

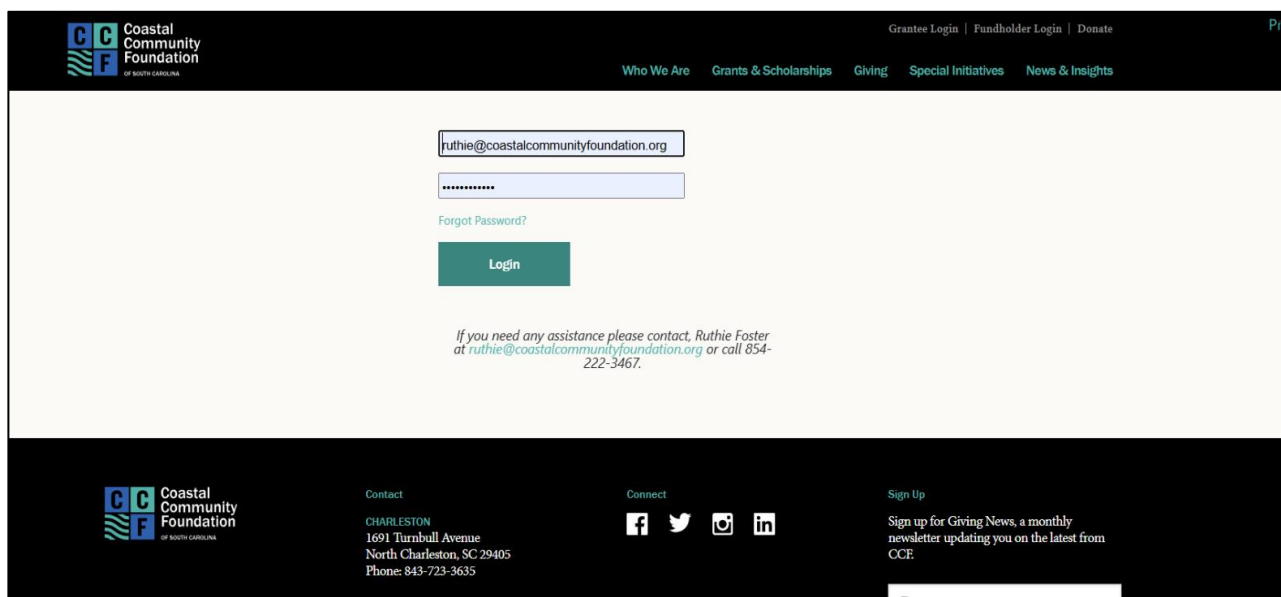
Coastal Community Foundation uses an online Portal to provide a secure and easy way through which you can access fund information. Depending on the type of fund you advise, you may be able to view the latest fund balances, make grant recommendations, or review gift history. The information provided below is meant to guide you in learning about this new system. If you need additional assistance, or have any questions, please contact the Philanthropy Manager at 854-222-3468 or by email at sarah@coastalcommunityfoundation.org

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Logging into the Portal for the First Time

You will receive an email directly from the Stewardship and Donor Engagement Manager with a login name (typically your email address) and a link to access your personal Portal page. Select the link and you will be prompted to create a password for the Portal site. Once your password is created, go to the login page, enter your credentials, and log in. You should see the page below.

