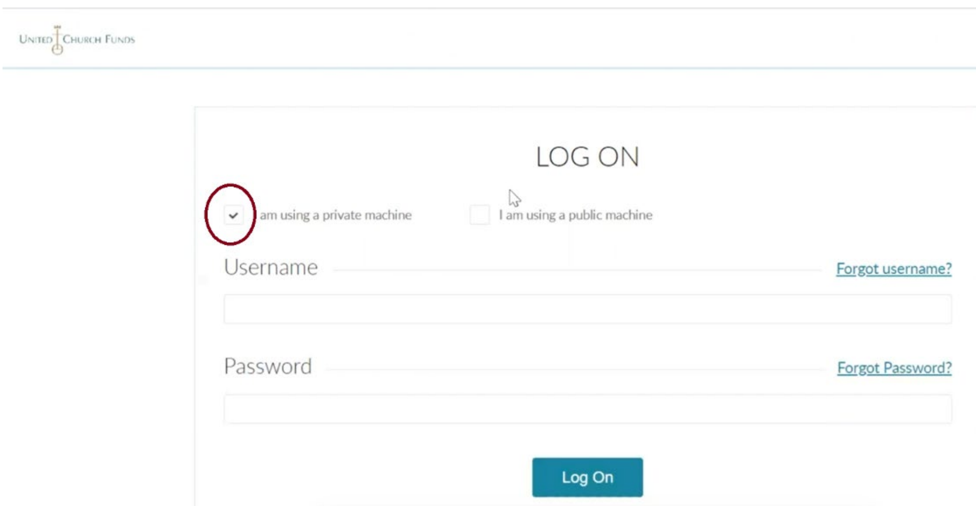
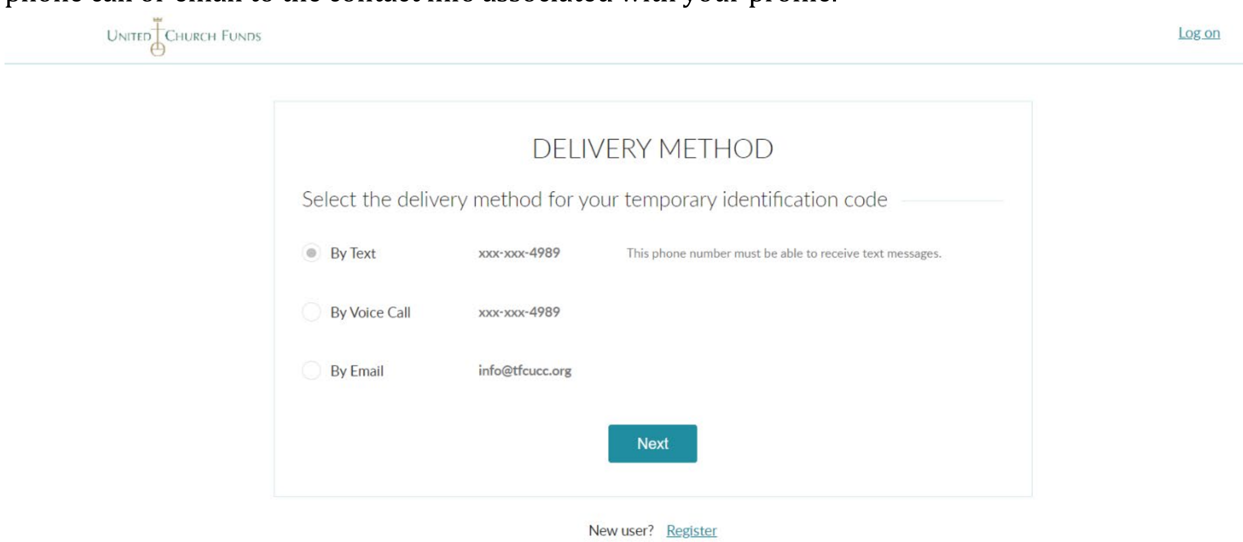
UCF Innovue Tutorial Guide

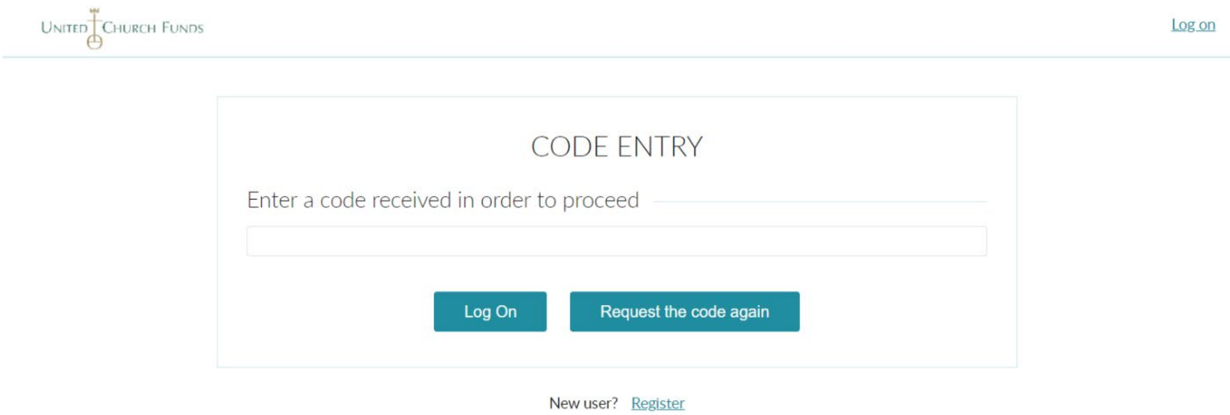
Welcome to Innovue, UCF's new client portal. Innovue features greater security, detailed account and asset allocation information and enhanced statements. Following is a brief tutorial on using Innovue and taking advantage of all its features. We have also created a video tutorial with the same information that you can watch **here**.

