Instructions for Navigating the Donor Portal for Fund Representatives

La Crosse Community Foundation is excited to offer a new online donor portal where fund representatives can access fund information 24/7, 365 days of the year via a secure, password protected website.

Three Steps to Get Started:

1. Email sherry@laxcommfoundation.com to request a link to login. The login email will arrive from sender no-reply@fcsuite.com
You will see "La Crosse Community Foundation" in the email's subject line. Some email programs might flag this message as spam, so please check your other email folders.

2. The email will provide you with a unique link to establish your password
Click the link in the email to start the simple set-up process. The set-up system is user-friendly, and you will likely be up and running in under two minutes. Be sure to write down your username and password. **Please note:** Your username will be the email address we have on file for you, unless you notify us of a change.

3. Once you have successfully completed your password set up, you can log in to the donor portal at any time with this link: https://laxcommfoundation.fcsuite.com/erp/fundmanager

    The login link is also located on our website homepage where you used to log in to view your fund statements.

After You Log In

Once you have logged in, you can select the tabs at the top of the page to view the different types of information available. Your screen will look like this:
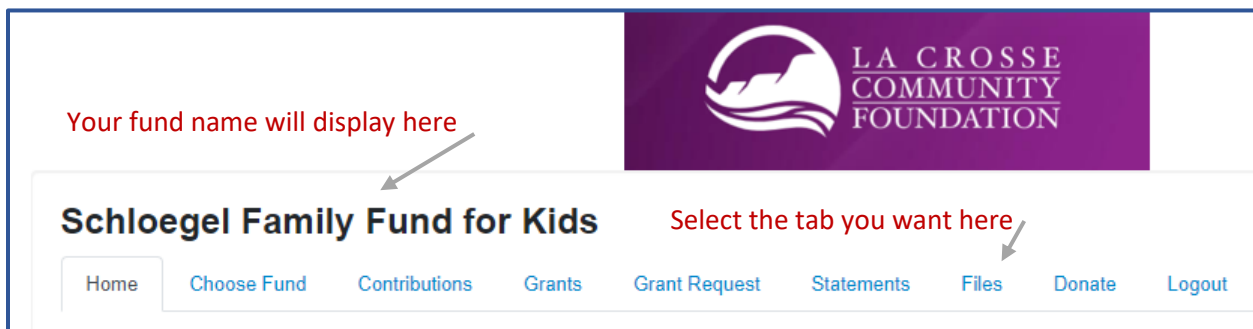
- The "**Home**" tab shows the fund's current balance plus the spendable balance (if applicable). This area also lists all fund representatives, shows recent contributions and recent grants given from the fund.

- The **"Choose Fund"** tab is visible only if you are a fund representative for more than one fund. If so, you can click on "Choose Fund" to view your different funds.

- The **"Contributions"** tab shows all contributions or donations to the fund from 2018 to current.
  - Clicking on a contributor's name will bring up their history of contributions.

- The **"Grants"** tab will show the history of grants made from the fund from 2018 to current.

- The "**Grant Request**" tab allows you to make grant recommendations and looks like this:

Home	Choose Fund	Contributions	Grants	Grant Request	Statements	Files	Donate	Logout

Use this form to request a new grant or contribution from your fund. Select a grantee from the drop-down menu or enter a new nonprofit. La Crosse Community Foundation will receive notification of your request and process your grant. We will notify you once the grant has been completed. Grants already processed from your fund are listed.

Choose from previous Grantee

Grantees you have given to in the past

⌄

Foundation funds you have given to in the past

⌄

Other foundation funds

⌄

or

Search for other Grantees

Name

City

State   [Search]

or

Enter Grantee information manually

Name *

Address *

Grants

⇕ Date	⇕ Status	⇕ Recipient	⇕ Description	⇕ Amount	⇕
12/07/2021	Complete			500.00	
10/27/2021	Complete		Specific grant information was redacted to protect donor privacy	1,000.00	
08/02/2021	Complete			250.00	
07/14/2021	Complete			500.00	
07/14/2021	Complete			500.00	
03/24/2021	Complete			1,000.00	
03/11/2021	Complete			1,000.00	

- **The right side** of your screen will list all the grants you've recommended with their status. If the current status is "Request," you can cancel that grant recommendation from this screen.
- **The left side** of the screen is where you will recommend new grants:
  - "**Choose from previous Grantee" –** Charitable organizations and LCF funds that you have given to before can be selected from the drop-down lists.
  - "**Search for other Grantees**" – Will allow you to search for the charitable organization by typing in some basic information and then click the "Search" button. The system will search GuideStar for organizations containing the keywords. GuideStar is an information

service specializing in reporting on U.S. nonprofit companies. The more keywords used, the better the search results will be.

- ▪ "**Enter Grantee information manually**" – Use this section to manually enter a new nonprofit or grantee. You will need to enter the name of the new grantee, an address, zip code and a phone number to move the grant request to the community foundation for approval.
  - o Once the grantee information has been added, you can complete the request by clicking the "Submit" button at the bottom of the page.

- The "**Statements**" tab will show your fund's quarterly fund statements. Fund representatives will be able to view newly created fund statements immediately after they are created as well as past fund statements.
  - o Printing Statements - The system will generate a PDF in a new window in your web browser that you may save or print.

- The "**Donate**" tab will allow you to donate to any LCF fund.

- The "**Files**" tab will contain a copy of your fund agreement, and any other pertinent documents related to your fund.

- Remember to use the **"Logout"** tab to close your Donor Portal. You will be automatically logged out each night even if you do not logout.

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 us for help.

Alerts

We can now alert you every time a donation is made, or a grant is paid out from your fund. These alerts can be utilized or cancelled at any point, but the alerts are not retroactive, so you will not be notified of past grants or donations. Please let us know if you wish to be notified of each donation and/or grant paid.