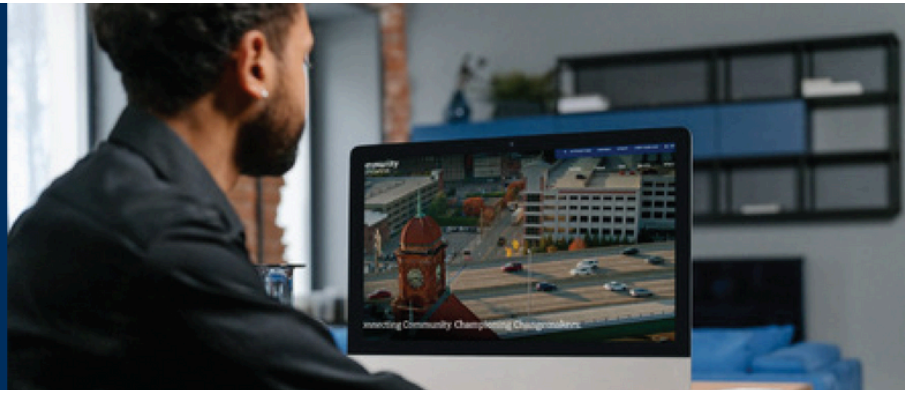


# PORTAL RESOURCES

*Navigating the Portal*



## Welcome to the Community Foundation Portal!

As a fund holder at the Community Foundation, the Fund Portal (or portal) provides you with online access to your fund's recent information and activity - 24/7 from anywhere, on any device. You can:

- Check your fund balance;
- View donation and grant history;
- Request and manage grant requests; and
- View/download tax receipts and quarterly fund statements.

This user guide provides an overview of each page of the portal, along with instructions for accomplishing certain tasks. **Click on the quick link buttons below to jump to a particular section.**



Accessing  
the Portal



Fund  
Summary



Donations  
to Fund



Grants



Grant  
Request



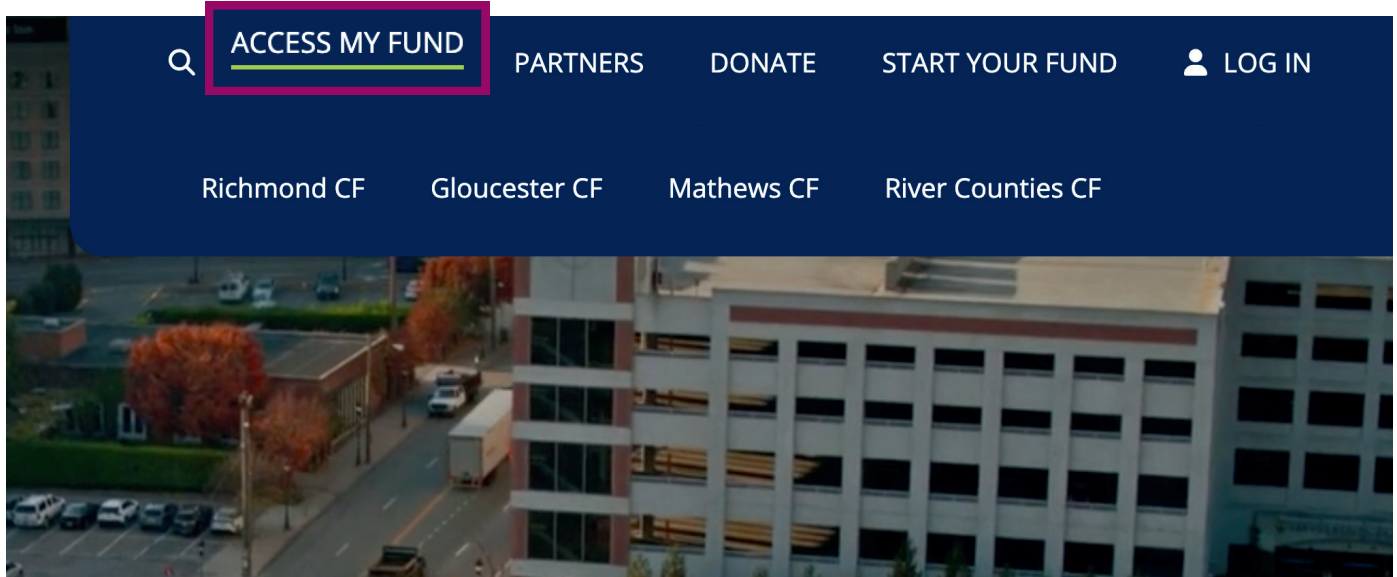
Files &  
Statements



Donate by  
Credit Card

We are excited to provide you with this portal experience and to continue to serve as a trusted steward for your philanthropic goals! If you have any questions along the way or encounter issues logging in, please email [Connect with an Expert](#) or call 804-330-7400.

