Fund Advisor Portal Guide

*As a Fund Advisor of the Community Foundation, 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 24/7 from anywhere, on any device.*

Portal Advantages

The secure online Portal is similar to online banking. Once logged in, you can:

- ❖ **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.

More Exciting Changes:

- Transactions update in real time.
- Passwords can be updated easily by Community Foundation staff.
- Grant Requests now allow you to search for organizations within GuideStar, the world's largest database of nonprofit organizations.
- Additional advisors, emails, and customized levels of access are also available.

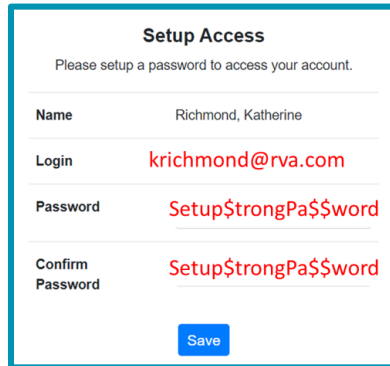## Initial Login Process and Creating Your Account

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 phone at

(804)-409-5636 or email **customersupport@cfrichmond.org**. The personal link you will receive by email is formatted like this:

https://tcfrichmond-sandbox.fcsuite.com/erp/fundmanager?invite=191fd5db46e89ff85eb8c5912fa3e2aa
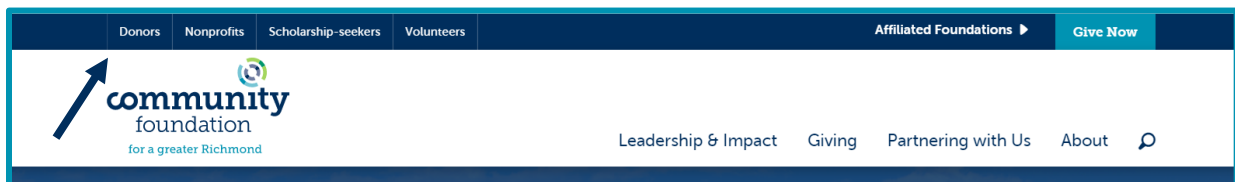
It is a one-time link used to set up your password. We recommend using random words, capital letters, numbers and/or special characters to keep your account secure.

Setup Access

Please setup a password to access your account.

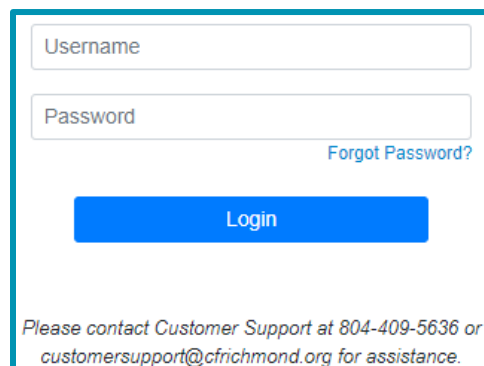|	
Name	Richmond, Katherine
Login	krichmond@rva.com
Password	Setup$trongPa$$word
Confirm Password	Setup$trongPa$$word

Save

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**.

Donors   Nonprofits   Scholarship-seekers   Volunteers   Affiliated Foundations ▶   Give Now

community foundation
for a greater Richmond

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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 and cannot look them up for you.

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

Username
Password

Forgot Password?

Login

Please contact Customer Support at 804-409-5636 or customersupport@cfrichmond.org for assistance.

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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.

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.

Richmond Family Fund for Community Prosperity

| Home | Choose Fund | Contributions | Grants | Grant Request | Statements | Files | Donate | Tax Receipts | Logout |

Statements

Statement	Date Range	Status

Files

This tab shows any viewable files regarding your Fund.

Richmond Family Fund for Community Prosperity

| Home | Choose Fund | Contributions | Grants | Grant Request | Statements | Files | Donate | Tax Receipts | Logout |

Files

Date	Filename	Description

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.

