

Welcome to the new Donor Portal system.

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The Community Foundation of Abilene has been working hard to implement this new technology to improve the experience for you, our Donors. We are excited to launch this system and ask for your continued patience as we bring additional features online over the coming months. We have assembled this quick-reference guide to introduce the basics of the new Donor Portal. As always, please know we stand by ready to answer any questions you might have.

Note: Certain features of the system pertain only to certain types of accounts. For example, distributions from Designated Endowments are typically made quarterly; thus, advisors for this particular type of account should not attempt to enter grant requests through the Donor Portal.

- **Establishing Your Password:** The Community Foundation of Abilene will initiate your account by confirming your eligibility to serve as an advisor to one or more charitable accounts. This eligibility is determined by the Fund Advisors documented in fund agreements or documentation connected to each charitable account. If updates are needed, please have any of the documented individuals contact the CFA for assistance. Once the process has been initiated, you will receive an automated email from sender “no-reply@fcsuite.com” you will notice the “Community Foundation of Abilene” referenced in the email’s subject line. The automated email will instruct you on the steps to create a custom password specific to your account. Take note of your username and password as you complete this process. Please delete this automated email once you have successfully completed this process. The link contained in the email is only to be used for establishing your initial password.
- **Accessing the System:** To access the portal at any time, simply visit “cfabilene.org/portal” and enter your username and password established in the step outlined above. Once inside the system, select the particular account you wish to review and then use the menu items in the screenshots below to navigate through the Donor Portal.



Community Donor

Username

Password

If you need to reset your password please contact us

If you serve as an advisor for multiple charitable funds, you will see the “Choose Fund” menu once you have successfully signed in to the Donor Portal system. Choose the particular fund with which you wish to interact. If you are listed as an advisor for only one fund, you will not see this screen.



Community Donor


Choose Fund

*** Communities Foundation of Oklahoma - Operations
Fleeta Greenwood Foundation Endowment Fund
Matching Endowment Fund Gifts
Oklahoma Initiative Fund
OklahomaHOPE Donor Advised Fund

Once inside the system, select the particular fund you wish to review and then use the menu items in the screenshots below to navigate through the Donor Portal.



Donor Advised Fund

Home Choose Fund Contributions Grants Grant Request Grant Catalog Statements Files Logout  MENU BAR

Current Balance: \$98.74

Fund Advisors are:

Recent Contributions				Recent Grants				
Date	ID	Contributor	Amount	Date	ID	Status	Recipient	Amount
03/01/2017	35616		102.00					

The main screen provides an at-a-glance list of Recent Contributions received into the fund and Recent Grants paid out of the fund.

You will also see the Current Balance, updated in real-time, and the current Fund Advisors will be indicated just below the balance. Note that each person listed will have similar access to the Donor Portal.

The menu bar along the top of the window provides the following additional options:

Choose Fund - allows you to select a different account for which you serve as an advisor

Contributions - provides in-depth information regarding each contribution received into the charitable fund. Provided the donor has not requested to remain anonymous, you will be able to learn more detail about each donor by clicking his/her name. You will note that an "Export" option now appears on the right side of the menu bar. This feature will export information about each donation into a Microsoft Excel spreadsheet.

Grants - provides more detail about all grants paid from this charitable fund. The top section provides a summary of grants by recipient (aka, grantee). Scroll down past the summary section to see an itemized list of grants paid in descending order (most recent first).

- Look for the word "Complete" in the Status column to know the grant has been awarded. Other status indicators will appear as the grant moves along our internal processes.
- Only the status "Complete" confirms that a grant has been successfully awarded. Contact us for questions about grant status indicators.

Grant Requests - use this tab to recommend a grant payment from your Donor Advised Fund. NOTE: Designated Endowments and/or Scholarship Accounts should not utilize this tab. You will find the Grant Requests window divided into four sections.

- The Grants Listing appears in the right half of the window. Here you will find each grant recommended/awarded from this charitable fund listed in descending date order. Look for the word “Complete” in the Status column to confirm a grant has been successfully awarded.
- The first portion on the left side of the screen is labeled **Choose From Previous Grantee**. You can recommend additional payments to any recipient previously awarded from this account using this handy tool. Use one of the options below to recommend grant payments to new recipients not previously awarded from this particular fund.
- **Search for Other Grantees** - This box queries the complete list of nonprofit organizations holding current 501(c)(3) tax-exempt status with the Internal Revenue Service.
- **Enter Grantee Information Manually** - the last section allows you to manually enter the information we will need to process your grant recommendation. 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.

Grant Catalog - The grant catalog will only be available during active grant cycles. CFA staff will notify you when the grant catalog is open so that you may review projects and choose whether or not to provide financial support for those projects during grant cycles.

Statements - Starting in April 2018, statements related to this charitable fund will appear under the Statements tab as opposed to being sent via email from our old system. This ensures each statement is archived in one convenient location that can be accessed at any time by any of the fund advisors.

If you access the Donor Portal from a shared computer or device, we strongly encourage you to use the Logout option after completing each session for protection of your information.