## Accessing the Portal from CFrichmond.org



### LOGGING IN

Please visit our website, [www.cfrichmond.org](http://www.cfrichmond.org), where you can login to the portal by clicking [\*Access My Fund\*](#) in the menu at the top right corner of the homepage.

You will be directed to the portal's login page to enter your username - usually your email in all lowercase or a username you have chosen - and your password to sign in.

**NOTE: Passwords require a minimum of 12 characters and must have a character from 3 of the following types:**

- lower case
- numbers
- special characters (allowed: ~!@#%\$^&\*()-\_+=<>?.,/:[]{}" ' | )
- upper case

We encourage you to bookmark the login page. In many browsers, this can be done by clicking the star icon located on the right-hand side of the address bar.

### FORGOT YOUR PASSWORD?

The Community Foundation **does not** have the ability to access your password. If you forget your password, you can reset it on the login page by clicking on the *Forgot Your Password?* link. If you need assistance, please email [\*\*Connect with an Expert\*\*](#) or call 804-330-7400.

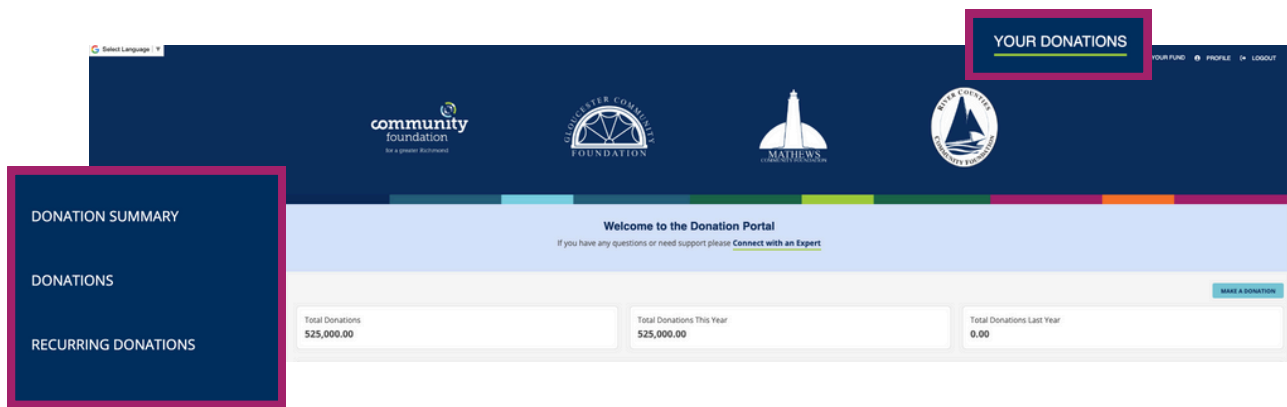
## Navigating the Portal's Main Menu

Once logged into the portal, use the main menu that appears at the top right of your screen to select from the following options from left to right

### YOUR DONATIONS

**Donation History** – Click on *Your Donations* at the top of the page to view a history of donations you have made to **any** fund at the Foundation.

**Tax Receipts** – To view your tax receipts, navigate to the left-side menu to see options for *Donation Summary*, *Donations* (itemized list) and *Recurring Donations* (donations scheduled at a frequency you choose). To see your receipts, click on *Donations*, then *Donation ID*. You can print your tax receipts by clicking *Print Tax Receipt* on the right side of the screen.



### ACCESS YOUR FUND

Select *Access Your Fund* to find all detailed information about your fund including fund balances, contributions summary, donation and grant history, grant request form, fund statements and other important documents.

**Note:** If you have access to multiple funds, you can switch between funds using the fund dropdown or by clicking back to *Fund Summary*.



## PROFILE

You may use the *Profile* tab to update your username, password, address, or phone number.

