

THE
COMMUNITY
FOUNDATION

MARTIN
ST. LUCIE

Inspiring
PHILANTHROPY



FUND ADVISOR PORTAL
USER GUIDE



Hello,

In keeping with our commitment to simplify your charitable giving, we offer access to our online Fund Advisor Portal. As a Fundholder of The Community Foundation Martin - St. Lucie, you can access information specifically connected to your Fund account(s). Within the portal, you can easily check your Fund balance, view and download Fund Statements, request and track grants (or scholarships) and more. The Fund Advisor Portal makes it easy to manage and track the activity related to your Fund and it is available 24/7 from anywhere, on any device.

This guide was designed to provide instructions on navigating the Fund Advisor Portal.

While we are pleased to offer this Fund Advisor Portal for your convenience, your Community Foundation Team remains available to assist and always ready to provide our concierge level services.

Your Community Foundation Team

**President and
CEO**



Elizabeth Barbella
Elizabeth@tcfmsl.org

**Manager of
Programs**



Ellie Gundrania
Ellie@tcfmsl.org

**Executive
Assistant**



Jackie Nelson
Jackie@tcfmsl.org

**Program
Associate**



Courtney Brown
Courtney@tcfmsl.org

Initial Login Process and Creating Your Account

You will receive an automated email from The Community Foundation Martin - St. Lucie 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 can easily find it.

Delete this initial automated email after you have successfully completed this process. The link contained in the email can only be used once to establish your initial password. Instructions on how to access the Fund Advisor Portal in the future are on the next page.

THE COMMUNITY FOUNDATION

MARTIN | ST. LUCIE

Setup Access

Please setup a password to access your account.

Name	Test, Mr. TCFMSL
Login	admin@tcfmsl.org
Password	<input type="password"/>
Confirm Password	<input type="password"/>

Password Requirements

Tips One easy way to create a strong memorable password is to use sentences or small sentence fragments. You are not limited to a single word.

Avoid using single dictionary words or common sentences.

Avoid using birthdays, anniversaries, etc. These things are easy to find online. (e.g. social media)

Good Example:

Returning Users

To access the Fund Advisor Portal at any time (following the initial “setup access”), simply visit www.tcfmsl.org and click on the Fund Advisor Portal link at the top right corner of The Community Foundation Martin - St. Lucie's website: www.tcfmsl.org.

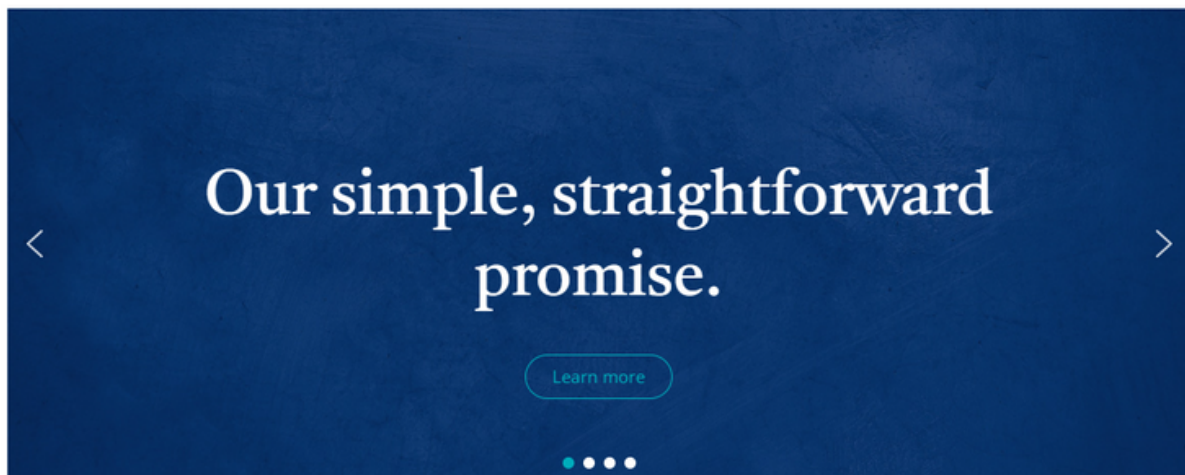


LOGIN: Board, Committee, Fundholder | Scholarship Portal | Grant Portal | Donor Portal

THE
COMMUNITY
FOUNDATION

MARTIN
ST. LUCIE

Home About Us Give Receive Advisors Newsroom Contact us



This will take you to the Portal's informational webpage, where you will click on the button to log in. The login screen is where you will enter your username and password established in the step outlined above.

The Community Foundation 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 need assistance, please contact your Team at (772) 288-3795 or email admin@tcfmsl.org.

