Coastal Community Foundation
OF SOUTH CAROLINA

New Portal Guide

Revised 2026

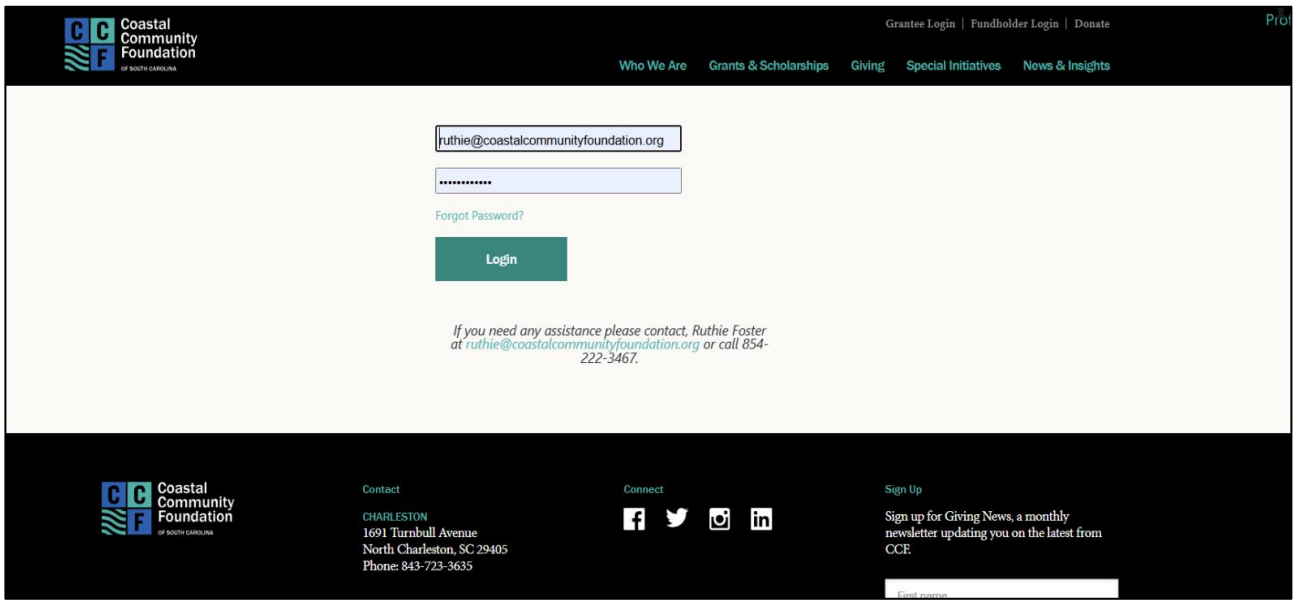
Coastal Community Foundation uses an online Portal to provide a secure and easy way through which you can access fund information. Depending on the type of fund you advise, you may be able to view the latest fund balances, make grant recommendations, or review gift history. The information provided below 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

Table of Contents:

Logging into the Portal for the First Time	2
Logging into the Portal After Setup	2
Tab Selections	3
Fund Summary Tab	4
Donations Tab	4
Grant History Tab	5
Grant Request Tab	6
Fund Statements and Files Tab	11
Logging Out of the Portal	12
Locked Out of your Donor Portal?	12
FAQs	12

Logging into the Portal for the First Time

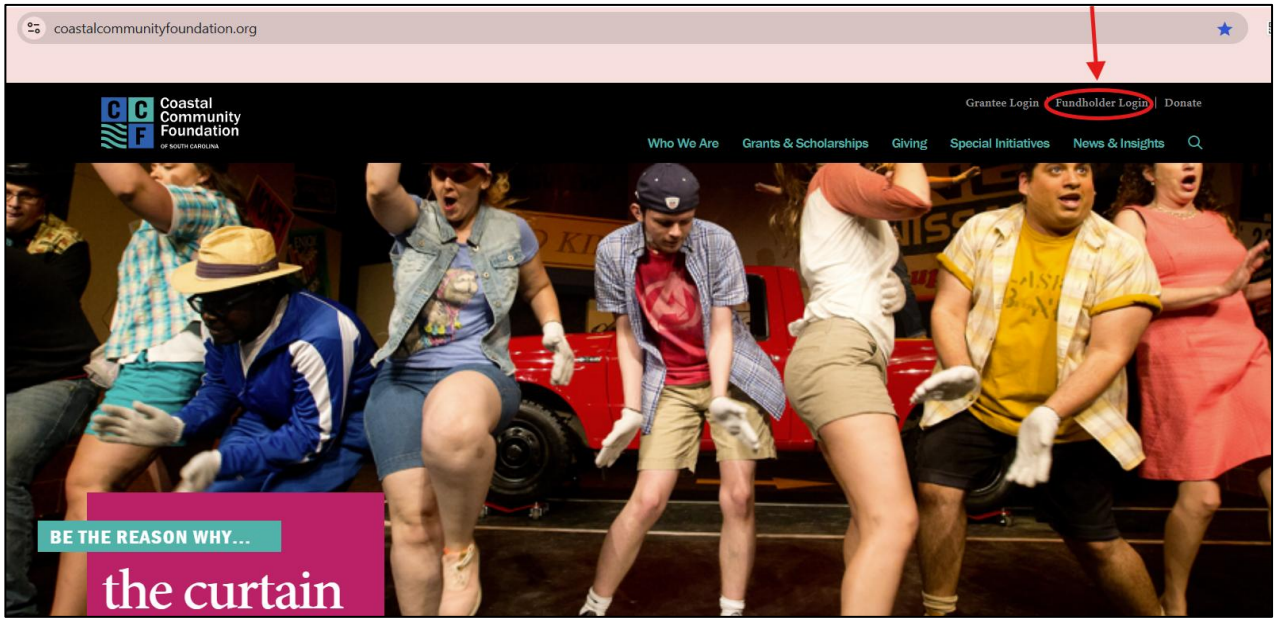
You will receive an email directly from the Stewardship and Donor Engagement Manager with a login name (typically your email address) and a link to access your personal Portal page. Select the link and you will be prompted to create a password for the Portal site. Once your password is created, go to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



