



COMMUNITY FOUNDATION
FOR THE ALLEGHENIES

Online Fund Access Guide

Your Username:

Your Password:

(Please keep your Donor Portal Guide in a safe place.)

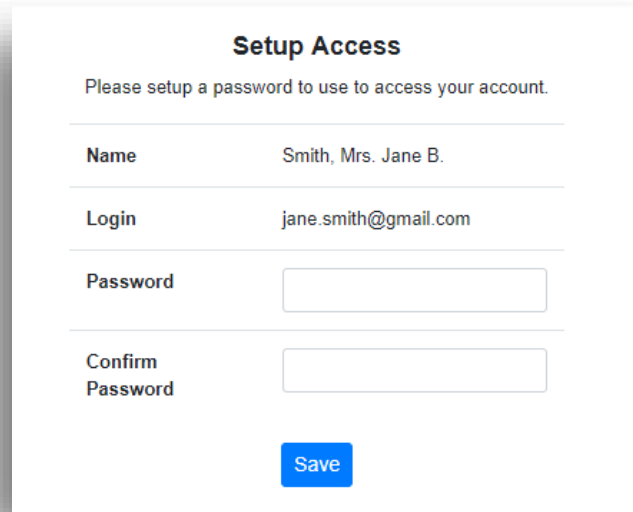
Online Fund Access Guide

Fund Advisor Portal

Welcome to your new Online Fund Access Portal. As a fundholder of Community Foundation for the Alleghenies, you have the ability to access your fund information online. 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 Online Fund Access Portal makes it easy to manage your fund and is available 24/7 from anywhere, on any device.

Initial Login Process and Creating Your Account

You should have received an email from Community Foundation for the Alleghenies with a custom invitation link to create your new account. Your username will be your email address that we have on file (the same email where you received your invitation link). If you would like to change your username for any reason, please contact us at info@cfalleghenies.org or call (814) 536-7741. Once you click on the invitation link in the email, you will be prompted to create a password of your choice. Please choose a password that won't be easy to guess and save that in a secure location (such as the front of this user guide).

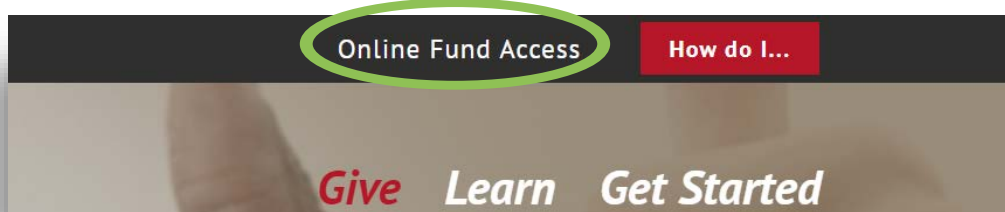


Setup Access	
Please setup a password to use to access your account.	
Name	Smith, Mrs. Jane B.
Login	jane.smith@gmail.com
Password	<input type="password"/>
Confirm Password	<input type="password"/>
<input type="button" value="Save"/>	

Returning Users

To access the Online Fund Access portal, visit Community Foundation for the Alleghenies' website at www.cfalleghenies.org and click Online Fund Access on the top navigation bar. You will be redirected to a login page where you will enter your unique username and password. If you forgot your credentials, you can choose the "Forgot Password" option on the login page. If you have any other password-related concerns, please contact us at info@cfalleghenies.org or call (814) 536-7741. While our staff can assist you in resetting your password, please understand we do not have access to user passwords and cannot look them up for you.

Note: The portal will lock you out after five unsuccessful login attempts. If you are locked out, please contact us at info@cfalleghenies.org or call (814) 536-7741.



Donor 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. Choose the fund you wish to review from the drop-down menu.*

The screenshot displays the donor portal interface for the Smith Family Fund. At the top, the logo for the Community Foundation for the Alleghenies is visible. Below the logo, the fund name 'Smith Family Fund' is prominently displayed. A navigation menu includes tabs for Home, Choose Fund, Contributions, Grant Distributions, Grant Requests, Fund Statements, Donate, Vouchers, Invoices, and Logout. The current balance is shown as \$180,574.72. Below the balance, there are two tables: 'Recent Contributions' and 'Recent Grants'. Both tables have columns for Date, ID, Amount, Status, and Recipient.

The tabs at the top of the page display different features available to you as a fundholder:

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. If your fund fee is assessed per gift, the current spendable balances will reflect the fee activity as gifts are received. If your fund is assessed a percentage fee based on the fund balance, fees will be assessed at the end of each quarter.

Contributions

This tab shows all donations made to your fund. Clicking on a contributor's name will bring up their history of contributions including date of gift, type and amount.

Grant Distributions

This tab shows the history of grants awarded from your fund including date, organization name, purpose and amount.

Grant Requests

This tab allows you to make a grant request from your fund and see recent grant statuses.

