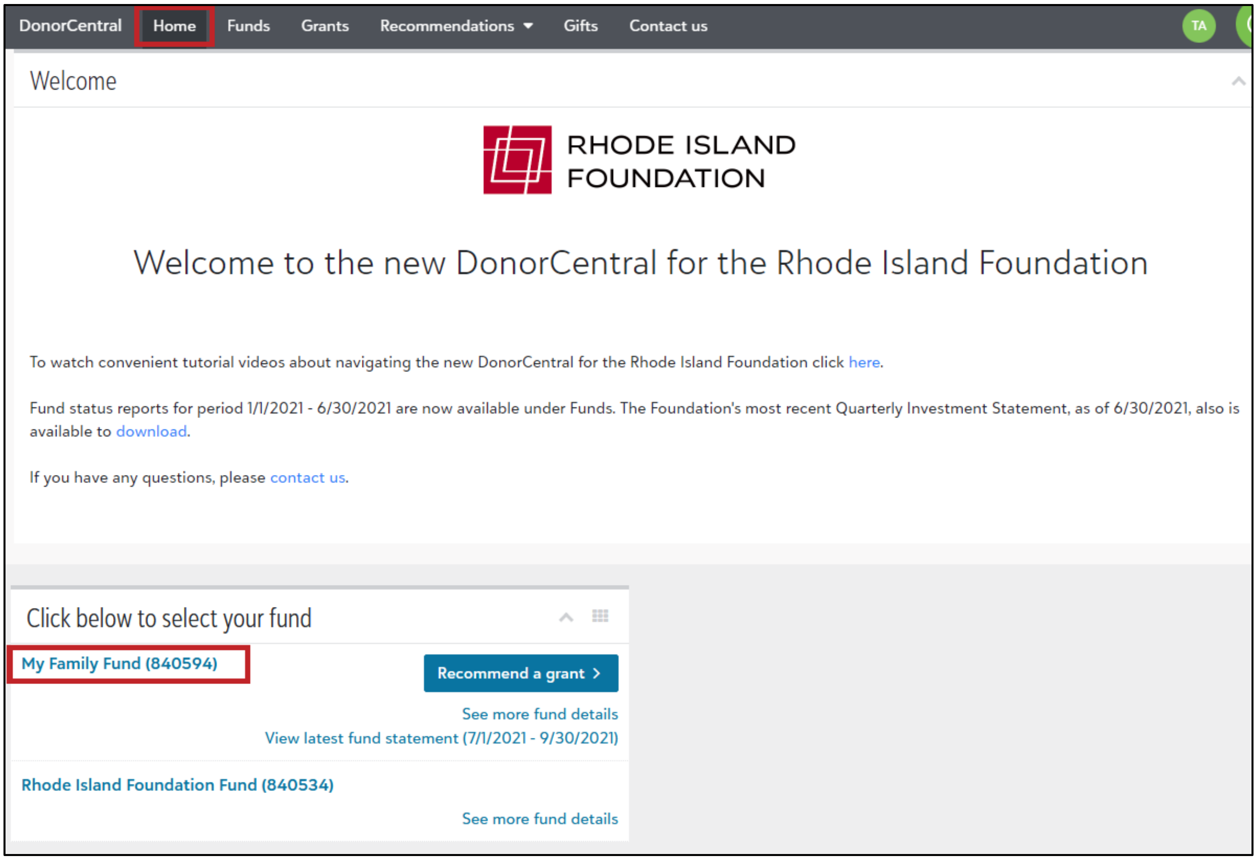
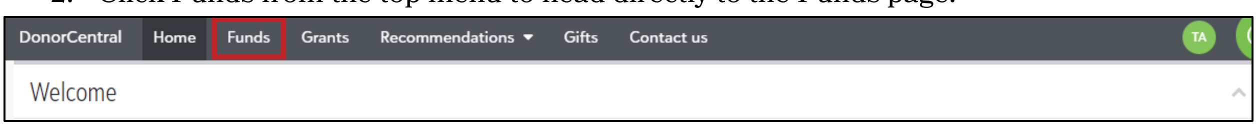
View Fund Information

You can access your fund information in DonorCentral from one of two areas:

