Our Community Foundation

For a Greater Birmingham

Donor Central Portal

A Guide for the Community Foundation
of Greater Birmingham's Online Portal
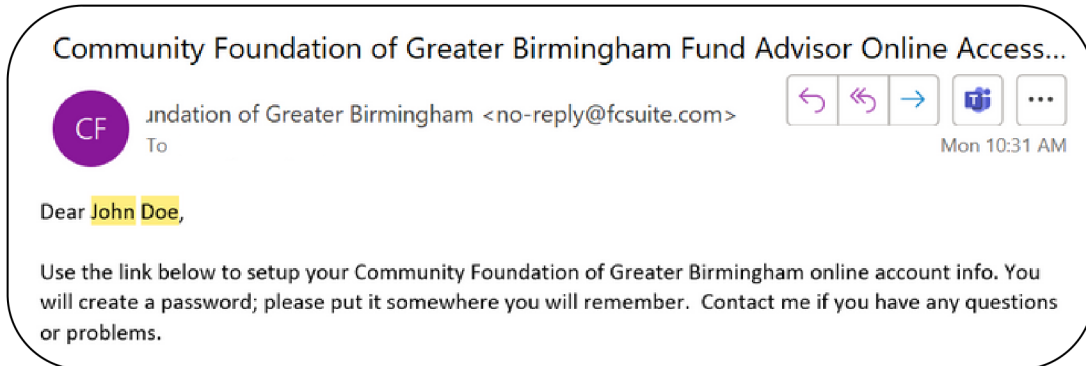
TABLE OF CONTENTS

# Account Set Up

First Time Log In

For first-time users, there will be an account set-up process. You will receive an email from no-reply@fcsuite.com with the subject line "Community Foundation of Greater Birmingham Fund Advisor Online Access Info"

Follow the instructions outlined to create your password for your account. Please note the username (your email) and password as you complete the process.

Accessing the Portal

You may access the portal at any time after password and account set-up. Just go to www.cfbham.org and click on "Access Your Fund" in the top right corner of the webpage. Log in to check fund balance, track contributions, view old grants, recommend new grants, and look over statements.
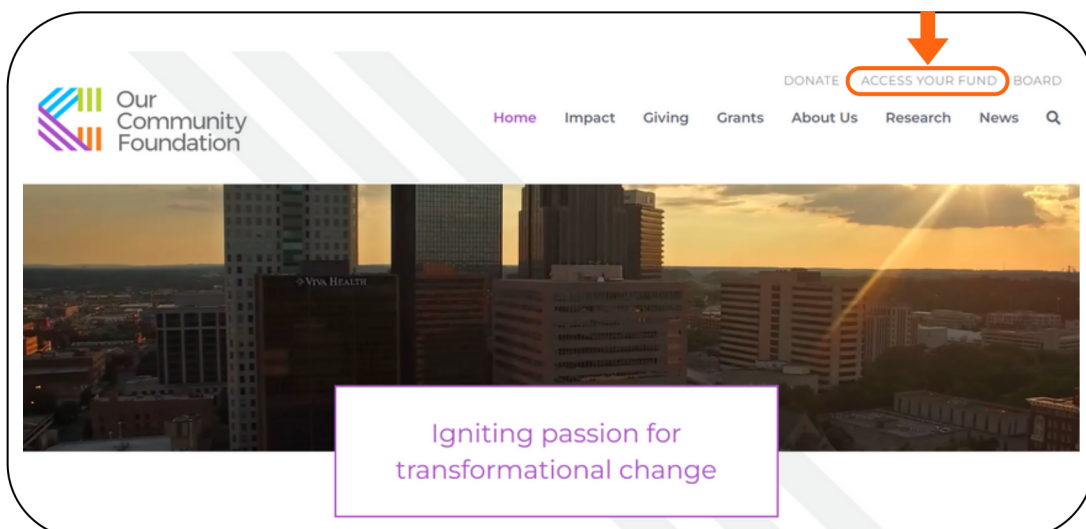
Navigating Your Portal