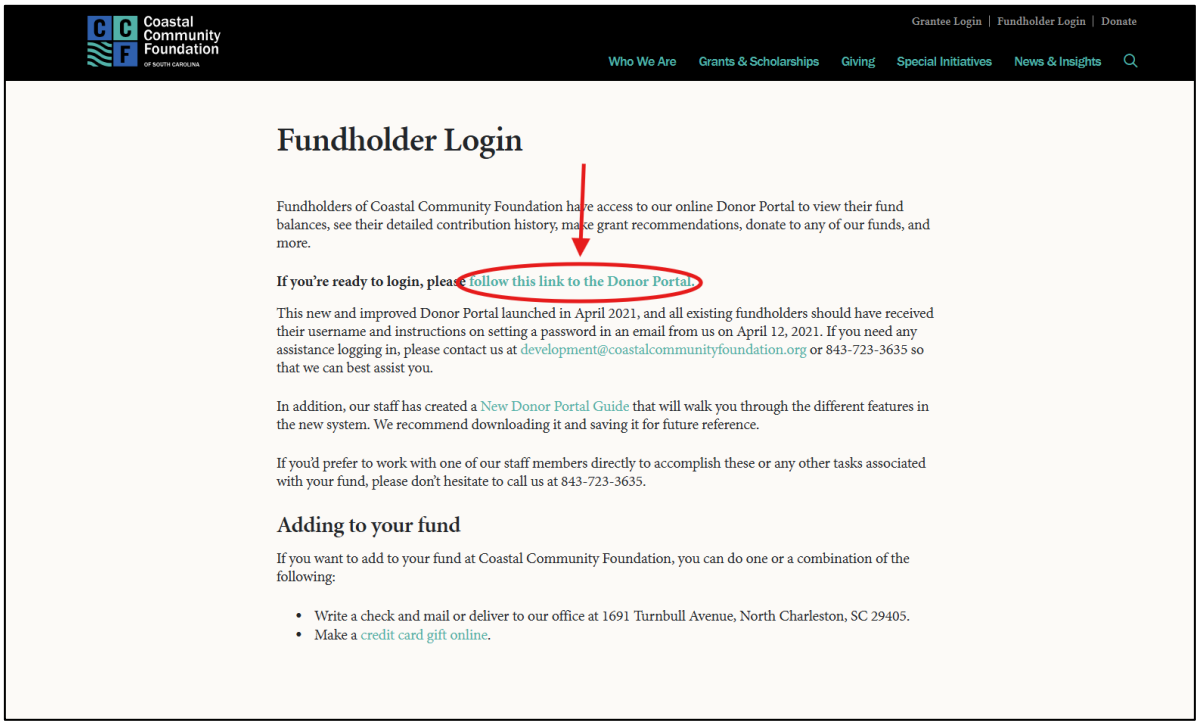
Note: We recommend you bookmark this URL and make note of your new username and password in a safe place for your records.

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.

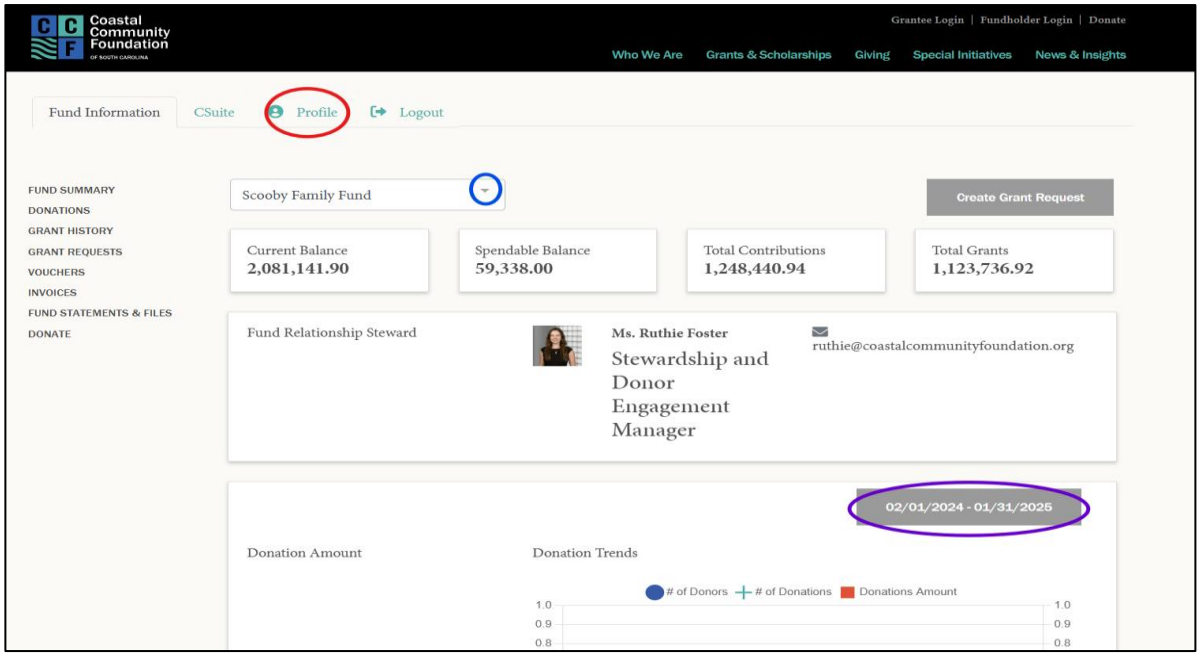


Once you click Fundholder Login, you will be directed to the below landing page where this guide and a Portal walkthrough video are linked. We highly encourage you to watch the video. You will click “follow this link to the portal” to login.



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:

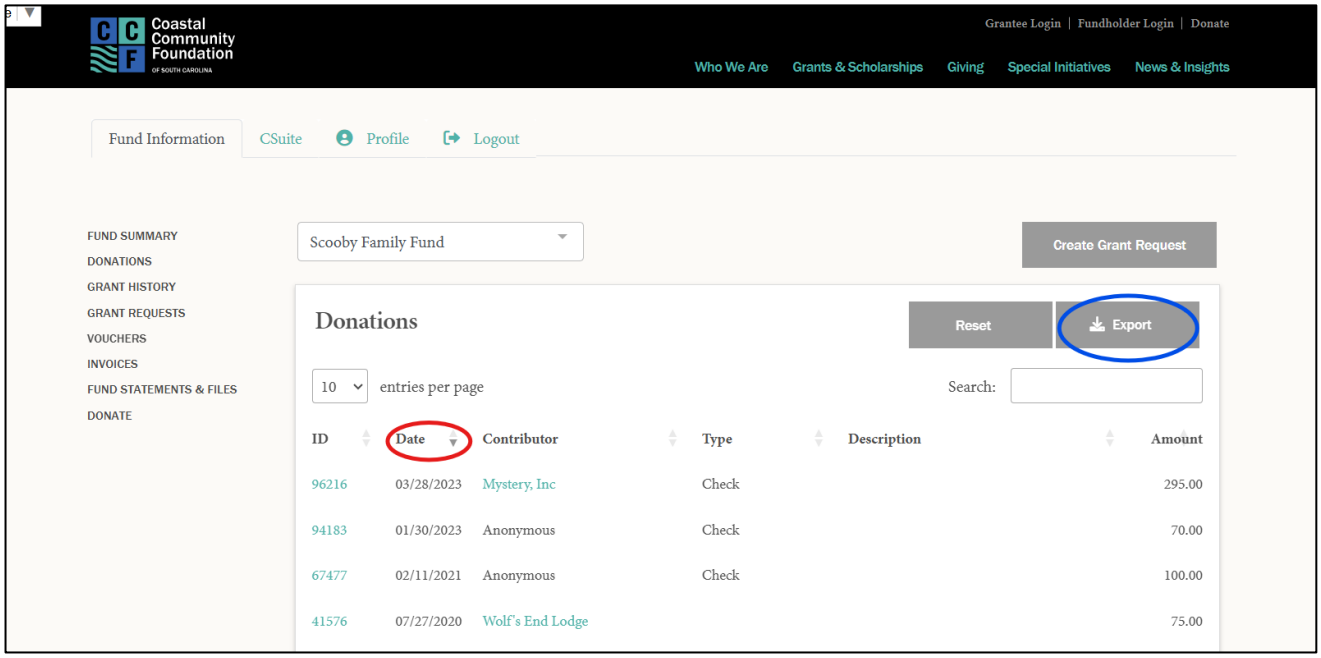


Fund Summary Tab

- 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.

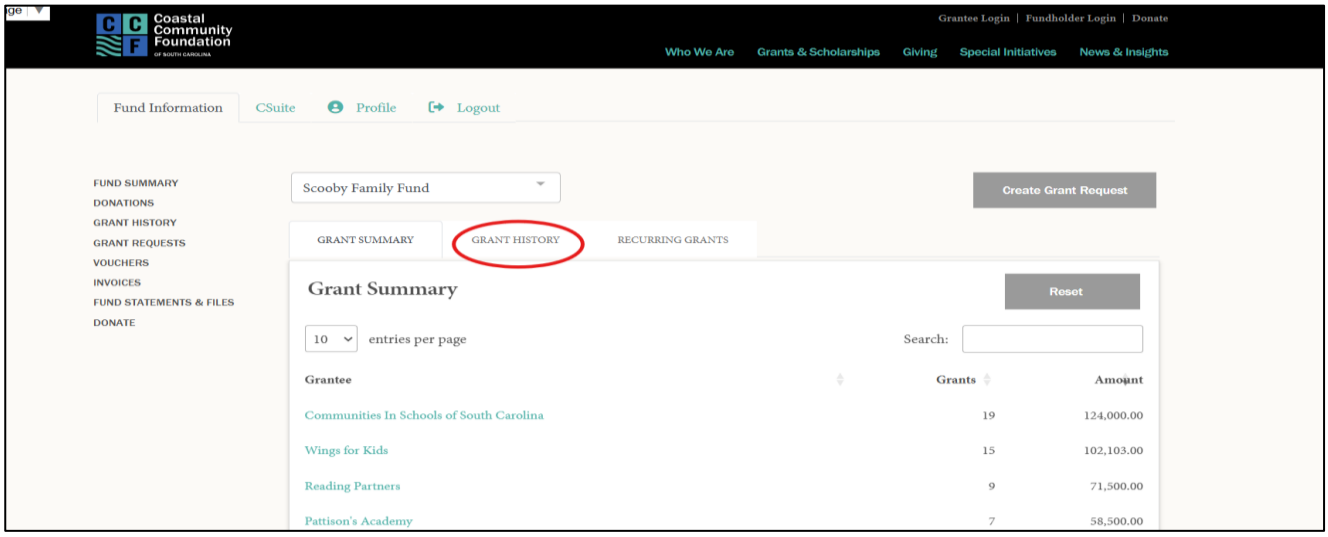
Donations Tab

- 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).

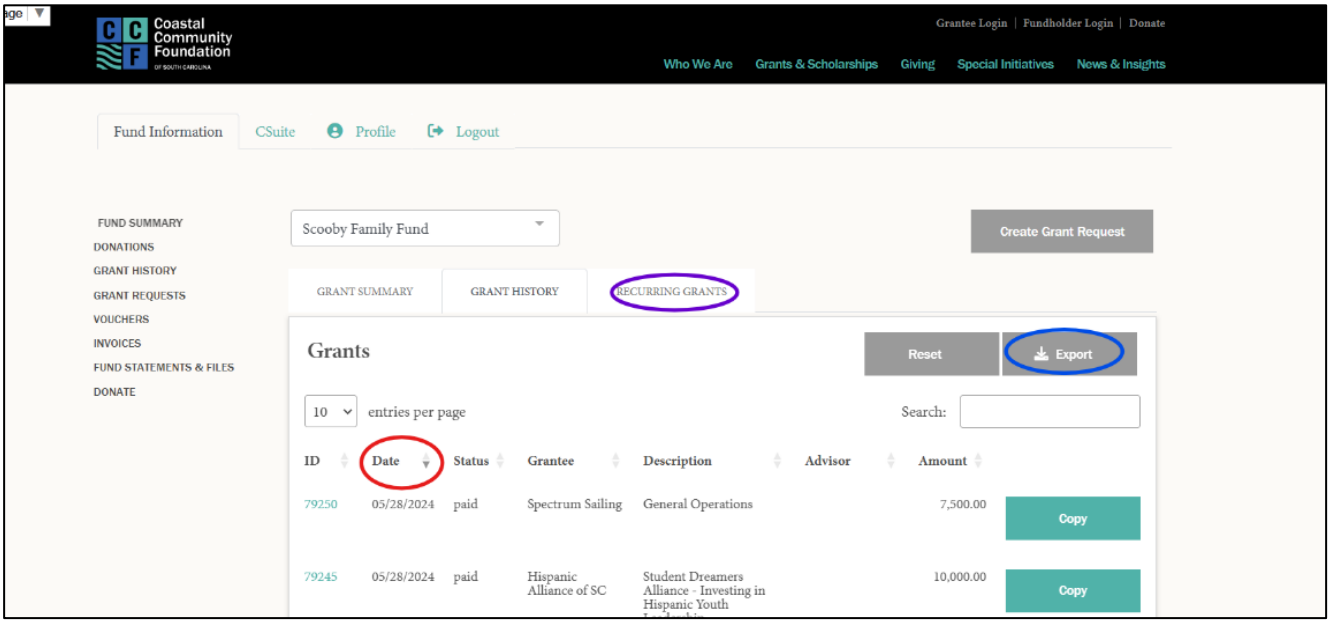


Grant History Tab

- 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.



