Fund Advisor Portal Guide

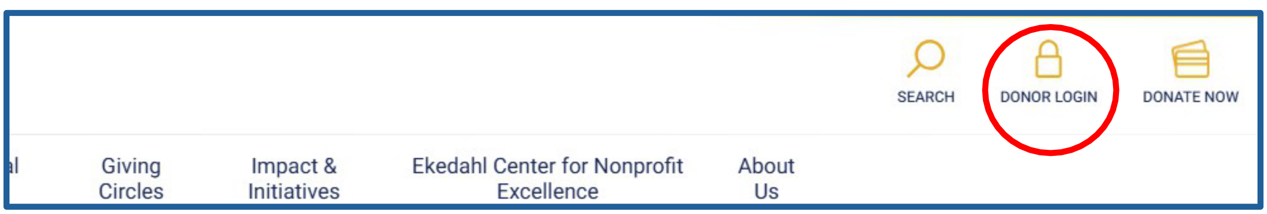
Community Foundation of the Lowcountry is committed to providing you with the best tools and resources quickly and easily view information about your fund(s), make critical grants, view your fund balance, and take advantage of many other features. We are excited to share enhancements to our online portal, launching on March 11, 2025!

While the portal's content remains the same, the layout has been redesigned for better usability. Additionally, new features have been introduced to enhance your experience. If you have any questions or need technical assistance during this transition, please contact your fund liaison at **843-681- 9100**.

Below is a step-by-step guide to help you navigate the new system.

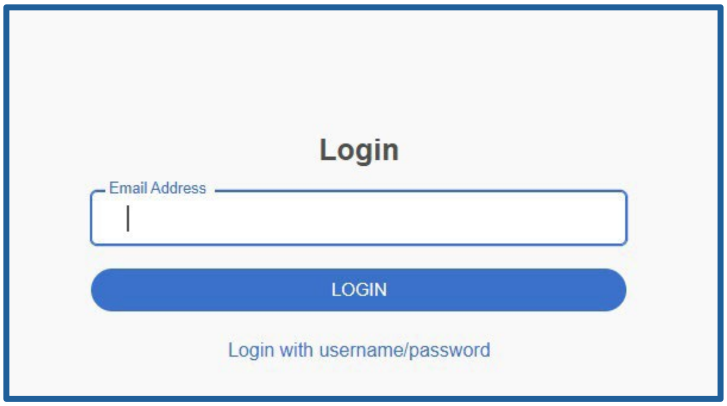
Logging In

- Go to CFL's homepage, **https://www.cf-lowcountry.org** and click DONOR LOGIN. You will automatically be redirected to the new login page.



- Alternatively, you may bookmark the login page: https://lowcountry.fcsuite.com/erp/portal
- Select **"Login with username/password"** and log in using your current credentials.

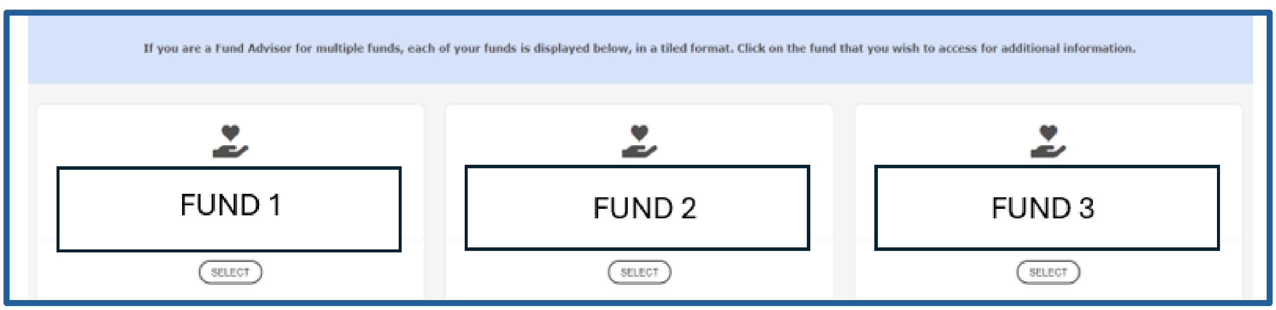
  Note: You may be prompted to create a new password if your current password does not meet security requirements.



Single Fund Advisors: You will be taken directly to your fund's homepage.

Fund Advisors with Multiple Funds

If you are linked to multiple funds, the homepage will display all funds in a **tile format**. Select the fund you wish to interact with.



