



Fund Advisor Portal Guide

As a Fund Advisor, you can access your fund information online through our **Fund Advisor Portal**. Within the Portal, you can easily check your fund balance, view and download quarterly fund statements, request and track grants, add to your fund, and more. The **Fund Advisor Portal** makes it easy to manage your fund and is available anytime, from anywhere, on any device.

Portal Advantages

The secure online Portal has many advantages such as:

- ❖ **Review details of your Fund(s)** – including the list of advisors on the Fund.
- ❖ **View Current Balance** (available balance = asset balance - pending grants/fees) and **Spendable Balance** (if applicable)
- ❖ **View Recent Transactions** for contributions and grants
- ❖ **Make Grant Requests** to your favorite nonprofits
- ❖ View and print all **Quarterly Fund Statements** (PDF)
- ❖ View and download **Fund-related Files**
- ❖ View and print all **Tax Receipts** (PDF)
- ❖ Access the **Online Donation** portal to make contributions by credit card to your Fund(s) or donate to other funds at the Foundation.
- ❖ Transactions update in real time
- ❖ Grant requests allow you to search for organizations within GuideStar, the world's largest database of nonprofit organizations.

Initial Login Process and Creating Your Account

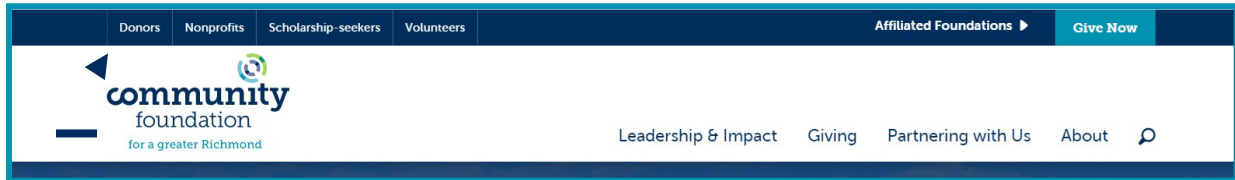
You will receive an email from the Community Foundation with a custom invitation link to create your account in the Fund Advisor Portal. Your username will be your email address that we have on file. If you want to change your username for any reason, please contact **Customer Support** by email at customersupport@cfrichmond.org. The personal link you will receive by email is formatted like this:

<https://tcfichmond-sandbox.fcsuite.com/erp/fundmanager?invite=191fd5db46e89ff85eb8c5912fa3e2aa>

and is a one-time link used to set up your password. We recommend using random words, capital letters, numbers and/or special characters to keep your account secure.

Access from the Community Foundation Website

To begin, visit the Community Foundation's website at www.cfrichmond.org. Hover over **Donors** on the top navigation bar, and then select **Fund Advisor Portal**.



You will be redirected to the secure login page where you can enter your **Username** (email) and **Password**. If you forget your password, select **Forgot Password?** to receive a link by email to reset it. You also may contact **Customer Support**. While our staff can assist you in resetting your password, please understand we do not have access to your previous passwords.

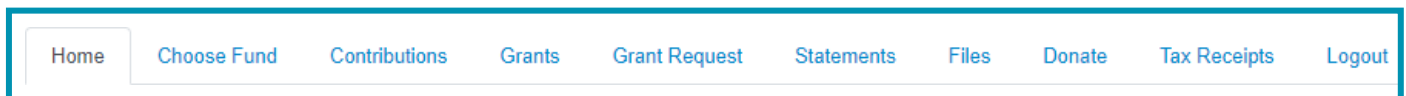
Note: The Fund Advisor Portal will **lock** you out after **five (5)** unsuccessful login attempts.

Fund Advisor Portal Features

Once you are logged in, your Fund's homepage will appear. If you manage multiple Funds, you will see a **Choose Fund** menu. Select the Fund you wish to access.



The tabs at the top of the page display features available to you as a Fund Advisor.



Home

Your homepage is a quick snapshot of your Fund's most recent activity. It will show your Fund's current balance, all fund advisors, recent contributions, and recent grant history.

Contributions

This tab shows all Contributions made to your Fund. Selecting a name under **Contributor** will show that individual's history of contributions to your Fund including date of gift, type, and amount. You can also select **Export** to download a CSV file of your contribution history. **Note:** To protect donor privacy, donations made in memory or honor will not show amounts.

Grants

This tab shows the history of Grants made from your Fund. You can select **Export** to download a CSV file of your grantmaking history.

Grant Request

This tab allows you to make a Grant Request from your Fund and see recent grant statuses. More detailed instructions are included below.

Statements

This tab shows your Quarterly Fund Statements. Next to the statement you wish to view, select Print, and the system will generate a PDF in a new window that you may view, save, or print.

Files

This tab shows any viewable files regarding your Fund.