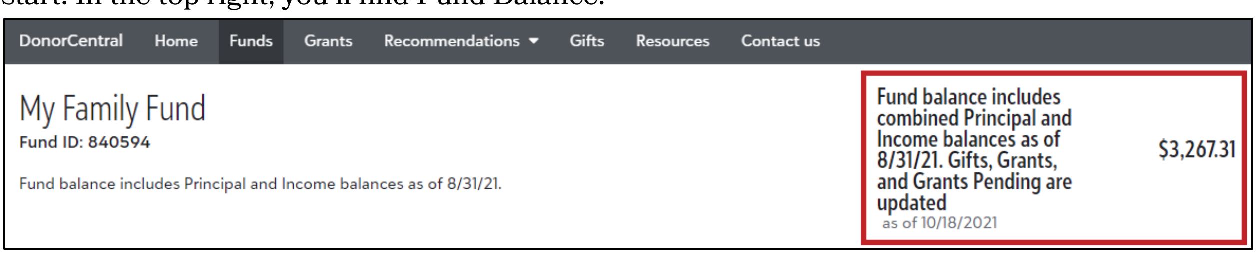
1. On the home page, look for your fund beneath the welcome message. Clicking a fund name will open the Funds page with that fund pre-selected.



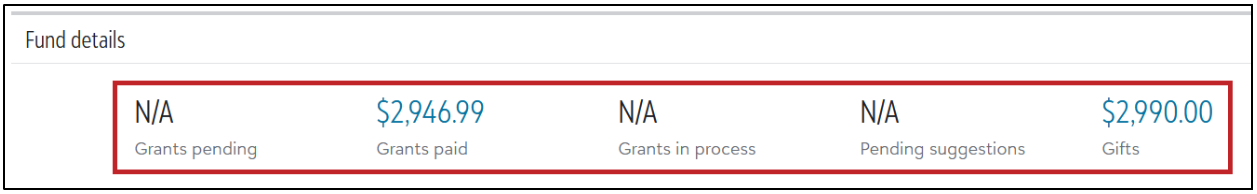
2. Click Funds from the top menu to head directly to the Funds page.



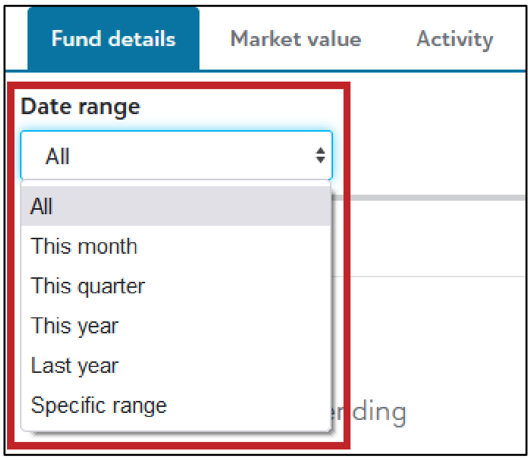
For users with access to more than 1 fund, the page will default to just one fund selected to start. In the top-right, you'll find Fund Balance.



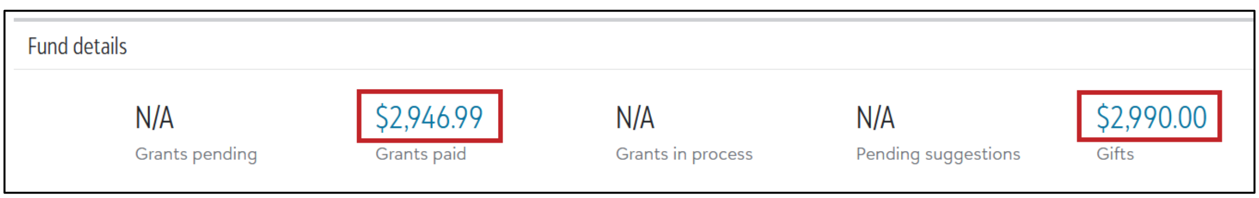
Under Fund details are gift and grant categories.



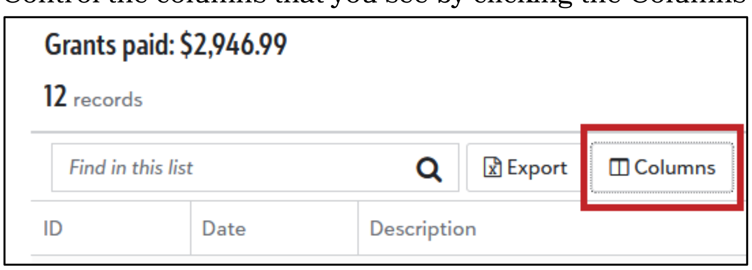
By default, the Funds page loads Fund Details with all-time information. You can change the date range by selecting the dropdown.