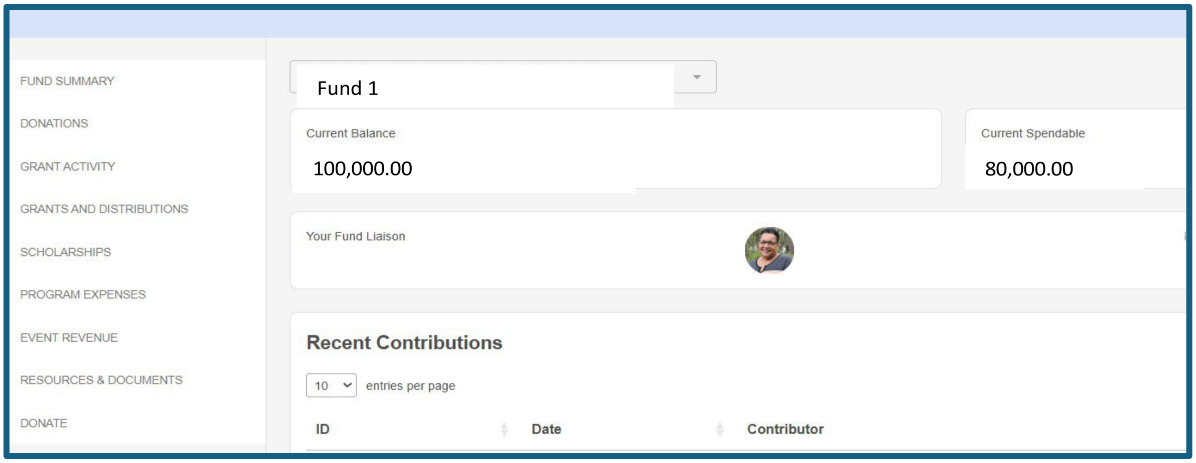
Click on the fund that you wish to access for additional information.

Once you are in a fund, to move between your other funds, click the dropdown box and select the appropriate fund.

FUND 1 (click on the arrow by the fund name to move between funds)
FUND 2
FUND 3

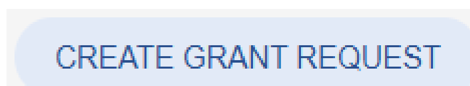
Navigating the Portal

Once you've clicked on your fund, you will be directed to the FUND SUMMARY (home page) of that fund. You will see a series of tabs on the left-hand side of the page. **Depending on the type of fund you manage, some tabs may not be visible.**



Tab Overview

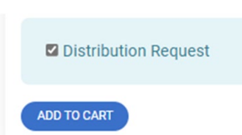
Please note, you can initiate a grant request from any tab in the portal by clicking



Begin a new grant request by choosing from the following options:

- **Previous Grantee**: Select from grantees you've supported before.
- **Search Grantee**: Use keywords to search for organizations via the Foundation's or Candid's database. (Candid is a national nonprofit database)
- **Enter Grantee Manually**: Input details for a new grantee (name, address, phone number, etc.).

Complete the request form and check "**Distribution Request**".



Click: **Add to Cart**

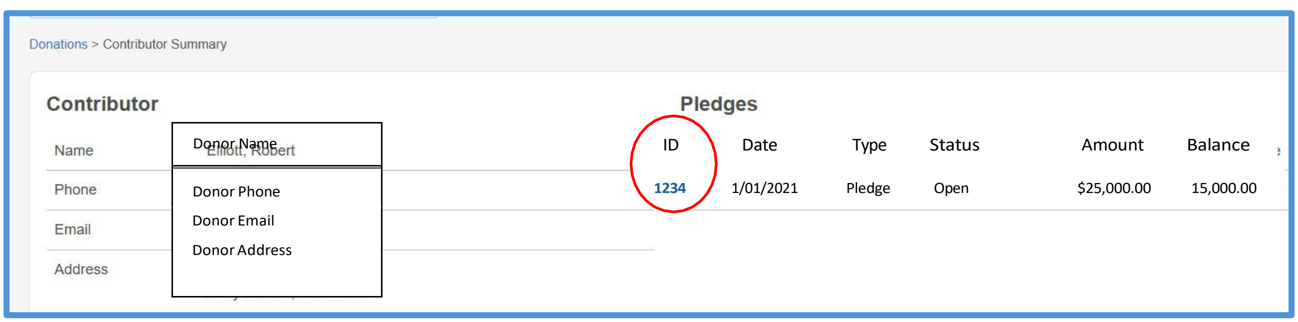
➢ **Fund Summary Tab**: Displays the fund's current balance, spendable balance (for endowment funds), your fund liaison's contact information, and the most recent contribution and grant activity in your fund. You will see charts if they are enabled.

➢ **Donations Tab**: Shows detailed records of all gifts received into the fund. Click on the Contributor Name to see full details and gift history. Use the

button to download this data as a spreadsheet.

