α|ALETHEIACRM
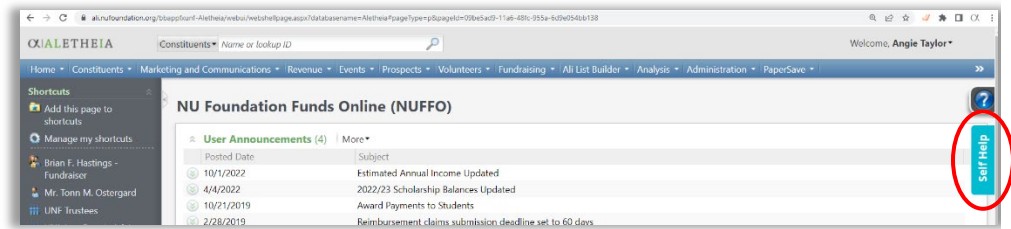**+NUFFO**

NUFFO 102: Summary Reports, Student Fund Finder and Request Foundation Funds

COURSE TYPE

Technology

MODALITY

Virtual
Instructor-led
Training

DURATION

1 hour

DELIVERY METHOD

Online, via Zoom

PREREQUISITES

NUFFO 101

COURSE OVERVIEW

This instructor-led course introduces new **NU Foundation Funds Online (NUFFO)** users to the basics of navigation within Ali CRM+NUFFO. Participants learn fund management basic concepts such as fund type, purpose and authority and how to log in to Ali CRM, access NUFFO and understand individual fund information. This course emphasizes how to run reports about all funds in your portfolio, how to use the Student Fund Finder wizard to generate outputs for all student award funds in your portfolio and how to request foundation funds including spending tips.

NU Foundation Funds Online (also known as the "NUFFO portal") provides university partners with funds management information about foundation-held funds. Being able to capture the preferences of each individual and all interactions with those individuals — and then having the ability to access that information anytime and anywhere — allows the university to have the smartest conversations possible with our donors, alumni and friends, and provides a customized, consistent experience for each supporter of the university.

Whatfix is a built-in companion tool that simplifies using Ali+NUFFO, provides on-demand assistance and tips and guides you through tasks step by step. Google Chrome is the preferred browser for Ali+NUFFO. ==*Prior to attending training,*== please visit the Chrome Store to install the foundation's Chrome extension (if you have not previously done so).

Click **Add to Chrome** > **Add extension**.

Success is indicated when you see the **Self Help** tab on the edge of your browser window:

TARGET AUDIENCE

This course is designed for all new NUFFO users who have fund authority to view or manage foundation-held funds including all new NUFFO university partners and select development, finance and advancement staff at the foundation.

LEARNING OBJECTIVES

- [Log in](#) to Ali CRM+NUFFO

- Access and review **Summary Reports**, the NUFFO area providing reports for all funds in your portfolio

    o   All Activity, Expense Report, Revenue Report, Fund to Fund Transfers, Monthly Fund Balances, Donor Information Report

        ▪   Consider system viewing limitations due to public records request responsibilities of university partners

    o   Fund Summary Memos (bulk list, updates)

        ▪   Fund criteria for new funds, plus existing funds can be changed by donors

        •   [Navigating Fund Summary Memos guide](#)

    o   Subscribe to Gift Notifications: Report Subscriptions (Whatfix flow)

- Access and review **Student Fund Finder**, the NUFFO wizard that allows you to search and review student support fund criteria for funds in your authority

    o   Two reasons to use the tool:

        1.   Making annual student awards – generate report of *all* funds under your authority and identify criteria that apply to each fund

        2.   Identify funds to support individual students based on criteria

- o Access **Self Help** tab for support videos and automated **Flows** that walk you through one-time setup of configuration and use of the tool
- o Criteria basics:
    - ▪ Preferred vs. Required
    - ▪ Subject to change
    - ▪ Hover over top for tips and suggestions
- o Fund Criteria tab and Boolean Operators
- o Output Fields tab – Save/Load configuration
- o Results tab – Optional **Export to CSV** (Caution: Refresh/re-export often since criteria is subject to change at any time.) Refresh list
    - ▪ * next to criteria = *required*
    - ▪ Blank means the fund agreement is silent on that criterion
- • **Request Foundation Funds**
    - o Spending and Form Tips (see Self Help)
    - o [Forms](#)
        - ▪ [Fund Authority Form](#)
        - ▪ [Payment Request Form](#)
        - ▪ [Transfer Request Form](#)
        - ▪ [Domestic Per Diem Calculator](#)
        - ▪ [Gift Transmittal Form](#)
        - ▪ [Reinvestment Request Form](#)
    - o [How to Request Foundation Funds (Key Contacts)](#)
    - o Whatfix flows:
        - ▪ NUFFO Home Screen
            - • Generate a list of donors (to all funds under my authority)
            - • Student Fund Finder: Welcome new user + set up default configuration *(do this setup process once)*
            - • Subscribe to Gift Notifications *(set up once, change later if desired)*
        - ▪ Summary Reports area

- Access and Download Individual Fund Summary Memos

- How to access multiple or recently updated Fund Summary Memos (FSMs)

• Review foundation contacts:
servicedesk@nufoundation.org
fundmanagement@nufoundation.org
training@nufoundation.org
paymentrequest@nufoundation.org
transferrequest@nufoundation.org

RESOURCES PROVIDED DURING TRAINING

- Student Fund Finder Essentials

- Student Fund Finder Guide

VIEW ADDITIONAL INFORMATION

- NUFFO Quick Links

- NUFFO Forms

- NUFFO Training and References

- How to Request Foundation Funds

THANK YOU

Angie Taylor, UNF Technical Trainer — angie.taylor@nufoundation.org