Richmond Family Fund for Community Prosperity

| Home | Choose Fund | Contributions | Grants | Grant Request | Statements | Files | Donate | Tax Receipts | Logout |

Receipts

⇕ Date	⇕ ID	⇕ Contributor	⇕ Fund	⇕ Amount
03/24/2021	52018	Richmond, Katherine	Richmond Family Fund for Community Prosperity :: Donor Advised	500.00
03/19/2021	51924	Richmond, Katherine	The Richmond Family Fund :: Donor Advised	25,000.00
03/19/2021	51923	Richmond, Katherine	Richmond Family Fund for Community Prosperity :: Donor Advised	75,000.00
03/19/2021	51922	Richmond, Katherine	Richmond Family Fund for Community Prosperity :: Donor Advised	250,000.00

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.

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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**

    1. **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.

    2. **Other Funds at the Community Foundation**
    Choose a Fund you want to support from this drop-down list of Funds at the Community Foundation.

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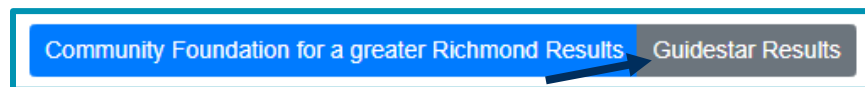
    4. **Enter Grantee information manually**
    If you can't find the organization in the Foundation's database or GuideStar, you may enter the organization manually and then select **Submit**. The required fields for manual entry are Name, Address, and Phone Number. Please note that grant requests can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

2. **Enter Grant details**

    1. 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.
    2. Enter the **Amount** (a $100 minimum is required for each Grant Request).
    3. Check the **Anonymous** box if you'd like to remain anonymous for this specific Grant Request.
    4. 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)** (captures how many times you'd like to make the recurring grant, or allows you to leave it blank to grant in perpetuity).
    5. Upload an **Attachment** with an **Attachment Description** if there are any documents you'd like to remain attached to your Grant Request.
    6. In the **Special Recognition or Request** field, please let the Foundation know if you require any special handling for this Grant Request.
    7. Select **Review** once you're finished.

New Grant Request

Grantee	The Richmond Family Fund
Description	[ ]
	0/255 characters
Amount	[ ]
Anonymous	☐
Recurring	☐
Attachment	[Choose Files] No file chosen
	(or drag and drop anywhere on the page)
Attachment Description	[ ]
Special Recognition or Requests	[ ]

[Review]

3. Review and Submit Request

Review the details you've entered and the terms and conditions of your Grant Request. You can select **Edit Request** if you need to make changes, or select **Submit Request**. You will receive an email confirmation once the grant is **paid** from your Fund.

Review New Grant Request

Grantee	The Richmond Family Fund
Description	general purposes
Amount	$ 250
Anonymous	No

Special Recognition or Requests

We acknowledge that the above recommendations do not represent the payment of any pledges or other obligations we have made, nor do we expect any personal benefits from this charitable distribution. We understand that the final judgment rests with the Board of Governors whose charge is to see that all distributions affirm the charitable purposes for which the fund was created and are within the broad charitable purposes of The Community Foundation, Inc.

[Submit Request] [Edit Request]

Made a mistake? The yellow **Cancel** button will be available on the **Grant Request** tab until your request is processed by Community Foundation staff.

Grants

⇕ Date	⇕ Status	⇕ Recipient	⇕ Description	⇕ Amount	⇕
03/21/2021	Request	The Richmond Family Fund	general purposes	250.00	[Cancel]

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

Grantee Summary

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:

1. **Request** means that your Grant Request has been sent to our staff.
2. **Canceled** means your Grant Request has been canceled.
3. **Pending** means that our staff is currently processing your Grant Request.
4. **Approved** means your grant request has been approved but not yet paid.
5. **Paid** means the Grant Request has been approved and a check or ACH payment has been made to the organization.
6. **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

We will alert you via email every time a new Contribution has been made to your Fund or a new Grant Request has been paid from your Fund. These alerts can be canceled at any time.

Questions?

For personal assistance, please contact **Customer Support** by email at **customersupport@cfrichmond.org** or by phone at **(804) 409-4636** for assistance.

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 virtual resources to answer frequently asked questions.