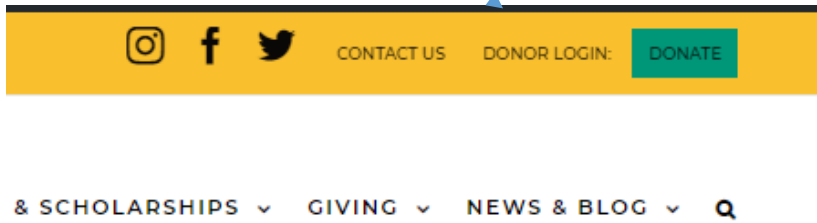


The Foundation’s new donor portal system has been activated. You should have received from the Community Foundation a link via email to setup your password. If you did not see an email, please check your spam folder. Once your password is created, go to our website at [commfoun.com](http://commfoun.com) and login in under “Donor Login” in the upper right-hand corner next to the “Donate” button. Enter your email address (username) and new password and log in.



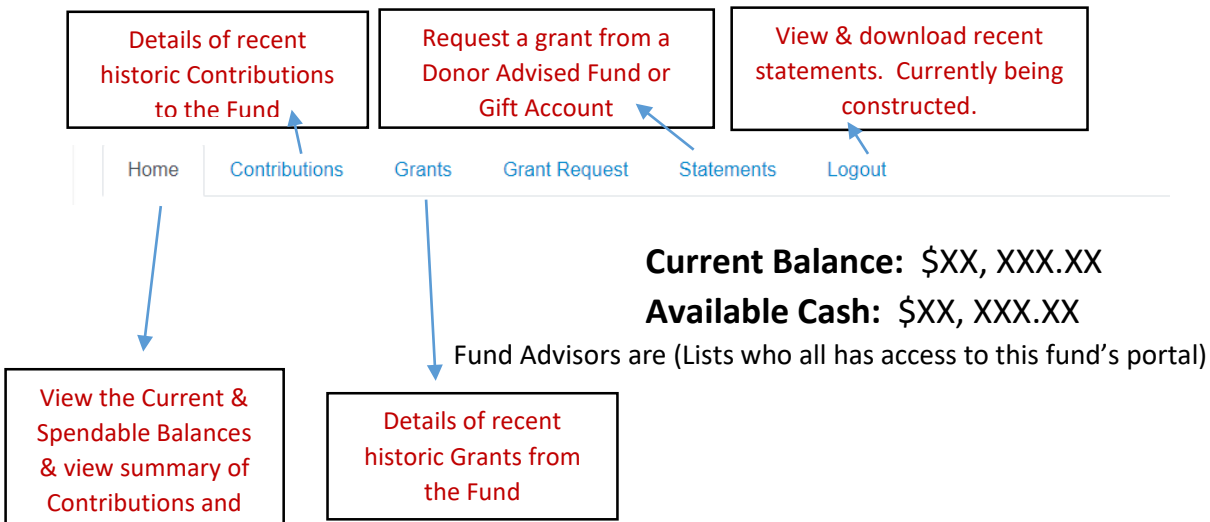
If you are listed as an advisor for only one Fund, you will go directly to the home page for that fund. However, if you serve as an advisor for multiple funds, you will see the “Choose Fund” menu once you have successfully signed in to the donor portal system. Choose the particular fund you wish to view.

Once you have logged in, you can select the tabs at the top of the page to review the different areas available to you as a fund advisor.

## Snapshot of Fund Advisor Portal



### Fund Name



- **Home** – shows the fund’s current balance plus the spendable balance (cash available for granting). This area also lists all fund advisors, shows recent contributions and recent grants given for the fund.
- **Choose Fund** – visible if there are other funds to select and view.
- **Contributions** – displays all donations to the fund.
  - Clicking on a contributor’s name will bring up their history of contributions.
- **Grants** – will show the history of grants made from the fund.
  - At the top of the page, grantees are listed alphabetically with the number of grants given to the organization and the current total amount granted. You can click on any of the blue links to see the breakdown of the grants to the grantee.
  - Scroll down to a second section to view the list of grants that can be filtered in many ways, such as date and recipient. Filter by hovering over column heading and click on filter icon.
- **Grant Request** - as a fund advisor you may be able to request grants from the fund by clicking on the “Grant Request” tab.
  - This tab shows a list of recent grant requests on the right side under “Grants”.
  - Grant requests still in the “request” status can be canceled from this screen.
  - The left side of the screen is where new grant requests are created.
    - Previous grantees and funds that you have given to can be selected from the drop down list under “Grantees you have given to in the past”.
    - In the middle of the left side of your screen is “Search for other Grantees”. This is helpful because you can type in some keywords and click “Search.” The system will search [GuideStar](#) for organizations containing the keywords. GuideStar is an information service specializing in reporting on U.S. nonprofits. The more keywords used, the better the search results will be.
    - Once the grantee information has been added, you can complete the request by clicking the “submit” button at the bottom of the page.
- **Statements** – will show monthly fund statements that are associated with the new software moving forward. If you are in need of prior statements, please contact me at [jfortkamp@commfoun.com](mailto:jfortkamp@commfoun.com).
  - **Printing Statements** - the system will generate a PDF in a new window in your web browser that you may save or print.

Remember to “Logout” to close your donor portal. You will be automatically logged out each night even if you do not logout.

### **Locked Out of your Donor Portal?**

If you are locked out of your account, click “Forgot Password” on the login page. Enter your username (email address) and click the “Reset Password” button. If an account with the provided username is found, instructions to reset your password will be sent to the email address for that account. If you’re still having trouble, please contact me at [jfortkamp@commfoun.com](mailto:jfortkamp@commfoun.com).

### **Alerts**

The Foundation can alert you every time a donation is made or a grant is paid out from the associated fund. These alerts can be utilized or cancelled at any point. To setup these options, contact me at [jfortkamp@commfoun.com](mailto:jfortkamp@commfoun.com).

Please feel free to contact me if you have any other questions at [jfortkamp@commfoun.com](mailto:jfortkamp@commfoun.com) or 937-497-7800.