

FUNDWEB 3 ADMIN GUIDE

Creating and administering Fundweb accounts

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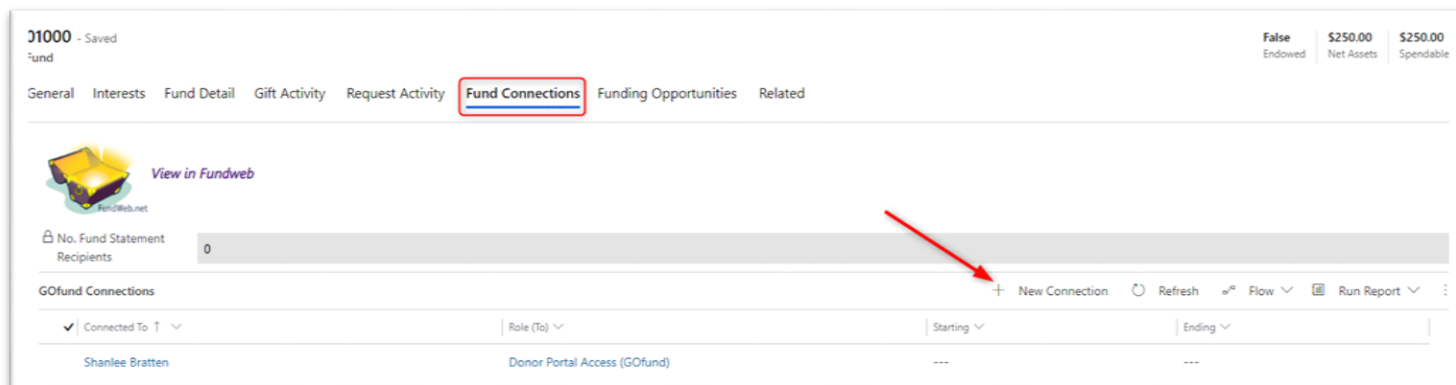
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CREATING A FUNDWEB ACCOUNT

Fundweb account setup is initiated by you, the foundation, and completed by the user. As Fundweb admins, you determine which funds a user can access and what level of access they have to fund detail.

ESTABLISH A CONNECTION

1. Fund Connection: From the Fund, navigate to the Fund Connections tab and choose + New Connection



01000 - Saved Fund

False Endowed \$250.00 Net Assets \$250.00 Spendable

General Interests Fund Detail Gift Activity Request Activity **Fund Connections** Funding Opportunities Related

View in Fundweb

No. Fund Statement Recipients 0

GOfund Connections

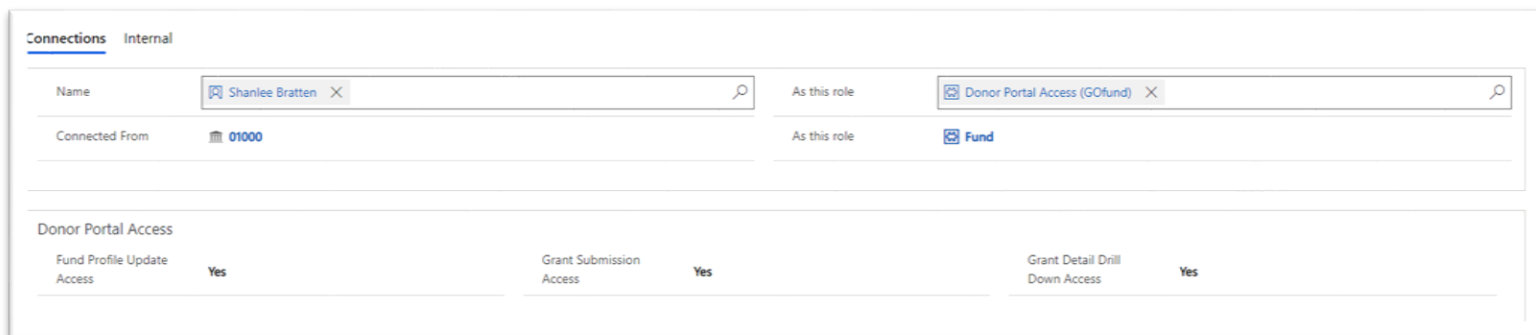
+ New Connection Refresh Flow Run Report

Connected To	Role (To)	Starting	Ending
Shanlee Bratten	Donor Portal Access (GOfund)	---	---

2. Add Contact: Search in Name or select Create New if the record doesn't yet exist. In that case, fill in the Quick Create form, and save. If you select anything other than a Contact record, the system will not allow you to save.