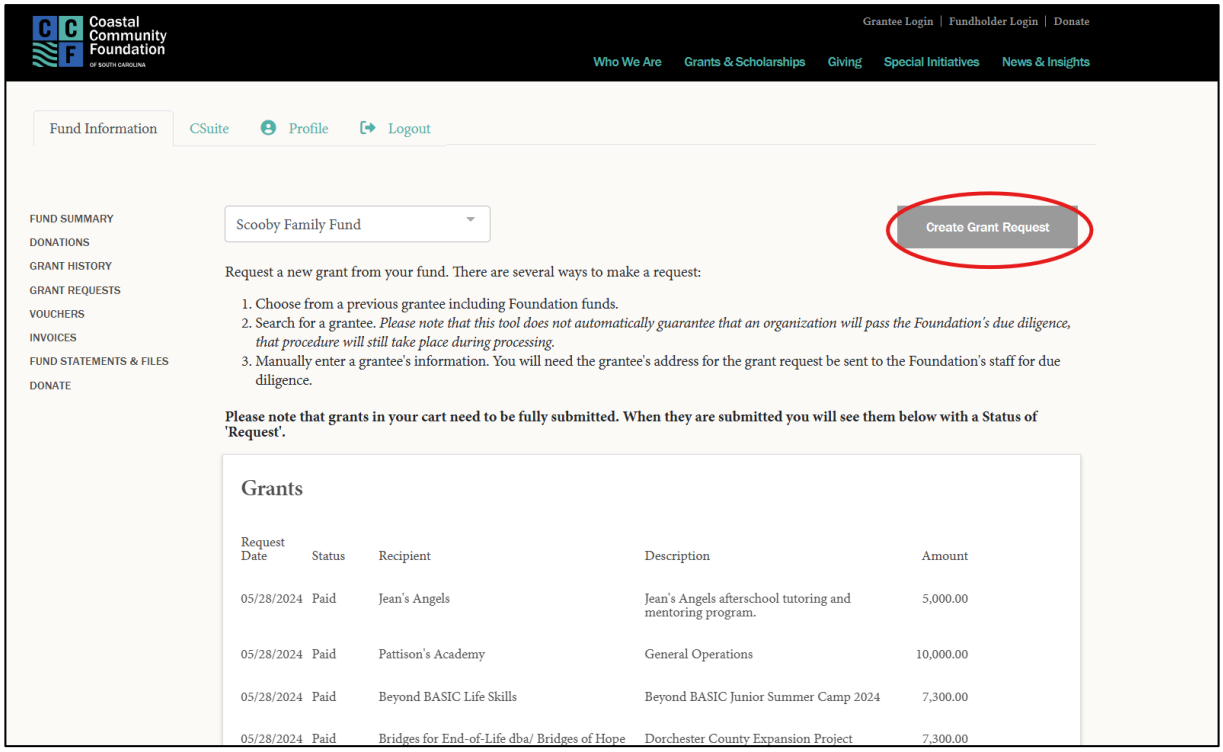
- Here, you can see the grant ID, the grant date, the grant status, the grantee, the grant description, and the grant amount. You can sort the grants by clicking the headers (circled in red) and can utilize the search bar to search for specific grants. This information is exportable as a CSV file, and 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.



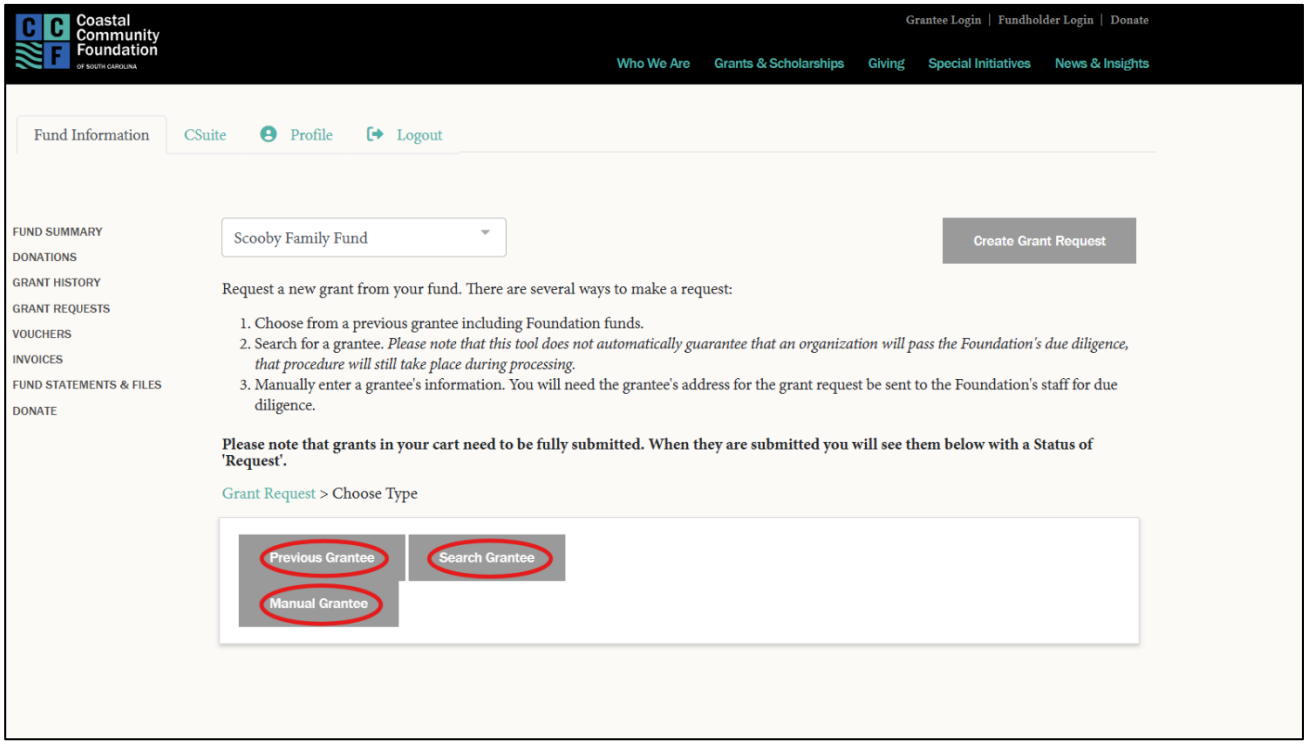
- Status indicators may appear throughout the grantmaking process and are listed below. Please contact the Foundation if you have questions about the status of a grant. Most grants are processed in 5-7 business days, unless they need additional approval by our Grantmaking and Community Leadership Committee, 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