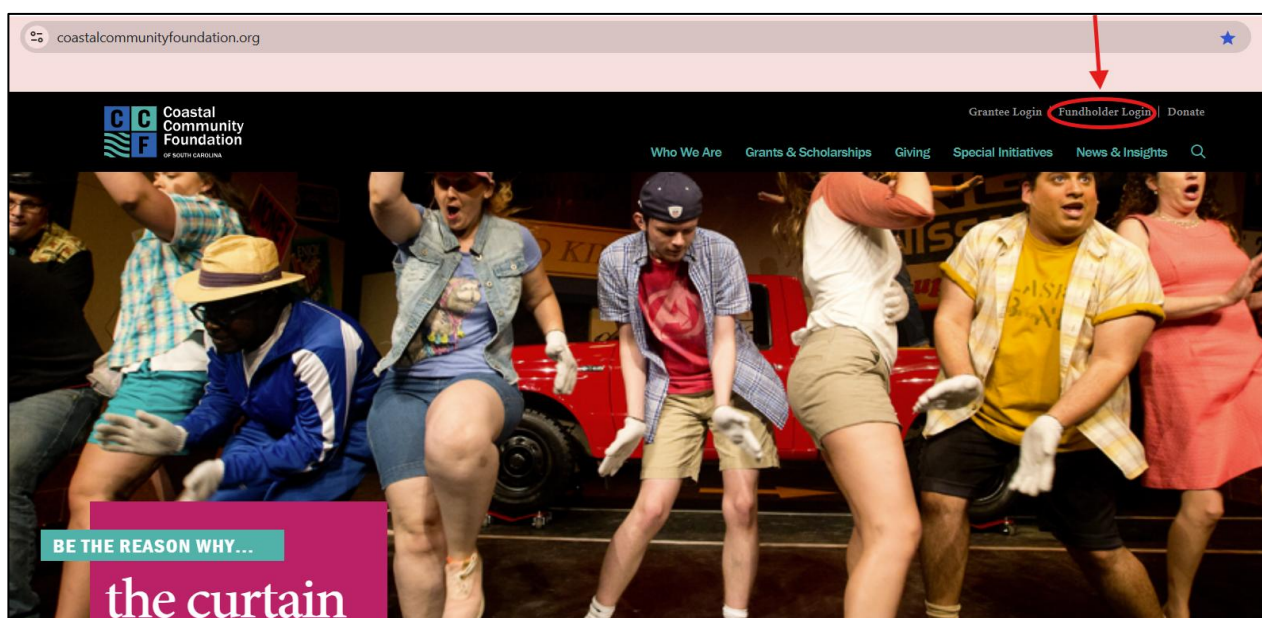


The screenshot shows the login page for the Coastal Community Foundation. At the top left is the CCF logo. To the right are links for 'Grantee Login', 'Fundholder Login', and 'Donate'. Below these are navigation links: 'Who We Are', 'Grants & Scholarships', 'Giving', 'Special Initiatives', and 'News & Insights'. The main content area has a login form with a text input field containing 'ruthie@coastalcommunityfoundation.org', a password input field with masked characters, a 'Forgot Password?' link, and a green 'Login' button. Below the form is a note: 'If you need any assistance please contact, Ruthie Foster at ruthie@coastalcommunityfoundation.org or call 854-222-3467.' The footer contains the CCF logo, contact information for Charleston (1691 Turnbull Avenue, North Charleston, SC 29405, Phone: 843-723-3635), social media icons for Facebook, Twitter, Instagram, and LinkedIn, and a 'Sign Up' section for a newsletter.

Note: We recommend you bookmark this URL and make note of your new username and password in a safe place for your records.

Logging into the Portal After Setup

To log in after setting up your account in the future, navigate to our website at <http://www.coastalcommunityfoundation.org> and select Fundholder Login on the top right-hand side of the homepage (circled in red). Be careful to select Fundholder Login, not the Grantee Login.



Once you click Fundholder Login, you will be directed to the below landing page where this guide and a Portal walkthrough video are linked. We highly encourage you to watch the video. You will click “follow this link to the portal” to login.

Fundholder Login

Fundholders of Coastal Community Foundation have access to our online Donor Portal to view their fund balances, see their detailed contribution history, make grant recommendations, donate to any of our funds, and more.

If you're ready to login, please [follow this link to the Donor Portal](#).

This new and improved Donor Portal launched in April 2021, and all existing fundholders should have received their username and instructions on setting a password in an email from us on April 12, 2021. If you need any assistance logging in, please contact us at development@coastalcommunityfoundation.org or 843-723-3635 so that we can best assist you.

In addition, our staff has created a [New Donor Portal Guide](#) that will walk you through the different features in the new system. We recommend downloading it and saving it for future reference.

If you'd prefer to work with one of our staff members directly to accomplish these or any other tasks associated with your fund, please don't hesitate to call us at 843-723-3635.

Adding to your fund

If you want to add to your fund at Coastal Community Foundation, you can do one or a combination of the following:

- Write a check and mail or deliver to our office at 1691 Turnbull Avenue, North Charleston, SC 29405.
- Make a [credit card gift online](#).

