



Donor Portal

Name:

Username:

Password:

Updated October 2019

Donor Portal Guide

Welcome to the new Donor Portal!

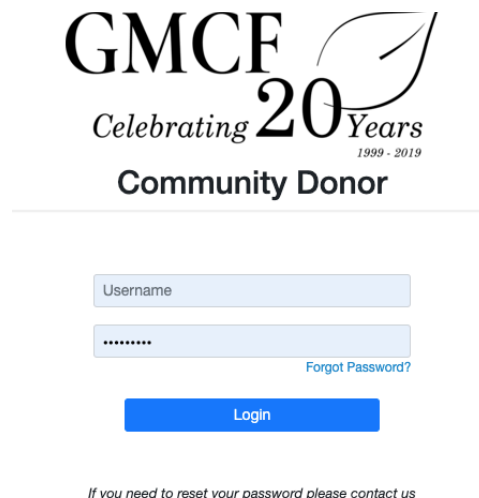
Our team has been hard at work to implement a new software system that will improve your user experience as one of our valued fund advisors. Within the portal, you can easily check your fund balance, view and download quarterly market summaries, request and track grants, add to your fund, and more. The Donor Portal makes it easy to manage your fund and is available 24/7 from anywhere, on any device.

Please note that beginning November 1, 2019, the information in DonorCentral, our previous system, will no longer be updated or accurate.

We have assembled this quick-reference guide to introduce the basics of the new Donor Portal. As always, please reach out to us if you have any questions: 785-587-8995 or foundation@mcfks.org.

Initial Login Process and Creating Your Account

You will receive an email from Greater Manhattan Community Foundation with a custom invitation link to create your account in the Donor Portal. Your username will be your email address that we have on file. If you would like to change your username, please contact us. Once you click on the invitation link in the email, you will be prompted to create a password of your choice.



The image shows a login form for the GMCF Community Donor portal. At the top, it features the GMCF logo with a stylized leaf, followed by 'Celebrating 20 Years 1999 - 2019' and 'Community Donor'. Below this is a horizontal line. The form consists of two input fields: 'Username' and a password field (indicated by dots). To the right of the password field is a link that says 'Forgot Password?'. Below these fields is a blue 'Login' button. At the bottom, there is a small line of text: 'If you need to reset your password please contact us'.

Returning Users

Once you've set up your account, to access the Donor Portal, visit Greater Manhattan Community Foundation's website at www.mcfks.org and click on the Donor Portal graphic in the bottom panel. You will be redirected to a login page where you will enter your username and password. If you forgot your credentials, please contact us.

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

Donor Portal Features

Once you are logged in, your fund's homepage will appear. If you serve as an advisor for multiple funds, you will see a **“Choose Fund”** menu once you have successfully signed in. 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 see this screen.

The Smith Family Fund									
Home	Contributions	Grants	Grant Request	Statements	Files	Donate	Logout		
Current Balance: \$58,000.00									
Fund Advisors are: Smith, Mr. John A.; Smith, Mrs. Jane B.									
Recent Contributions					Recent Grants				
Date	ID	Contributor		Amount	Date	ID	Status	Recipient	Amount
08/16/2018	25416	Stark Community Foundation Interfund Transfer		2,000.00	08/30/2018	23506	Complete	Minerva United Methodist Church	8,000.00

Home

The main screen is a quick snapshot of your fund's most recent activity. You will see the current balance, all fund advisors associated with your fund, recent contributions, and recent grant history. Keep in mind that investment returns are only posted monthly, so your fund statement is still the most accurate picture of your fund's status.

Contributions

This tab shows all donations made to your fund. Unless the donor has requested to remain anonymous, you will be able to view more details about each donor by clicking his/her name. You can also click the “export” option on the far right side of the menu bar to export the details to a spreadsheet.

Grants

This tab shows the history of grants awarded from your fund including date, organization name, purpose, and amount.

Grant Requests

This tab allows you to make a grant request from your fund and see recent grant statuses. See the **“Submitting a Grant Request”** section below for more information about this process.