3. Set Roles/Permissions: If a user is given access to multiple funds, each fund can have its own unique level of access. For example, you might want a user to have full access to view and submit grants on some funds and only the ability to view information on other funds.

Click into the top "As this role" field and hit the Enter key to view all roles. Each role has unique permissions. There is a role called Donor Portal Access (GOfund). When this role is selected, a panel will appear in which you can choose which permissions apply to the user. The second "As this role" field will default to Fund. We recommend, as best practice, that you use the Donor Portal Access role and toggle permissions as you see fit.



Connections Internal

Name As this role

Connected From As this role

Donor Portal Access

Fund Profile Update Access	Yes	Grant Submission Access	Yes	Grant Detail Drill Down Access	Yes
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Fundweb 3 permissions are as follows:

- Fund Profile Update Access: User can update certain fields in their fund profile (formal fund name, anonymity for grantmaking, and purpose)
- Grant Submission Access: User can recommend grants
- Grant Detail Drill Down Access: User can see details on accounts including posting date, amount, and note

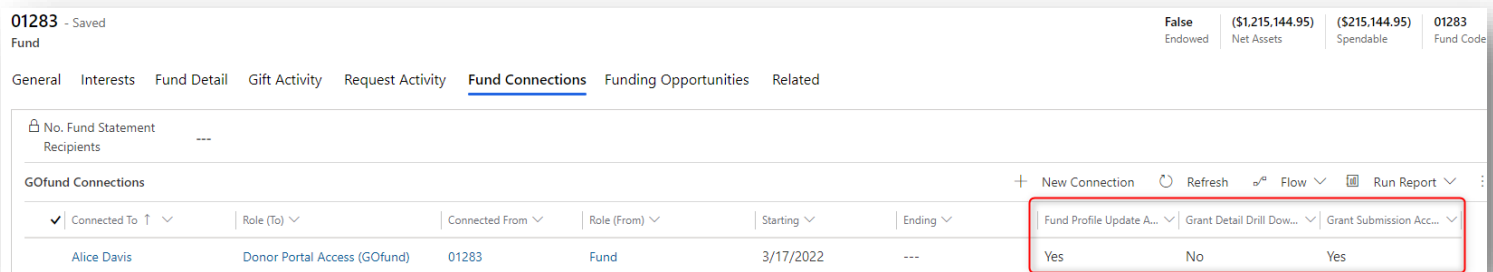
The following Roles have default permissions:

- GOfund Administrator, GOfund Full User, Fundweb.net Administrator, Donor List Email, Fundweb.net Full User:
 - Fund Profile Update access = No
 - Grant Submission access = Yes
 - Grant Detail Drill Down access = Yes
- GOfund Read Only, Fundweb.net Read Only, Fund Statement Recipient:
 - Fund Profile Update access = No
 - Grant Submission access = Yes
 - Grant Detail Drill Down access = No

4. Set Start Date: Set the Start Date in the bottom panel. For Donor Portal Access roles this field is required. For all other roles, it is optional. The Start Date indicates the day that the user's access to Fundweb is turned on and the End Date indicates the day it is turned off. End Date is optional for all roles.

When you create a Fund Connection, the user's Contact record will populate with their URL in the field called GOfund URL (Details tab).

All Fund Connection views will reflect the permissions granted in the Donor Portal Access role.