Fund Statements

This tab shows your fund's quarterly fund statement. Next to the summary you wish to view, click Print and the system will generate a PDF in a new window that you may view, save, or print.

Donate

This tab opens up a new window for you to make a gift to your fund. You can also set up a recurring donation.

Vouchers

This tab shows payments made from your fund for fundraising expenses or program distributions made to individuals or businesses.

Invoices

This tab shows non-tax-deductible payments made to your fund, such as portions of sponsorships where the donor received goods and/or services.

Logout

Clicking Logout will automatically log you out of the Donor Portal. If you do not log out this way, you will be automatically logged out at midnight.

Submitting a Grant Request

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:

A. Choose from Previous Grantee

Choose the organization you want to support from this drop-down list of organizations you have previously supported.

or

B. Other Foundation Funds

Choose a fund you want to support from this drop-down list of funds at Community Foundation for the Alleghenies.

or

C. Search for Other Grantees

Search for the organization you want to support in GuideStar, the world's largest database of nonprofit organizations. Once you find the organization you want to support, click **Create**

or

D. Enter Grantee Information Manually

If you can't find the organization you wish to support, you will need to enter the organization's information manually: name, address and phone number. Once you enter this information, click **Submit**.

The screenshot shows a form titled "Choose from previous Grantee" with four options: A. Grantees you have given to in the past (a dropdown menu), B. Other foundation funds (a dropdown menu), C. Search for other Grantees (a search bar with a "Search" button), and D. Enter Grantee information manually (fields for Name and Address).

Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details including grant description and amount.

2. Grant Details

In the description field, please provide the grant purpose and any special handling. Keep in mind that if you don't designate a specific grant purpose, your grant will be earmarked for General Support. A \$100 minimum is required for each grant request. You can also choose to remain anonymous by selecting the Anonymous checkbox. Once you are finished entering this information, click **Review**.

The screenshot shows a form titled "New Grant Request" with the following fields: Grantee (Adaptive Sports Program of Ohio), Description (General Support), Amount (100.00), and Anonymous (checkbox). A "Review" button is at the bottom.

3. Review and Submit Request

Review your grant request details and click **Submit Request**. Once you submit the request, you will receive an automated confirmation email and our staff will begin processing.

The screenshot shows a form titled "Review New Grant Request" with the following fields: Grantee (Adaptive Sports Program of Ohio), Description (General Support), Amount (\$ 100.00), and Anonymous (No). "Submit Request" and "Edit Request" buttons are at the bottom.

Viewing Grant History

To review your most recent grant history, click the **Grant Requests** tab.

Grants				
Date	Status	Recipient	Description	Amount
08/28/2018	Pending	ArtsinStark	General Support	100.00

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. If you would like to cancel a pending grant request before it is processed, click the yellow Cancel button.

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 that the grant request has been approved and a check has been paid out to the organization.

Completed means the grant request has successfully been fulfilled.

Viewing Voucher and Invoice History

To review your most recent voucher or invoice history, click the **Vouchers** or **Invoices** tab.

Home	Choose Fund	Contributions	Grant Distributions	Grant Requests	Fund Statements	Donate	Vouchers	Logout	Export
Voucher Activity									
Profile									Amount

In each tab, you will first see a list of organizations or individuals, along with cumulative totals. You can click on each name to see a detailed list of their activity. You can also scroll down to see a chronological list, organized by date.

If you would like to save this information to a spreadsheet, click on the **Export** button on the top menu.

Please note: You cannot request voucher payments (invoices, reimbursements, etc.) through this portal. You can submit those requests through a link on our website: cfalleghenies.org/reimbursement-request

Questions

If you have any questions about the Online Fund Access portal, contact us at info@cfalleghenies.org or call (814) 536-7741.

Frequently Asked Questions

How often are quarterly fund statements posted?

Quarterly fund statements are posted approximately six weeks after the end of each quarter. You will be notified via email when your summary is ready to be viewed in the Online Fund Access portal. If you are not receiving these notification emails, please contact us at info@cfalleghenies.org or call (814) 536-7741.

How do I change my password?

If you need to change your password, you can choose the "Forgot Password" option on the login page, or feel free to contact us at info@cfalleghenies.org or call (814) 536-7741. While our staff can assist you in resetting your password, please understand we do not have access to user passwords and cannot look them up for you.

How long does it take for my recommendation to be processed?

Generally, recommendations are processed within five to ten business days.

Who can I make recommendations to?

Grant recommendations must be made to 501(c)(3) organizations (including schools, churches and government entities).

What is the minimum amount for a grant recommendation?

A \$100 minimum is required for each grant recommendation.

How do I know if a grant I recommended has been issued?

Your most recent grants paid will be listed on your Online Fund Access portal homepage. Or, you may click on the Grant Request tab and on the right side of this page, you will see your recent grant requests with their status.

Who do I contact if I'm having issues with the Online Fund Access Portal?

If you have any questions or are experiencing issues with the Online Fund Access Portal, please contact us at info@cfalleghenies.org or call (814) 536-7741.