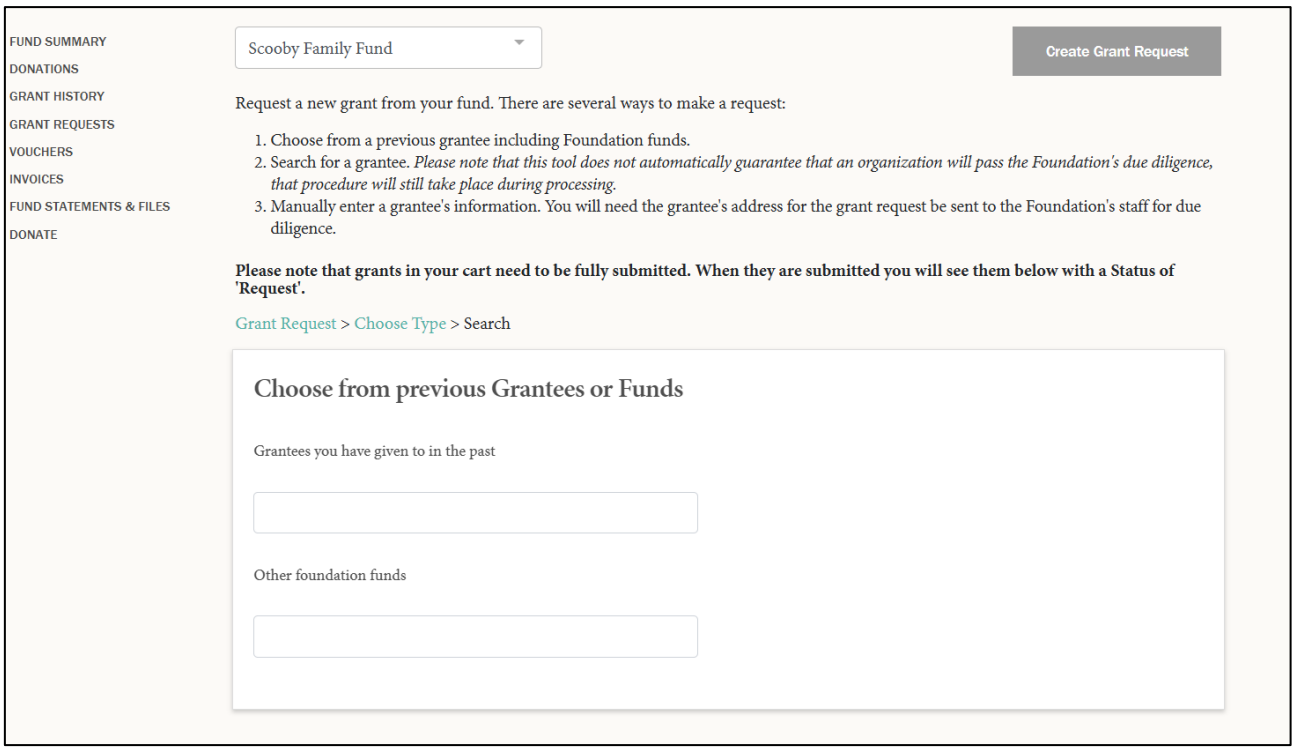
- When you click the Grant Request tab, you will see three ways to make a grant request. You can choose from a previous grantee, you can search for a grantee, or you can manually enter a grantee. To make a grant request, you click the Create Grant Request button (circled in red).



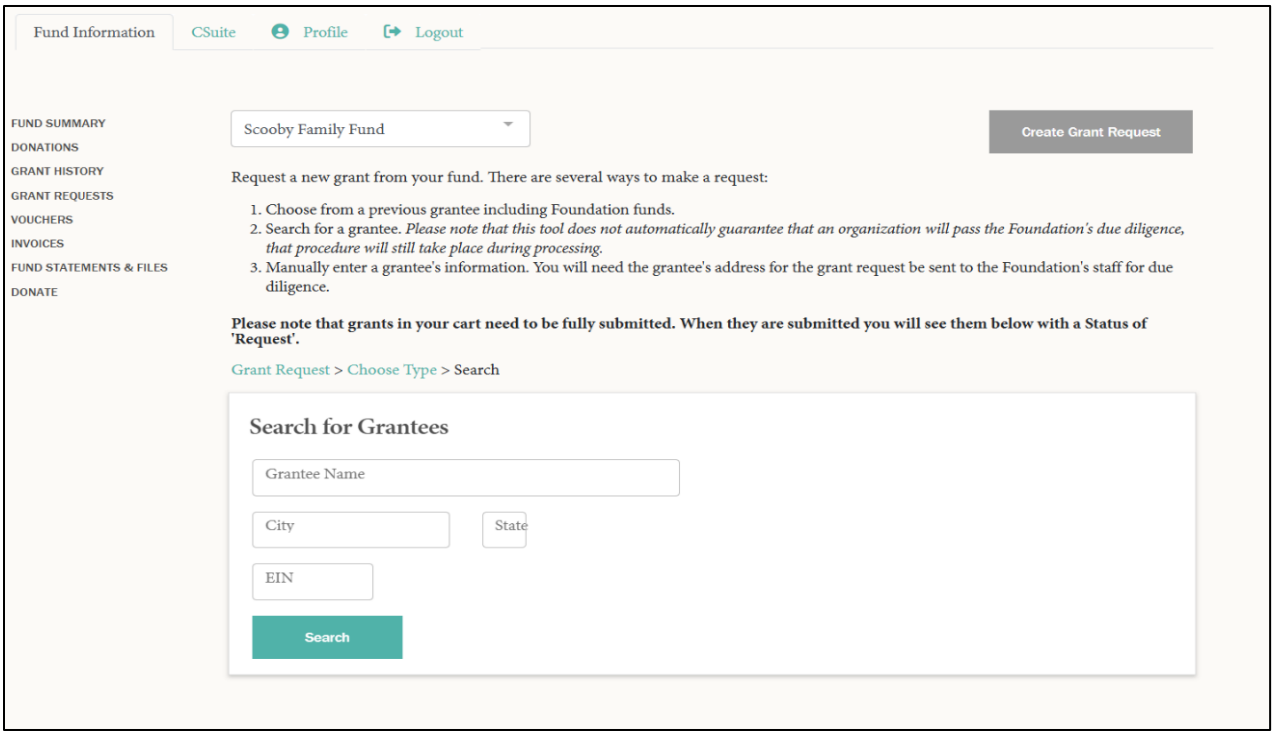
- Once you click Create Grant Request, you will be directed to the screen below where you can select how you would like to make your grant request (The three options circled in red).



