New Fund Holder Portal!

We are excited to roll out a new design for fund holders to access their fund information 24/7, 365 days a year! The new portal will operate very similarly to the current portal, but you will quickly find there are some GREAT new features!
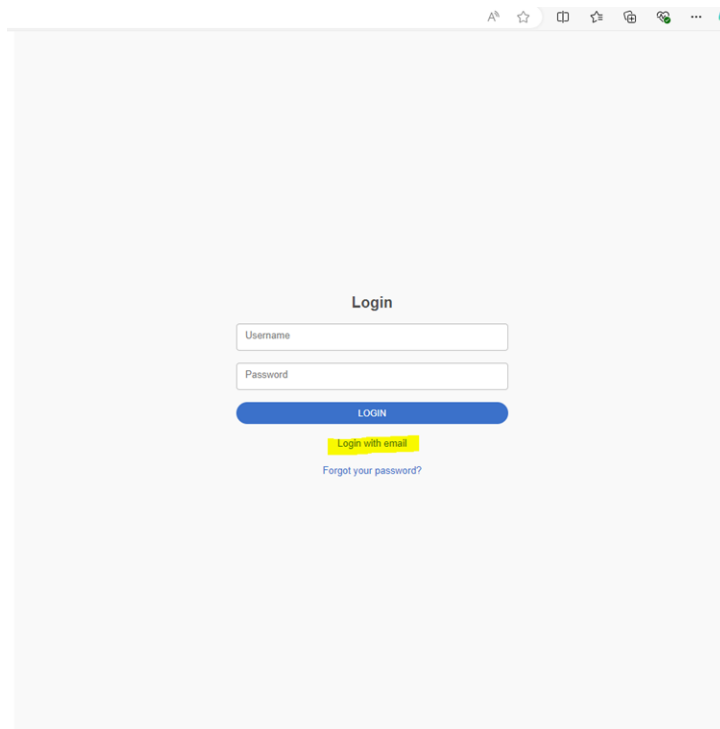
Check it out today! https://laxcommfoundation.fcsuite.com/erp/portal/

Log-in Instructions

You have logged into the portal before:

1. The link above will take you to a page to log in.
   a. If you have already logged into your fund holder portal (the older version OR the new version) you will be able to log in with your **SAME** username and email. Please skip to "Fund Holder Portal Tour" section.
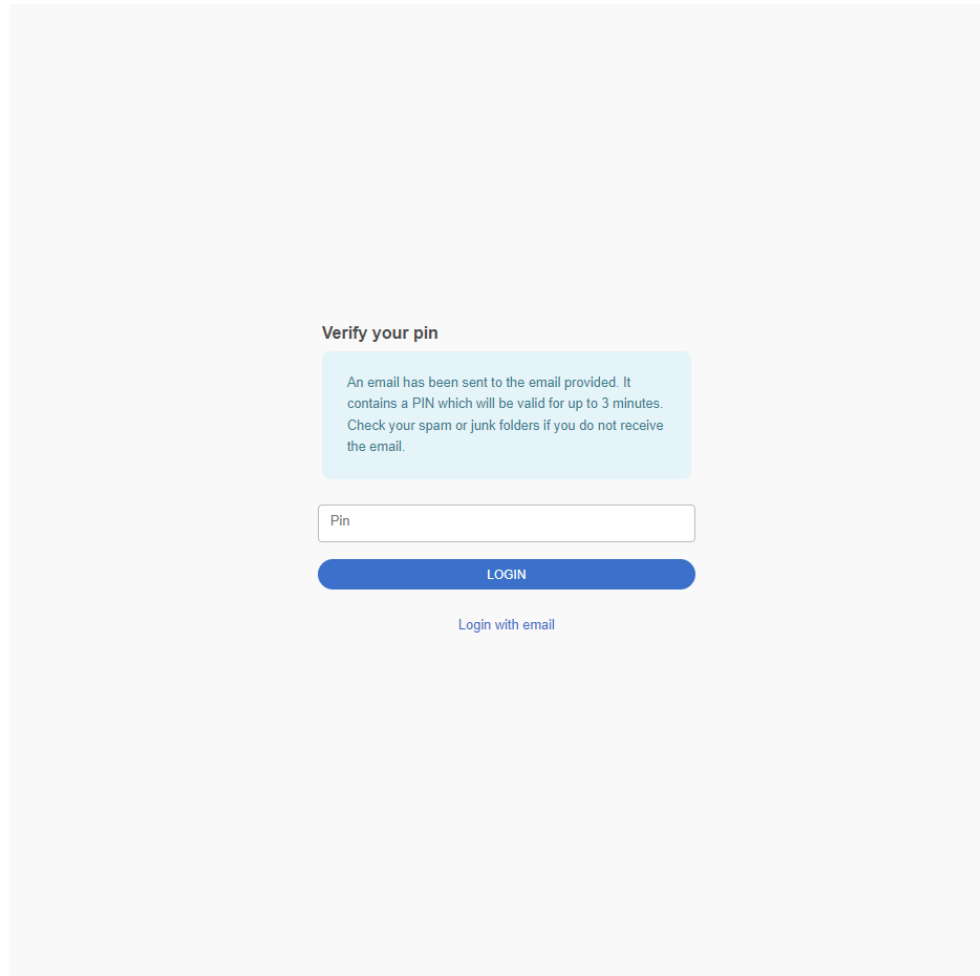
You have NEVER logged into the portal before:

