FUND ADVISOR PORTAL USER GUIDE

COMMUNITY FOUNDATION
OF COLLIER COUNTY
FOR GOOD. FOREVER.

Fund Advisor Portal

As a fundholder of the Community Foundation of Collier County, 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 fund statements, request and track grants (or scholarships), 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.

Initial Login Process and Creating Your Account

You will receive an automated email from Community Foundation of Collier County sent as "no-reply@fcsuite.com" with a custom invitation link to create your account in the Fund Advisor Portal.

Your username will be the main email address that we have on file for your fund.

Once you click on the invitation link in the email, you will be prompted to create a password of your choice. We recommend using random words, capital letters, numbers and/or special characters to keep your account secure. **Please write down your password and put it somewhere you will remember!**

Delete this initial automated email after you have successfully completed this process. The link contained in the email can only to be used once to establish your initial password.

Returning Users

To access the Fund Advisor Portal at any time (following the initial "setup access"), simply visit www.cfcollier.org and click on the green Fund Advisor Portal button at the top right corner of our website. There is also a button in the middle of the homepage under "Donors".
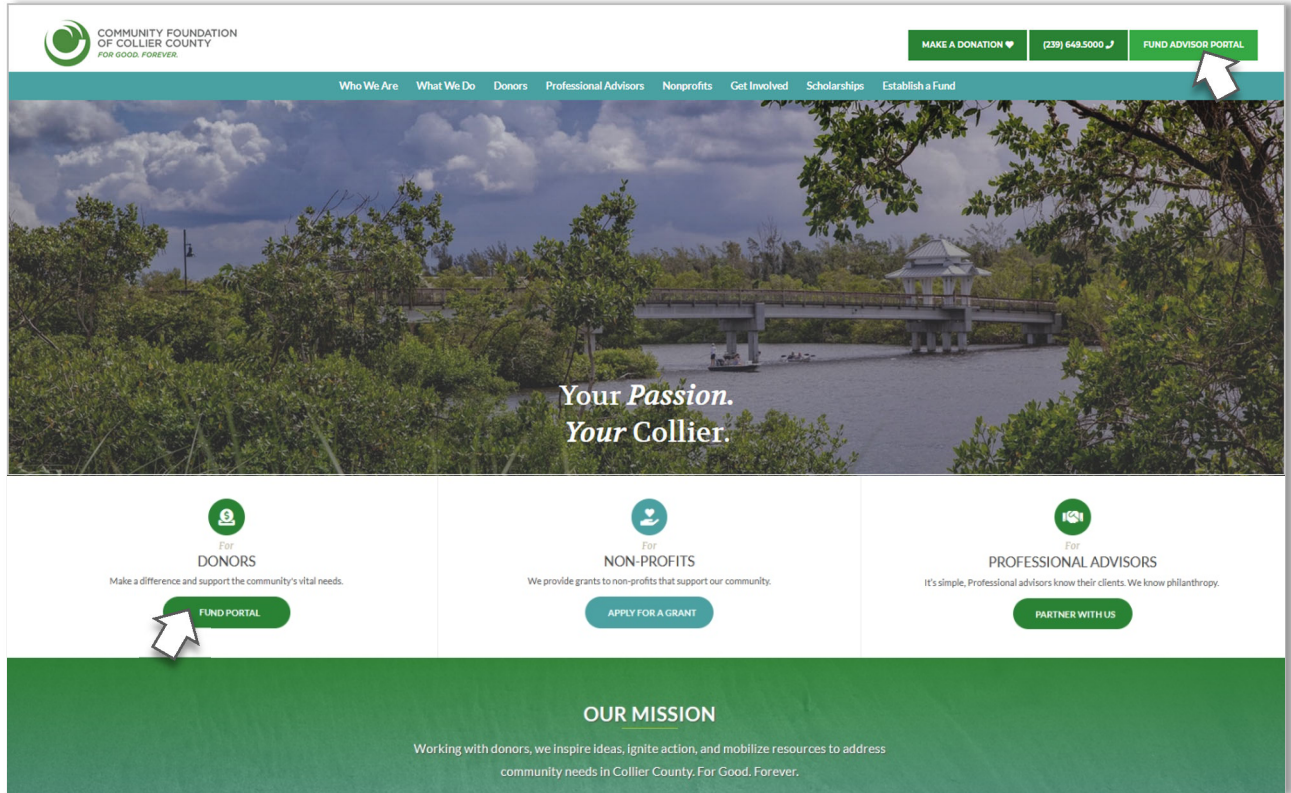

This will take you to the login screen where you will enter your username and password established in the step outlined above.