Home Page

Once within your portal, the <u>Home</u> tab will display your fund's current balance. It will also show you the total contributions and grants made over the fund's lifetime, as well as a list of current fund advisors and several interactive summary graphs.
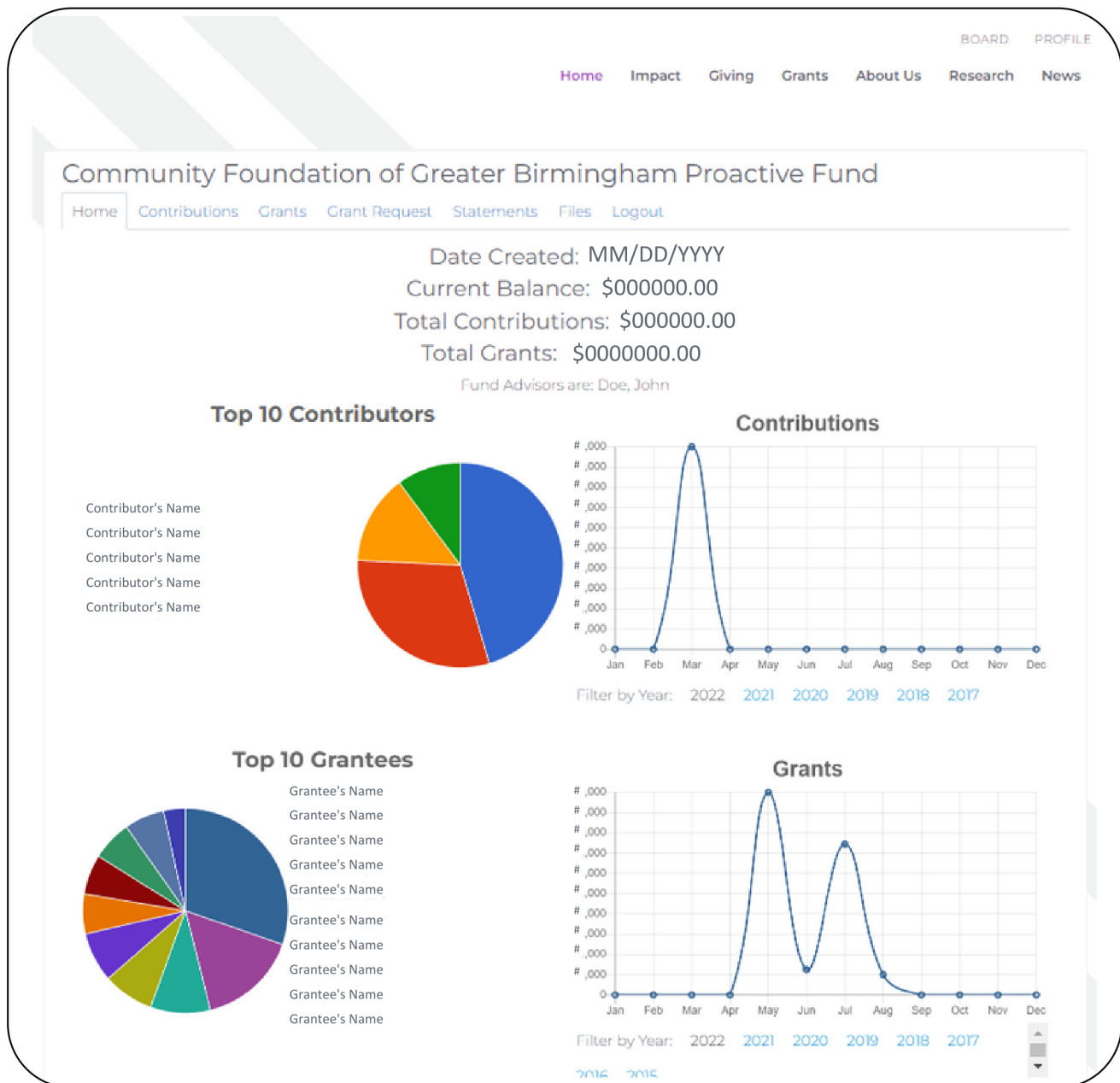
Contributions Summary

The Contributions tab shows you a list of all of the contributions made to the fund. Here you can sort the list by Date, ID number, Contributor name, Type, or Amount by clicking on those headings at the top of the list. You may also view a Contributor's details by clicking on the Contributor's name.

Outlined in purple above, a new Export tab appears while on the Contributions page. You can click on this tab to export a CSV report of contributions made to the fund.

Grants Summary

In the Grants tab, there will be a summary of Grantees that have received a grant from the fund. This list can be sorted by Grantee name, the number of grants they received, and the amount they received in total. There is an Export tab for this page as well so that you may export a CSV Grants report.

Grant Requests

You can make grant requests in the Grant Request tab. On the right side of the page is a sortable list of all grants associated with the fund and their status. The left side of the page displays three options through which you may start a grant request: Choosing from a previous Grantee, Searching for other Grantees, or Entering Grantee information manually.

After using one of the three methods to enter grantee information, you will be redirected to the New Grant Request page (pictured on page 8).

Choosing from Previous Grantee

Previous recipients from this fund will appear in a drop-down list. Selecting one will open the New Grant Request page.