1. The link above will take you to a page to log in.
   a. If you have **NEVER** logged into your fund holder portal you need to click the link under the "Login" button that says **"Login with email"**
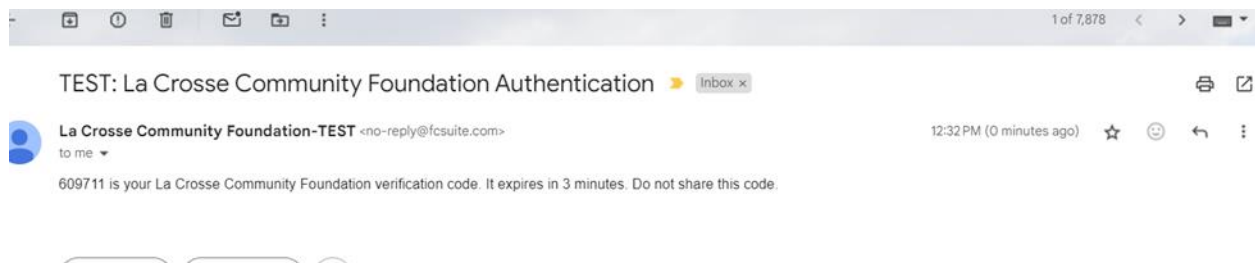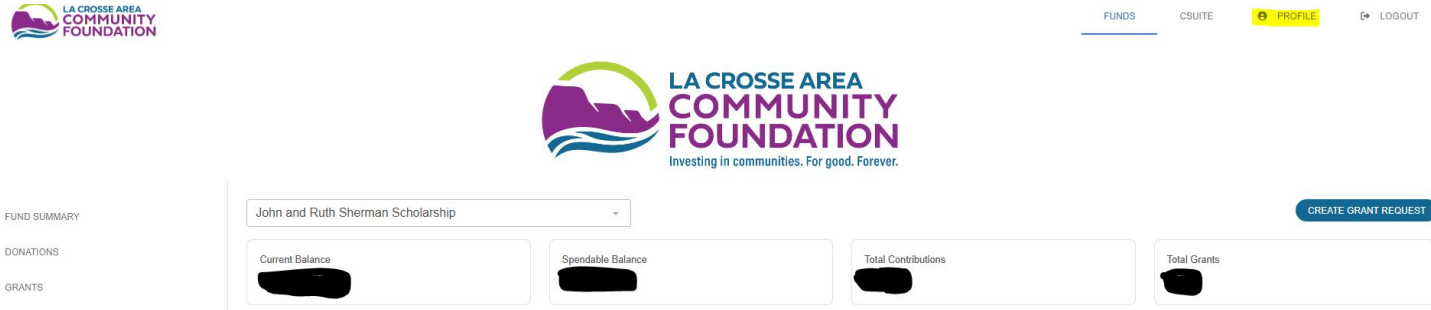
2. Enter your email address and this screen will pop up prompting you to put in a pin number. You will then need to go to your email to retrieve the pin number.

Verify your pin

An email has been sent to the email provided. It contains a PIN which will be valid for up to 3 minutes. Check your spam or junk folders if you do not receive the email.