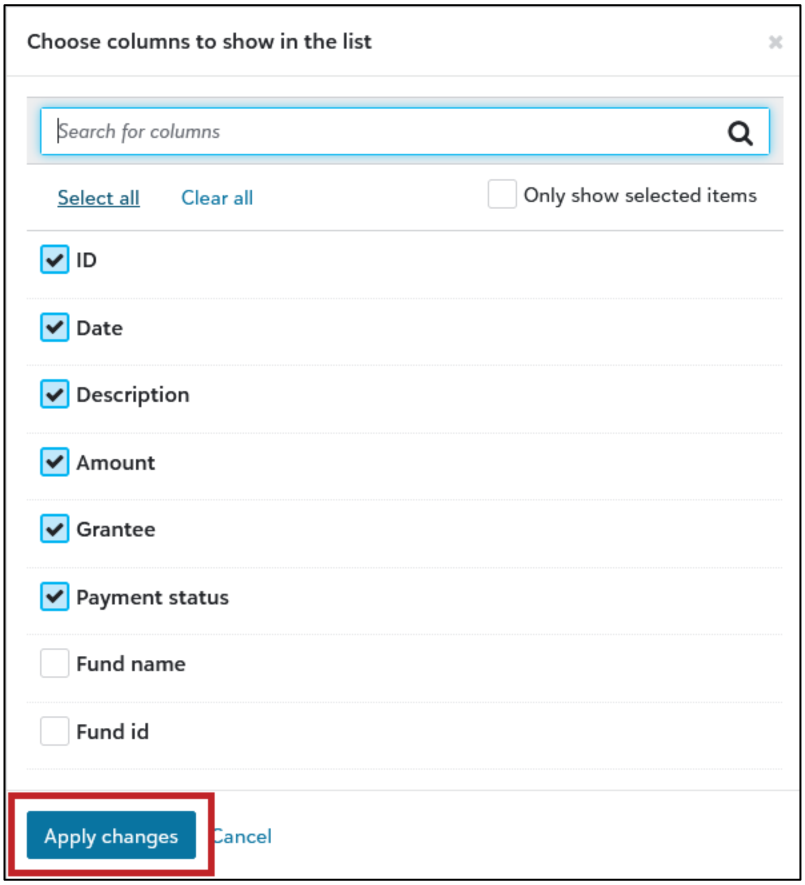
You can also click on the dollar amount totals to see individual records.



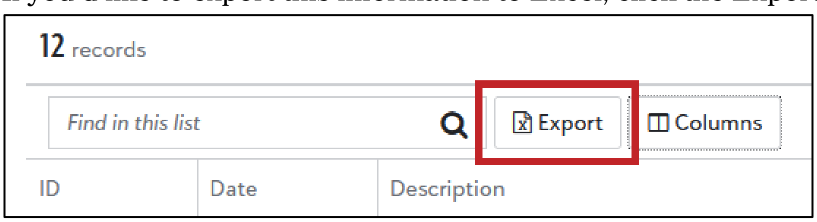
Control the columns that you see by clicking the Columns button.



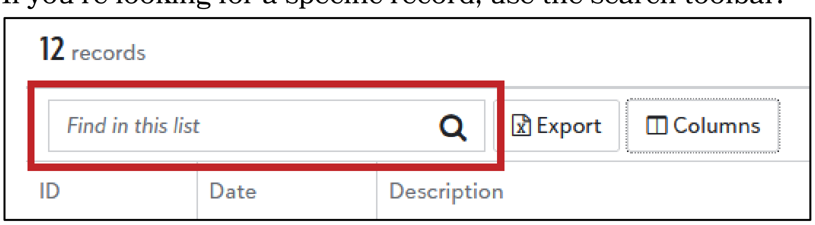
Select the checkboxes for the columns you would like to see and hit Apply changes.



If you'd like to export this information to Excel, click the Export button.

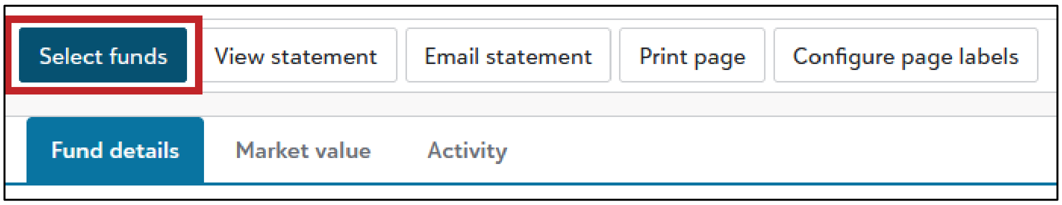


If you're looking for a specific record, use the search toolbar.



When you're done searching, you can set the page back to view all records by hitting the X in the search toolbar.

If you have access to more than one fund, use the Select funds button to only select the fund or funds that you'd like to see on this page. Selecting more than one fund will combine the fund information for Fund Balance and the Fund details section.



After making your selections, hit Apply.