





NU FOUNDATION FUNDS ONLINE LEARNING ROAD MAP

Last updated August 22, 2023

LEGEND

-  Foundation development and advancement staff
-  University staff who manage foundation funds
-  University staff who thank donors for their gifts
-  University staff who submit or approve expenses paid by foundation funds



FUND INFORMATION

Fund Balances | Recent Transactions | Spending Criteria | Fund Authority

DONOR INFORMATION

Send Thank-you's for Gifts

REPORTING FEATURES

Income | Expenses | Transfers | Donors

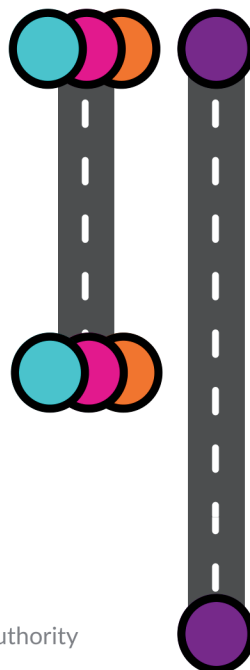
STUDENT FUND FINDER

Student Support Criteria for Funds in Your Portfolio

PAYMENT AND TRANSFER eREQUESTS

Request payments or transfers from funds held at UNF

WHO ATTENDS? | TRAINING SESSION



NUFFO 101 – Intro to NUFFO (1.25 hours)

- Fund management basics
- My Fund Portfolio
- NUFFO fund records
- Whatfix: Installation and use

NUFFO 102 – Next-Level NUFFO (1 hour)

101 is the prerequisite for 102

- Summary Reports: financials and thanking donors
- Student Fund Finder
- How to request foundation funds

NUFFO 103 – eRequests and Approvals (1.5 hours)

101 is the prerequisite for 103

- Fund authority and roles review
- eRequest and approval process overview
- Payment requests
- Transfer requests
- Reinvestment requests
- How to assign a temporary surrogate approver (select users)

Coming Fall 2023

*Constituent record access is not included in NUFFO due to annual HIPAA compliance requirements.