Tab Selections

Once you have logged in, you can select the tabs on the left 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 the following tab selections may be available to you. For reference, here is what the tab selections may look like on your screen:

Fund Information | CSuite | **Profile** | Logout

FUND SUMMARY

DONATIONS

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GRANT REQUESTS

VOUCHERS

INVOICES

FUND STATEMENTS & FILES

DONATE

Scooby Family Fund

Create Grant Request

Current Balance
2,081,141.90

Spendable Balance
59,338.00

Total Contributions
1,248,440.94

Total Grants
1,123,736.92

Fund Relationship Steward

Ms. Ruthie Foster
Stewardship and Donor Engagement Manager
ruthie@coastalcommunityfoundation.org

02/01/2024 - 01/31/2025

Donation Amount

Donation Trends

● # of Donors + # of Donations ■ Donations Amount

1.0 0.9 0.8

Fund Summary Tab

- Displayed on the Fund Summary Tab is your fund name, current balance updated in real time*, spendable balance, total contributions, and total grants. If you have multiple funds with CCF you could change these using the dropdown menu (circled in blue). Your fund relationship steward is also listed on this summary page. If you need to directly contact us, our photo and contact information are available here. **Please note that investment returns administrative fees are posted quarterly.*
- Also listed on this page are both donation and grant trends. If you click the grey date range box (circled in purple), you can create custom date ranges for this data.
- If you click Profile (circled in red) you can update personal information such as your address, phone number, username, password, and interest types.

Donations Tab

- The Donations Tab lists gifts received into the fund. You will be able to see the donation ID, the date of the donation, the donor, the donation type, and the amount. Anything in colored font is clickable for more information.
- If you would like to sort donations by date, you can click on the Date header (circled in red) and the donations will be sorted. You can also utilize the search bar to manually search for a specific donation. This information is exportable as a CSV file, and you can download it by clicking the Export button (circled in blue).

Coastal Community Foundation OF SOUTH CAROLINA

Grantee Login | Fundholder Login | Donate

Who We Are | Grants & Scholarships | Giving | Special Initiatives | News & Insights

Fund Information | CSuite | Profile | Logout

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Scooby Family Fund

Create Grant Request

Donations

Reset | Export

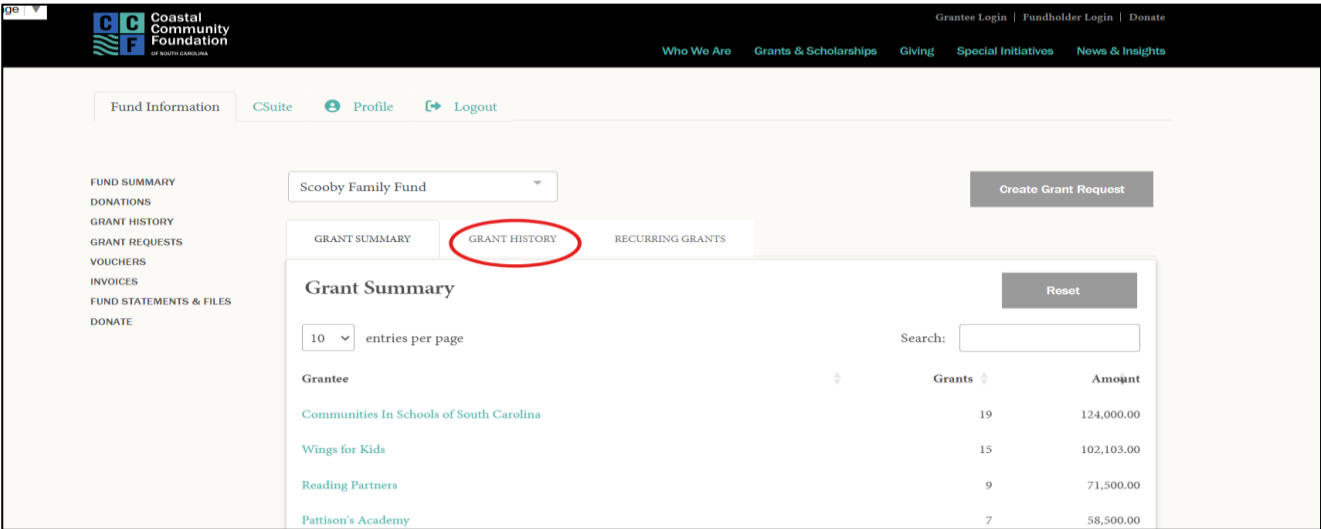
10 entries per page

Search:

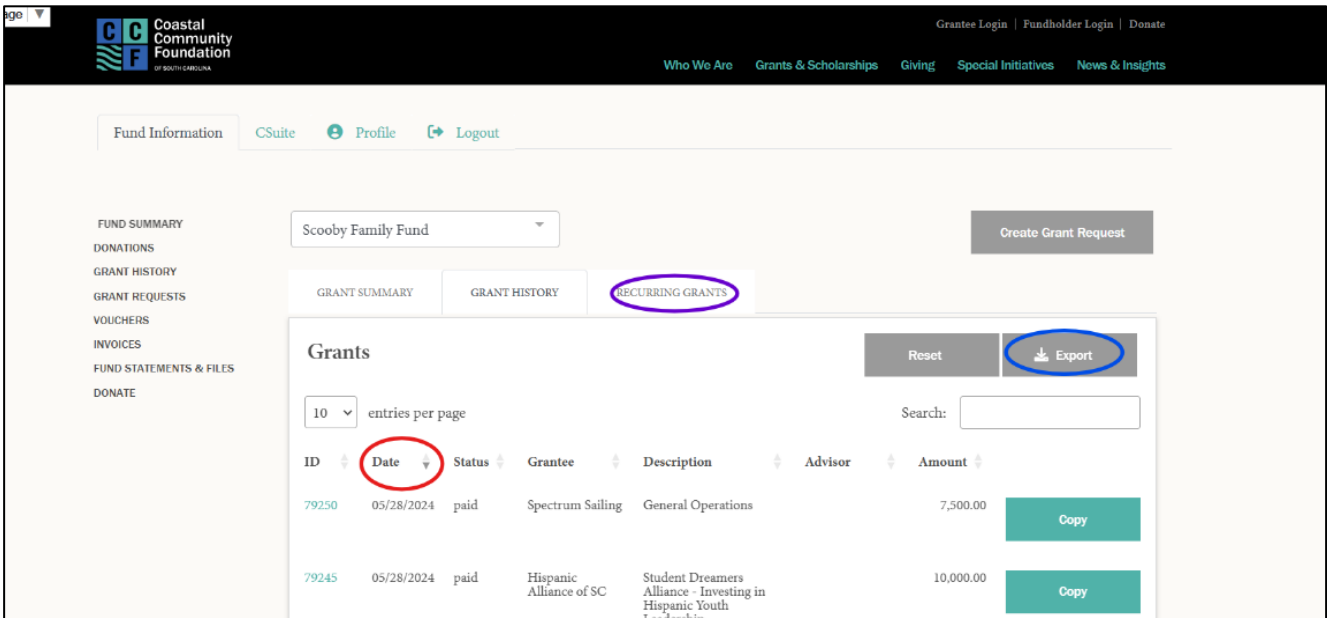
ID	Date	Contributor	Type	Description	Amount
96216	03/28/2023	Mystery, Inc	Check		295.00
94183	01/30/2023	Anonymous	Check		70.00
67477	02/11/2021	Anonymous	Check		100.00
41576	07/27/2020	Wolf's End Lodge			75.00

Grant History Tab

- The Grant Summary page summarizes information by grantee, organizations that have been granted money from the fund. If you click the Grant History button (circled in red), you will be taken to the fund’s overall grant history.