The CFCC team does not have the ability to access your password. If you forget your password, you can reset your password on the Fund Advisor Portal login page by clicking on the "Forgot Password?" link.

If you still need assistance, please contact our team at (239) 649-5000 or email dc@cfcollier.org.

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

If you are locked out, please contact our team at (239) 649-5000 or email dc@cfcollier.org.
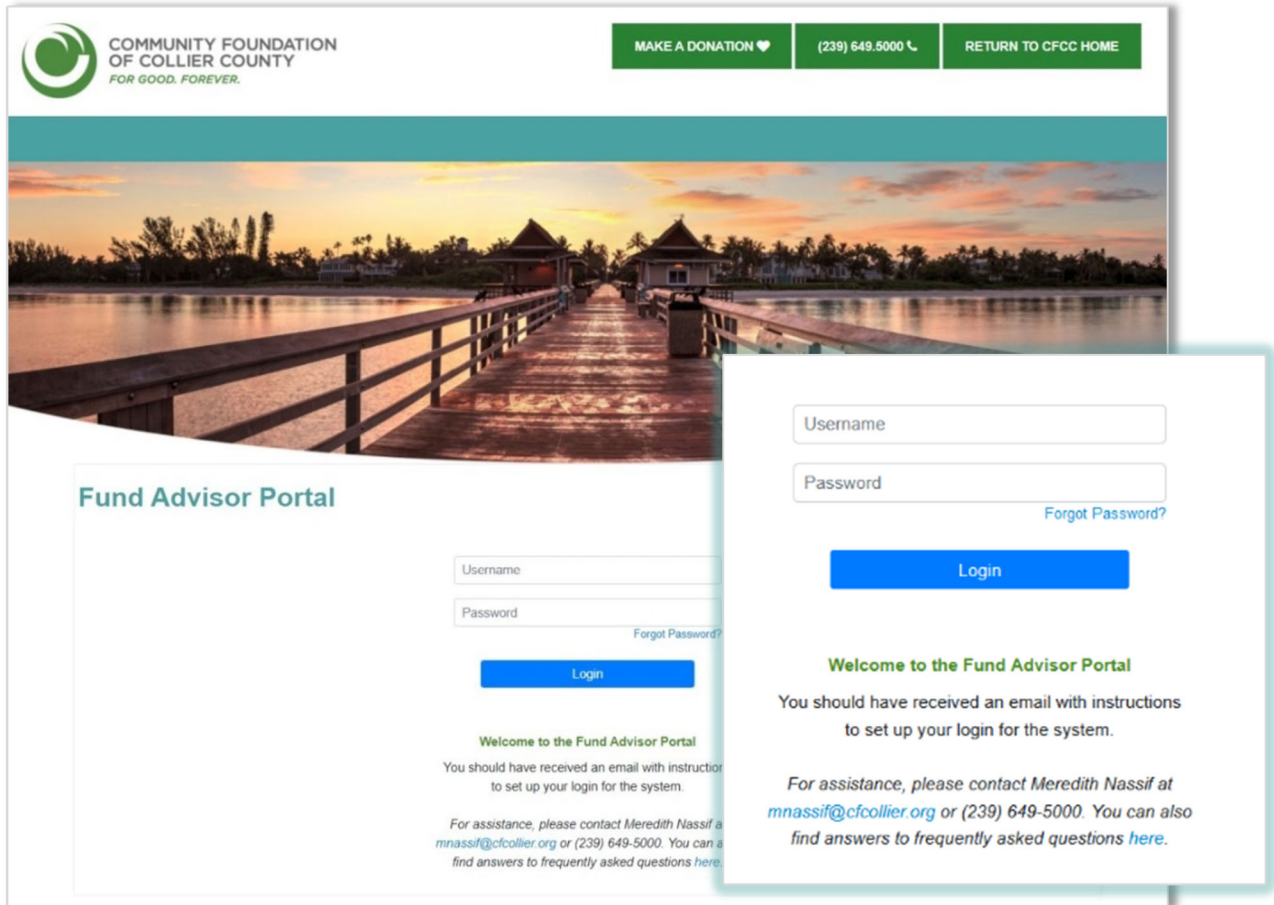
Visit www.cfcollier.org from any web browser or device (including smartphones and tablets) to access the Fund Advisor Portal system.

