



INTRO TO THE AWARD MODULE

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PRESENTERS



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TODAY'S AGENDA



- ✓ Webinar will be approx. 30 minutes—25 min. presentation and 5 min. Q & A (attendees in “listen only” mode)
- ✓ You will learn about an option available to Fundriver Clients—Award Module
- ✓ You will see Award Module in action
- ✓ Opportunity to ask questions at the end of the session using the “QUESTIONS” feature of GoToWebinar
- ✓ Survey will launch after session completes

ABOUT THE AWARD MODULE



- It is a stand alone module for tracking scholarship/award recipient information
 - Links to fund financial information using GLID, but doesn't impact anything entered on the investment activity and transaction side
 - Can track detailed information on recipients, including hometown, GPA, area of study, etc.
 - Has two user-defined fields that can be determined by client

ABOUT THE AWARD MODULE



- It is searchable by recipient information or fund
 - Once data is entered, you can view all recipients who have received awards from a particular fund or all scholarships received by a particular individual
 - Recipient and award information can be deleted or modified at any time

ABOUT THE AWARD MODULE



- It allows flexible data entry by import or one off, depending on your organization's needs
 - Some clients upload all award activity annually prior to sending out donor reports
 - Data entry can be shared between departments (financial/investment info = Business Office; award data = Advancement Office)
 - No financial information is impacted by what is input or imported into the Award Module

ABOUT THE AWARD MODULE



- It comes with 2 standard donor reports that combine fund performance information with award information
 - Recipient report shows all award recipients for specific post dates
 - Can run Award Report (by date range) for all funds but print/pdf a single fund
 - It makes donor reports easily accessible to Department Users (if you have that option)
 - Custom reports are available, by request

	FUNDRIVER. Basic	FUNDRIVER. Plus	FUNDRIVER. Pro
Automate unitization and reporting	^	^	^
Organize funds by type and purpose	^	^	^
117-1, donor and financial reports	^	^	^
Track multiple investment pools	^	^	^
Custom spending rules	^	^	^
Unlimited number of users	^	^	^
Export reports to Excel, Word, PDF	^	^	^
User-defined reporting tool	^	^	^
Customized import/export to your general ledger	^	^	^
Document management module	^	^	^
Investment manager module		^	^
Scholarship recipient/award module		^	^
Multiple databases		^	^
Department access module			^
User role manager			^
Report subscriptions			^
Single sign-on			^

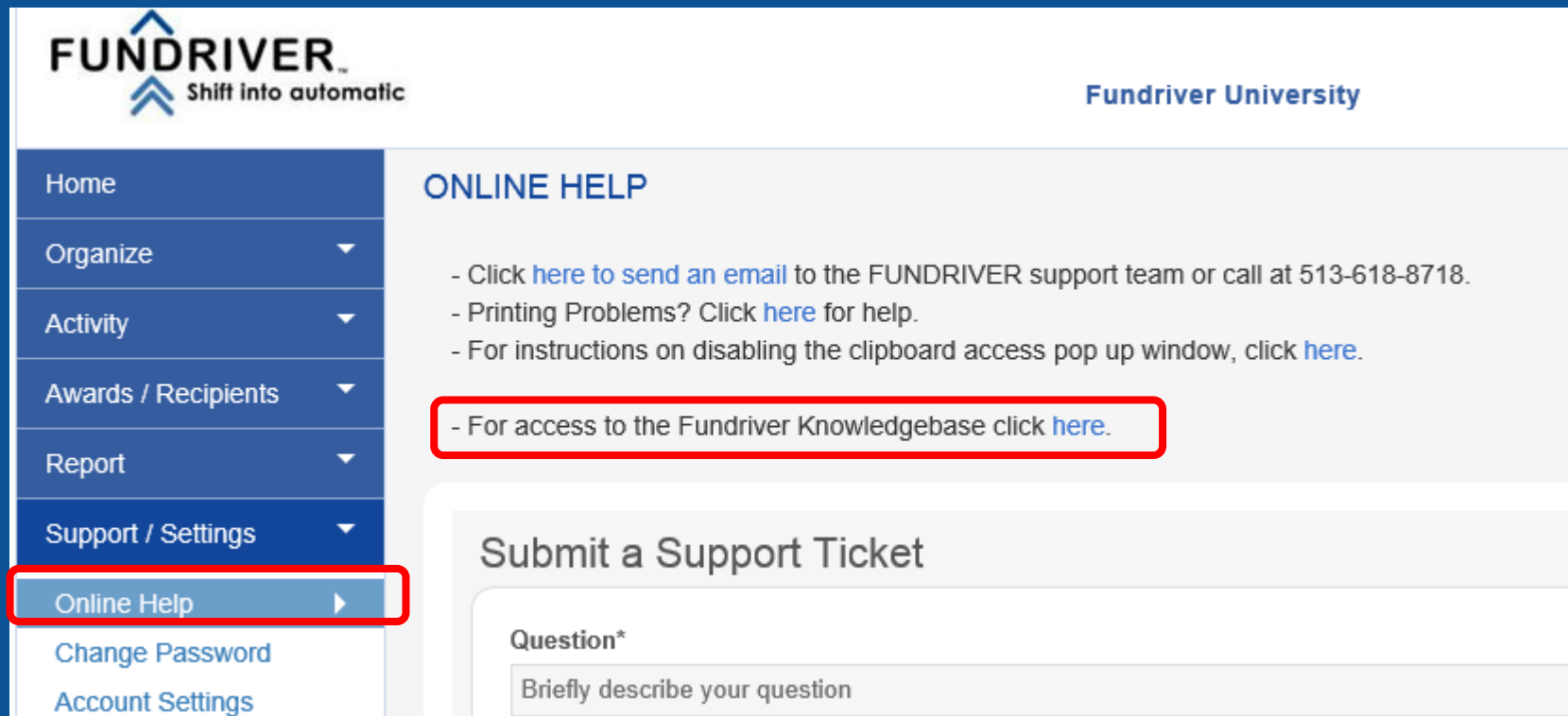
POLLS

DEMO

AWARD MODULE: ADDITIONAL INFORMATION



Access the Knowledgebase and Forums through Support/Settings > Online Help.



The screenshot shows the Fundriver University website interface. On the left is a vertical navigation menu with the following items: Home, Organize, Activity, Awards / Recipients, Report, Support / Settings, Online Help, Change Password, and Account Settings. The 'Online Help' item is highlighted with a red box. The main content area is titled 'ONLINE HELP' and contains the following text:

- Click [here to send an email](#) to the FUNDRIVER support team or call at 513-618-8718.
- Printing Problems? Click [here](#) for help.
- For instructions on disabling the clipboard access pop up window, click [here](#).
- For access to the Fundriver Knowledgebase click [here](#).

The last line of text is enclosed in a red box. Below the text is a section titled 'Submit a Support Ticket' with a text input field labeled 'Question*' and the placeholder text 'Briefly describe your question'.

Q & A

Type your questions in using the QUESTIONS feature of GoTo Webinar.

Click SEND when done typing.