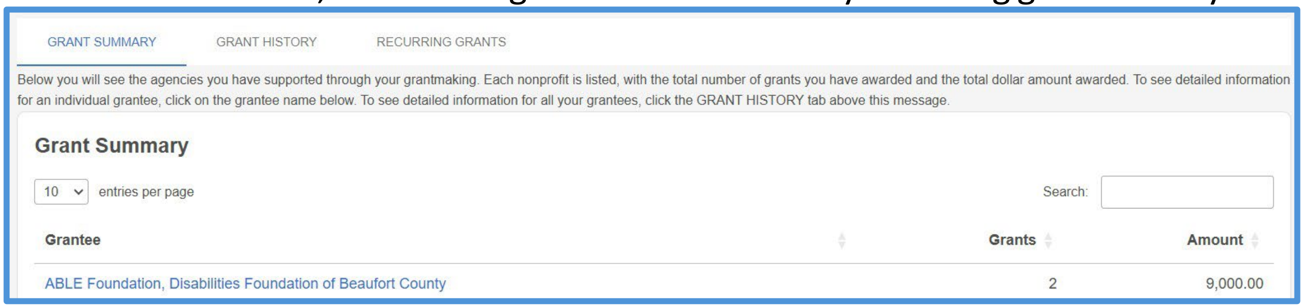
➢ **Pledges Tab:** Opens a list of donors who have made pledges to your fund.

❖ Click on a donor name in the list to open detailed information.



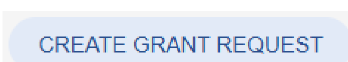
- You will see the donor's name and address (unless the pledge is anonymous).
- You can view additional payment details by clicking on the blue pledge number in the Pledge section as seen above.

➢ **Grant Activity Tab**: Opens the Grant Summary page. Above the grants displayed, you can move to a Grant History tab for additional information, or Recurring Grants to review any recurring grant activity.



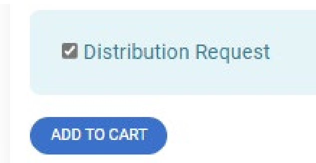
- **Grant Summary**: View total cumulative grants by grantee. (To drill down and see specific grants, click on the grantee name.)
- **Grant History**: Displays all grants made from the fund, starting with the most recent. Use the **"Copy"** button to replicate previous grant requests for a new grant. Note - check the grant amount and modify if a new grant amount is intended.
- **Recurring Grants**: Lists any recurring grants. Click on a recurring grant to edit it.

- **Grants and Distributions Tab**: (Clicking CREATE GRANT REQUEST anywhere in the portal will bring you to this section.)



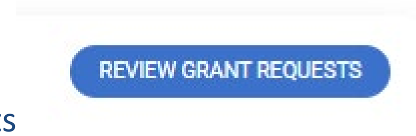
- **Create Grant Request**: Begin a new grant request by choosing from the following options:
  - **Previous Grantee**: Select from grantees you've supported before.
  - **Search Grantee**: Use keywords to search for organizations via the Foundation's or Candid's database. (Candid is a national database.)
  - **Enter Grantee Manually**: Input details for a new grantee (name, address, phone number, etc.). Note: EIN # is not required.
- Select the Grantee, complete the request form. You are required to

add a brief description. Once you have completed the form, check **"Distribution Request"** then click **Add to Cart**.

- 

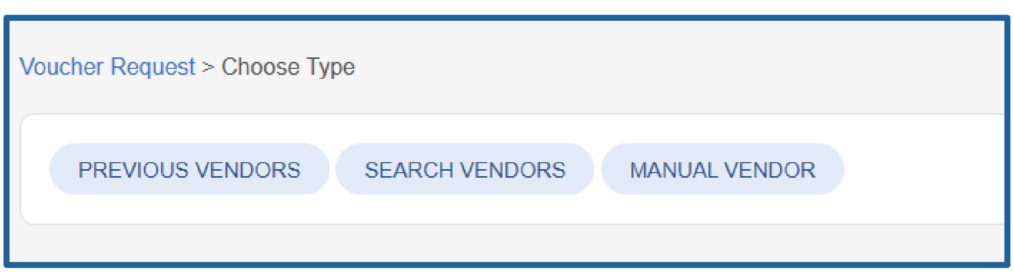
To add additional grants to your cart, begin the process again by clicking on Create Grant Request in the top right. You have the ability to add multiple grants to your cart.

- ***When you are ready to submit your request(s) click on the "cart" button on the top right*** *(next to the Create Grant Request button).*



- Click Review Grant Requests
- Once you review the request(s) click Submit Grant Requests.

