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GETTING STARTED:

Central Carolina Community Foundation uses an online Fundholder Portal to provide an easy way for you to access fund information. Depending on your relationship to the fund, you may be able to view fund balances, view fund statements or make grant recommendations.

We will email you, using the email address on record, a username and a link to access your fundholder portal. *(If you need to update your email address, please contact advancement@yourfoundation.org).*

Once you receive the email, open the link, and you will be prompted to create your own password to the fundholder portal site. Once your password is created select "Save". **Remember to save your login email and password in a secure location.** *All log in information is case-sensitive. The login page will indicate that you successfully set up access to the fundholder portal. You can select "Continue" and arrive at your fundholder page.

FUND ADVISOR TYPES AND PERMISSIONS:

Fund Advisor: Can view all fund activity and can recommend grants.

Primary Contact: Can view all fund activity and can recommend grants.

CC on Statements: Can view fund statements.

CC on Gifts: Can view fund acknowledgement letters/tax receipts.

TIPS:

You can use the back arrow to navigate to a prior page.

Under each tab, if the sort symbol appears you can sort on the field. 

Under each tab, if the filter symbol appears you can filter on the field. 

Remember to use the "**Logout**" tab to close your Fundholder Portal. You will be automatically logged out each night even if you do not log out.

TABS:

If you serve as an Advisor for only one Fund, you will go directly to the "**Home**" page for that Fund.

If you serve as an Advisor for multiple funds, you will see the "**Choose Fund**" menu. Choose the fund with which you wish to interact.

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



The **"Home"** tab shows the fund's "Current Balance" plus the "Spendable Balance" (if applicable). This area also lists all Advisors for the fund, shows recent contributions into the fund, and recent grants from the fund. *Please note: the current balance will reflect the latest statement balance, plus recorded contributions, less grants recommended.

The **"Choose Fund"** tab is visible if you have access to multiple funds. Using this tab, you can easily navigate to any of your funds without logging out of the fundholder portal.

The **"Contributions"** tab shows all contributions/donations into the fund. Clicking on a Contributor's name will bring up their history of contributions and fundholder details. * Please note- contributions received prior to October 2021 may not provide all details as to what type of contribution was made (i.e.: stock or cash gift).

The **"Grants"** tab will show the history of grants requested from the fund. The top section of this page will show a summary of grants and the lower section will provide details on each grant (e.g., grant date, designation, etc.) *If you schedule recurring grants, these will appear after the summary of grants.

The **"Grant Recommendations"** tab will allow you to make Grant Recommendations from the fund's assets only if you are a Fundholder Advisor or Primary Contact. No other fund Advisors will have access to requesting grants.

- This tab will show a list of grants requested to be paid out on the right-hand side with the status. Grant Requests in the **"Request"** status can be canceled from this screen.
- The left side of the screen is where Grant Requests are created. You can request a grant several ways:
 - **Grantee from giving history:** Choose a grantee that you have already given to from your giving history under the "Grantees you have given to in the past" drop down list.
 - **Other Foundation Funds:** Choose any of our funds or programs by selecting the drop-down box labeled "Other foundation funds"
 - **Search for other grantees:** In the middle of the left side of your screen is 'Search for other Grantees'. This is helpful because you can type in keywords and click the "Search" button. The system will search the Central Carolina Community Foundation database and [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.
 - **Enter a new grantee:** The bottom section is where a new nonprofit/ 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.
 - Once you select the Grantee, the following page will allow you to enter the following:
 - **Description.** This is where you will indicate:
 - If the grant is for a particular program or cause within the bigger nonprofit organization.
 - If the grant is "In honor of" or "In memory of" someone.
 - If the grant should be directed to a specific person or department at the organization.
 - If the description box is blank the grant will be issued as an "Unrestricted Gift".
 - **Please do not list that the grant is designated for a pledge, sponsorship, membership, or for the benefit of a person. These**



requests will be declined. A grant can be designated "to be used at the discretion of John Doe" or "to support the work of John Doe".

