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## FUND PORTAL GUIDE

As a fundholder, you will access fund information online through our fund portal. Using the fund portal, you can donate to the fund, view your latest fund balances, get fund statements, make grant recommendations, review your history, and more. If you need assistance beyond what is provided in this guide, please contact [heretohelp@austincf.org](mailto:heretohelp@austincf.org).

### GETTING STARTED

Fundholders receive an email from [no-reply@fcsuite.com](mailto:no-reply@fcsuite.com) with a custom invitation link that allows you to set up your password. After establishing your password, return to the portal by visiting [austincf.org](http://austincf.org) and click 'Login' at the top of the page. Your username will be the email address on file with the Foundation.

If you forget your login credentials or have trouble logging in, click 'Forgot Password?' on the login screen to reset your password. If you need assistance, reach out to us at [heretohelp@austincf.org](mailto:heretohelp@austincf.org) or call us at 512.472.4483.

### NAVIGATING THE PORTAL

Once logged in, the fund's home page will appear. If you manage multiple funds, you will be prompted to select the individual fund you wish to view. Toggle between your funds using the **Choose Fund** tab.

The tabs on the left side of the page display different features available to you. Some tabs may not be available based on fund type.

**/ Fund Summary** - Your home page is a snapshot of the fund's recent activity. It will show the fund's current balance, as well as recent contributions and grants. Click on a donor's name to bring up their history of contributions.

**/ Donations** – Allows you to view donations made to the fund. You can filter, reset, and export donations.

**/ Grants** – Shows the grant summary, history of grants, and recurring grants awarded from the fund including date, status, organization name, amount and purpose.

**/ Grant Request** – Allows you to make a grant request from the fund & shows the status of past grant requests. Detailed grant request instructions can be found on the next page.

**/ Payables** – Any accounts payable (voucher) information will be displayed here.

**/ Non-gifts** – Any non-deductible contribution (invoice) activity will be displayed here.

**/ Resources & Documents** – Allows you to view and download the fund statements, as well as any files the Foundation has uploaded to the fund and investment reports if applicable.

**/ Donate** – Allows you to make a gift to the fund at any time.

## SUBMITTING A GRANT REQUEST

To request a grant from the fund, click the Grant Request tab or select Grant Request on the right side of the page. Submitting a grant request is a three-step process:

- 1. Choose a grantee** - You have several options for selecting a grantee:
  - / You may select a grantee you have given to in the past,
  - / Search for grantees,
  - / Or enter your grantee information manually if you cannot find the organization you wish to support.
- 2. Enter grant details**
  - / In the Description field, include notes that should be passed along to the grantee in the check memo.
  - / Choose Anonymous if you do not wish for your name and fund information to be shared with the grantee.
  - / Upload any attachments you wish to provide along with the request. Please note attachments will not be shared with the grantee.
  - / In the Processing Notes field, provide any instructions for Austin Community Foundation to reference while processing the request.
- 3. Review and submit request.** Once you submit the request, the grant payment will be entered into the next weekly processing cycle. Staff will reach out to you with any questions or changes to your request.

## FREQUENTLY ASKED QUESTIONS

**What is my username?** Your username is the primary email address on file with the Foundation. If you don't know what email address to use, please contact us at [heretohelp@austincf.org](mailto:heretohelp@austincf.org).

**How do I reset my password?** If you need to reset your password, please click 'Forgot Password?' on the login screen to initiate an automated email with a password to reset your password. If you need assistance resetting your password, contact us at [heretohelp@austincf.org](mailto:heretohelp@austincf.org).

**How long does it take for grant requests to be processed?** Grants are processed weekly. Requests received by Wednesday at 5pm are generally processed the same week, pending any research or additional authorization required. If you have any questions about the status of your grant request, please reach out to us at [grants@austincf.org](mailto:grants@austincf.org)

**What type of recognition will appear on the grant transmittal letter sent to the charity?** Unless you specify that the fund or grant be anonymous, the grant transmittal letter will recognize the fund name along with the name and address of the person who submits the grant online.

**May I pay for a sponsorship or auction item from the fund?** The fund you advise may not be used for donations or sponsorships that include a benefit to the donor; grants distributed from the fund must be fully tax-deductible contributions.

**How do I know if my grant request has been processed?** The most recent grants paid will be listed on the **Grant Request** tab. You can also opt to receive email notifications by emailing [heretohelp@austincf.org](mailto:heretohelp@austincf.org).

**Who do I contact if I am having issues with the fund portal?** Contact us at [heretohelp@austincf.org](mailto:heretohelp@austincf.org), or call us at 512.472.4483.