Pin

LOGIN

Login with email
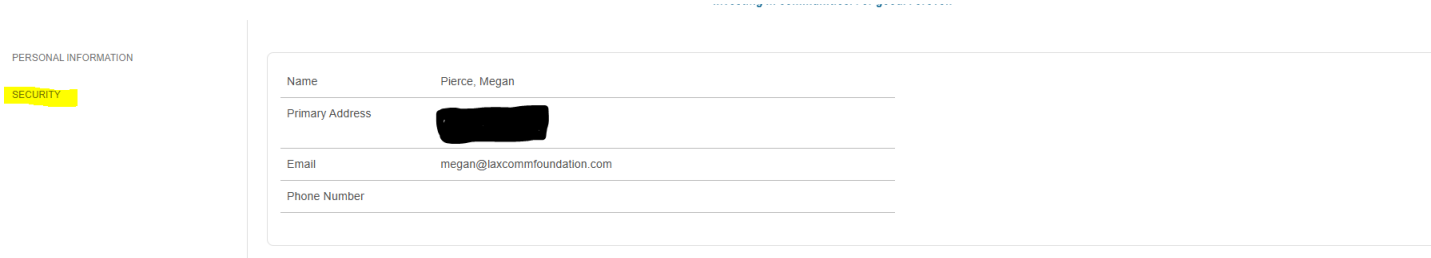
Example email you will receive that contains a one-time PIN to log into the portal

TEST: La Crosse Community Foundation Authentication   Inbox ×

La Crosse Community Foundation-TEST <no-reply@fcsuite.com>
to me ▾

12:32 PM (0 minutes ago)

609711 is your La Crosse Community Foundation verification code. It expires in 3 minutes. Do not share this code.

1 of 7,878

3. After you have logged in, click "Profile in the top right-hand corner

FUNDS   CSUITE   PROFILE   LOGOUT

FUND SUMMARY	John and Ruth Sherman Scholarship			CREATE GRANT REQUEST
DONATIONS	Current Balance	Spendable Balance	Total Contributions	Total Grants
GRANTS				

4. Then, click Security on the left-hand panel

PERSONAL INFORMATION
SECURITY

Name	Pierce, Megan
Primary Address	
Email	megan@laxcommfoundation.com
Phone Number	

5. Add username and password

PERSONAL INFORMATION
SECURITY

Username   ADD USERNAME/PASSWORD

LOGOUT

<u>Username and password Tips & Tricks</u>

- Username does not need to be an email address
- Save username and password in a safe location because you will need to use both to log in every time. (A PIN will not be required to log in every time once you set up a username and password)
- You can change your username and password at any time.
- If you forget your password, you can email or call LACF staff and we can reset your portal log in information.

Fund Holder Portal Tour

Homepage

If your primary email is associated with more than one profile or fund, then each profile will appear once you log in. Click on the profile you want to view details
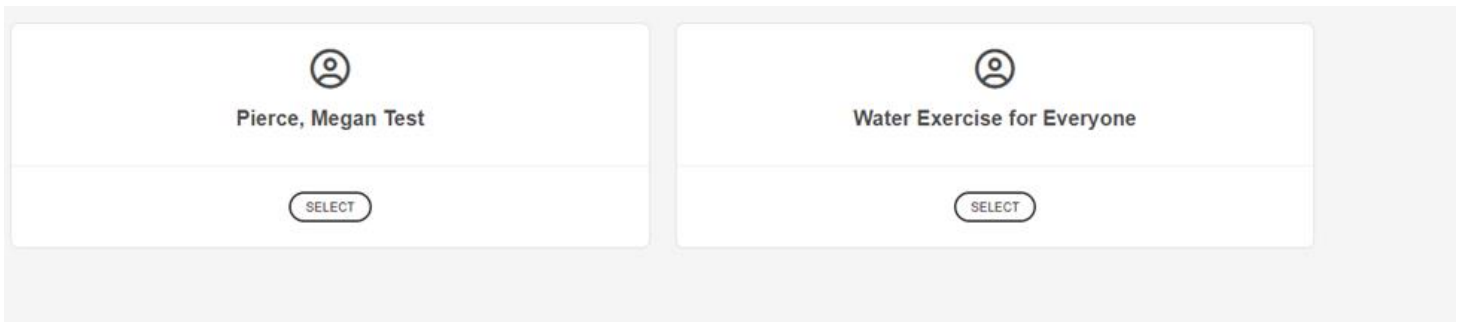

You will then be taken to the home screen. This provides an overall view of the fund in one spot. You can easily find the current balance, total contributions, and total grants made from the fund.

Underneath the overall fund information, you will see the LACF Donor Steward that is assigned to you. Please never hesitate to contact your donor student with questions or concerns.

As you scroll down the rest of the homepage, you will find the Fund Holder Dashboard that provides visual graphics of your fund's activity. Please note you can change the dates of when the information is being pulled. In the screenshot below the graphs are pulling information from 10/1/2023 – 9/20/2024.

