Treasurer or Fund Contact) with qualified permissions, you can do the following as **Fund Advisor Viewer**:

- View your fund’s financial records, including fund statements.
- View the fund’s history of gifts and grants.

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

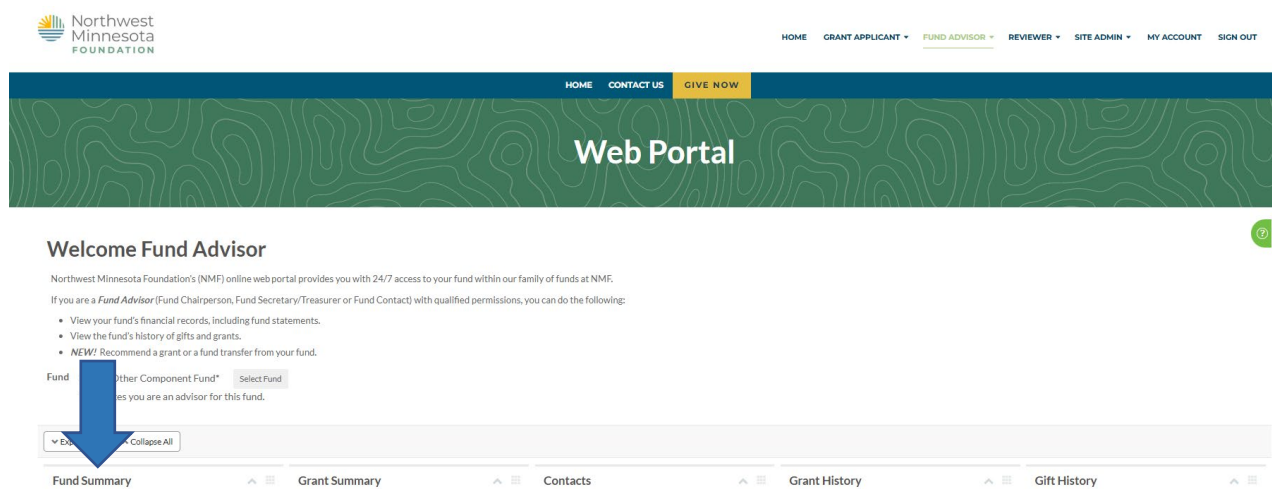
The NMF Web Portal provides an opportunity to do the same task in multiple places. We will be splitting this guide into two sections of the functionality:

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 Statement** 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.