IMPORTANT: *If you access the Fund Advisor Portal from a shared computer or device, we strongly encourage you to use the Logout option after completing each session. This ensures no one other than you has access to the system.*

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

If you are listed as an advisor for only one account, you will <u>not</u> have the "Choose Fund" menu but instead will see only your account information.
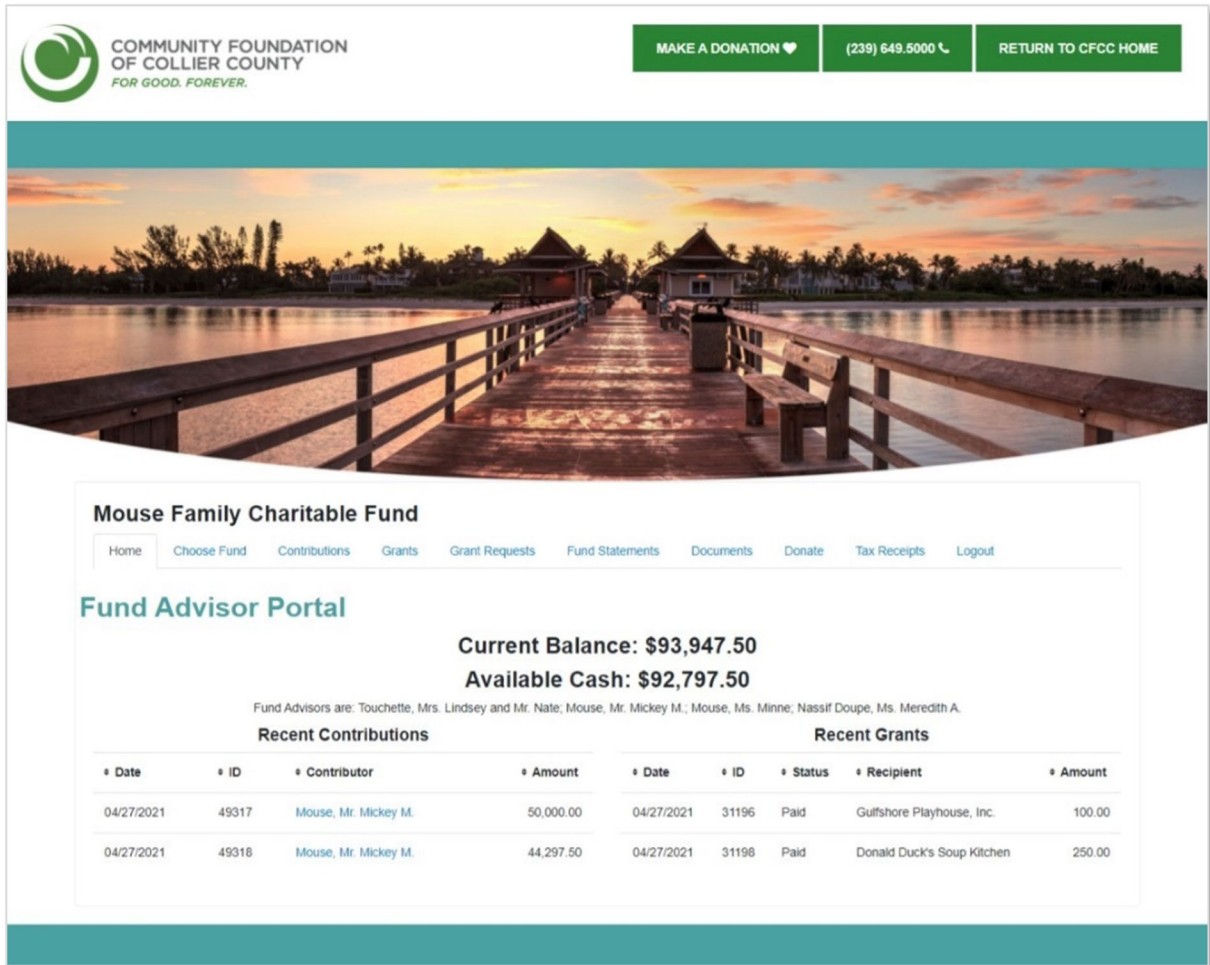
The tabs at the top of the page display different features available to you as a Fund Advisor:

Home - Your homepage is a quick snapshot of your fund's most recent activity. This tab shows your fund's current balance, all fund advisors, recent contributions, and recent grant history. Note that each Fund Advisor listed will have similar access to the Fund Advisor Portal.

Choose Fund - This tab is visible if there are other funds to select and view.

Contributions – Unless the donor has requested to stay anonymous, contributions show all contributions/donations made into the fund. You will note that an "Export" option appears on the far-right side of the menu bar. This feature will export information about

each donation into a Microsoft Excel spreadsheet. Clicking on a contributor's name will bring up their history of contributions including date of gift, type, and amount.

