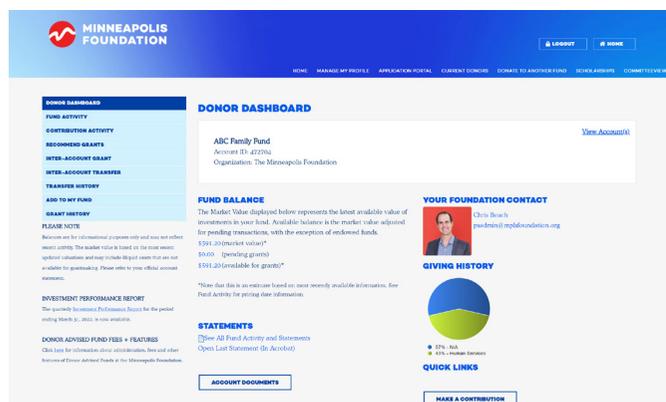




# DonorView Cheat Sheet

## Navigating Your Online Philanthropic Tool

DonorView is designed to make it easy for you to give to the organizations that you care about. This cheat sheet outlines some of its commonly used features. Once you log into DonorView, explore the left-hand menu (or, on a tablet or smartphone, click the “hamburger” menu icon) to get started. Enjoy!



## Donor Dashboard

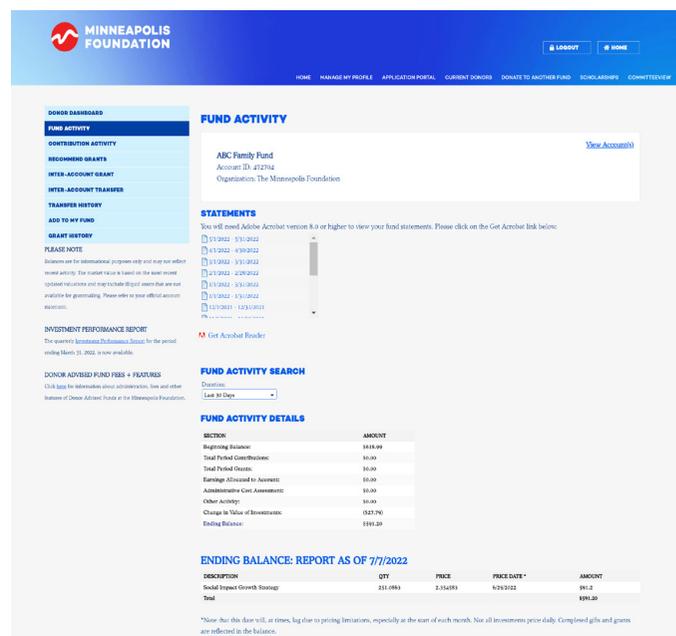
The **Donor Dashboard** is a summary of your fund. This section includes information about grant activity, including the status of grant payments; links to investment performance reports and investment tips; and fund balance information, including the latest market value of investments in your fund. The available balance shows the market value less pending transactions for non-endowed funds.

## Fund Activity

This section of DonorView is where your statements are located. New monthly statements appear roughly 30 days after the end of each statement period and are available for download.

To view a statement from a more specific date range, click on the drop-down menu under **Fund Activity Search** and select **Range**. Then use the calendar icons to select any start and end date.

The **Fund Activity Details** table will populate data based on the date range you choose. You can export the information into an Excel or PDF document.



## Contribution Activity

The **Contribution Activity** tab allows you to see gifts that have been made to the fund, by you or others. Date ranges can be manipulated to show contributions over the last 30 days (default), 60 days, 90 days, 6 months, the year to date, or a calendar year in the past five years.

By selecting **Advanced Search**, you can find contributions from specific parties (people or organizations) during specific time periods. Results from your search can be exported into an Excel, PDF, or mail merge document to create acknowledgment notes.

If you would like others to be able to contribute to your fund, please let your Philanthropic Advisor know. Once your fund has been set up to receive contributions from others, you will receive a unique link that you can share with prospective donors.

Contributions can also be made through the mail. Checks should be made out to the Minneapolis Foundation with the fund's name in the memo space.

### TIP

You can make contributions to your fund online. If you would like to contribute to your fund, select the **Add to My Fund** option on the Donor Dashboard menu. Doing so will bring you to the **Online Contributions** page and auto-populate much of your information.

Have stock, an illiquid asset, or something a little less traditional you'd like to gift? Contact your Philanthropic Advisor to discuss how best to transfer it to the Foundation.

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## Recommend Grants

The **Recommend Grants** tab contains a list of your favorite charities and allows you to recommend one or several grants. It also compares the current year's and previous year's grant totals for each organization.