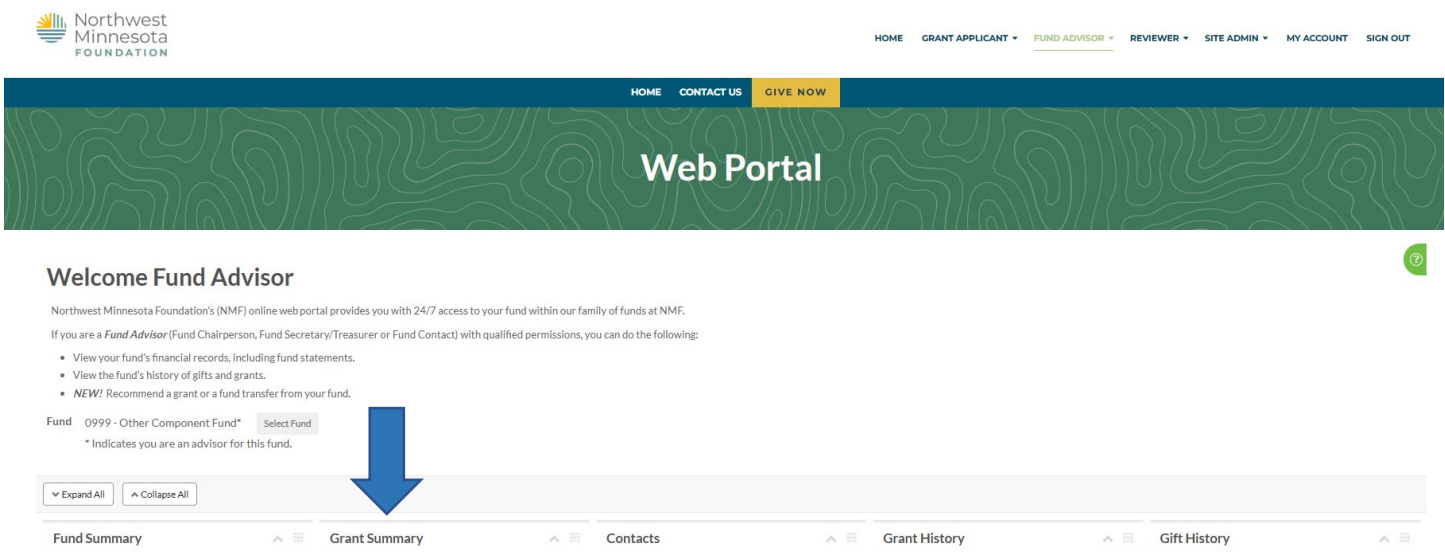
Fund Statement



The screenshot shows a form with the following fields: "Select Fund" with a dropdown menu showing "<Select a Value>", "Enter Period Start" with a date field containing "7/1/2019", and "Select Period End" with a date field containing "6/30/2020". A "View Report" button is located to the right of the date fields. A blue arrow points to the "View Report" button.

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

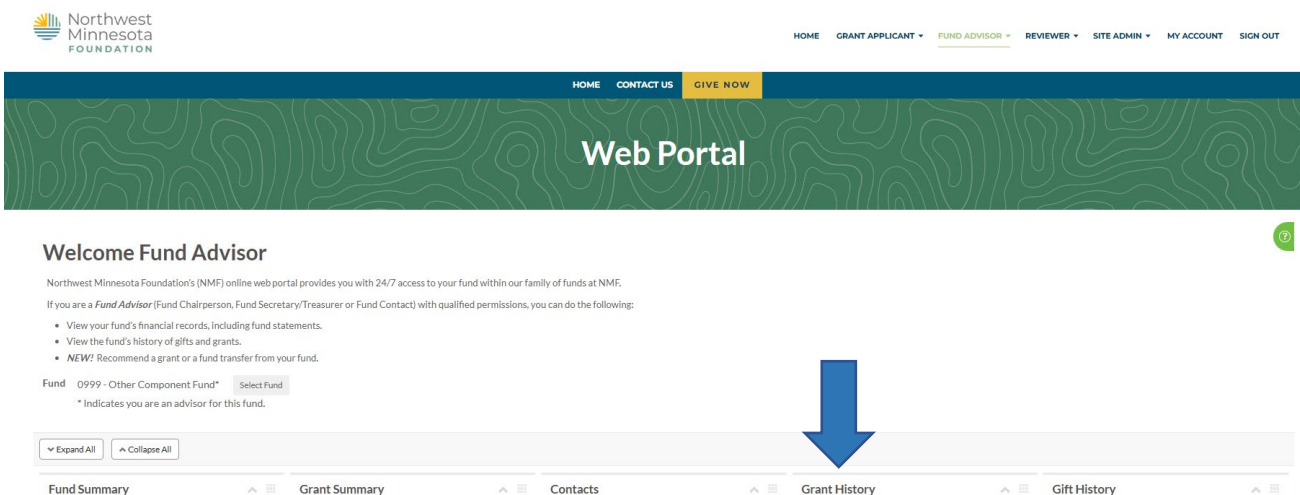


The screenshot shows the Northwest Minnesota Foundation Web Portal. The top navigation bar includes "HOME", "CONTACT US", "GIVE NOW", "HOME", "GRANT APPLICANT", "FUND ADVISOR", "REVIEWER", "SITE ADMIN", "MY ACCOUNT", and "SIGN OUT". The main heading is "Web Portal". Below the heading, there is a "Welcome Fund Advisor" section with a list of actions: "View your fund's financial records, including fund statements.", "View the fund's history of gifts and grants.", and "NEW! Recommend a grant or a fund transfer from your fund." Below this, there is a "Fund" dropdown menu showing "0999 - Other Component Fund*" and a "Select Fund" button. A blue arrow points to the "Grant Summary" tile in the main content area. The main content area also includes "Fund Summary", "Contacts", "Grant History", and "Gift History" tiles.