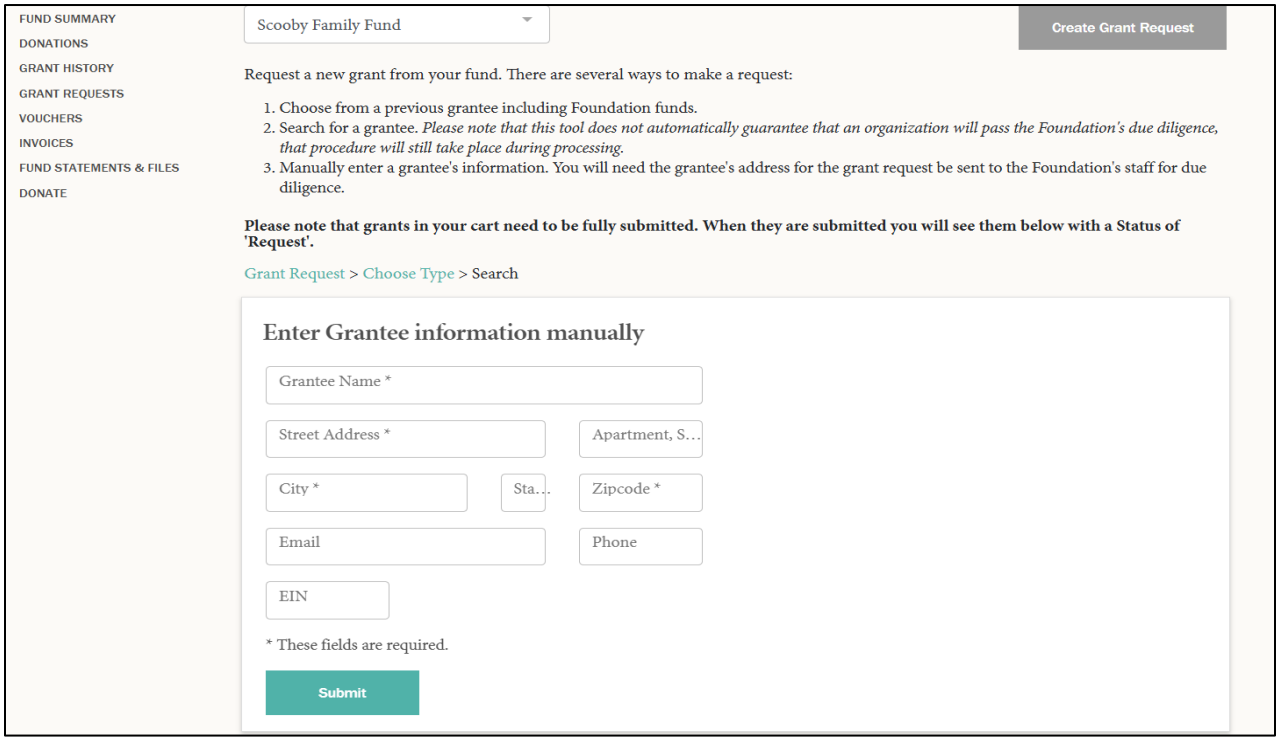
- If you click Previous Grantee, you can select from previous grantees or other funds at CCF. Options will populate from a dropdown menu when you click the text boxes.



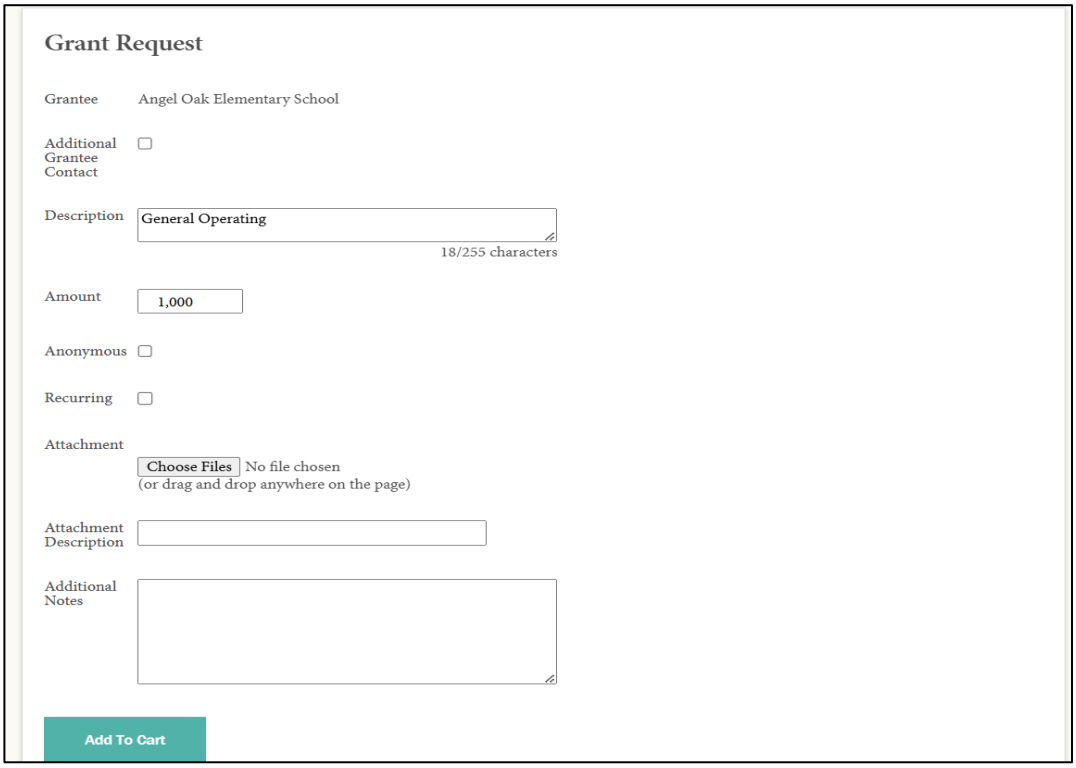
- If you click Search Grantee, you can input information such as the Grantee Name, City, State, or EIN number and a list will be generated when you click Search.



