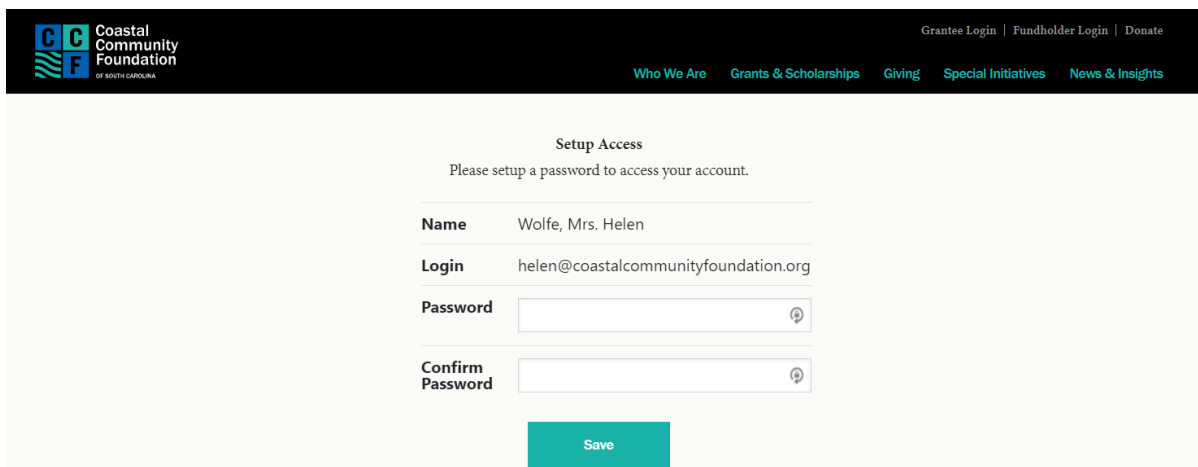


Coastal Community Foundation uses an online Donor Portal to provide a secure and easy way through which you can access fund information. Depending on the type of fund you advise, you may be able to view the latest fund balances, make grant recommendations, or review gift history. **The information provided below is meant to guide you in learning this new system.** If you need additional assistance, or have any questions, please contact the Development and Stewardship office at 843-723-3635 or by email at development@coastalcommunityfoundation.org.

Logging into the Donor Portal for the First Time

You will receive an email directly from our new system with a login name and a link to access your personal Donor Portal page. *The email will come from this address: Coastal Community Foundation <no-reply@fcsuite.com>.* Select the link and you will be prompted to create a password to the Donor Portal site. Once your password is created, go to the Login page, enter your credentials, and log in.

If your screen looks like this, you are in the right place:



The screenshot shows the 'Setup Access' page of the Coastal Community Foundation Donor Portal. The page has a dark header with the CCF logo and navigation links: 'Who We Are', 'Grants & Scholarships', 'Giving', 'Special Initiatives', and 'News & Insights'. In the top right corner of the header, there are links for 'Grantee Login', 'Fundholder Login', and 'Donate'. The main content area is white and contains the following text: 'Setup Access' and 'Please setup a password to access your account.' Below this is a form with four fields: 'Name' (pre-filled with 'Wolfe, Mrs. Helen'), 'Login' (pre-filled with 'helen@coastalcommunityfoundation.org'), 'Password' (with a toggle icon), and 'Confirm Password' (with a toggle icon). At the bottom of the form is a green 'Save' button.

Note: If you have the old portal bookmarked in your browser, it will no longer work. Please delete this bookmark and create a new one for the new portal. We recommend you make note of your new username and password in a safe place for your records.

Logging into the Donor Portal After Setup

To log in after setting up your account in the future, navigate to our website at www.coastalcommunityfoundation.org and select the Fundholder Login on the top right-hand side of the homepage. Be careful to select the Fundholder Login, not the Grantee Login!



Tab Selections

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. As a reminder, depending on the type of fund that you manage at the Foundation, not all of the following tab selections may be available to you.

For reference, here is what the tab selections may look like on your screen:

The screenshot displays the user interface of the Coastal Community Foundation portal. At the top, a dark navigation bar contains the logo on the left and links for 'Grantee Login', 'Fundholder Login', 'Donate', and 'Profile' on the right. Below this, a secondary bar lists 'Who We Are', 'Grants & Scholarships', 'Giving', 'Special Initiatives', and 'News & Insights'. The main content area features the fund name 'CCF Bridge Philanthropic Future Fund' and the Fund Relationship Manager's details: Mrs. Helen Wolfe, with email helen@coastalcommunityfoundation.org and phone 854-222-3458. A horizontal menu includes 'Home', 'Contributions', 'Grants', 'Grant Request', 'Statements', 'Files', 'Donate', 'Receipts', 'Vouchers', 'Invoices', and 'Logout'. Below the menu, a summary section shows 'Current Balance: Fund Balance will show here', 'Available Cash: Amount available for grantmaking will appear here', and 'Fund Advisors are: All listed advisors will appear here'.

Home Tab

- This tab provides an at-a-glance list of recent contributions to the fund and grants made by the fund. You will also see the fund's current balance, updated in real-time*. This screen also lists all individuals who have access to fund information, and the name, contact information and picture of your fund's relationship manager. **Please note that investment returns are only posted monthly and administrative fees quarterly.*

Choose Fund Tab

- If you serve as an advisor for multiple funds, you will see this tab once you have successfully signed into the system. Choose the particular fund with which you wish to interact. If you are listed as an advisor for only one fund, you will go directly to the homepage for that fund and will not see this tab.