1) On the log-on screen, check the box next to **I am using a private machine.**

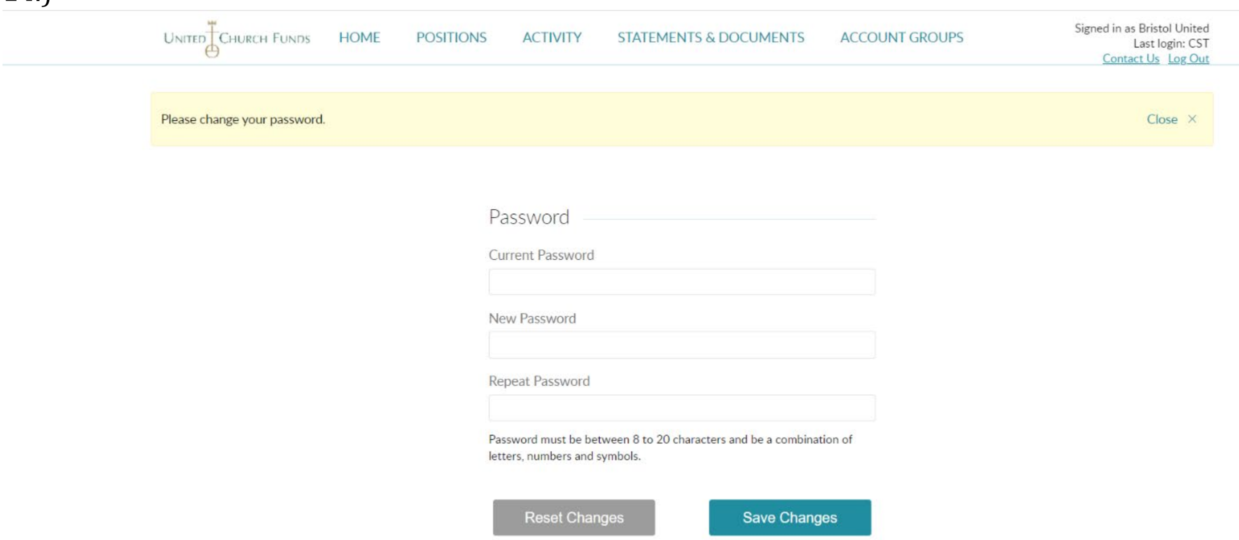


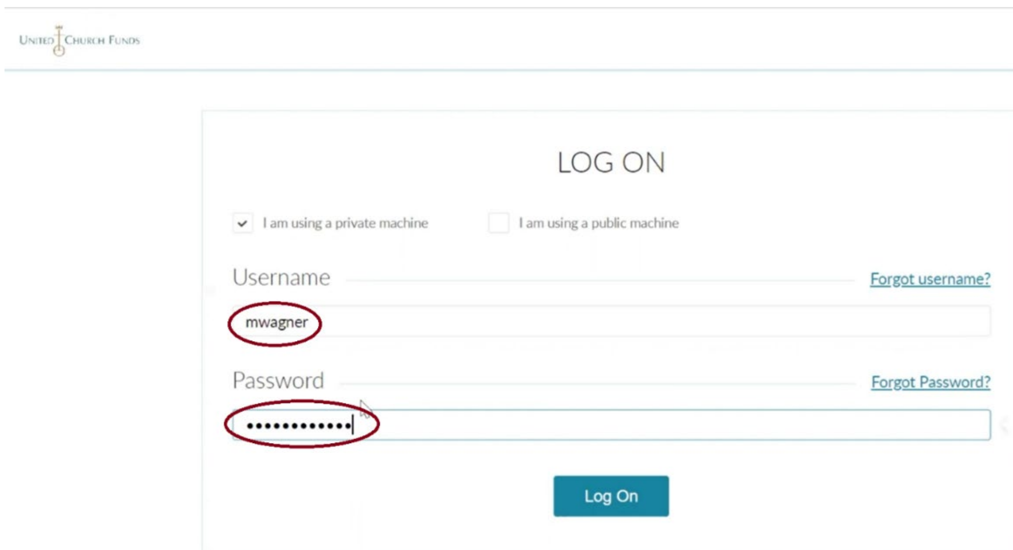
2) Log on using the username issued to your organization by UCF, along with your password. The system will prompt you to authenticate the log-on by sending a code either via text, phone call or email to the contact info associated with your profile.



