

# CF Communities Foundation of Oklahoma

## Fund Advisor Portal Overview

As a Fund Advisor you have access to the online fund advisor portal where you can access information about the funds you manage. Within the portal, you can view the fund balance, fund statements, files, and more. This convenient tool allows you to stay up to date with your fund's activity from any device, any time.

## Initial Login Process & Account Set Up

Communities Foundation of Oklahoma will send you a link to access the portal via email. Select the link and you will be prompted to create your own password to the fund advisor portal site. Your username will be the full email address we have on file. Once your password is created go to the Login page, enter your credentials, and log in. We recommend using a unique password with letters, numbers, and/or special characters to keep your account secure.



### Setup Access

Please setup a password to access your account.

Name Appleseed, Johnny

Login johnny.appleseed@appleseed.com

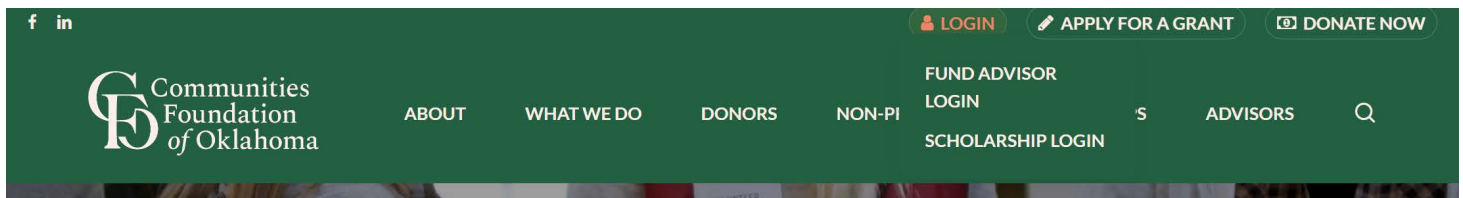
Password

Confirm Password

## Returning Users

For all future logins after the initial set up, please visit our website at [www.cfok.org](http://www.cfok.org) and click “Fund Advisor Login” under the Login tab at the top of the page. You will be redirected to the login page for the portal where you can enter your username and password created during the initial set up process.

If you have forgotten your password or have trouble logging in, please contact our office at 405-488-1450 for assistance. Please note the portal will lock you out after five unsuccessful login attempts. If you are locked out of your account, please contact us to regain access.



## Portal Features

Once you are logged in, you will see an overview page of your fund. *If you serve as an advisor for multiple funds, you will see the “Choose Fund” menu and will need to select the fund you wish to review from the dropdown menu.*

The image shows a screenshot of the Adamson Community Endowment Fund portal. At the top, there is a navigation menu with tabs: Home, Contributions, Grants, Statements, Files, Donate, Vouchers, Invoices, and Logout. Below the navigation, the current balance is displayed as \$473,000.00 and the spendable balance as \$8,500.00. Below this, it lists the fund advisors as Kent, Clark. A section titled "Recent Contributions" contains a table with the following data:

Date	ID	Contributor	Amount
03/18/2022	59427	Doe, Jane	450,000.00
03/18/2022	59428	Anonymous	14,500.00

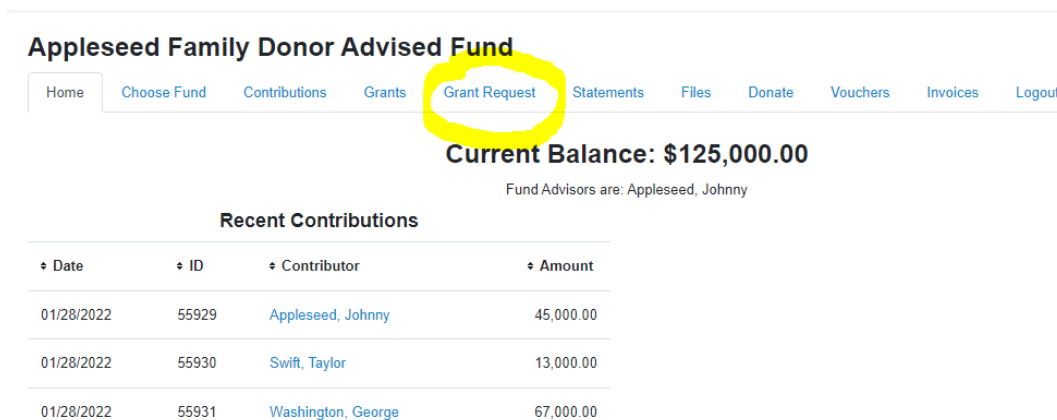
Once you have logged in you can select the tabs at the top of the page to review the different areas available to you as a Fund Advisor.

