



Donor Portal Guide

Triangle Community Foundation is committed to providing our fundholders with the best tools and resources to make critical grants where they are needed most. The Foundation uses an online Donor Portal to provide a secure and easy way through which you can access fund information. Depending on the type of fund you advise, you may be able to view the latest fund balances, make grant recommendations, or review gift history. **The information provided below is meant to guide you in learning this system.** If you need additional assistance or have any questions, please contact the Donor Services team at 919.474.8363 or by emailing donorservices@trianglecf.org.

Logging into the Donor Portal for the First Time

Fundholders will receive an email directly from the system with a new login name (your email on file) and a link to access your personal Donor Portal page. *The email will come from this address: Triangle Community Foundation <no-reply@fcsuite.com>.* Select the link and you will be prompted to create a password to the Donor Portal site. This link will expire after 30 days.

Logging into the Donor Portal After Setup

To log in after setting up your account in the future, navigate to our website at trianglecf.org and select Logins on the top right-hand side of the homepage. Be careful to select the Donor Portal, not the Grant Portal! If your screen looks like this, you are in the right place:

triangle community FOUNDATION
MAKE A DIFFERENCE

Username

Password

[Forgot Password?](#)

Login

Please be aware that your user name and password are case-sensitive. Enter your user name using all lowercase letters. If you are having trouble logging in, please contact us at donorservices@trianglecf.org

Note: If you have the old DonorCentral portal bookmarked in your browser, it will no longer work. Please delete this bookmark and create a new one for the new portal. We recommend you make note of your new username and password in a safe place for your records.

For Individuals who Advise Multiple Funds

If you serve as an advisor for multiple funds, you will see the "Choose Fund" menu once you have successfully signed into the 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 homepage for that fund.

Tab Selections

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. As a reminder, depending on the type of fund that you manage at the Foundation, not all the following tab selections may be available to you.

For reference, here is what the tab selections may look like on your screen:



- **Home Tab**
 - This tab provides the fund's current balance. This screen lists all Fund Advisors, shows recent contributions to the fund, and recent grants made for the fund.
- **Contributions Tab**
 - If applicable, this tab shows the detail for each gift received into the fund. Unless the donor has requested to remain anonymous, you will be able to view more detail about each donor by clicking their name. You can also click the "export" option on the far right side of the menu bar to export the details into an excel spreadsheet for your records.
- **Grants Tab**
 - This tab provides details on all grants distributed from the fund. The top section provides a summary of grants by grantees. Scroll past the summary section to see grants listed from most recent to oldest.
 - Fundholders can make copies of previous grants by selecting the blue "Copy" button. This will create a new grant request with the same details as the previous grant recommendation.
 - The grant status reflects where the grant is in the Foundation's process. Request status means

that the recommendation has been submitted. Paid status means the grant has been mailed and paid to the grantee. Please contact the Foundation if you have questions about the status of a grant.

- **Grant Request Tab**

- As a Fund Advisor, depending on the type of fund, you *may* be able to make grant requests from the fund by clicking on the "Grant Request" Tab. To request a grant, you can either "Choose from a Previous Grantee" which will list your previous grantees, or select a new grantee through the following 3 options:

- 1. **Grant to a Foundation Fund**

- a. Click on any of the Foundation's promoted funds (e.g. Fund for the Triangle or Send A Kid To Camp) to make a grant to one of these causes.

- 2. **Search for other Grantees**

- a. This is helpful because you can type in keywords and click the SEARCH button. The system will search GuideStar for organizations containing the keywords that you've selected. GuideStar is an information service specializing in reporting on U.S. nonprofit organizations. The more keywords used, the better the search results will be. Please note that this tool does not automatically guarantee that an organization will pass the Foundation's due diligence, that procedure will still take place during processing

- 3. **Enter a Grantee Manually**

- a. The bottom section of this tab is where a new nonprofit or grantee can be entered manually. You will need to enter the name of the grantee, an address, zip code, and a phone number to move the grant request to the Foundation's staff for due diligence.

- Regardless of how you choose to submit your grant, once the grantee information has been added, you can complete the request by clicking the SUBMIT button at the bottom of the page.
- This tab will also show a list of grants requested to be paid out on the right with their status. Grant requests still in the REQUEST status can be canceled from this screen, however, once Foundation staff begin processing you will no longer be able to cancel the grant.