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

If you are locked out, please contact your Team at (772) 288-3795 or email admin@tcfmsl.org.



Username
Password
Forgot
Login

Welcome to the Fund Advisor Portal
For new users, you should have received a
instructions to set up your login for the system.
For returning users, your username is your email.
Please note that both username and password are case sensitive.
For assistance, please contact The Community Foundation
Martin - St. Lucie at 772-288-3795. You can also find
answers to frequently asked questions by visiting
www.tcfmsl.org/donor-portal

Our support hours are Monday through Friday 9:00am - 5:00pm EST

Username
Password
Forgot Password?
Login

Welcome to the Fund Advisor Portal
For new users, you should have received an email with
instructions to set up your login for the system.
For returning users, your username is your email.
Please note that both username and password are case sensitive

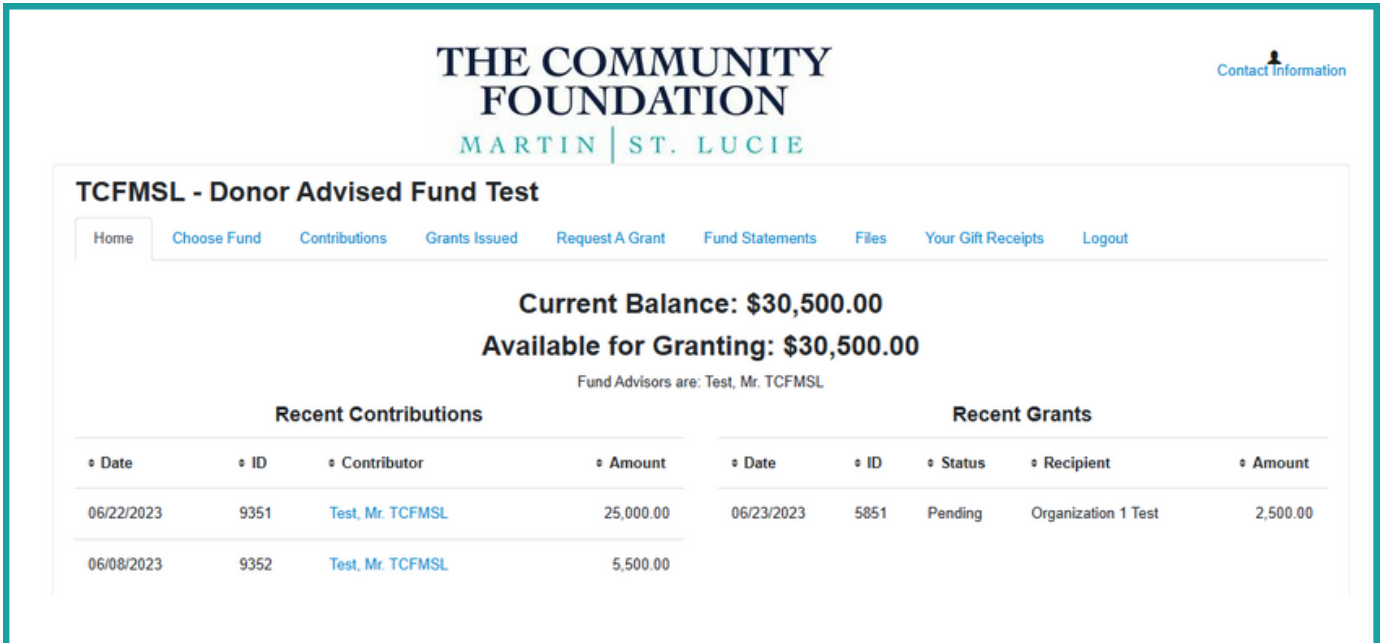
Visit www.tcfmsl.org from any web browser or device (including smartphones and tablets) to access the Fund Advisor Portal system.

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.

If changes need to be made to Fund Advisors of the Fund, please let The Community Foundation know by emailing admin@tcfmsl.org.

Fund Advisor Portal Features

Once you are logged in, your Fund’s homepage will appear. If you are an advisor to multiple Funds, you will see a “Choose Fund” tab. 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 not have the "Choose Fund" tab.**



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 donor’s name will bring up their history of contributions including date of gift, type, and amount.

Grants Issued - Provides details on all grants distributed from the Fund. The top section provides a summary of grants by grantees. Scroll past the summary section to see grants listed from most recent to oldest.