The grant summary tile allows you to:

- View your grant history.

GRANT HISTORY



The screenshot shows the Northwest Minnesota Foundation Web Portal. The top navigation bar includes "HOME", "CONTACT US", "GIVE NOW", "HOME", "GRANT APPLICANT", "FUND ADVISOR", "REVIEWER", "SITE ADMIN", "MY ACCOUNT", and "SIGN OUT". The main heading is "Web Portal". Below the heading, there is a "Welcome Fund Advisor" section with a list of actions: "View your fund's financial records, including fund statements.", "View the fund's history of gifts and grants.", and "NEW! Recommend a grant or a fund transfer from your fund." Below this, there is a "Fund" dropdown menu showing "0999 - Other Component Fund*" and a "Select Fund" button. A blue arrow points to the "Grant History" tile in the main content area. The main content area also includes "Fund Summary", "Grant Summary", "Contacts", and "Gift History" tiles.

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.



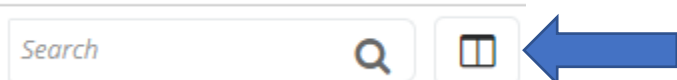
- To download the data, click on the export button and choose the format you wish to use.



GIFT HISTORY

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.



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



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.

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)

Northwest Minnesota FOUNDATION

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

HOME CONTACT US GIVE NOW

Web Portal

Welcome Fund Advisor

Northwest Minnesota Foundation's (NMF) online web portal provides you with 24/7 access to your fund within our family of funds at NMF.

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.

Fund 0999 - Other Component Fund*

* Indicates you are an advisor for this fund.

Expand All Collapse All

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

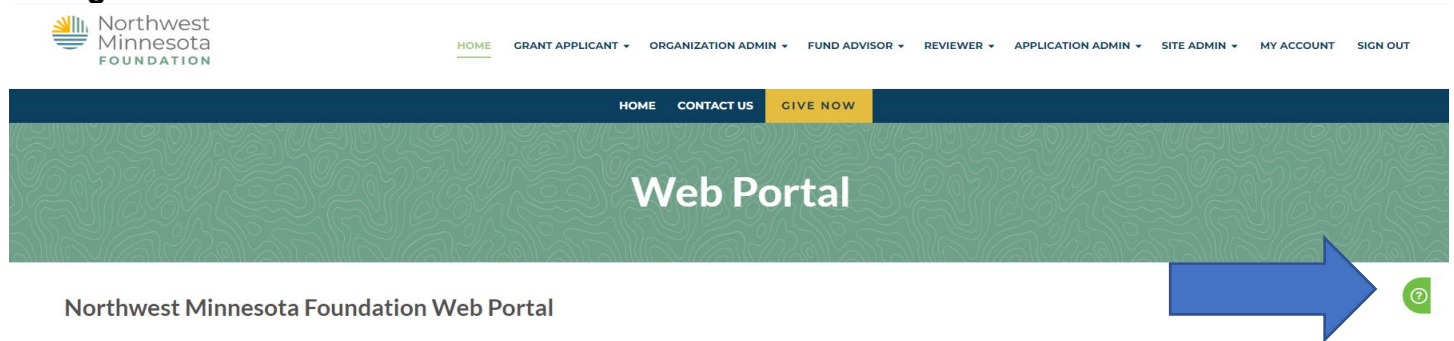
View a list of the fund's grant history.

FUND ADVISOR

- Home
- Documents
- Fund Statement
- Gift History
- Grant History

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