The areas highlighted in yellow are links that will take you to different locations in the fund holder portal and are explained on the next page.
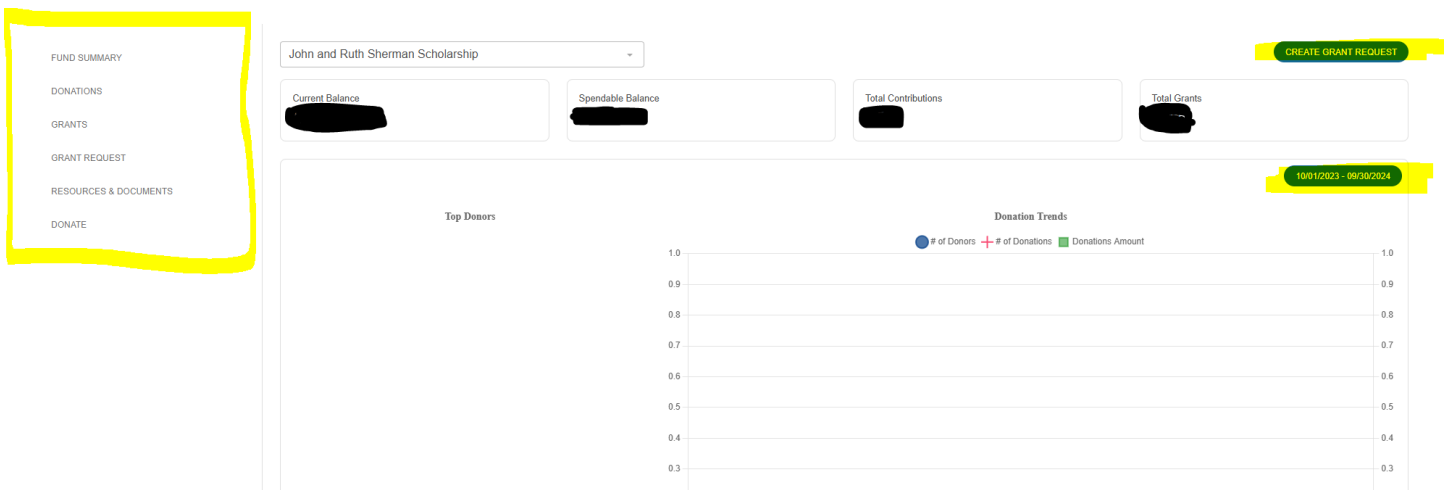
Links from left-side panel

Fund Summary – will take you back to the home page with all of the fund information.

Donations – List of all donations the fund has received. You can "search" and "export" this data

Grants

> **Grant Summary -** display the grantee, the number of grants per each grantee, and the total amount granted to the grantee. Click the grantee name to access grant details which will be displayed on the Grant History tab.

> **Grant History**- displays grant details of grants paid from the fund. Grant ID, date, status, grantee, description, advisor, and amount are displayed along with the ability to copy the grant. The list of grants can be exported.

> **Recurring Grants-** displays grant ID, grantee, start, interval, total grants, created grants, amount, and remaining amount, is displayed in this section. You can edit an already established recurring grant.

Grant Request – List of grants that have been requested

Resources & Documents- All the documents associated with your fund that are available to you at anytime. This frequently includes fund agreements and quarterly fund statements.

Donate- Direct link to the La Crosse Area Community Foundation Giving Hub

Create a Grant Request—*available for Donor Advised Fund Holders*

This button is accessible in the right-hand corner throughout the entire portal. This provides fund holders with a quick and simple way to request grants at any time. After grant requests are submitted an LACF staff member will follow up with you within 2-3 business days.

There are 3 ways for you to search for grantees:

> **Previous Grantee:** Allows you to select from grantees that you have already granted to very easily. This option also lists other La Crosse Area Community Foundation funds that are eligible to receive gifts.

> **Search Grantee:** Broadly search grantees by key words or location. The first option after you click "search" provides all of the results that La Crosse Area Community Foundation has granted. Click the "Candid Results" option and you'll find results all results including grantees LACF has not worked with before. Feel free to explore! You may find a new passion area!

> **Manual Grantee:** Allows you to input all of the grantee information. We recommend you use the first two options before entering a manual grantee. This is easier for you and us!

John and Ruth Sherman Scholarship ▾

CREATE GRANT REQUEST

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.

Grant Request > Choose Type

PREVIOUS GRANTEE   SEARCH GRANTEE   MANUAL GRANTEE