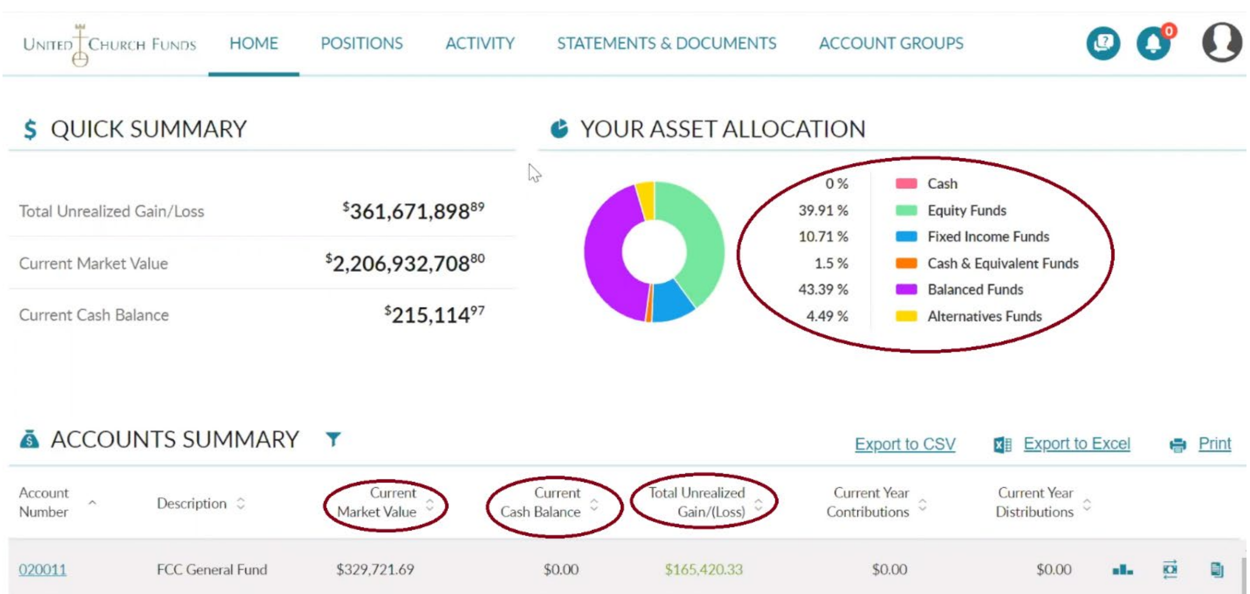


3) Once you've successfully entered the code, you can access the portal. If you're unsure of your username, please contact our Client Services team at info@ucfunds.org. If you've forgotten or don't know your password, you can select **Forgot Password** to generate a temporary password, which will be sent to the email address in your profile. (Also see Step 14.)

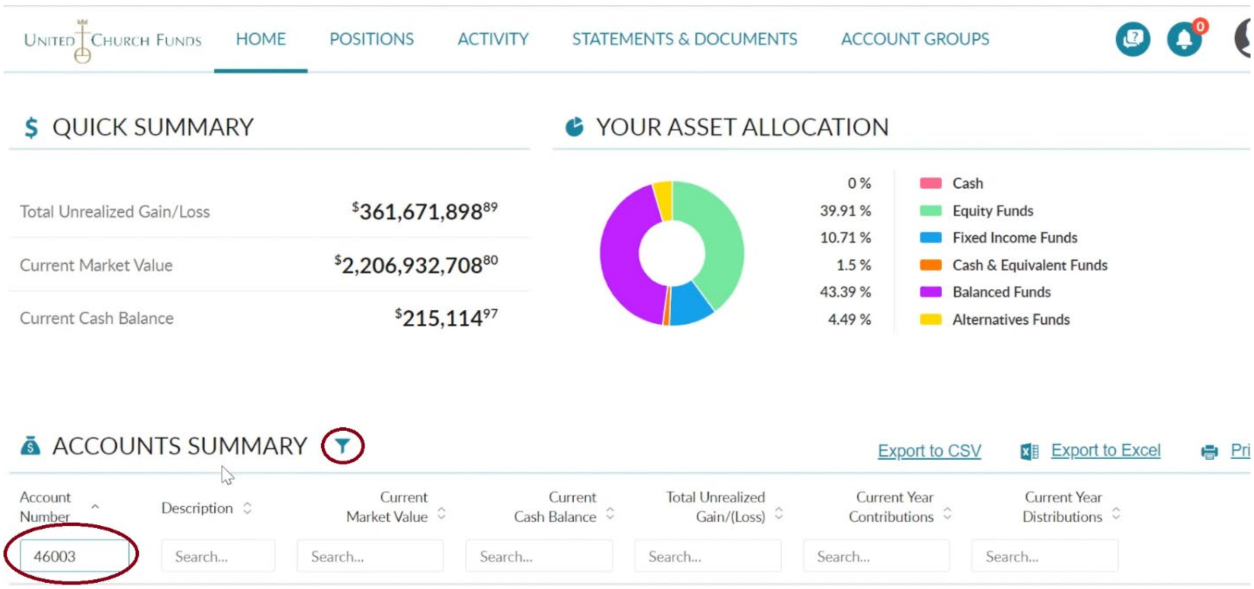




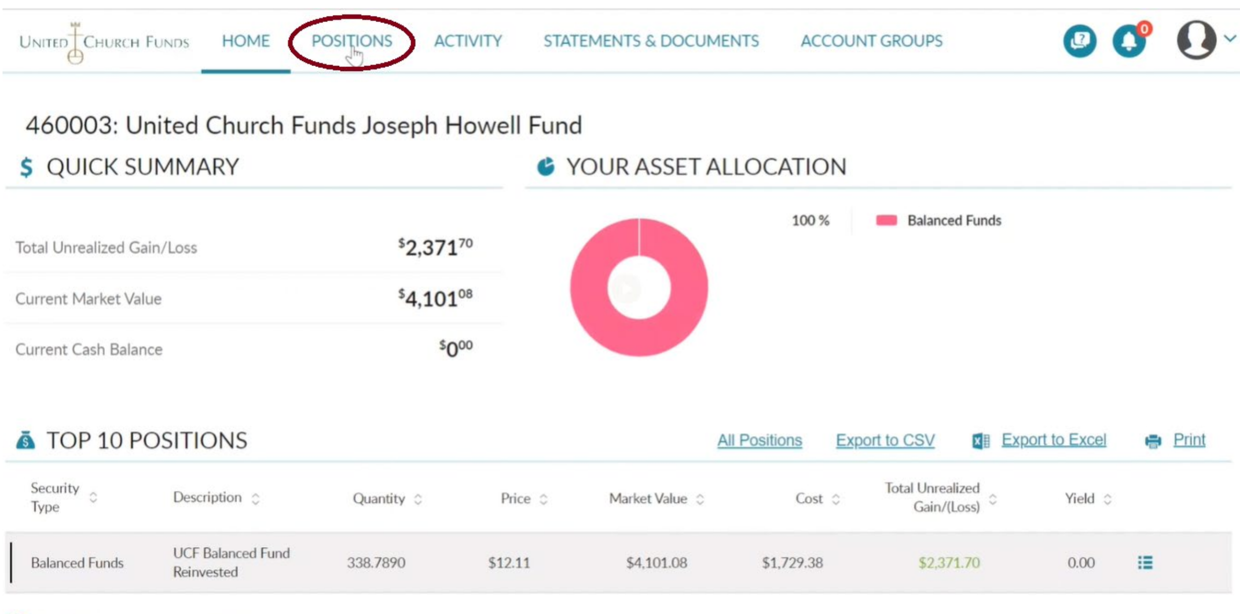
4) You will now see your home screen, which shows your UCF account(s), current market value, any current cash balance and total unrealized gains/losses. On the top right of the screen, you'll see your investments listed in terms of asset class, with corresponding percentage of each.