- Click *Profile* in the upper right corner of the portal to view the Personal Information we have on file. You may edit your profile information by clicking *Edit Information* on the right. Please contact your Philanthropic Advisor if you want to change your email address.
- Click on *Security*, to change your portal username and password and enable 2-step verification for your login.
- Click *Contact Preference*, to opt out of email, phone or mailed communications



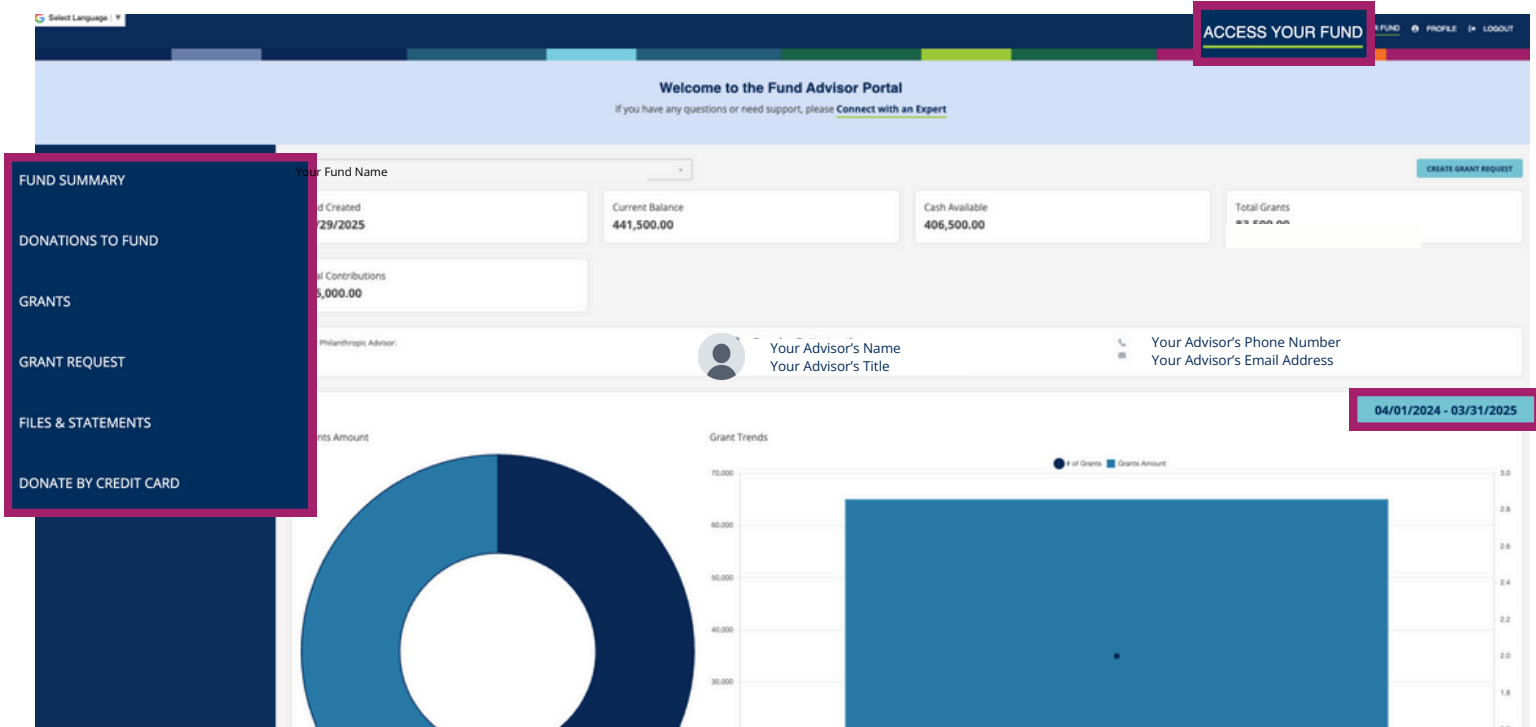
## LOGOUT

Click on *Logout* in the upper right menu to exit the portal securely and return to the login page. You will be automatically logged out each night, even if you forget to do so manually.



## Navigating Your Fund Information

From the top navigation, click on *Access My Fund*. You then will see a left-side menu where you can navigate to pages providing key information about your fund.



### FUND SUMMARY

The *Fund Summary* page displays a quick snapshot of your fund’s most recent activity including your fund balances, as well as a summary of recent donations into the fund and grants disbursed from the fund. You may select a date range for this information by clicking on and changing the range in the blue bar. If you have access to multiple funds, conveniently switch between funds using the drop-down under the fund name or click on *Access Your Fund* at the top of the page.

