



# FUND ADVISOR PORTAL USER GUIDE



*Legal Disclaimer: Please note that Community Foundation cannot give legal or tax advice but will work hand in hand with your advisor to achieve the results you intend.*

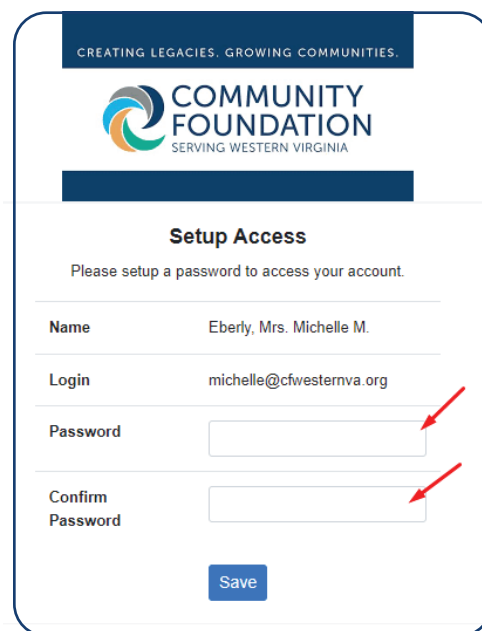
As a fundholder of Community Foundation Serving Western Virginia, you can access the Fund information online through the Fund Advisor Portal. Within the portal, you can easily check the Fund balance, view and download Fund Statements, request and track grants, add to the Fund, etc. The Fund Advisor Portal makes it easy to manage the Fund and is available 24/7 from anywhere, on any device.

## Initial Login Process and Creating Your Account

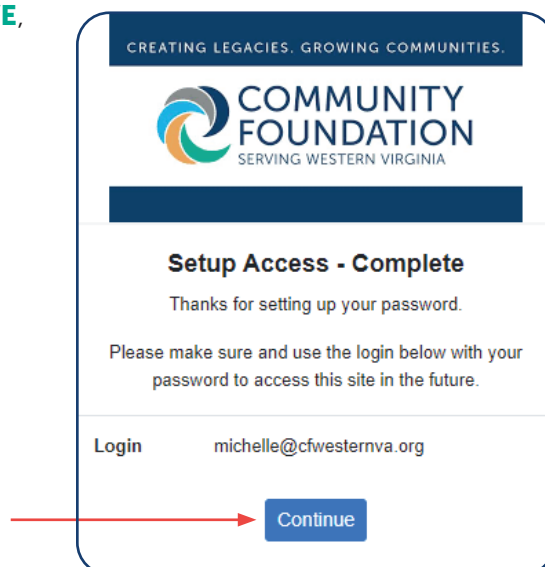
1. You will receive an automated email from Community Foundation Serving Western Virginia at **"no-reply@fcsuite.com"** with a unique invitation link to create your account in the Fund Advisor Portal.

Once you click on the link, you will be prompted to create a password for the Fund Advisor Portal site. Your username will be the email address that we have on file. If you need to update your email, please contact the Foundation.

**NOTE:** For privacy purposes, each Fund Advisor will have a unique login password.



2. Once you have set your password and clicked **SAVE**, you will see a message that the setup is complete. Click **CONTINUE** to go to the login page.
3. When you get to the login page, enter your credentials and log in. Please make sure to keep your password in a safe place.




## Returning Users

To access the Fund Advisor Portal, visit the Community Foundation's website at [www.cfwesternva.org](http://www.cfwesternva.org) and click **FUND ADVISOR PORTAL** at the top of the home page. You will be redirected to the login page where you will enter your username and password.

If you forget your password or 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 Foundation.

**NOTE:** Usernames are case-sensitive.

CREATING LEGACIES. GROWING COMMUNITIES.

**COMMUNITY FOUNDATION**  
SERVING WESTERN VIRGINIA

michelle@cfwesternva.org

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Forgot Password?


If you need to reset your password, please select "Forgot Password." If following the "forgot password" prompt is not successful, please contact the Community Foundation at 540-985-0204.