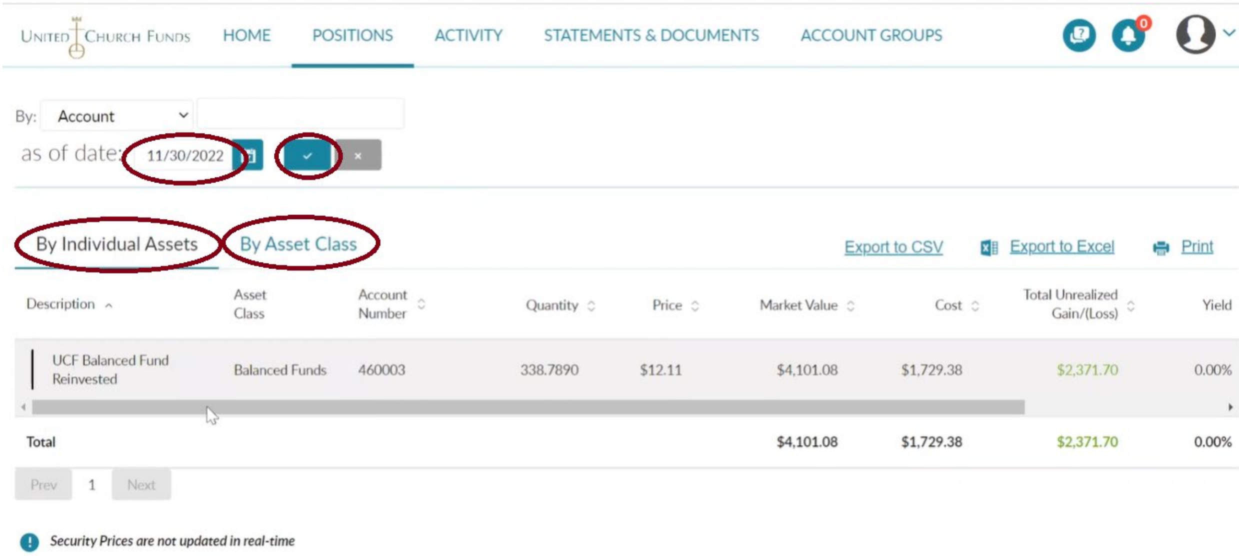
5) By clicking on the Filter icon, and entering an account number in the box below, you can search for a specific account.



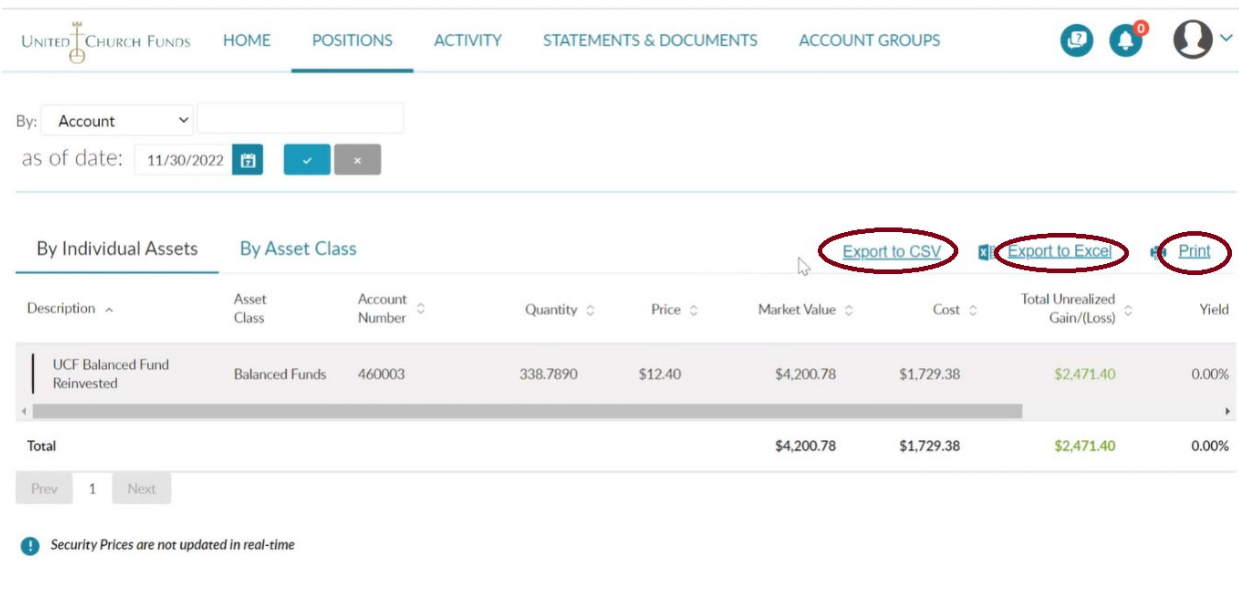
6) This will bring up a detailed view of that account, including asset allocation and summary. One of the features you can use from this page is the **POSITIONS** function. Click on that tab.