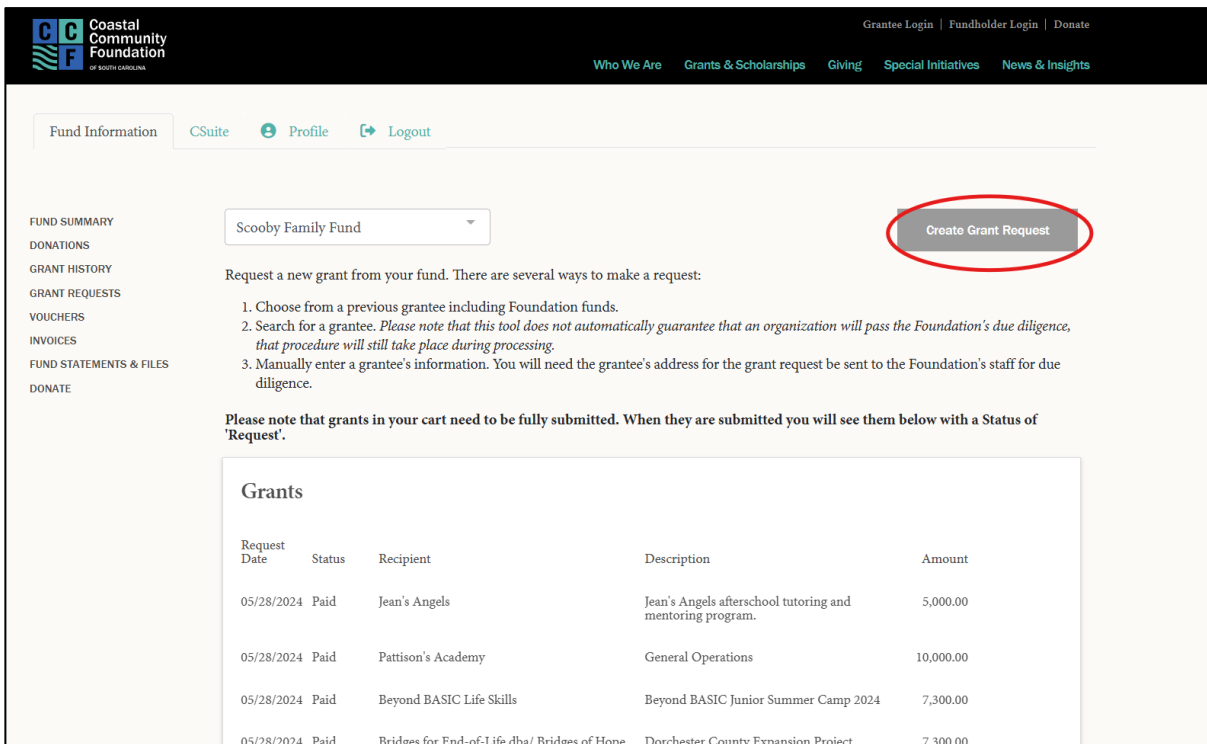
- Here, you can see the grant ID, the grant date, the grant status, the grantee, the grant description, and the grant amount. You can sort the grants by clicking the headers (circled in red) and can utilize the search bar to search for specific grants. This information is exportable as a CSV file, and you can download by clicking the Export button (circled in blue). If you click copy, that will automatically copy the grant into your cart. The Reoccurring Grants tab (circled in purple) lists any reoccurring grants you might have.



- Status indicators may appear throughout the grantmaking process and are listed below. 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.
- Grant Status Breakdown:
 - Request means that your grant request has been sent to our staff.
 - 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

- When you click the Grant Request tab, you will see three ways to make a grant request. You can choose from a previous grantee, you can search for a grantee, or you can manually enter a grantee. To make a grant request, you click the Create Grant Request button (circled in red).



The screenshot shows the Coastal Community Foundation of South Carolina website. The top navigation bar includes links for Grantee Login, Fundholder Login, and Donate. The main navigation bar lists Who We Are, Grants & Scholarships, Giving, Special Initiatives, and News & Insights. The left sidebar contains links for Fund Information, CSuite, Profile, and Logout. The main content area shows the 'FUND SUMMARY' section with a dropdown menu set to 'Scooby Family Fund'. A 'Create Grant Request' button is circled in red. Below this, there is a section titled 'Request a new grant from your fund. There are several ways to make a request:' followed by three numbered steps: 1. Choose from a previous grantee including Foundation funds. 2. Search for a grantee. 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. 3. Manually enter a grantee's information. You will need the grantee's address for the grant request be sent to the Foundation's staff for due diligence. Below this is a note: 'Please note that grants in your cart need to be fully submitted. When they are submitted you will see them below with a Status of Request'. At the bottom, there is a table titled 'Grants' with columns for Request Date, Status, Recipient, Description, and Amount.

