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FIN/m-Fin How-to: Looking up Available Gift Fund Balances [1]

You can look up the CU Foundation available balance for a linked Fund 34 Gift Speedtype in the Finance System -- or run an m-Fin report in the CU-Data System

Read the procedure

Option 1: Look up the available balance in the FIN system

Log into the Finance System.

From the **Finance Inquiry** or **Finance & Accounting** homepage, click the **SpeedType** tile.

You may want to save this as a favorite.

Search for your SpeedType using the prompts. When you find your SpeedType, click on the Gift Attributes tab. The Available Balance will display in the Foundation Gift section.

Option 2: See the available balance on certain m-Fin reports

Log into CU-Data.

Several m-Fin reports display the CU Foundation Available Balance for gift SpeedTypes. Here are some examples:

- m-Fin Operating Summary
- m-Fin Revenue and Expenditure Summary
- m-Fin BAE by Month - Summary
- m-Fin Actuals by Fiscal Year
- m-Fin Accounting Summary Fund 34
- m-Fin Balance Sheet Summary

If you're using m-FIN Launch, you'll see CUF next to m-Fin report names if they display a CU Foundation Available Balance.

Note - For Fundraising events, you should verify the detail of your transactions in CU-Data Advancement Intelligence (AI) to ensure revenues are appropriately recorded in your event's Foundation Fund. To view AI reports, log into CU-Data, use the menu on the left to select the **AI Landing Page**, then select the **CU Foundation** menu.

Have a question or feedback?

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OUC - Logging into CU-Data

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[2] mailto:fss@cu.edu?subject=Question%20or%20Feedback%20&body=What%20page%20this%20is%20from:%20' + window.location.href +