Grants - Shows the history of grants awarded from your fund including date, organization name, purpose, and amount. The top section provides a summary of grants by recipient (grantee). Scroll past the summary section to see grants listed from most recent to oldest.

Grant Request - Allows you to make a grant request from your fund and see recent grant statuses. ***Note: Online grant requests are only available to Donor Advised Funds at this time.***

Coming Soon: **Grant Catalog** - The catalog is a crowdfunding tool that you may search for funding opportunities and projects.

Coming Soon: **Fund Statements** - Shows your fund statements. Next to the fund statement you wish to view, click "Print" and the system will generate a PDF in a new window that you may view, save, or print.

Coming Soon: **Documents** - Shows any viewable files regarding your fund. At this time, fund agreements and other confidential documents are not available through the Fund Advisor Portal, but please contact our team if you would like any documents added to your portal.

Donate - Opens a new window for you to contribute to your fund, or other funds managed at the Community Foundation. You may also set up a recurring donation.

Tax Receipts – Shows your tax receipts. Next to the tax receipt you wish to view, click the ID number and the system will generate a PDF that you may view, save, or print.

Logout - Remember to use the **"**Logout" tab to close your Donor Portal. You will be automatically logged out after a period of inactivity even if you do not logout.

Export – This tab only shows when you are in the Contributions and Grants tabs. It produces an excel spreadsheet with the contribution or grant information.

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.

B. Other Foundation Funds - Choose a fund you want to support from this drop-down list of funds at the Community Foundation of Collier County.

C. Search for Other Grantees - Search for the organization you want to support in GuideStar, the world's largest database of nonprofit organizations. The more keywords used, the better the search results will be. Once you find the organization you want to support, click **Create Request**.

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: organization name, address and phone number. The fields marked with a red asterisk are required; providing all the requested information allows us to ensure your grant recommendation is processed as accurately and efficiently as possible. Once you enter this information, click **Submit**.

Mouse Family Charitable Fund

Home Choose Fund Contributions Grants Grant Requests Fund Statements Documents Donate Tax Receipts Logout

Fund Advisor Portal

Use the fields below to request a new grant from your fund.

Select a grantee from the drop-down menu, search for nonprofits already in our system, or enter a new nonprofit. The Community Foundation of Collier County will receive notification of your request and process your grant. We will notify you once the grant has been completed.

Grants already processed from your fund are listed to the right.

Recurring grants: the system will not notify you before a grant is about to be processed. Please email DC@cfcollier.org to cancel any recurring grants prior to their grant date.

Choose from previous Grantee

Grantees you have given to in the past

A ⇨ [⌄]

Other foundation funds

B ⇨ [⌄]

or

Search for other Grantees

C ⇨ Name [   ] [Search]

or

D ⇨ ### Enter Grantee information manually

Name * [   ]

Address * [   ]

[   ]

City* [   ]

State* [   ]

Zipcode * [   ]

Phone * [   ]

Email [   ]

* required information

[Submit]

Grants

Date	Status	Recipient	Description	Amount	
04/27/2021	Request	University of Missouri	Scholarships	1,000.00	Cancel
04/27/2021	Approved Request	Operating Fund		100.00	
			Monthly recurring. Starts 2021-05-10. 10 grant(s).		
04/27/2021	Request	Donald Duck's Soup Kitchen	For COVID Relief efforts	150.00	Cancel
04/27/2021	Paid	Gulfshore Playhouse, Inc.	For actors who aspire to work for Disney World	100.00	
04/27/2021	Paid	Donald Duck's Soup Kitchen	For COVID-19 food relief	250.00	

Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details including the 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 designated for unrestricted use.

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**.

