

PORTAL NAVIGATION GUIDE

PHILANTHROPY AT YOUR FINGERTIPS. ANY TIME. ANY PLACE.

DASHBOARD

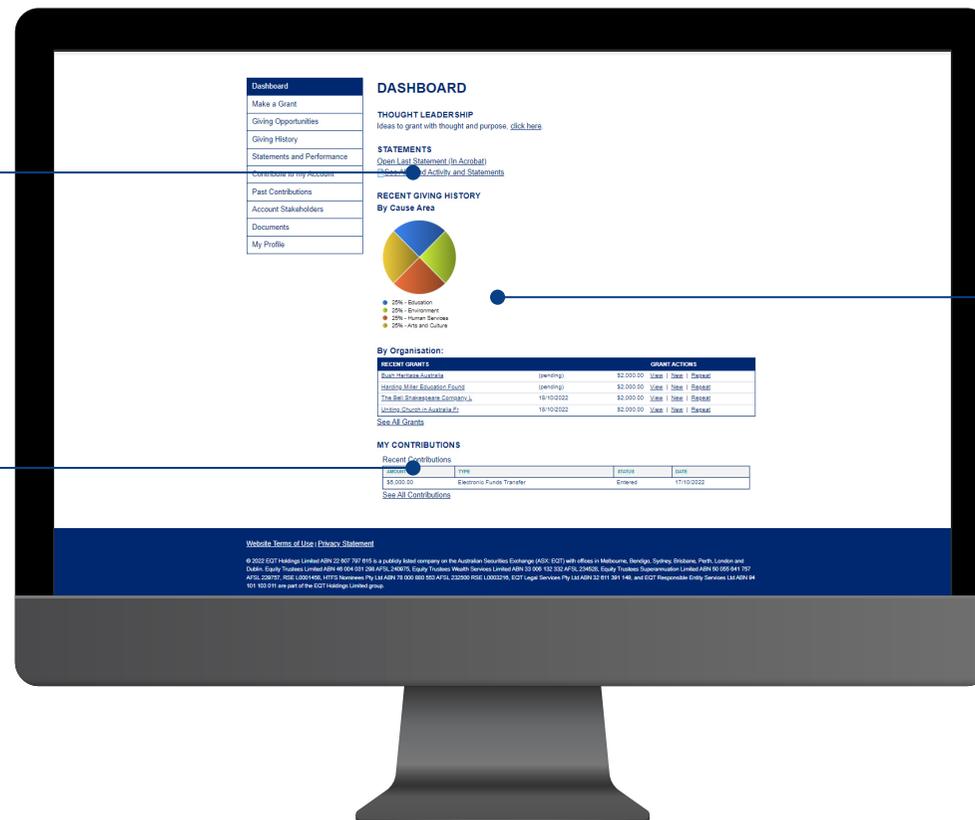
This page has a summary (or snapshot) of key information – which can also be found in more detail on other pages.

STATEMENTS

You can download your most recent statement – or you can visit the Statements and Performance page (side panel) to allow you to view all statement periods.

CONTRIBUTIONS

This provides a view of contribution transactions to your account that have been made, typically in the last 30 days but the date range can be changed. The number of recent transactions shown can also be changed.



RECENT GIVING HISTORY

Chart

The chart displays what area of interest your grant recommendations are supporting. The field of interest will automatically default in line with the purpose of the organisation funds are going towards.

Giving history

You will find a quick overview of recent grant recommendation transactions. You can adjust the date range and number of transactions shown.