- **Please note: descriptions cannot exceed 250 characters.**
- **Grant Amount.** Grants must be a minimum of \$250.00.
- **Anonymous:** Select if you wish for the grant to be anonymous.
- **Recurring:** Select if you wish for the grant to be recurring. If you select "Recurring" new fields will populate and you can indicate when the grant should start, the interval (Monthly, Quarterly, Semi-Annually, or Annually), number of recurring grants if you want a set end date.
 - **Attachment:** Upload any additional documents you may want to include as support for the grant recommendation.
 - **Attachment Description:** Please describe the attached document for review.
 - **Select Review:** This page will allow you to review and edit any changes. Once you are ready to submit your grant recommendation press "Submit Request".

Once you have entered your grant, you will be directed back to the "Grant Request" page where you will be able to view all of the "requested" grants. Most grants are processed in 5-7 business days unless additional approval is needed.

- **Request** means that your grant request has been sent to our staff. If you would like to cancel a pending grant request before it is processed, click the Cancel button.
- **Canceled** means your grant request has been canceled.
- **Pending** means that our staff is currently processing your grant request.
- **Approved** means your grant request has been approved but not yet paid.
- **Paid** means that the grant request has been approved and a check has been paid out to the organization.
- **Completed** means the grant request has successfully been fulfilled.

The "**Statements**" tab will show fund statements. Advisors will be able to view all available fund statements. *Please note: 2021 Q3 statements to date are visible. All prior statements will not be accessible in the portal.

- **Printing Statements** - The system will generate a PDF in a new window in your web browser that you may save or print.

The "**Files**" tab allows Advisors to view and access any files associated with the fund record.

The "**Gift Receipts (All Funds)**" tab allows the individual Advisor who made the contribution to view acknowledgement letters/tax receipts. This tab is only visible to the Fund Advisor who made the contribution.



FAQs

How long do I have to set up my password once I receive the Fundholder Portal link?

The link to login and create your password will expire after 30 days.

How do I access the Fundholder Portal after I set up my password?

Save your password and then visit www.yourfoundation.org. Select the "Fundholder Login" tab in the top right-hand corner of the home page.

What should I do if I lost my password?

You can reset your password on the fundholder portal login page. Your email and password are case sensitive, and **all emails should be entered as lowercase**. If you still need assistance, please email advancement@yourfoundation.org.

What should I do if I am locked out of the Fundholder 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 our team at 803-254-5601 or at advancement@yourfoundation.org.

How can I update information for my fund?

If you want to update details for the fund, please contact our team at 803-254-5601 or at advancement@yourfoundation.org.

What does my "Current Balance" reflect?

The current balance will reflect the latest statement balance, plus recorded contributions, less grants recommended. Note: Funds that are invested will have investment activity posted on period end statements.

How will I know if I submitted a grant successfully?

You can check the status of the grant in the fundholder portal, on the "Grants" tab.

Can I change a grant recommendation if I made a mistake?

If the grant is still in "Pending" status (check the list on the right-hand side of the Grants Request page), you can select "Cancel" to remove the grant request. Then, start over with a new request.

How long does it take to process a grant recommendation?

Grant recommendations are processed once a week but please allow up to two weeks. Grant recommendations remain in the queue for due diligence review until processed. Occasionally it is necessary to adjust the timeline due to holidays or other one-time occurrences. You can always check the status of a grant in the Fundholder Portal.

Where can I get help if I don't understand how to navigate the portal?

If you still have questions after reviewing the Fundholder Portal Instructions, please contact our team at 803-254-5601 or at advancement@yourfoundation.org.

What devices may I use to access the Fundholder Portal?

The new Fundholder Portal is compatible with most devices that can access the internet through a browser (e.g., your smartphone, tablet, and PC). However, there is not a separate app for the system.