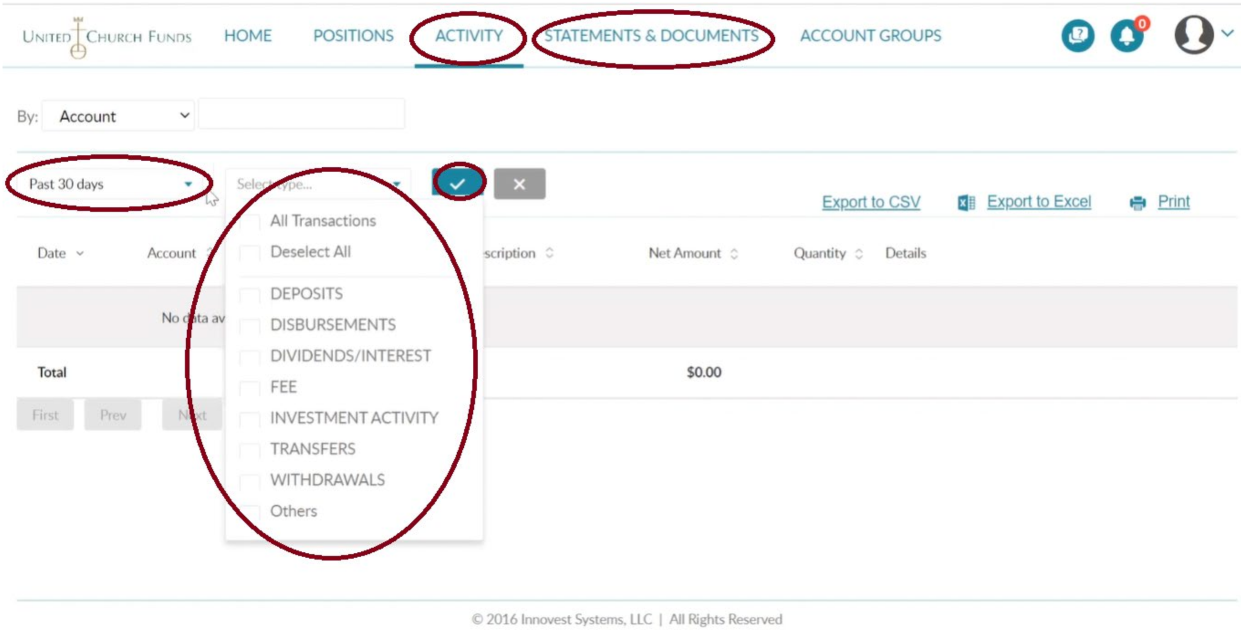
7) This will bring up a searchable database of accounts, which you can view by Individual Assets or Asset Class. Above those fields, you may also search for past values by entering a date in the date box and clicking the blue check mark to the right of it. In the example below, the balance of the account as of November 30, 2022 is being searched.



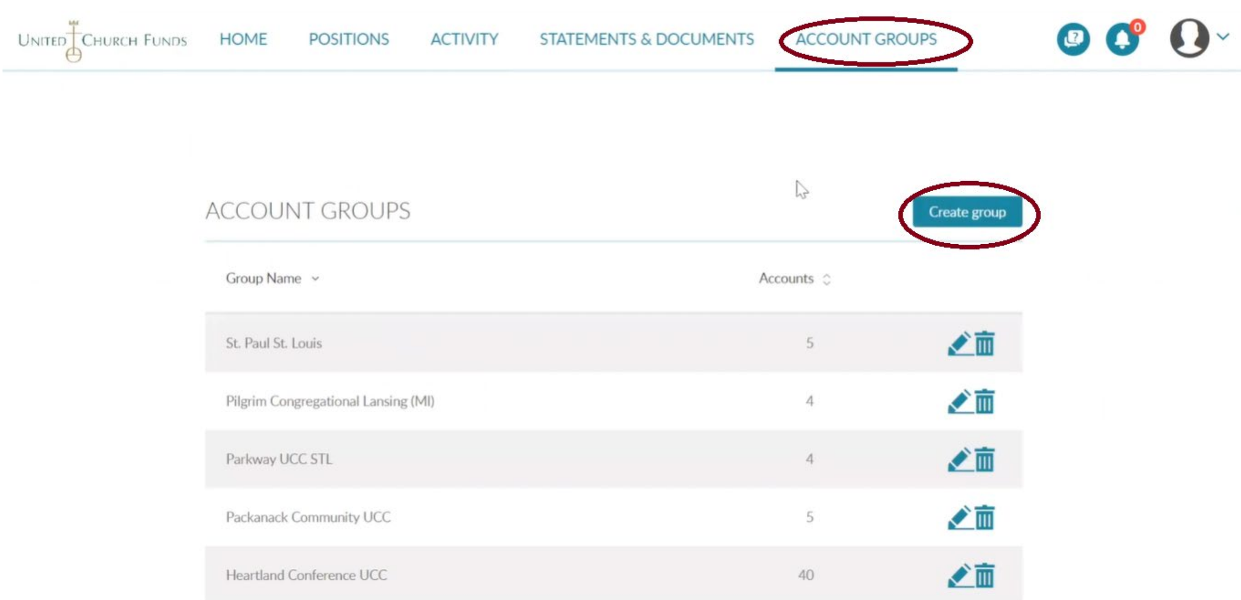
8) One important feature you can utilize from this screen is the ability to export the data in a given table to a CSV or Excel file or print a hard copy of it. This allows you to share the data with other members of your church or organization quickly and easily.



