



## ONLINE PORTAL FOR FUNDHOLDERS

As a benefit to our fundholders, we are pleased to provide you with online access to your fund information. Through this online portal, you will be able to view your fund balance and transactions, make grant recommendations, and more!

If you have any questions or need to set up your online access for the first time, please contact Dara Gannon, Director of Programs and Donor Services, at [dgannon@capecodfoundation.org](mailto:dgannon@capecodfoundation.org).

### **Logging In:**

To set up your portal access, you need to ensure that The Cape Cod Foundation has a current email address for you. You will then receive an email from this address *The Cape Cod Foundation* <[no-reply@fcsuite.com](mailto:no-reply@fcsuite.com)>. Follow the link in the email to create a password. Your username is your email address. Please note it is case-sensitive!

After your initial login, please visit this page of our website to access your information at any time: [www.capecodfoundation.org/manage](http://www.capecodfoundation.org/manage)

If you serve as an advisor for multiple funds, you will see the “Choose Fund” menu once you have signed in to the portal. Choose the fund you wish to view.

Only those advisors you give permission to will be able to access your fund information. We recommend you keep your login information handy, but if you forget your password, you can click “forgot password” on the Manage page of our website. That will generate an email for you to reset your password.

### **Navigating the Portal:**

Once you have logged in, you can select the tabs at the top of the page to review the different areas available to you as a fund advisor.

The “**Home**” tab shows the fund’s current balance and spendable balance (if applicable; spendable balance is for endowed funds that use the Foundation’s spending policy). This area also lists all fund advisors, recent contributions, and recent grants made from the fund.

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

The “**Contributions**” tab shows all contributions to the fund. Clicking on a contributor’s name will bring up their history of contributions.

The “**Grants**” tab will show the history of grants made from the fund.

As an advisor for a Donor-Advised fund, you can make grant recommendations by clicking “**Grant Request.**”

- This tab will show any grants to be paid and their current status.
- Grant recommendations still in “request” status can be canceled from this screen.
- The left side of the screen is where grant recommendations are created.

- Previous grantees and funds that you have given to can be selected from drop-down lists.
  - The bottom section is where a new nonprofit or grantee can be entered manually. You will need to enter the name of the new grantee, an address, zip code, and a phone number to move the grant request to The Cape Cod Foundation for approval.
  - In the middle of the left side of your screen is “Search for other Grantees.” This is helpful because you can type in some keywords and click the “Search” button. The system will search GuideStar for organizations containing the keywords. GuideStar is an information service specializing in reporting on U.S. nonprofit companies. The more keywords used, the better the search results will be.
  - Once the grantee information has been added, you can complete the request by clicking the “submit” button at the bottom of the page.
  - Once a grant has been submitted, you will see various status indicators as the grant moves along our internal review processes. The grant status will show as “Complete” when the grant has been successfully paid. Please allow up to two weeks for grant recommendations to go through this process and for checks to be mailed to grantees.
- The “**Grant Catalog**” is a tool for Donor-Advised funds to search for funding opportunities in the community. Through the grants catalog, you can contribute to a project or program directly from your fund. The Foundation works with local nonprofits to generate proposals to share with you through the catalog. If you would like to request proposals or ideas from a particular organization, contact Dara Gannon at [dgannon@capecodfoundation.org](mailto:dgannon@capecodfoundation.org). This feature replaces our printed “Partners in Philanthropy” newsletter.
  - The “**Statements**” tab will show fund statements. Fund advisors can view fund statements immediately after they are created and past fund statements (beginning with the year-end 2019 statement). The Foundation will post statements monthly, typically the 3<sup>rd</sup> week of the following month. We conduct due diligence on the year-end 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 that you can either save or print.

- The “**Files**” tab will hold documents that are important to your fund.
- The “**Donate**” tab will allow you to donate to funds at The Cape Cod Foundation, including your own.
- The “**Expenses**” tab shows the expenses of the fund.
- Remember to “**Logout**” to close your donor portal. You will be automatically logged out each night even if you do not manually logout.