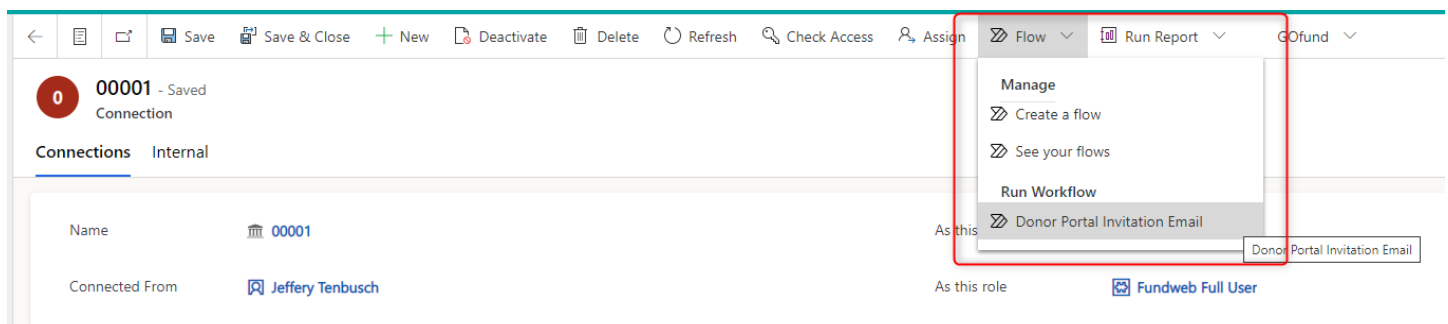
The screenshot shows the 'Fund Connections' tab in a web application. At the top, there's a header with '01283 - Saved Fund' and several financial metrics: 'False Endowed', '\$(\$1,215,144.95) Net Assets', '\$(\$215,144.95) Spendable', and '01283 Fund Code'. Below this is a navigation bar with tabs: 'General', 'Interests', 'Fund Detail', 'Gift Activity', 'Request Activity', 'Fund Connections' (selected), 'Funding Opportunities', and 'Related'. The main content area shows a table of 'GOfund Connections'. The table has columns: 'Connected To', 'Role (To)', 'Connected From', 'Role (From)', 'Starting', 'Ending', and three permission columns: 'Fund Profile Update A...', 'Grant Detail Drill Down...', and 'Grant Submission Acc...'. A red box highlights the permission columns for the first row, which shows 'Yes', 'No', and 'Yes' respectively. Above the table, there are buttons for '+ New Connection', 'Refresh', 'Flow', and 'Run Report'.

Connected To	Role (To)	Connected From	Role (From)	Starting	Ending	Fund Profile Update A...	Grant Detail Drill Down...	Grant Submission Acc...
Alice Davis	Donor Portal Access (GOfund)	01283	Fund	3/17/2022	---	Yes	No	Yes

INVITE EMAIL

Once your connection is established, invite the new user via Email.

From the Connection record, drop down Flow and select Donor Portal Invitation Email. The user will be sent an email to the address in their Contact record inviting them to join FundWeb.



The screenshot shows the 'Connections' tab in the system interface. The main content area displays a connection record for '00001 - Saved Connection'. The record shows 'Name' as '00001' and 'Connected From' as 'Jeffery Tenbusch'. A red box highlights the 'Flow' dropdown menu, which is open and shows options: 'Manage', 'Create a flow', 'See your flows', 'Run Workflow', and 'Donor Portal Invitation Email'. The 'Donor Portal Invitation Email' option is selected. Below the dropdown, there's a button labeled 'Donor Portal Invitation Email'. The interface also shows 'As this role' as 'Fundweb Full User'.

You can also select multiple connections to bulk-send the invite email.

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akoyaGO with accounting

Search

SAN

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Activate

Deactivate

Delete

Assign

Share

Email a Link

Flow

Run Report

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Donor Opportunit...