Statements

This tab shows all statements available for your fund. You will receive an email each month you are scheduled to receive a fund statement letting you know that your fund statement is ready to view or print. Next to the summary you wish to view, click Print to generate a PDF in a new window that you may view, save, or print.

Files

This tab will show any viewable files regarding your fund. At this time, fund agreements and other confidential documents are not available through the Donor Portal, but please contact us if you would like any documents added to your account.

Logout

Clicking “Logout” will automatically log you out of the Donor Portal.

Submitting a Grant Request

To recommend a grant from your fund, click the **Grant Request** tab. Remember that any grant payments for fund expenses are considered grants, including invoice payments and reimbursements for purchases. Recommending 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 Greater Manhattan Community Foundation and its affiliates.

C. Search for Other Grantees

Search for the organization you want to support in GuideStar, the world's largest database of nonprofit organizations. Once you find the organization you want to support, click Create Request.

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. 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. Once you enter this information, click **Submit**.

Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details including 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 earmarked for General Support. You can also choose to remain anonymous by selecting the Anonymous checkbox. Once you are finished entering this information, click **Review**.

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 staff will begin processing.

The image displays two screenshots of a web form for submitting a grant request. The top screenshot, titled "New Grant Request", shows a form with the following fields: "Grantee" (Adaptive Sports Program of Ohio), "Description" (General Support), "Amount" (100.00), and "Anonymous" (checkbox). A blue "Review" button is at the bottom. The bottom screenshot, titled "Review New Grant Request", shows the same information in a table format: Grantee: Adaptive Sports Program of Ohio, Description: General Support, Amount: \$ 100.00, Anonymous: No. At the bottom are two buttons: "Submit Request" (blue) and "Edit Request" (grey).

New Grant Request	
Grantee	Adaptive Sports Program of Ohio
Description	General Support
Amount	100.00
Anonymous	<input type="checkbox"/>
Review	

Review New Grant Request	
Grantee	Adaptive Sports Program of Ohio
Description	General Support
Amount	\$ 100.00
Anonymous	No
Submit Request Edit Request	

Viewing Grant History

To review your most recent grant history, click the **Grant Request** tab.

Grants				
Date	Status	Recipient	Description	Amount
08/28/2018	Pending	ArtsinStark	General Support	100.00

Under the **Status** column, you will see one of six statuses for each grant:

- **Request** means that your grant request has been sent to our staff. 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 our staff 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 Alerts

We will alert you via email every time a donation is made to your fund or a grant has been awarded from your fund. These alerts can be cancelled at any point. If you would like to cancel the alerts, please contact our office.

Questions

If you have any questions about the Donor Portal, we're happy to help! Please contact us at 785-587-8995 or foundation@mcfks.org.

Donor Portal Frequently Asked Questions

How do I change my password?

If you need to change your password, you can either follow the “forgot my password” link on the login page or contact our office. While our staff can assist you in looking up the email address associated with your login, please understand we do not have access to user passwords and cannot look them up for you. However, we’ll be happy to reset your password for you.

How long does it take for my recommendation to be processed?

Generally, recommendations are processed within five business days.

Who can I make recommendations to?

Grant recommendations must be made to 501(c)(3) organizations (including schools, churches, and government entities).

Are there other ways to submit a donor recommendation?

Yes, recommendations may be submitted through email or mail/fax.

Email: Email foundation@mcfks.org with your recommendation. Please include the fund name, grant amount, grant purpose, and any additional instructions in the email. Our staff will either reach out with further questions or email a confirmation of the recommendation.

Mail/Fax: If you prefer to make manual recommendations, you can fill out the Grant Distribution Recommendation Form, which is located on the foundation’s website, www.mcfks.org, within the Document Center and in the “Grants” folder.

How do I know if a grant I recommended has been issued?

Your most recent grants paid will be listed on your Donor Portal homepage. You may also click on the Grant Request tab; on the right side of the page, you will see your most recent grant requests with their status.

Who do I contact if I’m having issues with Donor Portal?

If you have any questions or are experiencing issues with the Donor Portal, please contact us at 785-587-8995 or foundation@mcfks.org.

Thank you for your patience with us during this transition! We are excited about this new software system and believe it will help us better serve you. Please reach out to our office if you have any questions or concerns.