Request Date	Status	Recipient	Description	Amount
05/28/2024	Paid	Jean's Angels	Jean's Angels afterschool tutoring and mentoring program.	5,000.00
05/28/2024	Paid	Pattison's Academy	General Operations	10,000.00
05/28/2024	Paid	Beyond BASIC Life Skills	Beyond BASIC Junior Summer Camp 2024	7,300.00
05/28/2024	Paid	Bridges for End-of-Life dba/ Bridges of Hope	Dorchester County Expansion Project	7,300.00

- Once you click Create Grant Request, you will be directed to the screen below where you can select how you would like to make your grant request (The three options circled in red).

Coastal Community Foundation of South Carolina

Grantee Login | Fundholder Login | Donate

Who We Are | Grants & Scholarships | Giving | Special Initiatives | News & Insights

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Scooby Family Fund

Create Grant Request

Request a new grant from your fund. There are several ways to make a request:

1. Choose from a previous grantee including Foundation funds.
2. Search for a grantee. *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.*
3. Manually enter a grantee's information. You will need the grantee's address for the grant request be sent to the Foundation's staff for due diligence.

Please note that grants in your cart need to be fully submitted. When they are submitted you will see them below with a Status of 'Request'.

Grant Request > Choose Type

Previous Grantee
Search Grantee
Manual Grantee

- If you click Previous Grantee, you can select from previous grantees or other funds at CCF. Options will populate from a dropdown menu when you click the text boxes.

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Scooby Family Fund

Create Grant Request

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2. Search for a grantee. *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.*
3. Manually enter a grantee's information. You will need the grantee's address for the grant request be sent to the Foundation's staff for due diligence.

Please note that grants in your cart need to be fully submitted. When they are submitted you will see them below with a Status of 'Request'.

Grant Request > Choose Type > Search

Choose from previous Grantees or Funds

Grantees you have given to in the past

Other foundation funds

- If you click Search Grantee, you can input information such as the Grantee Name, City, State, or EIN number and a list will be generated when you click Search.

Fund Information CSuite Profile Logout

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Scooby Family Fund

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2. Search for a grantee. *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.*
3. Manually enter a grantee's information. You will need the grantee's address for the grant request be sent to the Foundation's staff for due diligence.

Please note that grants in your cart need to be fully submitted. When they are submitted you will see them below with a Status of 'Request'.

Grant Request > Choose Type > Search

Search for Grantees

Grantee Name

City State

EIN

Search

- Lastly, you have the option to manually enter a grantee if you have their required information indicated by the asterisks below.

Fund Information CSuite Profile Logout

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Create Grant Request

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3. Manually enter a grantee's information. You will need the grantee's address for the grant request be sent to the Foundation's staff for due diligence.

Please note that grants in your cart need to be fully submitted. When they are submitted you will see them below with a Status of 'Request'.

Grant Request > Choose Type > Search

Enter Grantee information manually

Grantee Name *

Street Address * Apartment, S...

City * Sta... Zipcode *

Email Phone

EIN

* These fields are required.

Submit

- Regardless of how you select your grantee, you will be taken to the below page where you fill out the grant request. You will input information such as the description, the amount (grants must be over \$200), whether you would like to remain anonymous, whether you want the grant to be recurring, and additional notes. Once you have finished filling out the grant request, you will click Add to Cart.

Grant Request

Grantee Angel Oak Elementary School

Additional Grantee Contact ☐

Description 18/255 characters

Amount

Anonymous ☐

Recurring ☐

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

Attachment Description

Additional Notes

- Once you add the grant to your cart, you will be able to see it below in the Grant Request Cart. Your next step is to click Review Grant Requests (Circled in red).

Fund Information [Create](#) [Profile](#) [Logout](#)

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Scooby Family Fund

Create Grant Request

Cart (1)

Request a new grant from your fund. There are several ways to make a request:

1. Choose from a previous grantee including Foundation funds.
2. Search for a grantee. *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.*
3. Manually enter a grantee's information. You will need the grantee's address for the grant request to be sent to the Foundation's staff for due diligence.