Gifts

Gift Payments

Interfund Grants

Campaigns

Events

Proposals

Referrals

CRM

Constituents

Contacts

Committees

Connections

Activities

Active Connections

Connected To	Role (To)	Connected From	Role (From)		
00001	Fund	Jeffery Tenbusch	Fundweb Full User		
00001	Fund	GAIL SULLIVAN	Donor Portal Access (GOfund)	6/30/2022	Yes
00001	Fund	Alyson Belvin	Donor Portal Access (GOfund)	8/27/2022	Yes
00002	Fund	Danielle Tenbusch	Fundweb Full User		
00003	Fund	Karen Tenbusch	Fundweb Full User		
00003	Fund	Courtney E	Donor Portal Access (GOfund)	9/5/2022	Yes
00003	Fund	Funny Farm	Donor Portal Access (GOfund)	9/4/2022	Yes
00003	Fund	Meghan Davignon	Donor Portal Access (GOfund)	9/6/2022	Yes
00003	Fund	Michael Kohn	Donor Portal Access (GOfund)	9/5/2022	Yes

Manage

Create a flow

See your flows

Run Workflow

Donor Portal Invitation Email

USER ACCOUNT SET UP

Brand new users will receive an email requesting that they set up their Fundweb account by creating a password. The Fundweb Contact (Fund Management > Accounting Settings > Fundweb Contact) is the person who the email will show as From. Users that had Fundweb 2 accounts will not need to set up their account again. If their password does not fit Fundweb 3 guidelines, they will be prompted to reset it.



If the user needs to complete account setup for any reason (new account, email address change, requested password reset, etc.), the user will be sent an email with a link to complete account setup. If the user does not receive an email, make sure they check their junk or spam folder. If they can't find the email, please contact [akoyaGO support](#) and we will generate a new link and send it to you so the customer can complete account setup.

FUND STATEMENT VS. ACCOUNT DRILL DOWN



During your Fundweb site setup, you will be able to decide if your Fundweb users will see a Fund Statement or Account Drill down.


FUND STATEMENT

The Fund Statement pulls in from Business Central. Users can set date ranges and download to PDF.

 Bratten Family Fund ▾ Fund Statement ▾  Shanlee Bratten ▾

Bratten Family Fund

From: 01/01/2022  To: 02/14/2022  [Update](#) [Download PDF](#)



Summary of Fund Activity
Bratten Family Fund - # 01000

Fund Statement: 1/1/2022 through 2/14/2022

Beginning Fund Balance	(5,000.00)
Contributions	5,650.00
Investment Gains/Losses	0.00
Other Revenue	0.00
Total Revenue	5,650.00

ACCOUNT DRILL DOWN

Account drill down allows users to see details about the fund if their permissions allow. If their permissions are set to Account Drill Down = No, they will be unable to click on the blue links. The blue linked accounts open another window displaying the ledger details that make up the shown balance

Bratten Family Fund

From: 01/01/2022 To: 02/08/2022

Additions

Contributions - Spendable	\$250.00
Total Additions:	\$250.00

Subtractions

Grants Expense	(\$5,000.00)
Total Subtractions:	(\$5,000.00)



Bratten Family Fund

Contributions - Spendable

2022-01-01 - 2022-02-08

[Printer-friendly version](#)

Posting Date	Amount	Note
Tue Jan 25 2022	\$250.00	Austin Fiorini
Total:		\$250.00

Powered by FundWeb.net

GRANT RECOMMENDATIONS

Users with grant submission access will be able to recommend one-time or recurring grants from Fundweb. The grant recommendation form can be accessed from the button at the top center of the screen or from the link in the bottom right corner.

[Recommend a Grant](#)

Bratten Family Fund

From: 01/01/2022 To: 03/18/2022 [Update](#) [Download PDF](#)

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Summary of Fund Activity
Bratten Family Fund - # 01000

Fund Statement: 1/1/2022 through 3/18/2022

When a user submits a grant recommendation, a Request record and a Payment record is created in akoyaGO.

REQUEST

The Request will be titled "Donor Advisor Disbursement" and Request Type defaults to Grant. The recommended amount fills in Original Grant, and the status is set to Approved, with the Decision date being that date the recommendation was submitted.

REQUEST > PROCESS TAB

A box called Recommendation Info in the Process tab will fill in with the grant recommender's information. The GOfund Recommender field is a look up to Contact. Grant Recommender Certification confirms that they checked the box next to the disclaimer at the bottom of the grant recommendation form.