Searching for Other Grantees

This feature allows you to search and autofill information for a recipient that has not received grants from your fund before. Type in the Name, City, and State of the grantee to search for them in the Community Foundation's own system or the Guidestar system. (The Guidestar system is a database with some of the most up-to-date information on thousands of non-profits.) Search results will appear for you to select the non-profit that matches your recipient's information. You will have to toggle between Community Foundation results or Guidestar results, especially if the recipient is not registered in our system.

When the correct recipient shows on either list, you will be able to click the small Create Request link located directly to the left of the Recipient's Name on the list. This will re-direct you to the New Grant Request page.

Entering Grantee Information Manually

If you cannot select a recipient from the dropdown list of previous grantees or find them through the search method, you may enter their information manually. Once the information is completed and you hit the submit button, you will be redirected to the New Grant Request page.

Pictured above is the New Grant Request page that appears after entering grantee information.

New Grant Request Page

Once on the New Grant Request page, you will be prompted to fill out a description of the grant, indicate the amount requested, and attach files that are related to the grant. Outlined below are the methods to enter recipient information prior to submitting a new request.

After a Grant Request is Submitted

Once you have reviewed and submitted the information for a new grant, your request will appear at the top of the Grants list on the right side of the page, with the status "Request". It will also include a bright yellow "Cancel" button to the right of the amount column, should you need to cancel the request at any time while it is still in the "Request" status.

Statements

You will be able to view and download fund statements under the Statements tab. These statements are updated quarterly.

Files

Under this tab, you will be able to find additional information and documents related to your fund, such as the fund agreement.

General FAQs

When will my grant be processed?

The Community Foundation processes grants on a weekly basis. Grants are typically paid within 5 – 7 business days of submission. If you have a question about our payment schedule or need a grant to be expedited, please contact Kendall Chew.

How do I check my grant status?

You can check your grant status at any time under the Grants tab. The list displayed on the right side of the page will have all grants listed with their status written in the second column

What if my grant history includes information that I don't understand or appears incorrect?

If anything in your grant or fund history needs clarification or appears incorrect, please contact Kendall Chew at kchew@cfbham.org.

Is there another way to access my fund if I do not wish to use the portal?

We want everyone to be comfortable with how they access their funds. If you would like help processing any requests involving your fund outside of the portal please contact Kendall Chew at kchew@cfbham.org.

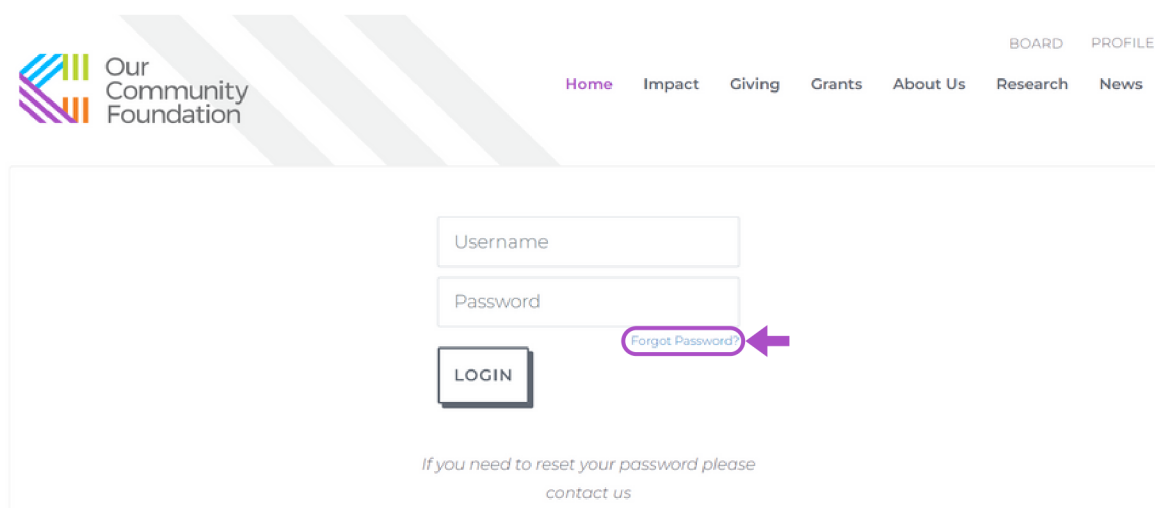## How do I manage my contact information?

You can change your contact information or add/remove advisors for your fund by contacting Kendall Chew at kchew@cfbham.org.

Who do I contact if I have additional questions?

Kendall Chew, Senior Philanthropy Coordinator at kchew@cfbham.org.

What if I forget my password?

On the login page, simply click the "Forgot Password" link to input your username and reset your password.