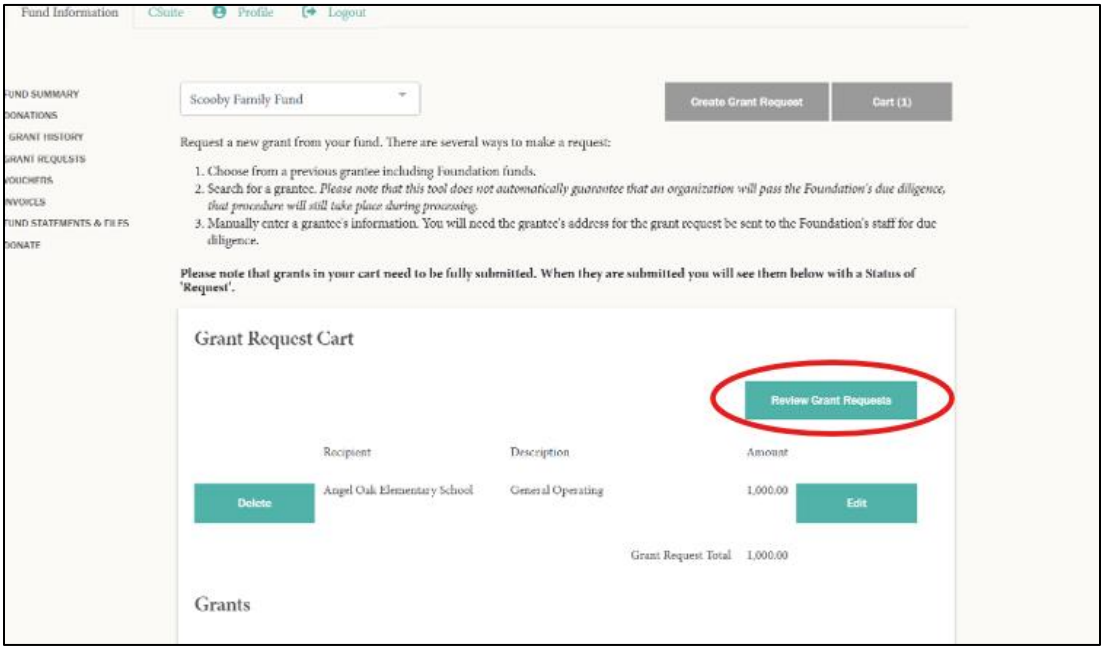
- Lastly, you have the option to manually enter a grantee if you have their required information indicated by the asterisks below.



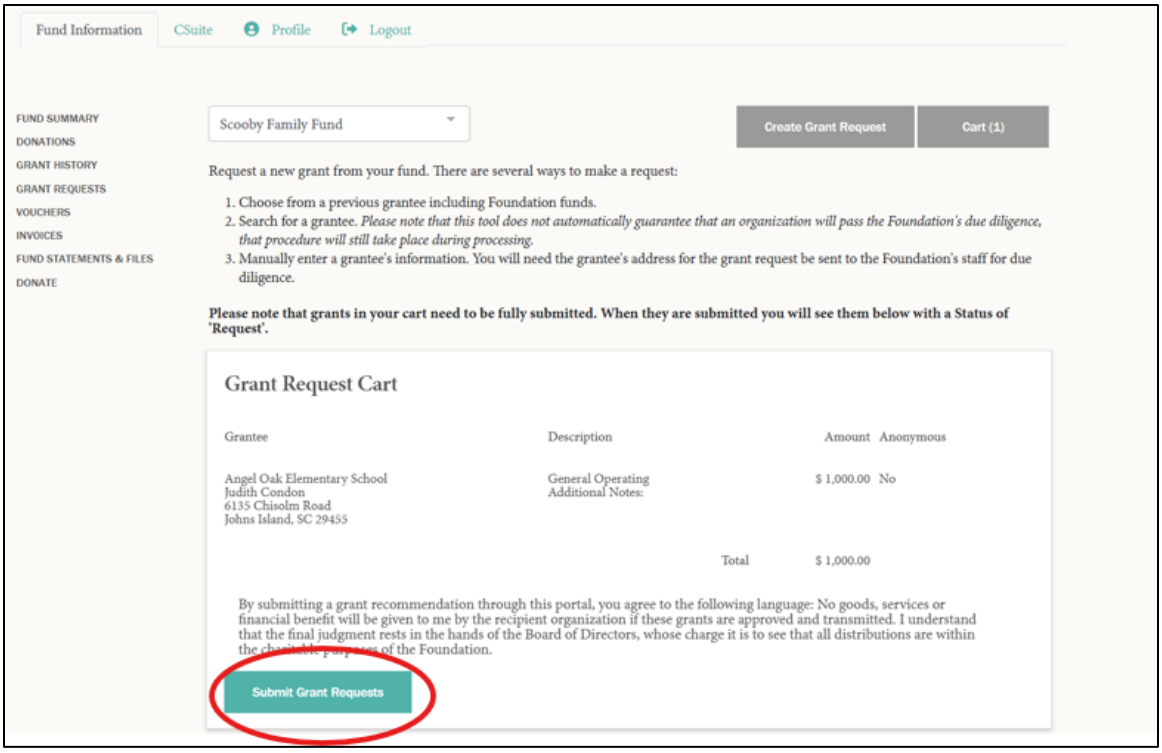
- Regardless of how you select your grantee, you will be taken to the below page where you fill out the grant request. You will input information such as the description, the amount (grants must be over $200), whether you would like to remain anonymous, whether you want the grant to be recurring, and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