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 team will begin processing the grant request.
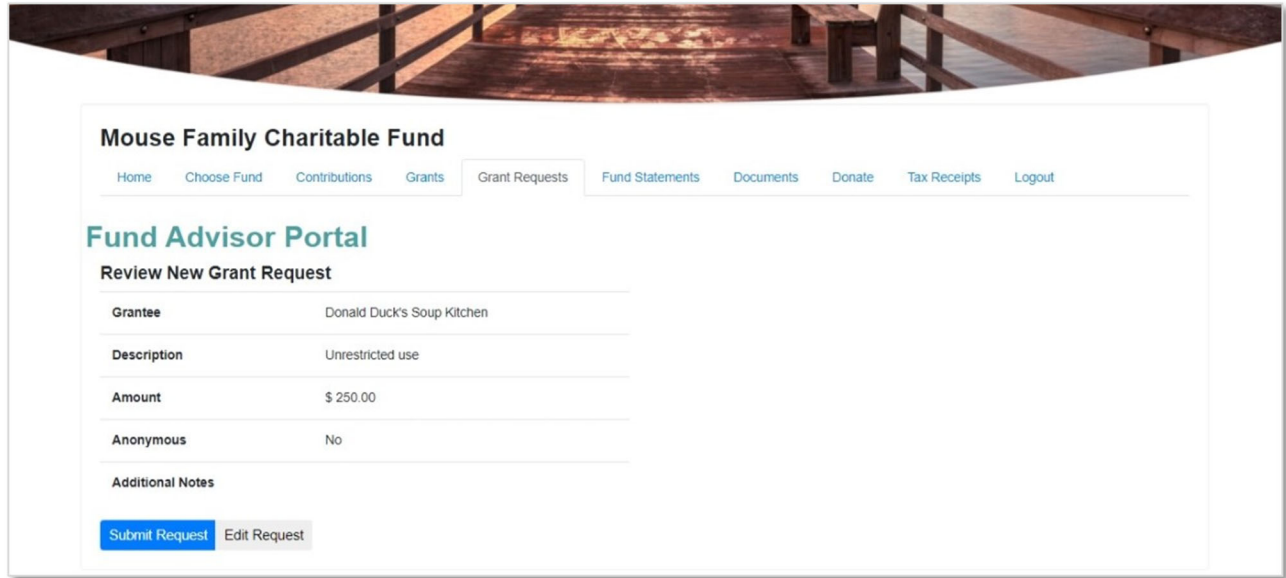
Viewing Grant History

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

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

Cancelled means your grant request has been cancelled.

Pending means that our team 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.

Email Alerts

We will alert you via email every time a contribution is made to your fund or a grant has been awarded from your fund. These alerts can be cancelled at any point, but the alerts are not retroactive, so you will not be notified of past grants or donations.

If you would like to cancel these alerts, please contact our Team at (239) 649-5000 or email Meredith Nassif, Director of Donor Services, at mnassif@cfcollier.org.

Fund Advisor Portal Frequently Asked Questions

Are there other ways to submit a grant request?
Yes, a request may be submitted by email or mail/fax using the Donor Suggestion Form.

Address:	Community Foundation of Collier County,
	1110 Pine Ridge Road, Suite 200, Naples, FL 34108
Fax:	(239) 649-5337
Email:	DGrundeman@cfcollier.org

Your grant requests must include the organization name and address, the grant purpose and the grant amount in order to be processed.

How long does it take for my grant request to be processed?
Depending on when grant requests are received, it can take up to 10 business days to process your request.

Who can I make grant requests to?
Grant recommendations must be made to qualified 501(c)(3) organizations (including schools, churches and government entities).

What is the minimum amount for a grant request?
A $100 minimum is required for each grant request.

How often are Fund Statements posted?
Fund statements are posted monthly. You will be notified via email when your fund statement is ready to be viewed in the Fund Advisor Portal. If you are not receiving these notification emails, please contact our team at (239) 649-5000, or email Meredith Nassif, Director of Donor Services at mnassif@cfcollier.org.

I haven't received the auto-generated email for the new Fund Advisor Portal yet. What should I do?
It could take an entire day for the system to fully process each custom URL and send the auto-generated email. Check your Spam or Junk folder for an email from no-reply@fcsuite.com.

If it hasn't arrived within a few days, please email Meredith Nassif at mnassif@cfcollier.org so that she can manually re-send the information you will need to get up-and-going.

When will you be conducting trainings for the new system?
For donor-advised or agency fund holders, please email Meredith Nassif at
mnassif@cfcollier.org to schedule a training for the new system.

Scholarship or employee-related fund holders can email Laura Bidireanu at
LBidireanu@cfcollier.org.

The URL only worked the first time. How do I return to the portal?
The custom URL inside the auto-generated email was only provided to establish your password.
To access the portal, go to www.cfcollier.org and click on the green Fund Advisor Portal button
at the top right corner of our website. This will take you to the login screen where you will enter
your username and password.

I've lost my password. What should I do?
The CFCC team does not have the ability to access your password. You can reset your
password on the Fund Advisor Portal login page by clicking on the "Forgot Password?" link.

If you still need assistance, please email dc@cfcollier.org or call (239) 649-5000 for assistance.

Questions
If you have any questions about the Fund Advisor Portal, please contact our Team at
(239) 649-5000 or Meredith Nassif, Director of Donor Services, at mnassif@cfcollier.org.