## Fund Advisor Portal Features

If you are a Fund Advisor for multiple Funds, you will see the **Choose Fund** menu once you have logged in. Select the Fund with which you wish to interact. If you are a Fund Advisor for one fund, the Fund's home page will appear. You can select the tabs at the top of the page to review the different areas available to you as a Fund Advisor.

\*If you are an Advisor for more than one Fund, this screen will appear when you log in.

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**COMMUNITY FOUNDATION**  
SERVING WESTERN VIRGINIA

Choose Fund

ABC Donor Advised Test Fund

Jane Doe Donor-Advised Fund

ABC Donor Advised Test Fund

Home

Choose Fund

Gift History

Grants Awarded

Grant Recommendations

Fund Statements

Documents

Donate

Donation Receipts

Logout

Current Balance: \$28,000.00

Spendable Balance: \$23,000.00

Fund Advisors are: Eberly, Mrs. Michelle M.

Recent Contributions

Date	ID	Contributor	Amount
07/12/2022	18820	Eberly, Mrs. Michelle M.	25,000.00

Recent Grants

Date	ID	Status	Recipient	Amount
07/12/2022	22219	Approved	Community Foundation Serving Western Virginia - Roanoke	2,000.00

- The **Home** tab shows the Fund's Current Balance plus the Spendable Balance (also called Grants Budget). (**NOTE:** The current balance is as of the last available quarterly balance). This area also lists all Fund Advisors and shows recent contributions to the Fund and recent grants made from the Fund.
- The **CHOOSE FUND** tab is only visible if you are a Fund Advisor to other Funds.
- The **GIFT HISTORY** tab shows all contributions or donations to the Fund.
  - Clicking on the Contributor's name will bring up their history of contributions.

<a href="#">Home</a>	<a href="#">Gift History</a>	<a href="#">Grants Awarded</a>	<a href="#">Grant Recommendations</a>	<a href="#">Documents</a>	<a href="#">Donate</a>	<a href="#">Donation Receipts</a>	<a href="#">Logout</a>
<b>Donor Details</b>		<b>Contributions</b>					
<b>Name</b>	Smth, Mr. and Mrs. John 			<b>Date</b>	<b>Description</b>	<b>Amount</b>	
				12/06/2021	addition to fund	2,500.00	
				12/28/2020		2,500.00	

- The **GRANTS AWARDED** tab will show the history of grants made from the Fund. You also have the option of creating grant recommendations from previous grantees by clicking on the **COPY** button.

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[Donation Receipts](#)
[Logout](#)
[Export](#)

Grantee Summary

✚ Grantee	✚ Grants	✚ Amount
Blue Ridge Autism and Achievement Center	1	890.00
Botetourt Resource Center	1	860.00
Girls on the Run Roanoke Valley	1	880.00
Good Samaritan Hospice Inc	1	1,890.00
Help Save the Next Girl Foundation	1	890.00
Orchard Hills Achievement Center	1	2,110.00
PATH Foundation	1	2,000.00
YMCA of Virginia's Blue Ridge	1	1,000.00

Grants

✚ Date	✚ ID	✚ Status	✚ Recipient	✚ Description	✚ Amount	
12/16/2021	19744	Paid	Orchard Hills Achievement Center	for the music program	2,110.00	<a href="#">Copy</a>
09/14/2020	13688	Complete	PATH Foundation	designated for PATH Partnerships for support of VFN - EIN 85 191194	2,000.00	<a href="#">Copy</a>
05/26/2020	13549	Complete	Good Samaritan Hospice Inc		1,890.00	<a href="#">Copy</a>

- As a Fund Advisor you are able to make grant requests from the Fund by clicking the **GRANT RECOMMENDATIONS** tab. See page 6 for the section titled **SUBMITTING A GRANT RECOMMENDATION**.

### \*Coming Soon\* Features

- Grant Catalog — A catalog is a crowdfunding tool that you may search for funding opportunities and projects. This will be similar to the **NONPROFIT WISH LIST** that was previously distributed to Donor Advisors.
  - The **FUND STATEMENTS** tab is where you will find the annual statements. Next to the Fund Statement you wish to view, click “print” and the system will generate a PDF in a new window that you may view, save, or print.
- The **DOCUMENTS** tab will contain important documents that can be viewed or downloaded i.e. Donor-Advised Fund Handbook, Fund Advisor Portal User Guide, Fund Agreement, etc.

