



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

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 Development Officer or Chris Bell, Development Specialist at [chrisb@nwmf.org](mailto:chrisb@nwmf.org). You may also send a message to [philanthropy@nwmf.org](mailto:philanthropy@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](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 left is the logo. The navigation menu includes: HOME, WHO WE ARE, WAYS TO GIVE, PROGRAMS, LOANS, RESOURCES, NEWS, CONTACT US, and GIVE NOW. A search bar is located on the right with a magnifying glass icon and a blue arrow pointing to it. Below the navigation menu are three buttons: COVID-19 UPDATES AND RESOURCES, SUPPORT FOR FARMERS AND RANCHERS, and MESSAGE TO FUND ADVISORS. The main banner features a forest background with the text: "Deeply rooted in the communities we serve, we're reimagining what's possible when it comes to building better lives for those throughout our region." and a "LEARN MORE" button.

# Web Portal

## Welcome Fund Advisor

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## NAVIGATE THE SITE

**TILES MENU ITEMS** - this page provides summary information. For further detail, please go to the Grant 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

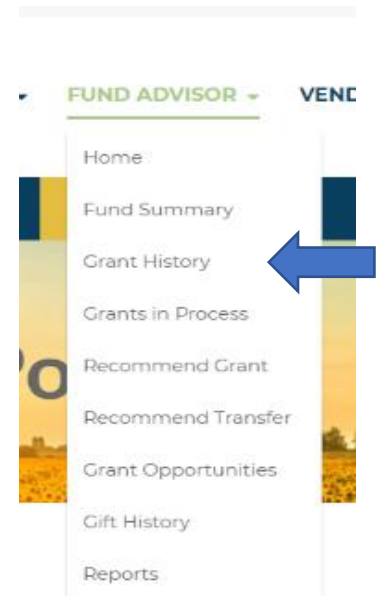
See special grantmaking opportunities available through NMF.

### 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.



## GRANT SUMMARY

The grant summary tile allows you to:

- Recommend a grant.
- View pending grant recommendations.
- View your grant/distribution history. You may also view grant history on the separate grant history tile.

## Recommending a Grant



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 box with 3 dots to the left of the grantee you wish to recommend a grant to.
  - Click on “Create a grant recommendation.”
  - Under the Grant Information tab, edit the amount, grant purpose, etc. and click Save.
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
    - Submission



### Grant Recommendation

Donor Name	Kari Cooper	Recipient
Donor Email	karc@nwmf.org	Amount
Status	NEW (8/11/2020 9:52 AM)	

 Delete  Save

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

**Fund Details** Recipient Grant Information Acknowledgement Submission

 Edit

Source Fund \*

Cash Available \$0.00

As of 6/25/2020 12:00 AM



Next Tab

3. 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	karic@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.

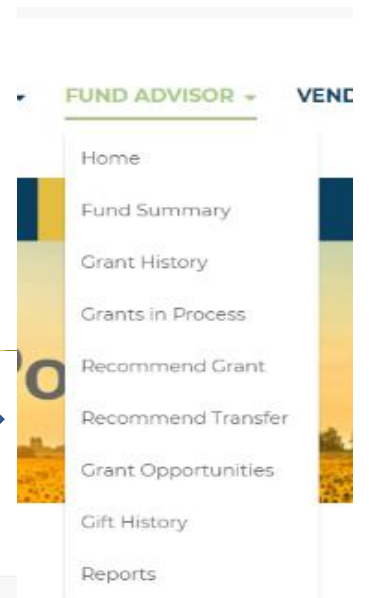
**Fund Details** Recipient Grant Information Acknowledgement Submission

 Edit

Source Fund \*

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

Next Tab

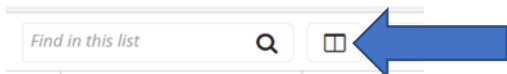


4. If you are a committee making grant recommendations, please e-mail your committee minutes where grants have been approved to Chris Bell, [chrisb@nwmf.org](mailto:chrisb@nwmf.org). We are working on a feature within the portal so that you may upload your minutes. This will be available within the year. Donor Advised Funds do not need to provide any additional supporting documentation.

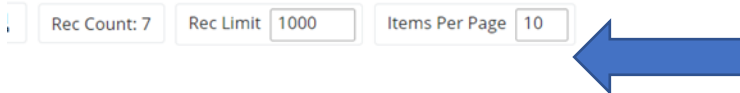
## GRANT HISTORY

The **Grant History** tile provides many ways to search your grant history (2012 to present) and to organize the information.

- Click on **Grant History** on the **Grant Summary** tile.
- 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 adjust the number of grants on each page, adjust the number on **Items per Page**.



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



## 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 Kari Cooper at [Karic@nwmf.org](mailto:Karic@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.



HOME GRANT APPLICANT FUND HOLDER FUND VIEWER REVIEWER APPLICATION ADMIN MY ACCOUNT SIGN OUT



Welcome Fund Advisor

Fund -\*

\* Indicates you are an advisor for this fund.



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