Request A Grant - Allows you to make a grant request from your Fund and see recent grant statuses. *Please note: Online grant requests are only available to Donor Advised and Designated Funds at this time. All other fund types can contact The Community Foundation at (772) 288 - 3795 to process grant recommendations.*

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. **Please note: The Fund Statement Tab contains the Fund Statements issued after March 2023. Please refer to the File Tab to locate Fund Statements issued prior to March 2023.*

Files - Shows any files related to the establishment and management of your Fund. **Please note that Fund Statements issued prior to March 2023 are also available under this tab.*

Your 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 request a grant from your Fund, click the **Grant Request** tab.

Requesting 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 Martin - St. Lucie.

C. Search for Other Grantees - Search for the organization you want to support in Candid/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**.
**Please note, we encourage you to take advantage of The Community Foundation's expertise and to contact the Team if you are interested in learning about or granting to a new charity anywhere in the United States.*

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 request is processed as accurately and efficiently as possible. Once you enter this information, click **Submit**.

**Please note, The Community Foundation Team is always available to assist in processing your grant request.*

The screenshot shows the 'Request A Grant' page with a navigation bar at the top containing: Home, Choose Fund, Contributions, Grants Issued, Request A Grant (active), Fund Statements, Files, Your Gift Receipts, and Logout. Below the navigation bar, the page title is 'Choose from previous Grantee' with a date '06/23/2023' and status 'Pending'. There are four main sections, each with a lettered callout (A, B, C, D) and a right-pointing arrow:

- A** Choose from previous Grantee: A dropdown menu labeled 'Grantees you have given to in the past'.
- B** Other foundation funds: A dropdown menu labeled 'Other foundation funds'.
- C** Search for other Grantees: A search form with fields for 'Name', 'City', and 'State', and a blue 'Search' button.
- D** Enter Grantee information manually: A form with a required 'Name' field (marked with a red asterisk).

FUND ADVISOR PORTAL USER GUIDE



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.

You can also choose to remain anonymous by selecting the Anonymous checkbox.

Once you are finished entering this information, click **Review**.



TCFMSL - Donor Advised Fund Test

HomeChoose FundContributionsGrants IssuedRequest A GrantFund StatementsFilesYour Gift ReceiptsLogout

Grant Request

Grantee Organization Test 2

Additional Grantee Contact

Description
0/255 characters

Amount

Anonymous

Recurring

Attachment No file chosen
(or drag and drop anywhere on the page)

Attachment Description

Additional notes for grant request

Grants

Date	Status	Recipient	Description	Amount	
06/23/2023	Pending	Organization 1 Test	to support general operating expenses	2,500.00	
06/22/2023	Request	Organization Test 2	to support general operating expenses	1,000.00	<input type="button" value="Cancel"/>

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.

[Home](#)
[Choose Fund](#)
[Contributions](#)
[Grants Issued](#)
[Request A Grant](#)
[Fund Statemen](#)

Review New Grant Request

Grantee	Organization Test 2
Description	to support general operating expenses
Amount	\$ 1,000
Anonymous	No

Additional notes for grant request

By pressing submit, you attest to the following: In relation to this grant, I (we) agree that every penny of this grant will be used for a charitable purpose, and neither myself (ourselves) nor anyone I (we) know will receive anything more than an incidental benefit in return. I (We) also acknowledge that this grant will not fulfill a legally binding pledge or commitment.

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 your 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 your 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 Notifications

We will notify you when a grant has been requested and processed from your Fund.

Date	Status	Recipient	Description	Amount	
06/23/2023	Pending	Organization 1 Test	to support general operating expenses	2,500.00	
06/22/2023	Request	Organization Test 2	to support general operating expenses	1,000.00	<input type="button" value="Cancel"/>

Fund Advisor Portal Frequently Asked Questions

Are there other ways to submit a grant request?

Yes, you can always call The Community Foundation at (772) 288-3795 or email admin@tcfmsl.org.

How long does it take for my grant request to be processed?

Depending on when grant requests are received, it can take up to 7 business days to process your request. If your request is time sensitive, please contact your Team at (772) 288-3795 or email admin@tcfmsl.org.

Who can I make grant requests to?

Grant requests must be made to qualified United States based 501(c)(3) organizations (including schools, churches and government entities).

How often are Fund Statements posted?

Fund statements are posted quarterly.

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 autogenerated 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 admin@tcfmsl.org so that we can manually re-send the information you will need to get up-and-going.

When will you be conducting trainings for the new system?

Please refer to www.tcfmsl.org/fundadvisorportal to view information about "office hours".

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.tcfmsl.org and click on the Fund Advisor Portal link 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 Community Foundation 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.

Questions

If you have any questions about the Fund Advisor Portal, please contact The Community Foundation Team at (772) 288-3795 or email admin@tcfmsl.org.