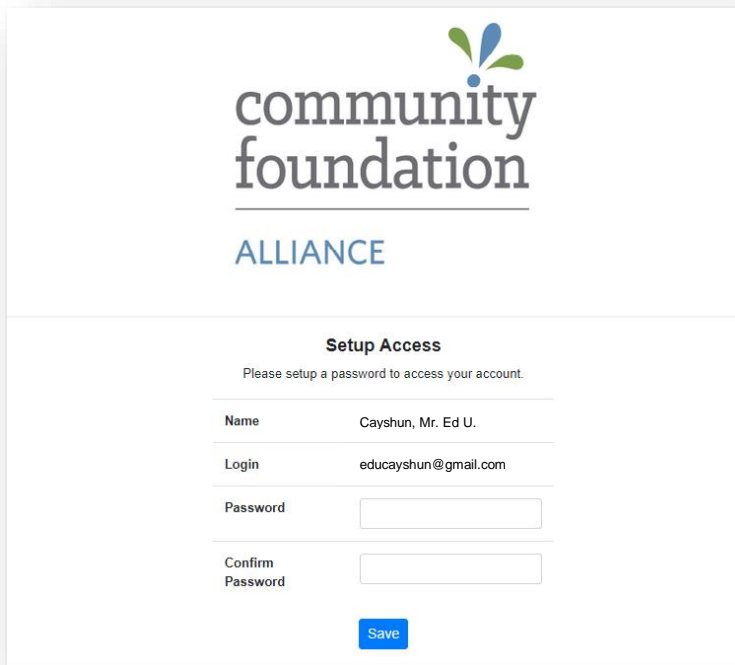


ALLIANCE

### Step 1: Establishing Your Password

The Community Foundation Alliance will create your account in the Fund Portal. An automated email from sender [Community Foundation Alliance <noreply@fcsuite.com>](mailto:noreply@fcsuite.com) will be sent to your email address on file with a link to a screen (shown below) for you to create your password. After using the link in the email to create your password, initial setup is complete. Please delete the email following this successful setup. **Note your username and password during this process.**

*Note: If you did not receive an email to access the system, please contact your Regional Director of Development.*



community  
foundation

ALLIANCE

**Setup Access**

Please setup a password to access your account.

Name	Cayshun, Mr. Ed U.
Login	educayshun@gmail.com
Password	<input type="password"/>
Confirm Password	<input type="password"/>

### Step 2: Accessing the Portal

Access the Fund Portal anytime by visiting <https://alliance.fcsuite.com/erp/fundmanager> and entering your username and password. You may also enter the Fund Portal from any page on the Community Foundation website, using the **Login to Your Fund** link found beneath the Donate button. Follow the steps and screenshots below to navigate through the Fund Portal.

*Note: If you are a fundholder, advisor, or representative for multiple funds, you will first choose the fund you want to review.*

### Step 3: Navigating the Portal

If you are listed as a fundholder, advisor, or representative for only one fund, you will be directed to the **Home** page for that fund. Navigate through tabs to review available content.

- **Home** – Shows the actual Current Balance plus the Spendable Balance. This area also lists all fundholders, advisors, or representatives with access to this fund's information.

**Current Balance:** The fund's current total amount of income, including gifts to endowment, matching gifts, revenue, and investment activity, less the disbursement activity of grants, distributions, program expenses and administrative support fees.

**Spendable Balance:** The fund's current total amount of Available to Grant (ATG).

- **Choose Fund** – This tab is only visible if you are a fundholder, advisor, or representative for multiple funds.
- **Grant Recommendation** – Only donor advised fund advisors have this tab available. Advisors may make grant recommendations from the fund's Spendable Balance shown on the Home tab. (*See Grant Recommendations Guide below for details*)
- **Fund Activity Reports** – Fundholders, advisors, and representatives will be able to view fund activity reports as they are made available. Click Print to display reports in a new browser tab to download or print.
- **Resources** – The files found here are applicable policies, guidelines, and reports that govern spending, award, and endowment activity of funds.
- **Tax Receipts** – This tab lists all tax receipts for your gifts to any fund. Click the ID number to display, download, or print a tax receipt.
- **Logout** – Use this tab to logout of the Fund Portal. **Remember to logout after each session.**

The screenshot shows the Community Foundation Alliance Fund Portal for the ABC Training Fund. At the top, the logo for the Community Foundation Alliance is displayed, featuring a stylized blue and green leaf icon above the text "community foundation" and "ALLIANCE". Below the logo, the title "ABC Training Fund" is shown. A navigation bar contains the following tabs: Home, Choose Fund, Grant Recommendation, Fund Activity Reports, Resources, Tax Receipts, and Logout. The main content area displays the following information:

- Current Balance: \$57,648.13**
- Spendable Balance: \$1,588.00**

Below the balance information, it lists the Fund Advisors: Cayshun, Mr. Ed U., Rowe-Soft, Mike, Nommanee, Oscar, and Littical, Anna.

### Forgot Password

If you are ever locked out of your account, click **Forgot Password** on the login page. Enter your username and click the **Reset Password** button. If an account with the provided username is found, an automated email will be sent to the email on file with instructions to reset your password. If you're still having trouble, please contact your Regional Director of Development.

## Grant Recommendations Guide (For Donor-Advised funds only)

### Step 1

- Read all instructions on the screen before proceeding
- Choose one of the four options to recommend a grantee:
  - **Grantee you have given to in the past** – The dropdown menu will display all grantees you have given to in the past
  - **Other Foundation Funds** – The dropdown menu will display all other foundation funds that you may grant to internally
  - **Search for other Grantee** – This box allows you to Search for grantees (funds and nonprofit organizations) already in the Community Foundation Alliance database, or other eligible national organizations using Guidestar Results; click Create Request
  - **Enter Grantee information manually** – Complete with all required information; click Submit button

### Step 2

- After selecting the grantee, please enter the following information:
  - **Description** – A description of your recommended grant purpose (*optional*)
  - **Amount** – The grant amount you are recommending. The **Spendable Balance** on the Home page will reflect the deduction of this amount once grant recommendation is submitted. (*Disclaimer: grant recommendations must go through approval process*)
  - **Anonymous** – Select this check box if you wish to grant anonymously
  - **Recurring** – For a recurring grant, please select a **Start Date, Recurrence Interval, and Number of Recurring (or leave blank)**. Subsequent recommendations will automatically be requested based on your selection and may only be cancelled by contacting your Regional Director of Development.
  - **Attachment** – Attachments may be added to the grant recommendation (*optional*)
  - **Attachment Description** – Describe attachment (*optional*)
  - **Additional Information** – Use this box to provide additional information and indicate if you would prefer the grant check provided to you for personal presentation.
  - **Review** – Click Review to verify information

### Step 3

- After entering the grant recommendation, please **Review New Grant Request** by verifying all information is correct; carefully read the legal disclosure
  - **Submit Request** – By submitting this request you agree that this recommendation adheres to all requirements and conditions of the disclosure
  - Once you click **Continue**, you may create additional grant recommendations or view fund information in other tabs

### Grants

- The **Status** of your submitted grant recommendation will update in the Fund Portal as it moves through the due diligence and approval process, displaying one of the following:
  - **Request** – Status at time of submission (*a non-recurring grant recommendation can only be cancelled from the portal during this stage*)
  - **Pending** – Status during due diligence review process
  - **Approved** – Status once grant has been approved
  - **Paid** – Status once grant payment has been issued (may take up to 14 business days for check to be received)

You may submit multiple grant recommendations per session, using the remaining current **Spendable Balance** shown on the Home page. Simply restart the process for each grant recommendation.