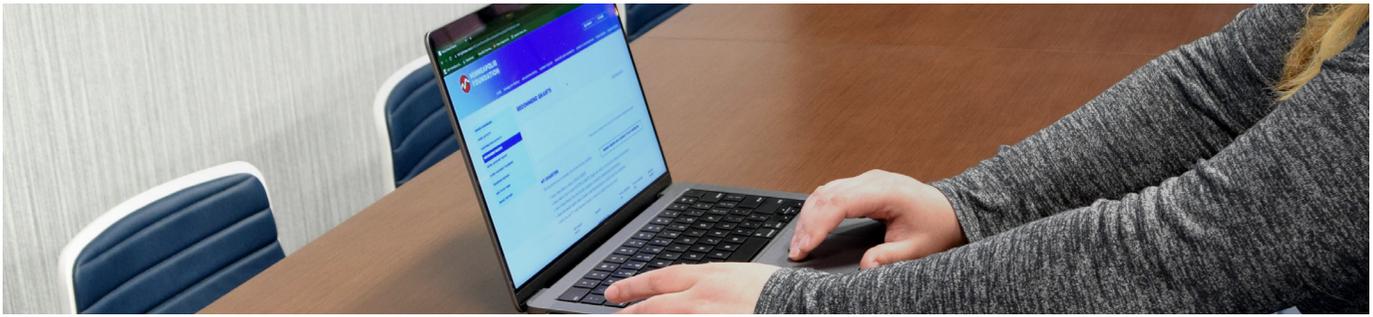
The first time you view this page, the **My Charities** table will be blank, and you will need to populate it:

1. Click the **Search** and/or **Add a Charity to My Favorites** button; this will bring you to a new page.
2. Scroll down to the **Charity Search** tool and enter the name of the charity you wish to add in the search bar.
3. If the organization you are looking for appears, click on the name, and the organization will be added to your **My Charities** table.

If the search results in a message reading "No records to display," you are welcome to suggest the organization as a new charity using the **Suggest A Charity** option. Complete as much information as you can using the provided form and press **Submit**. A member of the Grants Administration team will review the submission and verify the organization's legitimacy. The charity will then be added to your **My Charities** table, and you will be able to recommend a grant to this organization.

### TIP

Relax the parameters of your search by entering a portion of the organization's name instead of the complete name. For example, search for "Habitat" instead of "Habitat for Humanity."

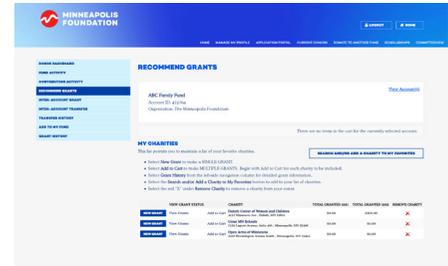


## Recommend Grants (Continued)

Once you have listed one or more charities, you can recommend grants online. Each grant can be entered as a single recommendation. You can also recommend several grants at once, review and edit your recommendations, and submit them all together (now or later) using the **Add to Cart** button.

1. Click on the **New Grant** button.
2. If the organization has more than one location, select an address using the address drop-down menu.
3. Add the amount you wish to recommend.
4. Choose to pay as soon as possible, or on a specific date in the future.
5. After your recommended grant is approved, the Minneapolis Foundation will notify the organization receiving the grant. The notification will be addressed to the default contact information unless you note otherwise.
6. The **Grant Purpose** field tells the organization receiving the grant whether you intend to support a specific program or activity (for example, website development) or if the organization can use the donation as it sees fit. General operating support is the default. You can also choose an option from the drop-down menu or enter your own grant purpose.
7. The **Special Instructions** field is for communicating with Foundation staff. Do you want the grant to be anonymous? Would you like a copy of the grant to be mailed to you? Is your preferred branch location missing from the address drop-down menu? Got a question? This is where you can let us know! The information you put in this field is viewable only by Foundation staff.
8. Press **Submit**.
9. On the next page, review your recommendation. Click on the appropriate button to **Confirm**, **Edit**, or **Cancel** your grant recommendation.

You will receive a confirmation email with the details of each grant recommendation. You can track your recommendations as they are processed using the **Grant History** section.



## Interaccount Transfer

If you are the primary or joint advisor of more than one fund with the Minneapolis Foundation, this feature allows the transfer of money between funds. If you have more than one fund and would like to use this tool, please contact your Philanthropic Advisor.

## Transfer History

This feature shows all transfers between accounts to which you are an interested party. It shows submitted transfer requests and can be searched to show transactions in a specific date range.

## Add to My Fund

The **Add to My Fund** section allows you to add to your fund online via credit card.

## Grant History

This section shows submitted grant recommendations and can be searched to show grants in a specific date range or to a specific organization.

The **Grant Payment** table will show you:

- The organizations to which you have recommended a grant
- The **Status** of the grant (entered, approved, posted)
- When the grant was **Created**
- When the grant payment was **Posted** by mail or **Issued** electronically
- The details or **Actions** of the grant

The table also provides an option to recommend a new grant to each of the organizations listed.

## Want to donate to another fund?

Use the **Donate to Another Fund** tab on the top menu of DonorView. This section allows you to contribute securely via credit card to charitable funds at the Minneapolis Foundation. All funds that have been set up to receive a grant from another fund can be found using the Search All Funds link. If you are not able to find the fund to which you'd like to contribute, please contact your Philanthropic Advisor.