001631 - Saved Request

Approved Request Status: 2/8/2022 Decision Date: --- Program: \$500.00 Grant Amount

Summary Payments & Requirements Project Scholarship **Process** GOapply Funding Opportunities Outcomes Interests Internal Information Related

LETTER OF INTENT

LOI Received	---	
LOI Acknowledged	---	
LOI Decision Date	---	

APPLICATION

Time to Complete	---
Request Received	---
Request Acknowledged	---

DECISION

Decision Date	2/8/2022
Review Complete	No
Recommended Grant	---
Denial Reason	---
Date Notified	---
Conditions	---

SITE VISIT

Site Visit Date	---
Site Visit Notes	---

RECOMMENDATION INFO

GOfund Recommender	Shanlee Bratten
Grant Recommender	Shanlee Bratten
Grant Recommender Email	shanlee@akoyago.com
Grant Recommender Phone	2178559054
Grant Recommender Certification	Yes

PAYMENT

A payment record is created upon Submit of a recommended grant with Amount, Payee, Posting Date, Est. Grant Pay Date, Fund, and Memo filled in accordingly.

To walk through the full grant recommendation process from the fund holder perspective, please see the Fundweb 3 User Guide, listed as a resource in GOlearn.

RECURRING GRANTS (SCHEDULED DISTRIBUTIONS)

When a user recommends a recurring grant, they set the cadence from the Fundweb form – Annual, Semi-annual, Quarterly, or Monthly. They also choose a start and end date.

When a recurring grant request is submitted, several workflows are triggered. One that creates a request and a payment record, and another that creates the scheduled distribution record. The scheduled distribution record

akoyaGO with Accounting

Search

Show Chart Edit Activate Deactivate Delete Assign Share Email a Link Flow Run Report Word Templates

Active Scheduled Distributions

Grantee	Payee	Purpose	Frequency	Most Recent D...	Next Distr
American Swedish Institut	American Swedish Institut	Scheduled distribution to ASI	Annual	1/15/2020	1/15/2021
Community Foundation	Community Foundation	Scheduled distribution for F...	Annual	---	1/15/2021
American Association of U	American Association of U	quarterly with end date start...	Quarterly	---	8/1/2022
Arizona Humane Society	Arizona Humane Society	start and end monthlv	Monthly	---	7/1/2022

Flow

- Manage
- Create a flow
- See your flows
- Run Workflow
- Calculate Scheduled Distrib...
- Calculate Scheduled Distributions

contains a field called Grant Recommender that looks up to Contact. To create the remaining payment records, initiate the workflow on the scheduled distribution record or manually create the payments from request.

THEME

Please contact [akoyaGO support](#) to change your Fundweb theme. We've created a document to help you communicate theme changes. Please see the [Fundweb Theme](#) resource. Theme can be edited on an organizational level or by individual funds. Fundweb theme accepts colors in HEX code (#CCCCCC).

TROUBLESHOOTING

CHANGING A USER'S EMAIL ADDRESS

If you change the email address on the **contact record** for a Fundweb user, Fundweb will be notified of the email address change. The account under the old email address will be deactivated and the user will need to complete setup of their account under the new email address. As with initial account setup, the user will receive an email with a link to complete account setup using the new email address. The user must click the link in the email and complete setup of the new account. The same funds that were available to them under the old email address will continue to be available to them under the new email address.

Please note that this change will load overnight, it is not automatic.

RESET PASSWORD

Users can reset their password from the log in screen. After clicking Forgot Password, they will enter the email address associated with the account and a reset password link will be sent to their email. Passwords must have at least one non alphanumeric character, at least one digit ('0'-'9'), and at least one uppercase letter ('A'-'Z').

They can also choose Reset Password in their user settings (top right corner of screen).

MISC. TROUBLESHOOTING

If a user complains of "spinning" on their fund statement page, this probably means their session has timed out. Please have them refresh the page or log out then back in again.

For help with FundWeb administration, please reach out to akoyaGO Support: support@akoyago.com or call 877-767-6703.