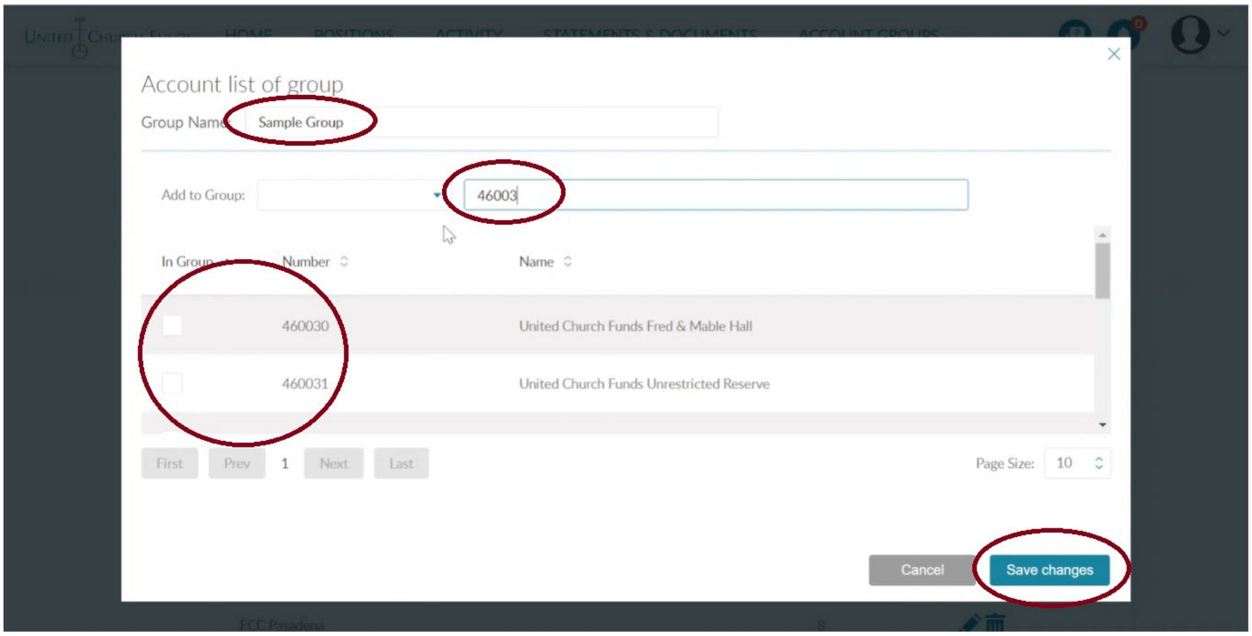
9) Clicking on the **ACTIVITY** tab allows you to view all transactions, including deposits, disbursements, dividends/interest and other account activities within a specified period of time. Remember to hit the blue check mark box after you've entered your desired time period and transaction type. You can use this same process to view current or past statements by clicking on the **STATEMENTS & DOCUMENTS** tab at the top of the page.



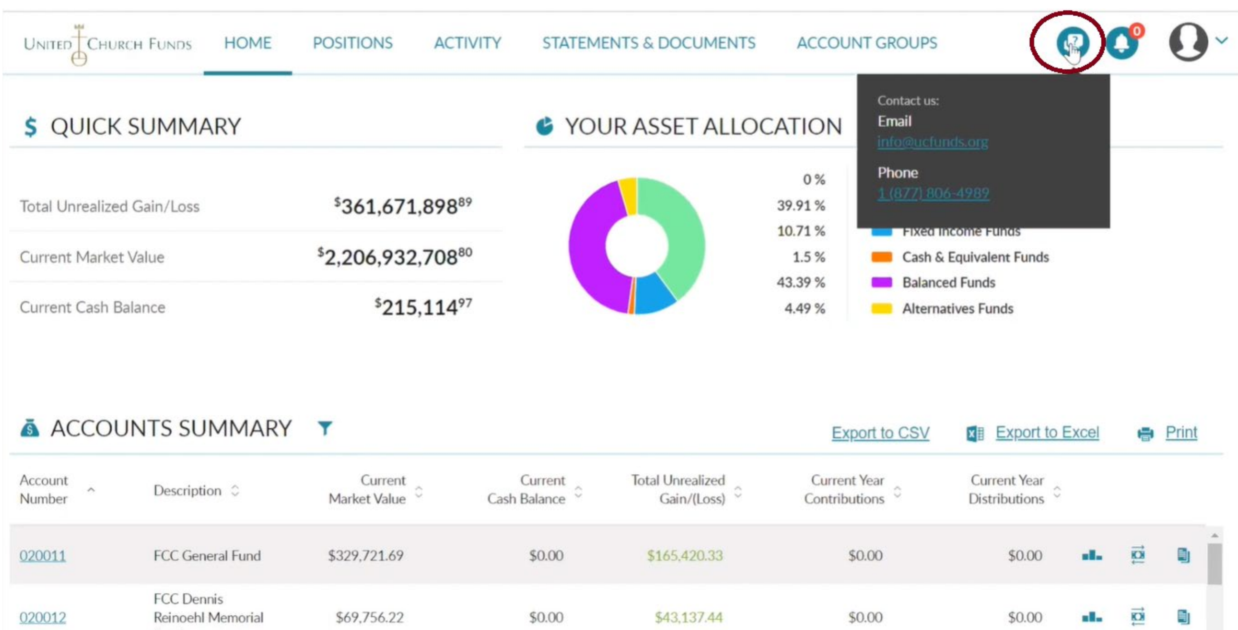
10) If you have multiple accounts, you can group them, using the **ACCOUNT GROUPS** tab, by any criteria you wish (endowment accounts, operations accounts, legacy accounts, etc). In the example below, you will see a list of groups that have already been created. To create a new group, click on the **Create group** box