- **Fund Statements Tab**

- This tab is available to review current and previous fund statements dating back to September 2020. If you would like to see a statement before that time, please ask your fund liaison. If you receive fund statements via mail, they will not be listed on the portal.

- **Giving Together Tab**

- This tab is available to learn about active Giving Together campaigns from the Foundation. Our Giving Together program increases impact by pooling Foundation and donor resources to support strong organizations and collaborations making a difference in our community. If there is an open campaign, you will be able to select from the option(s) inside this tab to make a grant alongside your fellow fundholders to maximize your impact from the fund that you manage.

- **Donate Tab**

- The Donate tab allows you to contribute via credit or debit card to any listed funds at the Foundation. By clicking this tab, you will be redirected to our website's donation page and invited to select the fund you want to contribute to. *Please note: the Foundation is unable to support active fundraising or solicitation for contributions to any of the funds it holds.* If you have questions about your contribution using the DONATE button, please contact the Donor Services team at 919.474.8363 or by email at

Logging Out of the Portal

Remember to use the "Logout" tab to close the Donor Portal securely. You will be automatically logged out each night even if you do not remember to log out, so we recommend that you make note of your new username and password in a safe place for your records.

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 the Donor Services team at 919.474.8363 or by email at donorservices@trianglecf.org.

Additional FAQ

1. How many logins do we get to access the Donor Portal?

- a. Currently each fund receives one login. If you would like to switch your email on file, contact Donor Services or your Fund Liaison.

2. I want to update my information. Can I do that in the Donor Portal?

- a. You can update your personal information in the donor portal. Click the profile icon in the upper right-hand corner, then proceed to edit the information. You can edit the email address that you use to log in to the donor portal. Any changes made in the donor portal will be reflected in the Foundation's internal records.

3. I want to update the fund's information. Can I do that in the Donor Portal?

- a. If you want to update details for the fund (such as name, investment portfolio, or those associated with the fund) please contact the Donor Services team.

4. How will I know if I submitted a grant successfully?

- a. You can check the status of the grant in the donor portal, on the Grants tab.

5. How long does it take to process a grant recommendation?

- a. Grant recommendations received by Sunday at 11:59 PM will be in the queue for due diligence review and processing that week. Occasionally it is necessary to adjust this timeline due to holidays or other one-time occurrences

6. How will I know when my grant is processed?

- a. All fund advisors will receive an email notification when a grant is posted and mailed. If you do not want this notification, please contact Donor Services. You can always check the status of a grant in the Donor Portal.

7. Why can't I recommend a grant?

- a. Not all fund types have the same permissions, what you were able to do in the old system is the same as what you will be able to do in the new system. Agency Fundholders who have questions about this should contact [Tanaya Suddreth Lynch](#).

8. What do I do if I forgot my Fund Liaison's contact information?

- a. All our staff is listed on our [website](#) with their contact information. During this time, while we are working remotely, emailing us is the fastest way to ensure a response.

9. On what devices may I access the Donor Portal?

- a. Unlike our old system, the new Donor Portal is compatible with most devices that can access the internet through a browser (e.g. your smartphone, tablet, and PC). However, there is no separate app for the system.
- b. The best browser to use is Google Chrome.

10. Can I find my tax receipts in the Donor Portal?

- a. Currently, tax receipts are not available in the donor portal. The Foundation emails you a tax receipt when your gift is processed. You can always email Donor Services to receive a new copy of a tax receipt.

11. Is the fund balance listed in the donor portal of money listed all that I can grant from the fund?

- a. The fund balance listed in the Donor Portal lists the total amount in the fund. However, there are fund minimums for funds and they vary by fund type. (For example, donor-advised funds must maintain a minimum of \$10,000.) If you have questions about your funds, please contact your Fund Liaison.

12. Why is my contribution amount different than the amount I sent in stocks?

- a. The Foundation values the gift on the date we receive it in our Schwab account. Our Finance team can't see it in Schwab to sell it until the following day, so there is almost always a day lag, which causes a gain or loss when they sell the stock. The cash proceeds posted to the fund are the amount Schwab sends to us, and the donation value is the high/low average on the donation date times the number of shares received (for mutual funds, we use the daily price).

13. How quickly will my contribution show up in my Donor Portal?

- a. The Foundation will process your gift in 7-10 business days. During certain peak periods, such as the end of the calendar year, gift processing may take longer than normal to complete