



## Fund Advisor & Fund Viewer Web Portal Quick Start Guide – NAVIGATING FUND STATEMENTS

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

If you are a Fund Advisor (Fund Chairperson, Fund Secretary/Treasurer or the Fund Contact) for a fund at NMF, you will use the Fund Advisor view. As a **Fund Advisor**, with qualified permissions, you can do the following:

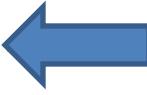
- View your fund's financial records, including fund statements and history of contributions and distributions.
- Recommend grants and check grant history.
- Request payment of mission related expenses directly to vendors or through reimbursements.

If you have questions, you may reach out to your Philanthropy Officer or Chris Bell, Philanthropy Specialist at [chrisb@nwmf.org](mailto:chrisb@nwmf.org).

### LOG ON to the PORTAL

Click on the link to access the portal: <https://nwmf.spectrumportal.net/accounts/signin> or go to [www.nwmf.org](http://www.nwmf.org) and click on the link to the portal on our home page.

The screenshot shows the Northwest Minnesota Foundation website. At the top, there is a navigation bar with links for Fund Advisors, Donor Advised Funds, Professional Advisors, Grants, Scholarships, and NMF Web Portal. A large blue arrow points to the 'NMF Web Portal' link. Below the navigation bar, there is a secondary navigation bar with links for HOME, WHO WE ARE, WAYS TO GIVE, PROGRAMS, LOANS, RESOURCES, NEWS, CONTACT US, and GIVE NOW. At the bottom, there are three buttons: OPEN GRANT ROUNDS!, SUPPORT FOR FARMERS AND RANCHERS, and MEET OUR TEAM!



# Web Portal

## NAVIGATE THE SITE

**TILES MENU ITEMS** – this page provides summary information. For further detail, please go to the Fund Summary button on the drop down menu.

### Fund Summary (See additional section below)

View fund balance, current available balance and fund statements.

### Grant Summary (See additional section below)

Make grant recommendations (advised funds only) and view grant history.

### Contacts

View who to call/email for inquiries.

### Giving Opportunities

See special grantmaking opportunities available through NMF.

### Grant History (See additional section below)

View history of grants/scholarships (advised funds only) or endowment distributions.

### Gift History (See additional section below)

View a history of contributions to your fund.

### FUND ADVISOR

Home

Fund Summary

Grant History

Grants in Process

Recommend Grant

Recommend Transfer

Grant Opportunities

Gift History

Reports

## FUND SUMMARY

The fund summary section gives you a quick view of your **Current Net Assets** and **Current Available Balance**.

This summary is found on the Fund Advisor Home Page – see the blue arrow above.

In addition to checking your fund balance, you may view your fund statements by clicking on **Report-Fund Statement**. See the gold arrow above.

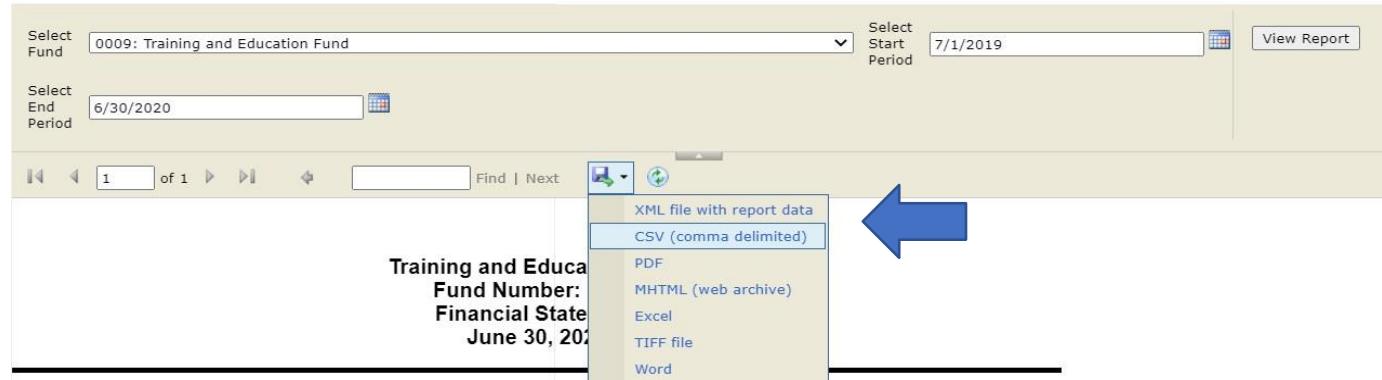
The **Fund Statement** viewer allows you to select a custom reporting period. Click on **View Report** after you have chosen your start and end date.

## Fund Statement



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

## Fund Statement



Training and Education Fund  
Fund Number:  
Financial Statement  
June 30, 2020

XML file with report data  
**CSV (comma delimited)**  
PDF  
MHTML (web archive)  
Excel  
TIFF file  
Word

## 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.
- To view NMF's newsletter, click on **Resource Newsletter** under **NEWS** on the NMF home page. To receive newsletters directly, contact Bethany Wesley at [bethanyw@nwmf.org](mailto:bethanyw@nwmf.org)

## FIND HELP

- 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.



Northwest Minnesota Foundation

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

HOME CONTACT US GIVE NOW

# Web Portal

- For staff assistance, contact Chris Bell, Philanthropy Specialist, at [chrisb@nwmf.org](mailto:chrisb@nwmf.org)