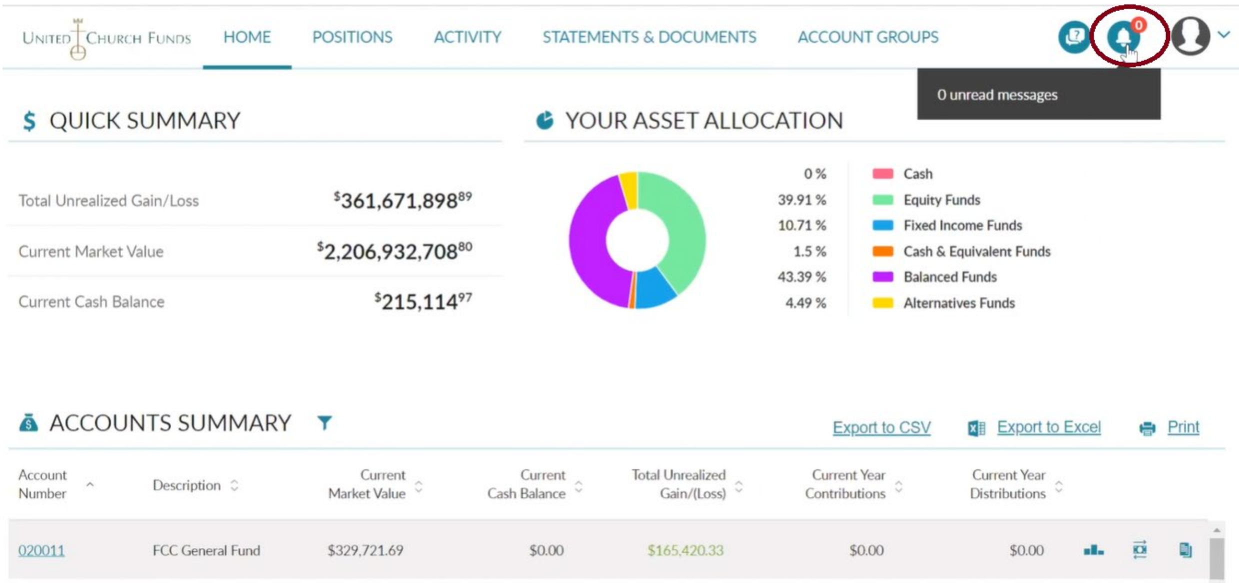
11) From there, enter a group name at the top and a specific account number(s) you wish to add to the group. Select an account by checking on the box to the left and then click the **Save changes** box.



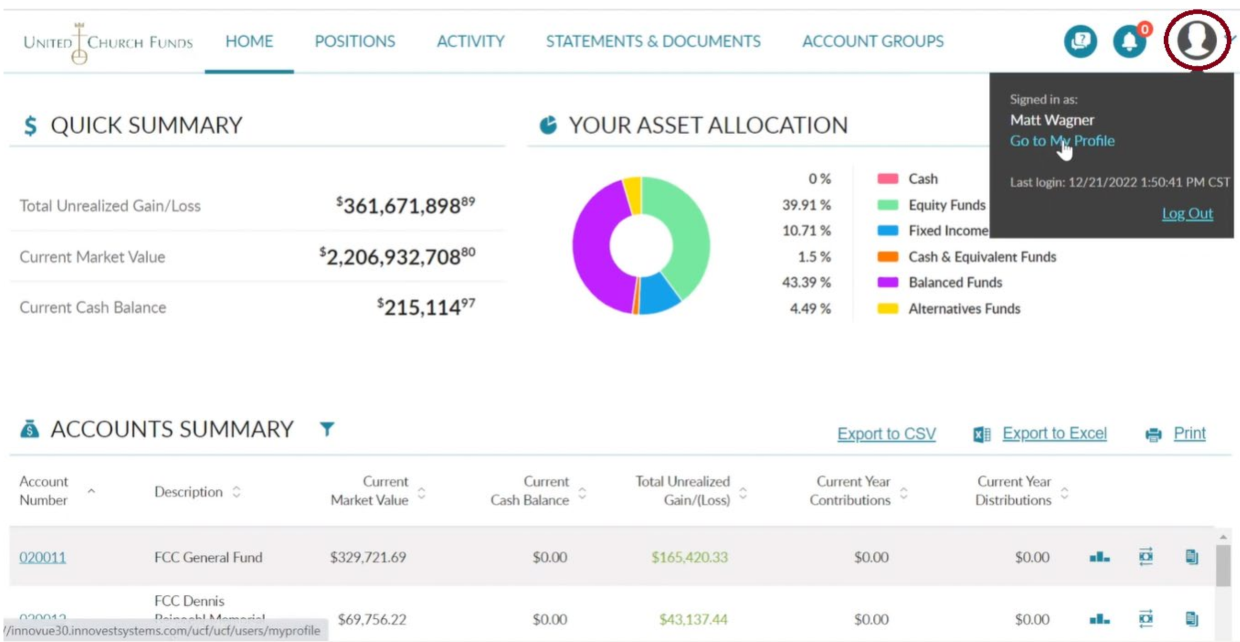
12) If at any time you need any assistance from the UCF team, click on the help (?) icon on the upper right of any screen, which reveals our Client Services email address and phone number, along with clickable links.