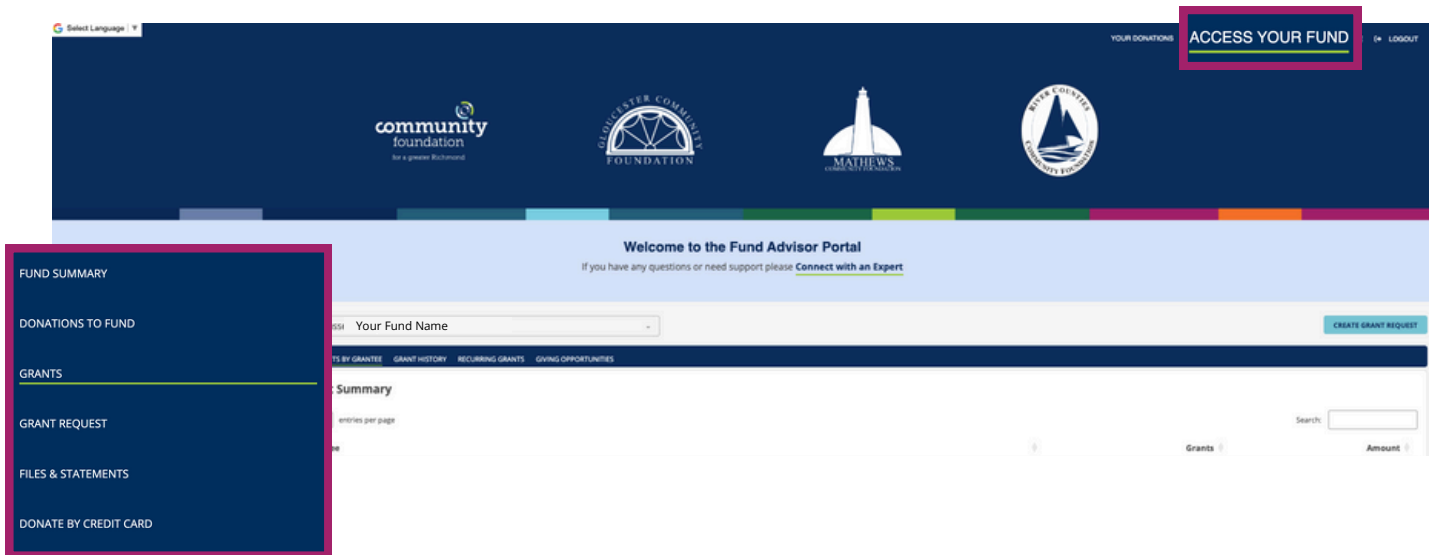
### DONATIONS TO FUND

This section shows donations made to your fund. Clicking on a contributor’s name will show their contact information and a history of their donations into the fund, unless they have requested to remain anonymous.

To view a history of donations you have made to any fund at the Foundation and accompanying tax receipts, click on Your Donations from the menu at the top of the page. See page 3 to review instructions.

## GRANTS

The *Grants* page offers three ways to view your fund's grantmaking and offers collaborative giving opportunities with the Community Foundation.



*Grants by Grantee*, or *Grant Summary*, provides an alphabetical listing of grants summarized by the grantee. Clicking on a grantee's name will show the history of grants made to that organization.

*Grant History* shows grant distributions made from your fund in an itemized list, starting with the most recent. In addition, from the Grant History section, you can click on the "Copy" button to create a new grant request with the same details as the previous grant recommendation, and then edit details as needed on the next screen. You may also use the "Export" button to download the data into a CSV spreadsheet, or the "Filter" button to view by a date range you choose.

*Recurring Grants* lists any recurring grants you've established for the fund. By selecting the individual recurring grant, the option to edit will appear on the right-hand side. If you'd like to cancel a grant, update the grant amount or grantee, reach out to us via **Connect with an Expert**, or call 804-330-7400.

*Giving Opportunities* links to the Community Foundation's collaborative giving opportunities such as giving circles and community funds in which contributions will be used to support needs in a specific region or interest area.

Fund Name

**GRANTS BY GRANTEE** GRANT HISTORY RECURRING GRANTS GIVING CIRCLES

**CREATE GRANT REQUEST**

Grant Summary

10 entries per page Search:

Grantee	Grants	Amount
Nonprofit Organization Name	Amount of Grants	\$ Total Grants
Nonprofit Organization Name	Amount of Grants	\$ Total Grants

Showing 1 to 2 of 2 entries

If you have an advised fund and wish to request grants from your fund, you may make grant requests from the fund's spendable balance to a nonprofit or another fund held at the Foundation. There is a \$100 grant minimum. You can start a grant request on any page of the portal by clicking the "Create Grant Request" button on the right side of each page, or the Grant Request page from the left-hand navigation.

1. **Start the request** by clicking the "Create Grant Request" button to the right.
2. **Choose the grantee type** from the buttons that appear below.

*Previous Grantee or Fund* – If selecting a grantee previously funded OR granting to another fund held at the Foundation, click *Previous Grantee* and locate the nonprofit or fund from the drop-down lists.

