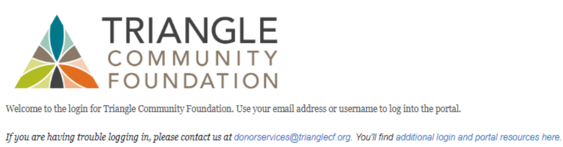
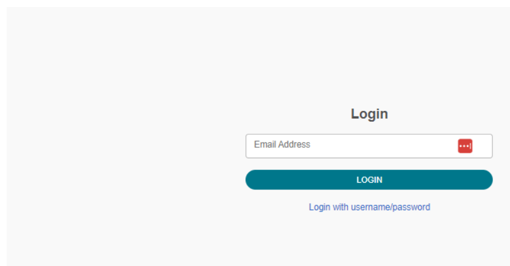
Donor Portal Guide

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 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

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:

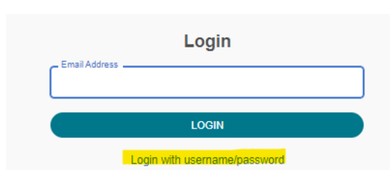




Fund advisors will login with your primary email and then authenticate with a PIN. If you are logging in for the first time, enter your email address and you will be sent a PIN to verify your email. Note this code is only **active for 3 minutes** so don't delay entering it into the system. Once you enter your code, you will be logged into the system.

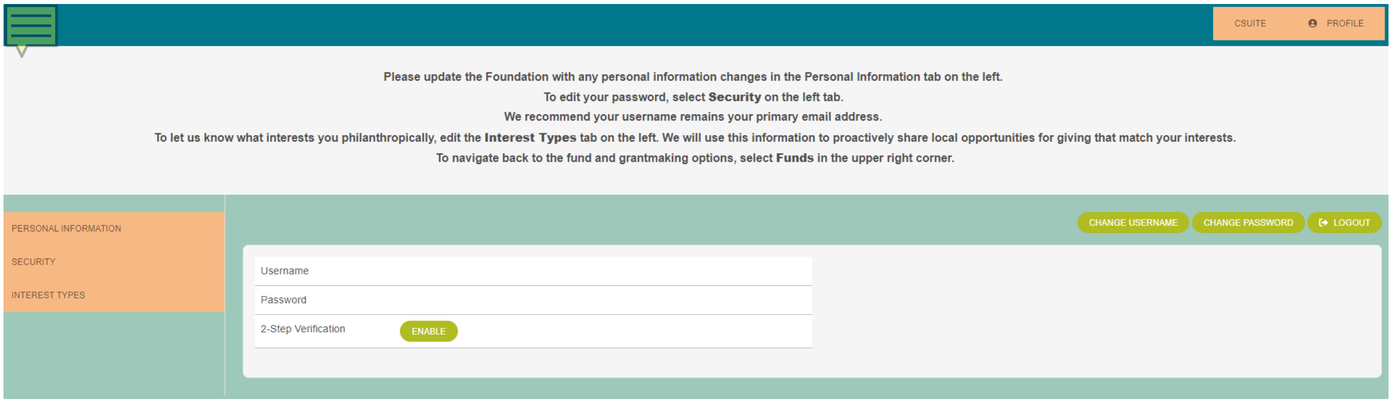
<u>If you are logging in for the first time, you can either decide to use your email and receive a pin to log in every time to the system or set up a username and password. These options will remain on the initial login page.</u>

(Current fundholders can select "Login with username/password" on this page to log in with their current credentials. You may be prompted to create a new password depending on how strong your password is.)



To set up a username and password, navigate to the profile icon on the top right-hand side in the portal. Click on Profile and then select "Security" on the left-hand side. You can enter your username and password here. We recommend using your primary email address as your username.

