



Fund Advisor & Fund Viewer Web Portal Quick Start Guide – **GIFTS** and **GIFT HISTORY**

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.

LOG ON to the PORTAL

Click on the link to access the portal: <https://nwmf.spectrumportal.net/#/donors/home> or go to 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 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 of the page 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 Gift History 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

GIFT HISTORY

To access
your
gift
history
(history
of
contributions
to
your fund),
on View Gift
History
Screen.

Gift History

If you are an advisor for the selected fund then you can set Gift Source to "All" to see gifts made by all donors. If you chose "All" funds then you must be an Advisor for all of the funds in order to see gifts made by others. If you made a gift that was split between multiple recipients it will appear as multiple gifts here.

Fund

* Indicates you are an advisor for this fund.

Gift Source Mine All

Find in this list		Open	Date	Type	Amount	Rec Count: 0	Rec Limit: 1000	Items Per Page: 10	Address	City	State	Zip
Page Total					\$0.00							
Grand Total					\$0.00							

to
click

- You may choose the columns that will show in the list by clicking on the column icon.



- To adjust the number of grants on each page, adjust the number on **Items per Page**.



- To download the data, click on the download button. Data will be downloaded in a .csv file which can be converted to an excel file.



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

FIND HELP

Northwest Minnesota Foundation Web Portal

- 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.
- For staff assistance, contact Chris Bell, Philanthropy Specialist, at chrisb@nwmf.org