*Search Grantee* – To search for a new specific organization, click "Search Grantee" and enter keywords that may include the organization's name, city, state, and/or EIN, and then click the "Search" button. The system will search the Foundation's database first. If your chosen organization does not populate, click the "Candid Results" tab and then Candid (a national database previously known as Guidestar) will populate other organizations containing the search information. Toggle between these two database options to find the desired organization and then click "Create Request" to start a grant recommendation.

*Manual Grantee* – If you are unable to find an organization through the Community Foundation or Candid options, click on "Manual Grantee" to create a new grantee. Enter the name, address, zip code, and phone number. These fields are required to move the request to the Foundation for the eligibility check and approval.

**Agency Fund Advisors:** Agencies can only make grants (distributions) to their own organization.

FUND SUMMARY

DONATIONS TO FUND

GRANTS

GRANT REQUESTS

FILES & STATEMENTS

DONATE BY CREDIT CARD

Fund Name

CREATE GRANT REQUEST

Use this form to submit grant requests from your fund. Select a Grantee from the drop-down menus or search using both the Community Foundation's and Candid's (formerly GuideStar) databases. You may also manually enter Grantee information. The Community Foundation will receive notification of your request and process your grant(s). You will receive an email confirmation that your grant request(s) have been submitted for processing. You may log into the Fund Advisor Portal at any time to see the status of your grant request(s).

REMINDER: MINIMUM GRANT AMOUNT IS \$100.00

Grant Request > Choose Type

PREVIOUS GRANTEE OR FUND SEARCH GRANTEE MANUAL GRANTEE

### 3. Populate the following fields to complete your Grant Request:

*Description* - Include the purpose of the grant. Common purposes may include the program you wish to support, general operating support, or a capital campaign.

*Amount* - Enter the dollar amount you wish to grant. The minimum grant amount is \$100.

#### The following fields are optional:

*Anonymous* - Check this box only if you want your grant to be completely anonymous to the organization.

*Recurring* - Check this box if you would like your grant to be recurring. Once this box is checked, you will select a Recurrence Start Date, as well as a Recurrence Interval and the Number of Recurrences. If you leave the number of recurrences blank, the grant will continue at the interval you selected until you cancel it.

*Attachment* - If you have a document related to a particular grant, you may upload it.

*Attachment Description* - If you upload a document, you may add a description of that document.

*Grant Notes* - You may add any other notes that are pertinent to the grant request.

Click the checkbox to acknowledge fund advisors may not receive benefits associated with grants.

**4. Click "Add to Cart."** By clicking this after your grantee and grant information has been entered, it will be held in your "Cart". You may enter additional grants to your cart by clicking Create Grant Request again. If you have completed entering your grants, click "Review Grant Requests".

**5. Click “Submit Grant Requests”** to finalize your grant submission and send them to the Foundation for processing. You must click “Submit Grant Requests” or they will remain in your cart. If grants remain in the cart for more than 24 hours, you will receive a notification that the grant recommendation is still pending.

**a. Confirmation** – You will receive an email when grant requests are successfully submitted.

**b. Status Updates** – You may check the status of grants from your fund at any time on the “Grant Request” tab in Foundation Portal. After conducting an eligibility check, the Foundation will schedule the grant for payment. Payments are made both by ACH and by check and are typically processed weekly. Status updates include:

**Request** – A grant request has been submitted to the Community Foundation team for processing. To cancel a grant request before it is processed, click the CANCEL button.

**Canceled** – A grant suggestion has been canceled.

**Pending** – The Community Foundation team is currently processing the grant request.

**Approved** – The grant request has been approved but not yet paid.

**Paid/Complete** – The grant request has been approved, and a payment has been made to the organization.

A record of fully processed grant requests can be found on the *Grants* page, accessed in the left navigation menu, and then clicking on the *Grant Summary* or *Grant History* tabs.

## FILES & STATEMENTS

Investment commentary and quarterly fund statements are listed here to view, download, or print. Click “View” on the right to open a PDF file in a new window of your web browser. From here, you can download or print the statement. (Statements prior to January 2016 are available upon request.)

## DONATE BY CREDIT CARD

When you click on *Donate by Credit Card*, you will be directed to the Foundation’s Donation Portal, where you can make a gift to your fund or another fund stewarded by the Community Foundation via credit, debit card, or ETF (electronic funds transfer). To return to the Fund Advisor Portal, click on the back arrow at the top left of your screen. Should you wish to make a gift of another type, contact your Philanthropic Advisor or **[Connect with an Expert.](#)**



**For more information, please contact us at:**

**(804) 330-7400 | [info@cfrichmond.org](mailto:info@cfrichmond.org)**

**[www.cfrichmond.org](http://www.cfrichmond.org)**