North Lee Community Foundation Donor Portal for Fund Advisors

As a Fund Advisor you have an online portal where you can access information about the funds you manage. **The Community Foundation will send you a login name and a link to access your Donor Portal via email**. Click on the link in the email and you will be prompted to create your own password to the donor portal site.

Credentials:
- **Your username is YOUR email address associated with your fund**
- **The password is the same password YOU created in the link**

Once your password is created, go to the North Lee Community Foundation Donor Login tab at **www.northleecf.org** (an orange button located at the top right of the page) and enter your credentials and log in.

Need help? Contact Philip Ricketts, North Lee Community Foundation Donor Officer, by phone at **319.670.0207** or by email at **info@northleecf.org.**

If you serve as an advisor for multiple funds, you will see the "Choose Fund" menu once you have successfully signed into the Donor Portal System. Choose the particular account with which you wish to interact.
- If you are listed as an advisor for only one Fund, you will go directly to the Home page for that Fund.

Once you have logged in you can select the tabs at the top of the page to review the different areas available to you as a Fund Advisor.

- The "**Home**" tab shows the Fund's Current Balance plus the Spendable balance (if applicable). This area also lists all fund advisors, shows recent contributions and recent grants given for the Fund.

- The **"Choose Fund"** tab is visible if there are other funds to select and view.

- The **"Contributions"** tab shows all contributions or donations to the fund.
    - 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.

- As a Fund Advisor you may be able to make Grant Requests from the fund's assets by clicking into the "**Grant Request**" Tab.
  - This tab will show a list of Grants requested to be paid out on the right with the current status.
  - Grant Requests still in the "request" status can be canceled from this screen.
  - The left side of the screen is where Grant Requests are created.
  - Previous Grantees and Funds that you have given to can be selected from drop down lists.
    - The bottom section is where a new Nonprofit or Grantee can be entered manually. 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.
    - In the middle of the left side of your screen is 'Search for other Grantees'. This is helpful because you can type in some keywords and 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.
    - 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 fund statements if they are setup for the fund. Fund Advisors will be able to view newly created fund statements immediately after they are created as well as past fund statements.
  - Printing Statements - The system will generate a PDF in a new window in your web browser that you may save or print.

- 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 your Foundation.

Alerts
Your community foundation can 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.
- If you wish to be notified of each donation and/or grant requested and paid, contact your Community Foundation.