Please note that grants in your cart need to be fully submitted. When they are submitted you will see them below with a Status of 'Request'.

Grant Request Cart

	Recipient	Description	Amount	
<input type="button" value="Delete"/>	Angel Oak Elementary School	General Operating	1,000.00	<input type="button" value="Edit"/>
Grant Request Total			1,000.00	

Grants

- The final step is to review the compliance language listed below and click Submit Grant Requests (circled in red).

Fund Information CSuite Profile Logout

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Create Grant Request Cart (1)

Request a new grant from your fund. There are several ways to make a request:

1. Choose from a previous grantee including Foundation funds.
2. Search for a grantee. *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.*
3. Manually enter a grantee's information. You will need the grantee's address for the grant request be sent to the Foundation's staff for due diligence.

Please note that grants in your cart need to be fully submitted. When they are submitted you will see them below with a Status of 'Request'.

Grant Request Cart

Grantee	Description	Amount	Anonymous
Angel Oak Elementary School Judith Condon 6135 Chisolm Road Johns Island, SC 29455	General Operating Additional Notes:	\$ 1,000.00	No
Total		\$ 1,000.00	

By submitting a grant recommendation through this portal, you agree to the following language: No goods, services or financial benefit will be given to me by the recipient organization if these grants are approved and transmitted. I understand that the final judgment rests in the hands of the Board of Directors, whose charge it is to see that all distributions are within the charitable purposes of the Foundation.

Submit Grant Requests

- Once you submit your grant request, you are finished when you see the red Grant Request Submitted memo below.

CCF Coastal Community Foundation OF SOUTH CAROLINA

Grantee Login | Fundholder Login | Donate

Who We Are Grants & Scholarships Giving Special Initiatives News & Insights

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Scooby Family Fund

Create Grant Request Cart (1)

Grant Request Submitted

Continue

CCF Coastal Community Foundation OF SOUTH CAROLINA

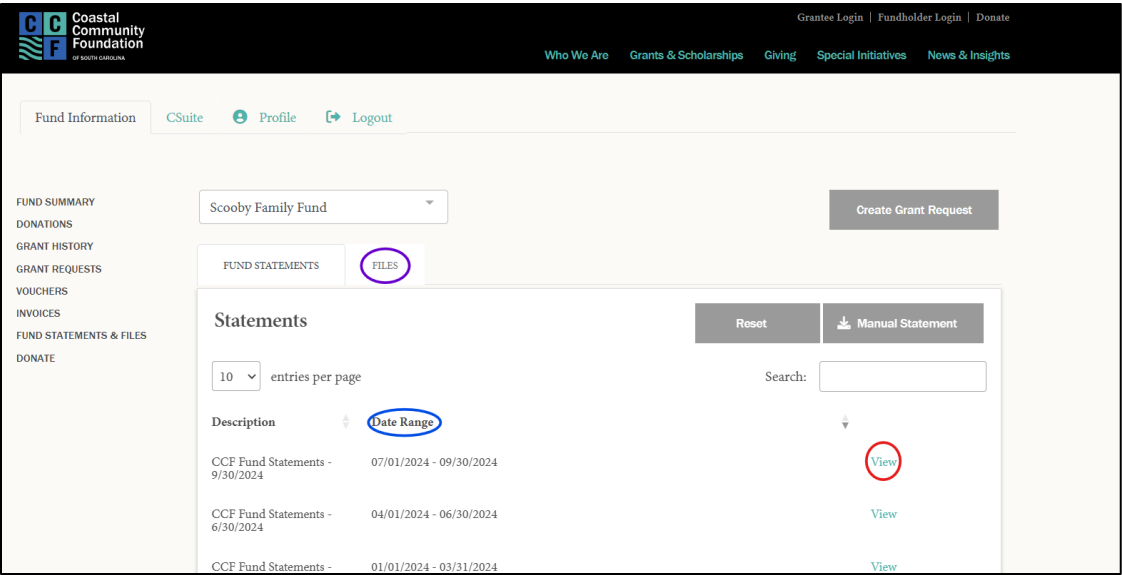
Contact
CHARLESTON
1691 Turnbull Avenue
North Charleston, SC 29405
Phone: 843-723-3635

Connect
f t i in

Sign Up
Sign up for Giving News, a monthly newsletter updating you on the latest from CCF.