Home	Gift History	Grants Awarded	Grant Recommendations	Documents	Donate	Donation Receipts	Logout
Files							
Date	Filename	Description					
08/30/2021	John and Jane Doe Fund	Fund Agreement					

- The **DONATE** tab allows you to make gifts to the Fund, or other Funds administered by the Foundation. You may also set up a recurring donation. Please refer to the section titled **Making a Gift via the Fund Advisor Portal**, on page 8.
- The **DONATION RECEIPTS** tab shows your tax receipts. Next to the tax receipt you wish to view, click the ID number and the system will generate a PDF that you may view, save, or print.
- Remember to use the **LOGOUT** tab to close the Fund Advisor Portal.



## Submitting a Grant Recommendation

To recommend a grant(s) from the Fund, click on the **GRANT RECOMMENDATIONS** tab.

Choose a Grantee in one of four ways:

- **Choose from Previous Grantee** — choose the organization you want to support from this drop-down list of organizations that you have previously supported.
- **Select Other Foundation Funds** — choose a Fund you want to support from this drop-down list of Funds at the Community Foundation. NOTE: If the Fund you want to support is not listed, please contact the Foundation for further guidance.
- **Search for Other Grantees** — search for the organization you want to support in Guidestar, the world's largest database of nonprofit organizations. The more keywords used the better the search results will be. Once you find the organization you want to support, click **CREATE REQUEST**.

- **Enter Grantee Information Manually** — if you can't find the organization you wish to support, you will need to enter the organization's information manually: organization name, address, and phone number. The fields marked with a red asterisk are required; providing all the requested information allows us to ensure your grant recommendation is processed as accurately and efficiently as possible. Once you enter the information, click **SUBMIT**.
- Once the organization has been selected, you will be directed to a new page to provide pertinent grant details including the grant description and amount.
- In the description field, please provide the grant purpose. Keep in mind that if you do not designate a specific grant purpose, your grant will be designated **for general purposes**.
- A \$100 minimum is required for each grant request.

This screenshot shows the 'Choose from previous Grantee' section of the grant recommendation form. It includes a dropdown menu for 'Grantees you have given to in the past', a section for 'Other foundation funds' with another dropdown, and a 'Search for other Grantees' section with input fields for Name, City, and State, along with a 'Search' button. Below these is an 'Enter Grantee information manually' section with required fields (marked with a red asterisk) for Name, Address, City, and State.

This screenshot shows the 'New Grant Request' form. It contains fields for Grantee (pre-filled with 'Good Samaritan Hospice Inc'), Description (with a 0/255 character limit), Amount, and checkboxes for Anonymous and Recurring. There is an Attachment section with a 'Choose Files' button and a note 'No file chosen (or drag and drop anywhere on the page)'. Below this is an 'Attachment Description' field and a 'Special Instructions' text area. A 'Review' button is located at the bottom left of the form.

- You can choose to remain anonymous by selecting the **Anonymous checkbox**.
- If you would like to make this a recurring grant, check the **Recurring checkbox**. Then enter the recurrence start date and interval (monthly, quarterly, semi-annually, annually) and the number of recurrences.
- If there are any attachments and/or additional notes, please complete that section.
- If you have additional instructions or notes you would like us to see, please enter them in the Special Instructions box.
- Click **REVIEW**.
- Review your grant request details and click **SUBMIT REQUEST**. Once you submit the request, you will receive an automated confirmation email (no-reply email from CFSWVA) and our team will begin processing the grant request.
- The **GRANT RECOMMENDATIONS** tab will also show a list of grants requested to be paid along with the current status of the grant. Grant Requests still in the **REQUEST** status can be canceled from this screen.

### ABC Donor Advised Test Fund

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[Choose Fund](#)
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[Logout](#)

Please use this form to recommend a grant from your fund. Select a grantee from the drop-down menu, search for a grantee or enter a new nonprofit organization manually. The Community Foundation will receive notification of your recommendation and conduct the required due diligence to process the grant. The most recent grants already processed from your fund are listed to the right side of this screen. For a complete list of grants awarded from your fund, click on the Grants Awarded tab above.