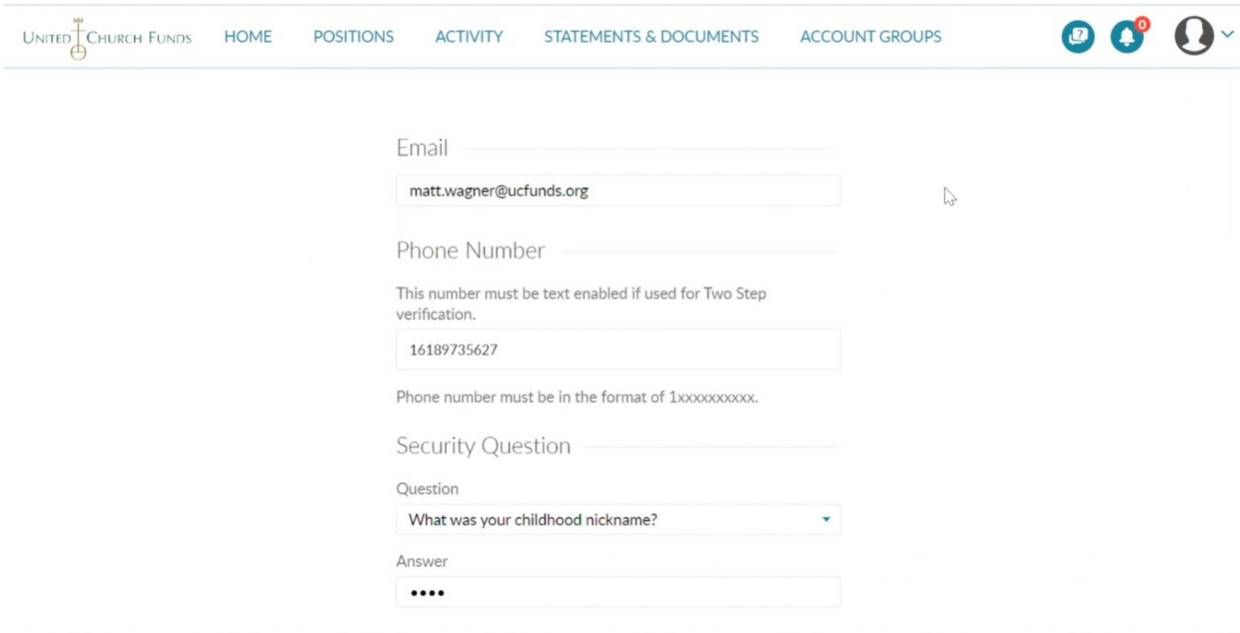
13) The bell icon in the upper right indicates any notifications you may have regarding your account. Click on it to reveal any unread messages.



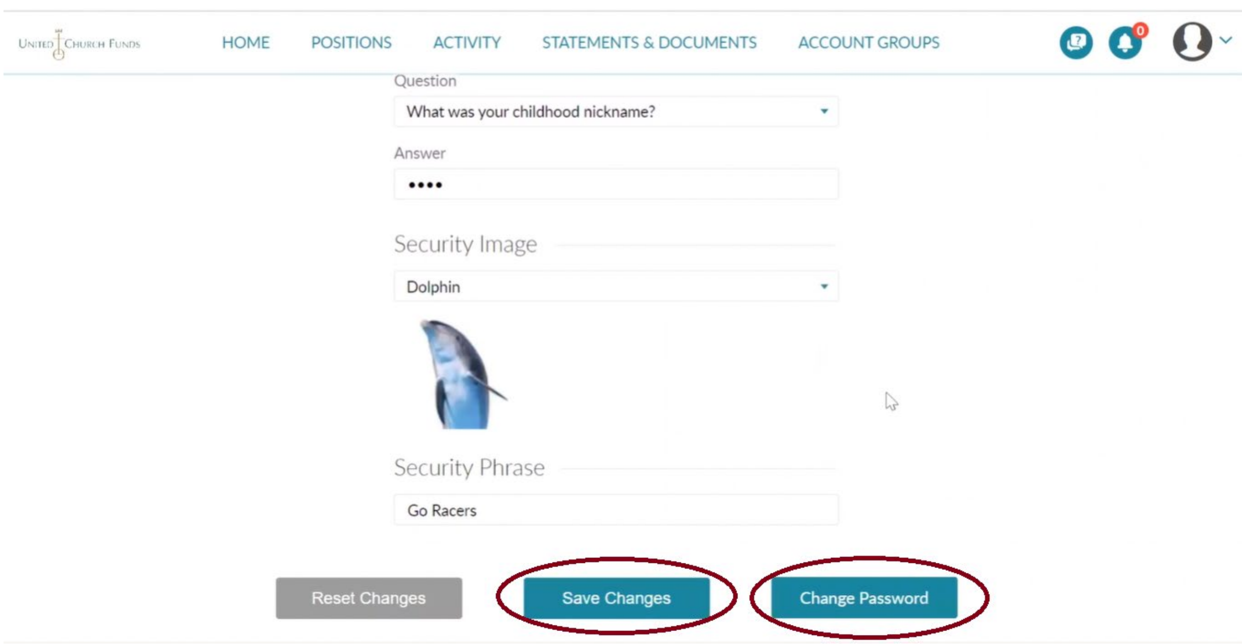
14) The face icon in the upper right is where you click to access your account information.



15) Click on that icon to change any personal information and security features, including email address, phone number and password. Please ensure that your email address and phone number are current, as it will impact your ability to successfully receive the multi-factor authentication security code as described in Step #2.



16) You’ll find the **Change Password** button at the bottom right of this page. After making any changes to your account page, including the password, make sure to click on the **Save Changes** button at the bottom center of the page. It is important to note that the username you have been issued will never change throughout the life of your church or organization.



We hope you have found this guide helpful! As always, if you have additional questions or concerns, please reach out to us anytime at info@ucfunds.org or 877-806-4989.