FUNDRIVER BASICS: FUND MANAGEMENT

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PRESENTER

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TODAY'S AGENDA

FUNDRIVER
Shift into automatic
Flexible. Seamless. Automatic.

- ✓ Webinar will be approx. 45 minutes—40 min. presentation and 5 min. Q & A (attendees in "listen only" mode)
- ✓ Fundriver Support Options
- ✓ Walkthrough of Managing Funds in Fundriver
- ✓ Survey will launch after session completes

FUNDRIVER BASICS

Fundriver Basics was designed for:

1. New users to Fundriver (6 months or less)
2. Users who have not used Fundriver in a while
3. Users who may be expanding their role in Fundriver

(POLL)

FUNDRIVER BASICS

A live presentation of Fundriver Basics is offered quarterly.

You can access a recorded version of the training in the Knowledgebase at any time.

Benefit of live training is the opportunity to ask questions.

FUND MANAGEMENT

Demonstration includes:

- ✓ How to set up a new fund
- ✓ How to modify a fund
- ✓ How to view fund history/transaction history
- ✓ How to set up and assign fund categories
- ✓ How to assign funds to a spending rule
- ✓ Intro to the Bulk Import tool

FUND MANAGEMENT

Demonstration does not include:

✓ Information on the new Non-Pooled Module

If you want to learn more, check out our YouTube channel!

https://www.youtube.com/watch?v=ZTHrwQFhm8k

DEMO

Q & A

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

Click SEND when done typing.