



## ONLINE PORTAL FOR FUNDHOLDERS

Through this online portal, you will have 24/7 access to all your fund information. You can view your fund balance and transactions, submit and track grant recommendations, review statements and expenses, and learn about funding opportunities at your convenience.

### LOGGING IN:

To set up your portal access, please request an access link from Tracy Kramer, Director of Operations: [tkramer@capecodfoundation.org](mailto:tkramer@capecodfoundation.org). She will also need you to supply or verify your current email address.

You will then receive an email from The Cape Cod Foundation <[no-reply@fcsuite.com](mailto:no-reply@fcsuite.com)> with an access link to set up your username and password and enter the portal.

If you are listed as an advisor for one fund, you will go directly to the Home page for that fund.

If you serve as an advisor for multiple funds, once you have successfully logged in to the portal, select the fund you wish to view in the "Choose Fund" menu.

Only you and any other advisors to whom you give permission will be able to access your fund information.

To access the portal at any time, visit [www.capecodfoundation.org/manage](http://www.capecodfoundation.org/manage) and follow the link to enter your username and password. Keep your log-in information handy. If you forget your password, click the "Forgot Password" link on the main log-in page of the portal. This will generate an email for you to reset your password.

### NAVIGATING THE PORTAL:

Once you have logged in, review the different areas available to you as a Fund Advisor by selecting the tabs at the top of the page.

The "**Home**" tab shows the fund's Current Balance and Spendable Balance, if applicable. (Some fundholders follow the Foundation's spending policy). View all fund advisors and recent contributions and grants made from the Fund here.

The "**Choose Fund**" tab is visible if there are other funds to select and view.

The "**Contributions**" tab shows all contributions or donations to the fund. When you click on contributors' names, you will see their history of contributions.

The "**Grants**" tab shows the history of grants made from the fund.

As a Fund Advisor on a Donor-Advised Fund, you can make grant recommendations from the “**Grant Request**” Tab.

- On the left side of the screen, you can create grant recommendations.
- Select Previous Grantees and Funds that you have given to before from drop down lists.
- Manually enter a new Nonprofit or Grantee in the bottom section. You will need to provide the grantee’s name, along with an address, zip code and phone number to move the grant request to The Cape Cod Foundation for approval.
- The “Search for other Grantees” function in the middle of the left side of your screen is also helpful. Simply type in keywords and click the “Search” button. The system will search GuideStar for organizations containing those keywords. GuideStar is an information service specializing in reporting on U.S. nonprofit organizations. The more keywords used, the better the search results will be.
- Once you have added the grantee information, complete the request by clicking the “submit” button at the bottom of the page.
- Once you have submitted a grant, you will see various status indicators as the grant moves along our internal review processes. When the grant has been successfully paid, its status will show as “Complete.” Please allow up to two weeks for us to complete this process before we mail checks to grantees.
- On the right side of the screen, view all grants recommended for payment with the current status.
- If desired, you can cancel grant recommendations in the “request” status from this screen.

The “**Grant Catalog**” contains funding opportunities you may want to consider. Because many donors have expressed an interest in learning what the current needs are in the community, we feature several promising projects and programs from nonprofit organizations here. We also share proposals for unfunded or underfunded initiatives submitted through one of our grantmaking programs. This feature replaces the “Partners in Philanthropy” newsletter we used to mail twice per year.

If you would like to receive proposals or ideas from a particular organization, contact Dara Gannon, Director of Programs and Donors Services at [dgannon@capecodfoundation.org](mailto:dgannon@capecodfoundation.org).

- The “**Statements**” tab shows fund statements available. You will be able to view current fund statements immediately after they are released and past fund statements (beginning with the year-end 2019 statement). The Foundation posts statements on a monthly basis, typically the 3<sup>rd</sup> week of the following month. We conduct due diligence on the statements two times per year, with the end-of-year statement (January to December) and the mid-year (January to June). If you have questions about your statements, contact us at any time!

**The default delivery method for statements from your fund is now through this portal.** The system will generate a PDF version of your statement for your to save and/or print.

- The “**Files**” tab holds documents that are important to your fund.
- The “**Donate**” tab allows you to donate to funds at The Cape Cod Foundation, including your own.
- The “**Expenses**” tab shows expenses of the fund.
- Remember to use the “**Logout**” tab to close your Donor Portal. Even if you do not manually logout, the system will automatically log you out each night.