- **Voucher Request Tab:** Will only be displayed for funds that pay Program Expenses (invoices) on behalf of the fund. Generally, Field of Interest Funds are the primary fund type that will have this option. If you do not see this tab displayed and think you should, contact your fund liaison.

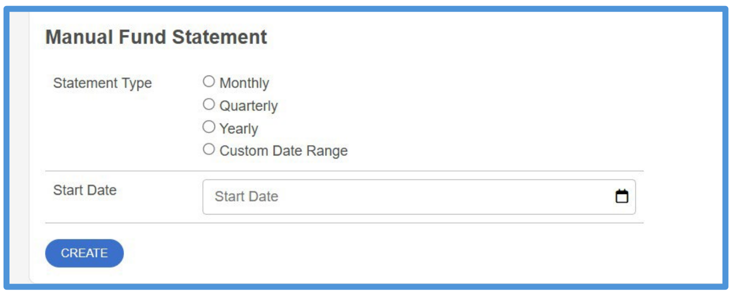


- ❖ You may select a vendor you have already paid through your fund by clicking on PREVOUS VENDORS
- ❖ You can search for a vendor in the Community Foundation's portal by clicking on **SEARCH VENDORS**
- ❖ Enter a new vendor by clicking MANUAL VENDOR. If you enter a new vendor, please enter as much information as you can to ensure we mail the check to the appropriate vendor and address. **Upload supporting documents to help us verify the information.**

- ❖ Once the form is completed, click "Review"
- ❖ You will be prompted to "Edit Request" or "Submit"

- ➢ **Program Expenses Tab**: View vouchers for program expenses paid through the fund. Note that expenses incurred before December 2022 may not be populated in the portal.
- ➢ **Event Revenue Tab**: Lists payments to the fund for non-charitable items such as events or services. Most funds will not see this tab.
- ➢ **Scholarships Tab**: Scholarship Funds will have both the Grant History tab and the Scholarships tab.
  - ❖ **Grant History Tab**: Shows universities receiving funds on behalf of students who were awarded scholarships.
  - ❖ **Scholarships Tab**: Lists students who received awards.

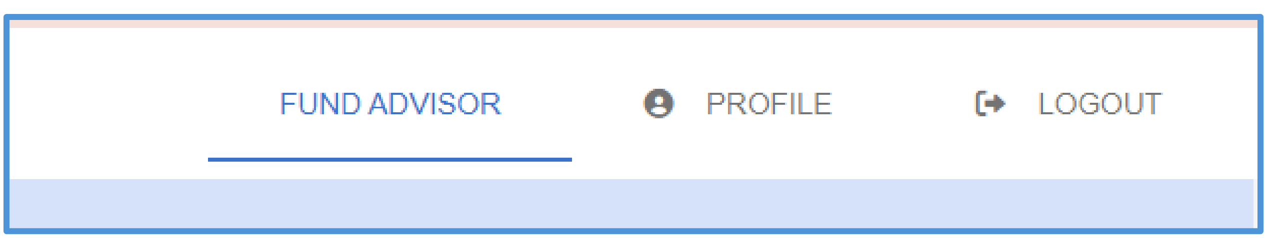
- **Resources and Documents Tab**: Access fund statements (dating back to November 2022) and other shared files.
  - Click the FILES tab to view documents uploaded by CFL staff.
  - To generate a manual fund statement, click **"Manual Fund Statement"**, You may select Monthly, Quarterly, Yearly or a Custom Date Range. After you make your selections, click CREATE to generate the statement.



- **Grant Catalog Tab**: Explore active Grantmaking Partner Opportunity campaigns, which pool resources from the Foundation and donors to support impactful proposals.
- **Donate Tab**: Use this tab to make contributions via credit or debit card to funds listed on the public Donate Now page on the CFL website.

Logging Out

To log out, click the **profile icon** in the upper right corner and select **"Logout"**. For security, you will be automatically logged out each night. Be sure to store your username and password in a safe place.



Key Features at a Glance

- **Editable User Profile:** Please contact your liaison if changes need to be made to your profile. You can make the changes in your portal, but we would like to note them in our larger data base for consistency in service.
- **Enhanced Navigation**: Simplified layout for easier access to fund details.
- **Grant Request Options**: Streamlined process with multiple options for selecting grantees.
- **Voucher Request Options**: Streamlined process with multiple options for selecting vendors to pay Program Expenses.
- **Visual Summaries**: Charts and graphs to track fund activity.
- **Exportable Data**: Downloadable reports for your records.

If you have any questions, don't hesitate to contact your fund liaison. We are here to help you make the most of your giving experience.

Thank you for your continued partnership with the Community Foundation of the Lowcountry!