Updated as of 10/07/2024



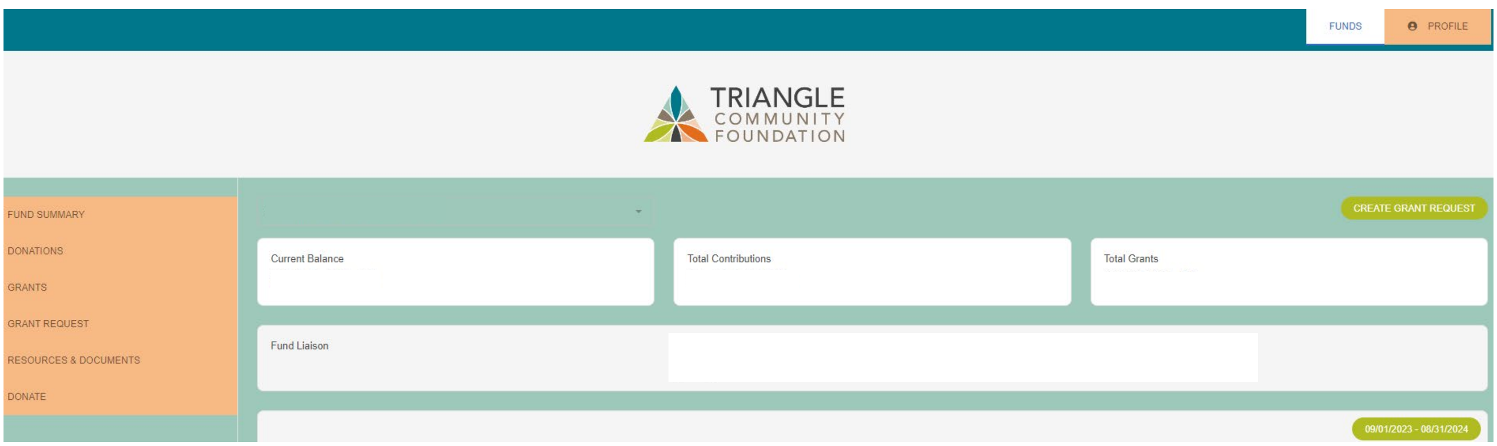
For Individuals Who Advise Multiple Funds

If you advise multiple funds, you will see all the funds you advise listed on the home page of the portal. Choose the 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 on the left-hand side 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:



- **Fund Summary Tab**
  - This tab provides the fund's current balance, your fund liaison's information, total grants and contributions as well as a series of charts to see the fund's activity visually.

- **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 green "export" button on the right side of the screen to export the details into an excel spreadsheet for your records.

- **Grants Tab**

- The top menu will show 3 options to learn more about the grants from the fund: Grant Summary, Grant History and Recurring Grants. This tab provides details on all grants distributed from the fund.
- **Grant summary** which lists total cumulative grants by grantee.
- **Grant History** lists each individual grant made from the fund, starting with the most recent.
    1. 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.
    2. 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.
- **Recurring Grants** lists any recurring grants associated with the fund. By selecting the individual recurring grant, the option to edit the recurring grant will appear on the right-hand side.

- **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, first select the Create Grant Request button, then select from the following 3 options to proceed in your grantmaking request.
        1. **Previous Grantee**
            a. This will give you the option to choose from a grantee you have given to in the past, a Foundation fund you have given to in the past, or other Foundation funds you might want to support.
        2. **Search Grantee**
            a. This selection allows you to search for a grantee based on name, address or EIN. The system will search the Foundation's database as well as Candid for organizations containing the keywords that you've selected. Candid is an information service specializing in reporting on U.S. nonprofit organizations. The more keywords used, the better the search results will be.
            b. Results will be displayed from the Foundation's database and then Candid.
            c. 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. This selection allows you to enter nonprofit or grantee details 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 filling out the remaining details of the grant request and clicking the SUBMIT button at the bottom of the page.

- **Resources and Documents 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.
    - For agency fundholders, this tab will also display files related to the fund's authorized users.
- **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 Giving Hub 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 donorservices@trianglecf.org.

Logging Out of the Portal

Remember to log out of the Portal when you have completed your activities. Navigate to the profile icon in the right-hand corner, then select the green Logout" button 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 cannot gain access to your account, 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 or update it in the profile section of the Portal.

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. Any changes made in the donor portal will be reflected in the Foundation's internal records.
    b. Please consider adding your philanthropic interests into the profile section of the portal. This will allow us to contact you to share potential giving opportunities that match your interests!
    c. If you need to update your primary email, please contact the Donor Services team.

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 Grant Request tab. Additionally you should receive an emailed grant confirmation once the grant has been posted and mailed to the grantee.

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

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. 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. Please 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. **I want my Donor Portal experience to be the most secure. What recommendations do you have?**
    a. To make your Donor Portal experience as secure as possible, we recommend the following steps:
        - Navigate to the Profile tab, then select Security on the right-hand side. Click the Change Username button and create a username that is not your primary email address.
        - Either login with a pin every time or enable 2 step Verification
            - Enable 2 factor authentication: Navigate to the profile tab in the upper right hand of the Portal, then select Security. You should see a 2-step verification Enable button to turn this functionality on.
14. **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