**Choose from previous Grantee**

Grantees you have given to in the past

#### Grants

Date	Status	Recipient	Description	Amount	
07/12/2022	Request	Community Foundation Serving Western Virginia - Roanoke Corporate Office	for general purposes	500.00	<div>Cancel</div>



## Making a Gift via the Fund Advisor Portal




- Click on the **DONATE** tab. This will take you to the donate page. You can choose to make a gift to the Donor-Advised Fund, the Foundation's Operating Fund, and/or unrestricted Community Enrichment Fund. You can also make a gift to other Community Foundation funds by using the search bar.
- Click on the **DONATE** button next to the Fund name.
- Enter the Donation Amount and Tribute Information (if applicable).
- Click **ADD TO CART**.
- You can either continue giving or checkout.
- Complete the Checkout Information and click **REVIEW**.



Thank you for your interest in donating to  
Community Foundation Serving Western Virginia

In addition to the Funds listed below please use the **show all funds** list search feature below to locate the fund of your choice.  
We respectfully request that minimum donations be at least \$25.00.  
If you have questions, please contact us at (540) 965-0204 or [support@cfswwv.org](mailto:support@cfswwv.org)

**Donate To A Fund**

	<b>Donate</b> <b>Operating Fund</b> I/We would like to support the administration of the Foundation and its work in the community. *We are honored to recognize donors who give annual administrative support to the Community Foundation in the amount of \$500 or more as "Friends of the Foundation" for that fiscal year.
	<b>Donate</b> <b>Community Enrichment Fund</b> Established by a member of the Board of Governors.
	<b>Donate</b> <b>Women in Philanthropy</b> My donation is for WIP membership dues. Note: Women in Philanthropy is an initiative of our Martinsville Regional Office and supports community needs in Martinsville, Henry County, and Patrick County. Women in Philanthropy (WIP) recognizes and celebrates the important role that women play in making our community a wonderful place to live. The mission of Women in Philanthropy is to encourage, increase and recognize women's participation in philanthropy and to make significant impact grants in the local community.

**Donation**

Fund: Operating Fund

I/We would like to support the administration of the Foundation and its work in the community.  
\*We are honored to recognize donors who give annual administrative support to the Community Foundation in the amount of \$500 or more as "Friends of the Foundation" for that fiscal year.

Donation Amount:

**Tribute Information (optional)**

☐ Donation in Memory or Honor

Special Instructions:


**Add To Cart**

**Cart Summary**

Description	Amount	
Donation to fund :: Operating Fund	200.00	<b>Remove</b>
<b>Total</b>	<b>200.00</b>	

**Checkout Information**

Privacy: ☐ I wish my donation to remain anonymous

Name: Doe, Mr. John D. 

Email: john\_doe@email.com

Phone: 540-123-4567

Recognition Name (optional):   
*How do you want to be recognized?*


Increase Donation: ☐ Add 3.0% to your donation to cover our processing fees

**Review**



- This will take you to the Payment Information page. Click on the **PAY WITH CREDIT CARD** tab to proceed.
- Enter your credit card information and then click **PAY**.
- You will receive an email that will serve as your tax receipt (no-reply email from CFSWVA). Please keep this email for your records.

Payment Information

Name	Doe, Mr. John D. 
Email	john_doe@email.com
Phone	540-123-4567
Total	200.00

Cart Summary

Description	Amount
Donation to fund :: Operating Fund	200.00
Total	200.00

Pay with Credit Card

Update Information

☐ Save this card for my future use

## Alert

The Community Foundation can alert you every time a donation is made or a grant is paid from the Fund. These alerts can be activated or canceled at any point. If you wish to be notified of each donation and/or grant requested and paid, please contact us.

## Additional Questions about the Fund Advisor Portal?

If you have any questions or are experiencing any issues with the Fund Advisor Portal, please contact:



**Michelle Eberly**  
[michelle@cfwesternva.org](mailto:michelle@cfwesternva.org)  
 540-985-0204

OR



**April Haynes**  
[april@cfwesternva.org](mailto:april@cfwesternva.org)  
 276-656-6223