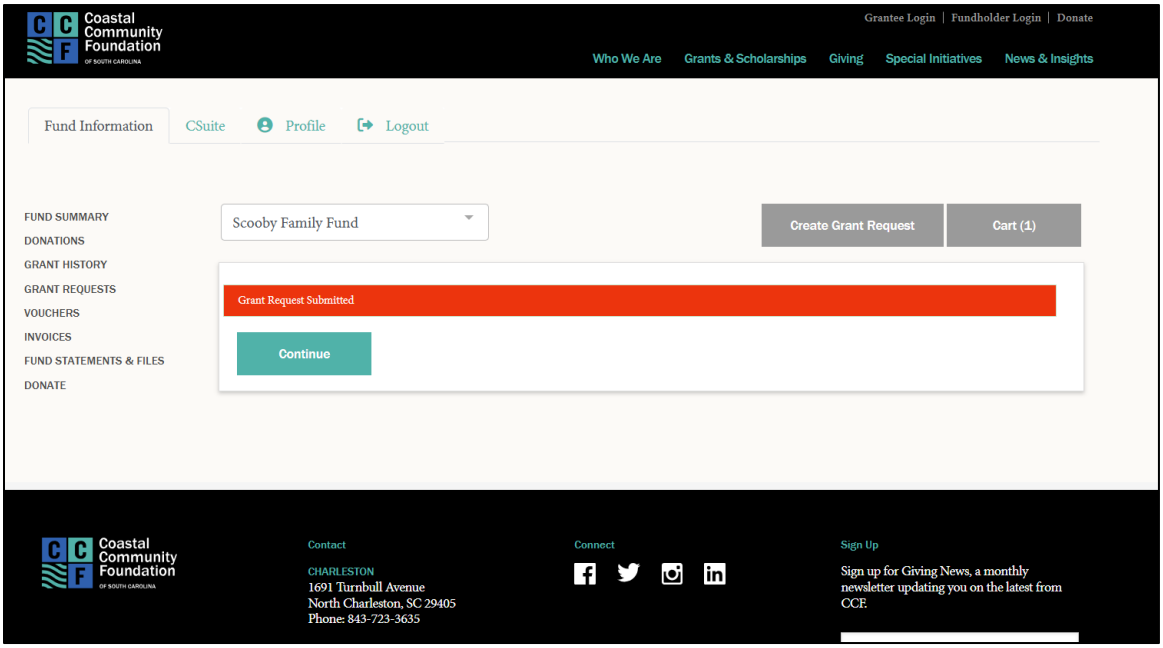
- Once you add the grant to your cart, you will be able to see it below in the Grant Request Cart. Your next step is to click Review Grant Requests (Circled in red).



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

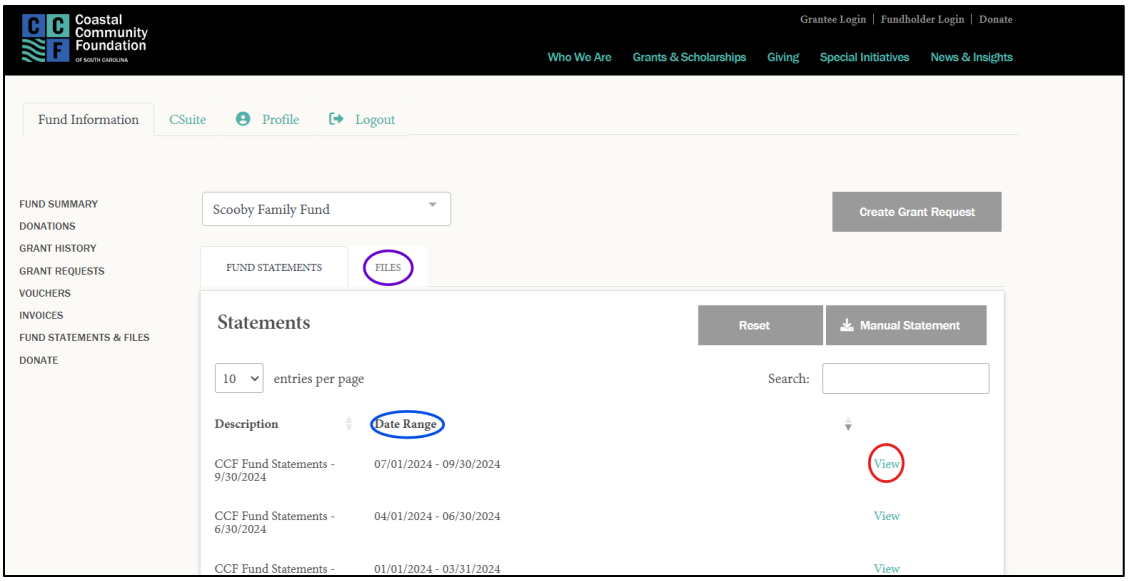


- Once you submit your grant request, you are finished when you see the red Grant Request Submitted memo below.



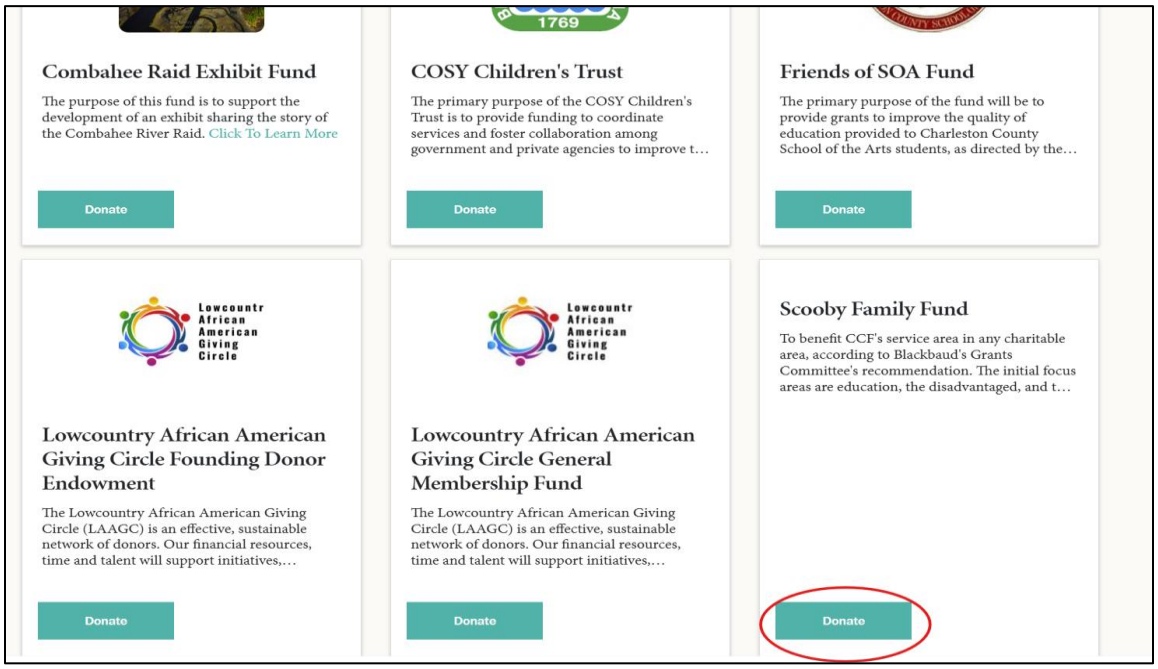
Fund Statements and Files Tab

- 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