

FUNDRIVER NEW USER TRAINING



Welcome to Fundriver! We've compiled some articles and videos that might help you as you start using the software.

Contact Us

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Category	Topic	Format
Overview	What Is Included in My Fundriver Support Package?	Article
	Fundriver Walk Through: Layout and Functionality	Webinar
	Module Overviews (Award Module, Department Module, Expendable Funds Module, Investment Portfolio Module)	Articles
Funds	Adding a New Fund	Article & Video
	Attaching Fund Documents	Article
	Closing a Fund	Article
	Merging a Fund	Article
	Deactivating, Closing and Merging Funds	Webinar
	Adding a Fund Category (Fund Profile Drop Down)	Article & Video
	Adding/Changing Funds in Bulk	Article & Video
	Fundriver Basics: Fund Management	Webinar
	Linking Expendable and Endowed Funds	Article
	Reference Guides	Transaction Type Guide
Expendable Funds Transaction Type Guide		Article
Fundriver's Glossary of Commonly Used Terms and Expressions		Article
Checklist for Posting Transactions and Investment Activity		Article
Transactions	How Transactions Impact Historical Gift, Book Value and Market Value	Article
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	Using Transaction Types in Fundriver	Webinar
	Exporting Transactions	Article
	Fixing Gifts Entered Incorrectly	Article

Category	Topic	Format
Spending	New Spending Interface	Articles
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	How Do I Know If We Have the New Spending Interface or the Old Spending Interface?	Article
Processing Activity	Imports and Exports	Webinar
	Reopening a Period	Article
	Assessing Fees	Article & Video
	Reconciling and Posting	Article
	Using Due To/Due From in Fundriver	Webinar
Reports	Using Due To/Due From (DTDF)	Article
	Using Reports	Articles
	Fundriver Basics: Using Fundriver Reports	Webinar
	Custom Donor Report Options Overview	Webinar
	User-Defined Reporting Tool	Article
Investment Manager (Add On – Not Applicable to All Users)	Manage Filters Feature	Article
	Using the Investment Portfolio Module	Webinar
	How Do I Enter Manager Investment Activity on the Import Template?	Article
	How Do I Upload the Investment Manager Template?	Article
	How Do I Add a New Investment Manager to a Pool?	Article
	Adding an Asset Class	Article