Contributions Tab

- If applicable, this tab shows the detail for each gift received into the fund dating back to 1/1/2012. Unless the donor has requested to remain anonymous, you will be able to view more detail about each donor by clicking their name. There are filtering options if you hover over the right side of any of the column headers, such as Date, Description, Amount, etc. You can also click the "export" option on the far-right side of the menu bar to export the details into an excel spreadsheet for your records.

Grants Tab

- This tab provides details on all grants distributed from the fund dating back to 1/1/2016. The top section provides a summary of grants by grantees. Scroll past the summary section to see grants listed from most recent to oldest. You can also click the "export" option on the far-right side of the menu bar to export the details into an excel spreadsheet for your records.
- Complete status means the grant has been paid. Other status indicators may appear throughout the grantmaking process. Please contact the Foundation if you have questions about the status of a grant. Most grants are processed in 5-7

business days, unless they need additional approval by our Grantmaking and Community Leadership Committee, which meets monthly.

- *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.

Grant Request Tab

- As a Fund Advisor, depending on the type of fund, you *may* be able to make grant requests from the fund by clicking into the Grant Request tab. To request a grant, you can either “Choose from a Previous Grantee” which will list your previous grantees, or select a new grantee through the following 3 options:
 - **Grant to a Promoted Foundation Fund**
 - This section includes some of our most active community-supported funds (e.g. COVID-19 Relief and Recovery Fund or Lowcountry Unity Fund). You will use the Search section to look for all other Foundation and Affiliate funds.
 - **Search for other Funds and Grantees**
 - This is helpful because you can type in keywords and click the SEARCH button. The system will search The Foundation for existing funds containing the keywords you’ve selected, recent Foundation grant recipients, as well as *GuideStar*. *GuideStar* is an information service specializing in reporting on U.S. nonprofit organizations. The more keywords used, the better the search results will be. *Please note that this tool does not automatically guarantee that an organization will pass the Foundation’s due diligence, that procedure will still take place during processing.*
 - **Enter a Grantee Manually**
 - The bottom section of this tab is where a new nonprofit or grantee can be entered manually. You will need to enter the name of the grantee, an address, zip code, and a phone number to move the grant request to the Foundation’s staff for due diligence.
- The minimum grant amount is \$200.
- Regardless of how you choose to submit your grant, once the grantee information has been added, you can complete the request by clicking the SUBMIT button at the bottom of the page.
- This tab will also show a list of grants requested to be paid out on the right with their current status. Grant requests still in the REQUEST status can be canceled from this screen, however, once Foundation staff begin processing you will no longer be able to cancel the grant.

Statements Tab

- You will be able to view your Fund Statements dating back to QE 12/31/2020 at this tab.

Files Tab

- The Files tab will contain information pertinent to your specific fund, such as Fund Agreements or Relationship Review documents, as well as copies of sample Fund Statements, Grant Transmittal Letters, and Check templates.

Donate Tab

- The Donate tab allows you to contribute to any listed funds at the Foundation. By clicking this tab, you will be redirected to our website's donation page and invited to select the fund you want to contribute into or search for any of the funds the Foundation holds. If you have questions about your contribution using the DONATE button, please contact the Development and Stewardship office at 843-723-3635 or by email at development@coastalcommunityfoundation.org.

Receipts Tab

- The Receipts tab will have copies of your donation's tax receipts, dating back to January 2021.

Vouchers Tab

- If applicable to your fund type, the Vouchers tab will show expenses paid for by your fund (this is separate from regular grants).

Profile Tab

- At the very top right of the page, you can click on the Profile tab. The Profile tab allows you to edit your login, email address, phone number and primary address.

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, but the alerts are not retroactive, so you will not be notified of past grants or donations. If you would like to cancel these alerts, please contact us at 843-723-3635 or development@coastalcommunityfoundation.org.

Logging Out of the Portal

Remember to use the "Logout" tab to close the Donor Portal securely. You will be automatically logged out each night even if you do not remember to logout, so we recommend that you make note of your new username and password in a safe place for your records.

Locked Out of your Donor Portal?

If you are 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, instructions to reset your password will be sent to the email address for that account. If you're still having trouble, please contact the Development and Stewardship office at 843-723-3635 or by email at development@coastalcommunityfoundation.org

FAQ

1. **How many logins do we get to access the Donor Portal?**
 - Currently each individual or organization receives one login. If you would like to switch your email on file, contact your Relationship Manager.
2. **I want to update my contact information. Can I do that in the Donor Portal?**
 - Yes, you can do so on the Profile tab.
3. **How will I know if I submitted a grant successfully?**
 - You can check the status of the grant in the donor portal, on the Grants tab.
4. **How long does it take to process a grant recommendation?**
 - Grant recommendations received by Monday at 11:59 AM will be in the queue for due diligence review and processing the following Friday. Occasionally it is necessary to adjust this timeline due to holidays or other one-time occurrences. You can always check the status of a grant in the Donor Portal.
5. **Why can't I recommend a grant?**
 - Not all fund types have the same permissions. Contact your Relationship Manager or Fund Contact to inquire.
6. **What do I do if I forgot my Fund Contact's information?**
 - Your fund relationship manager is listed at the top of the Home tab.
7. **On what devices may I access the Donor Portal?**
 - Unlike our old system, the new Donor Portal is compatible with most devices that can access the internet through a browser (e.g. your smartphone, tablet, and PC). However, there is not a separate app for the system.
8. **I've lost my password. What should I do?**
 - For security reasons, the Coastal Community Foundation does not have the ability to access your password. You can reset your password on the donor portal login page. If you still need assistance, please email development@coastalcommunityfoundation.org or call 843-723-3635 for assistance.
9. **I don't understand how to navigate the portal. Where can I get help?**
 - If you still have questions, reach out to our team by calling 843-723-3635.