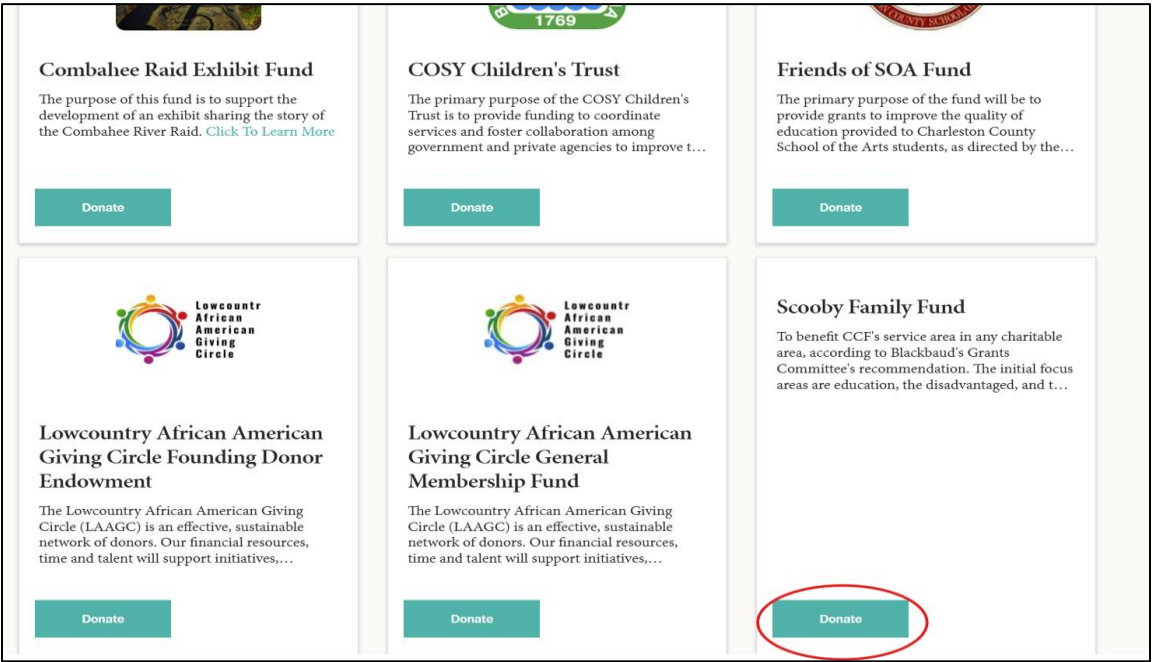
Fund Statements and Files Tab

- In the Fund Statements and Files tab, you can access your past fund statements by clicking View (Circled in red). You can click “Date Range” (Circled in blue) to sort by newest to oldest, or you can utilize the search bar to search for a specific date. If you click on files (Circled in purple), you will see files applicable to your fund, such as your fund agreement.



Donate Tab

- The Donate tab allows you to contribute to any listed funds at the Foundation, including your own. By clicking this tab, you will be redirected to our website’s donation page and invited to select the fund you want to contribute to or search for any of the funds at the Foundation.



Logging Out of the Portal

Remember to use the Logout tab to close the Portal securely. You will be automatically logged out each night regardless, so we recommend that you make note of your 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 are still having trouble, please contact the Philanthropy Manager at 854-222-3468 or by email at sarah@coastalcommunityfoundation.org

FAQs

- **How will I know if I submitted a grant successfully?**
You can check the status of the grant in the portal, on the Grants tab.
- **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 Portal.
- **Why can't I recommend a grant?**
Not all fund types have the same permissions. Contact your Relationship Steward or Fund Contact to inquire.
- **What do I do if I forgot my Fund Contact's information?**
Your fund relationship steward is listed at the top of the Fund Summary tab.
- **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 sarah@coastalcommunityfoundation.org or call 854-222-3468 for assistance.
- **I do not understand how to navigate the portal. Where can I get help?**
If you still have questions, reach out to the Philanthropy Manager at 854-222-3468 or by email at sarah@coastalcommunityfoundation.org