Donate

This tab sends you to the Community Foundation's Online Donation portal. From here, you can make a credit card donation to your Fund or other funds at the Community Foundation. You can set up a recurring credit card donation here as well. Selecting the **Back** icon on your browser will return you to the Fund Advisor Portal.

Tax Receipts

This tab shows the tax receipts for your contributions to your Fund.

Logout

Clicking **Logout** will sign you out of the Fund Advisor Portal. If you do not log out this way, you will be automatically signed out at midnight.

Submitting a Grant Request (detailed instructions)

To recommend a grant from your Fund, click the **Grant Request** tab. Recommending a grant is a three-step process.

1. Choose a Grantee in one of four ways

- **Choose from a list of your previous Grantees**
Select the organization or another Fund you want to support from this drop-down list of Grantees you have previously supported.
- **Other Funds at the Community Foundation**
Choose a Fund you want to support from this drop-down list of Funds at the Community Foundation.
- **Search for other Grantees**
Search for an organization currently within the Community Foundation's database. If your desired Grantee does not populate, you can select **GuideStar Results** to view organizations in the national database. Select **Create Request** on the organization you wish to support.

- **Enter Grantee information manually**

If you can't find the organization in the Foundation's database or GuideStar, you may enter the organization manually and then select **Submit**. The required fields for manual entry are Name, Address, and Phone Number. Please note that grant requests can be made to any 501(c)(3) organization (including educational, faith-based, and government entities).

2. Enter Grant details

- In the **Description** field, please provide any grant purpose. If you leave this field blank, the Foundation will let the organization know the grant is for General Purposes.
- Enter the **Amount** (a \$100 minimum is required for each Grant Request).
- Check the **Anonymous** box if you'd like to remain anonymous for this specific Grant Request.
- Check the **Recurring** box if you'd like to set up an automatically recurring grant to the same organization. If checked, you will be asked to enter the **Recurrence Start Date** (when the first grant should be paid), **Recurrence Interval** (monthly, quarterly, semi-annually, or annually), and the **Number of Recurring (or blank)** which captures how many times you want to make the recurring grant or if left blank, to grant in perpetuity. **Note:** You must contact the Foundation if you want to change or cancel a recurring grant.
- Upload an **Attachment** with an **Attachment Description** if there are any documents you'd like to remain attached to your Grant Request.
- In the **Special Recognition or Request** field, you may enter additional information you want to provide to the grantee.
- Select **Add to Grant Requests**

Grant Request

Grantee

Feed More, Inc.

Description

General Purposes

16/255 characters

Amount

100

Anonymous

Recurring

Attachment

Choose Files No file chosen

(or drag and drop anywhere on the page)

Attachment Description

Special Recognition or Request

Add To Grant Requests

3. Review and Submit Grant Requests

As you enter your grant(s), they will appear as a list at the top right of the Grant Request page.

Unsubmitted Grant Requests				
	Recipient	Description	Amount	
Delete	Feed More, Inc.	General Purposes	100.00	Edit
Delete	CARITAS	General Purposes	100.00	Edit
Grant Request Total			200.00	
Review and Submit Grant Requests				

Made a mistake? You are able to Edit or Delete grants prior to clicking Review and Submit Grant Requests.

View Grant History (detailed instructions)

To review your grantmaking history, select the **Grants** tab. Under **Grantee Summary**, you can view the total number of grants and amount sent to each Grantee. Select a **Grantee** from the list to view your grantmaking history for that organization.

Grantee Summary		
Grantee	Grants	Amount
Family Lifeline	1	15,000.00
FeedMore, Inc.	1	25,000.00
YWCA of Richmond	1	10,000.00

Under **Grants**, you can view your individual grantmaking history, including date, organization name, purpose, amount, and payment status. Under the **Status** column, you will see one of six statuses for each grant:

- **Request** means that your Grant Request has been sent to our staff.
- **Canceled** means your Grant Request has been canceled.
- **Pending** means that our staff is currently processing your Grant Request.
- **Approved** means your grant request has been approved but not yet paid.
- **Paid** means the Grant Request has been approved and a check or ACH payment has been made to the organization.
- **Completed** means the Grant Request has successfully been fulfilled.

Grants					
↕ Date	↕ ID	↕ Status	↕ Recipient	↕ Description	↕ Amount
03/19/2021	79508	Pending	YWCA of Richmond	Sprout School	10,000.00
03/19/2021	79509	Approved	FeedMore, Inc.	Food backpacks for children in early childhood programs	25,000.00
03/19/2021	79511	Paid	Family Lifeline	supporting home visitation	15,000.00

Email Alerts

You will receive an email every time a Grant Request has been made from your Fund.

Questions?

For assistance, please contact **Customer Support** by email at customersupport@cfrichmond.org or by phone at **(804) 330-7400**.

For a video tutorial, please visit www.cfrichmond.org and select **Customer Support under the Donors tab at the top left of the homepage. This is where you will also find answers to frequently asked questions.