- 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 or payments made from the fund.
- The “**Statements**” tab will show fund statements if they are set up 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.
- The “**Files**” tab will show any viewable files related to your fund. This may include recent Exhibit As, the fund agreement, and other relevant information.
- The “**Donate**” tab allows you to make a gift to your fund. You can also set up a recurring donation using this feature.
- The “**Logout**” tab will automatically log you out of the portal if you selected. Remember to use this tab when you are ready to exit the portal. You will be automatically logged out each night even if you do not logout.

## Submitting a grant request (Donor Advised Funds only)

As a Fund Advisor of a Donor Advised Fund you may be able to make Grant Requests from the fund’s assets by clicking into the “**Grant Request**” Tab.



The screenshot shows the user interface for the Appleseed Family Donor Advised Fund. At the top, there is a navigation menu with the following tabs: Home, Choose Fund, Contributions, Grants, Grant Request (highlighted with a yellow circle), Statements, Files, Donate, Vouchers, Invoices, and Logout. Below the navigation menu, the current balance is displayed as \$125,000.00, and the fund advisors are listed as Appleseed, Johnny. Below this information, there is a section titled 'Recent Contributions' with a table showing the following data:

Date	ID	Contributor	Amount
01/28/2022	55929	Appleseed, Johnny	45,000.00
01/28/2022	55930	Swift, Taylor	13,000.00
01/28/2022	55931	Washington, George	67,000.00

## Creating a grant request (Donor Advised Funds)

On the left side of your screen, choose a grantee in one of four ways:

- Choose from a Previous Grantee from the drop-down menu of organizations you have previously supported.
- Select from a list of other funds held at Communities Foundation of Oklahoma.
- Search for the organization you want to support in [Guidestar](#), the world's largest nonprofit database specializing in reporting on U.S. nonprofit organizations. The more keywords used, the better the search results will be. Once you find the organization you want to support, click "Create Request."
- Enter grantee information manually. Once you enter this information, please select "Submit"

Choose from previous Grantee

Grantees you have given to in the past

Other foundation funds

or

Search for other Grantees

Name

City

State

or

Enter Grantee information manually

Name \*

Address \*

City\*

State\*

Zipcode \*

Grants are processed once per week. **We ask that grant requests be submitted Mondays by 3:00 p.m. in order for the grant to be processed and a check cut and mailed in that same week.** Grant requests submitted after 3:00 p.m. on Monday will be held for processing in the following week.

Once the organization has been selected, you will be redirected to a new page to provide important information, including the grant description and amount.

- **Grant Details:** In the description box, please provide the grant purpose (e.g. capital campaign, support of a specific program, etc). Please note that if you do not indicate a specific grant purpose, your grant will be earmarked for general support. You can also choose to remain anonymous by checking the “Anonymous” check box below the amount. If you’d like to attach any information to the grant, please use the attachment section to upload relevant files. Once you have finished entering the grant details, click on “Review” to move forward.

**New Grant Request**

Grantee	Green Thumb Network
Description	<input type="text" value="For conservation efforts in Southwest Oklahoma"/> 46/255 characters
Amount	<input type="text" value="3000"/>
Anonymous	<input checked="" type="checkbox"/>
Recurring	<input type="checkbox"/>
Attachment	<input type="button" value="Choose Files"/> No file chosen (or drag and drop anywhere on the page)
Attachment Description	<input type="text"/>

- **Review & Submit Request:** Review your grant request for accuracy. If you need to change any details, please select “Edit Request.” Once you are ready, click “Submit Request” to send the grant recommendation to Communities Foundation of Oklahoma. You will receive an automated confirmation email once the grant request has been successfully submitted.

### Reviewing Grant History (Donor Advised Funds)

To view the most recent grant history for your donor advised fund, select the “Grant Request” tab. Grant Requests still in the “request” status can be canceled from this screen.

## Grants

↕ Date	↕ Status	↕ Recipient	↕ Description	↕ Amount	↕
01/28/2022	Request	Green Thumb Network	For conservation efforts in Southwest Oklahoma	3,000.00	Cancel
01/28/2022	Paid	OK Dept. of Wildlife Conservation	For General Support	8,500.00	
01/28/2022	Approved	Green Thumb Network	For conservation efforts in Oklahoma	4,500.00	

You can use the “Status” Column to track the progress of your grant request:

- **“Request”** – the grant request has been submitted to CFO staff. If you would like to cancel the pending request before it is processed, click the “Cancel” button or contact us at 405-488-1450.
- **“Cancelled”** – your grant request has been cancelled.
- **“Pending”** – CFO staff is currently processing your grant request.
- **“Approved”** – your grant request has been processed and approved but has not yet been paid.
- **“Paid”** - the grant request has been finalized and the payment made to the organization.

## Locked Out of your Fund Advisor 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 Communities Foundation of Oklahoma at 405-488-1450.

## Email Alerts

Default settings 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 have this notification turned off, please contact the staff at Communities Foundation of Oklahoma at 405-488-1450.

## Frequently Asked Questions

### How often are fund statements posted to the portal?

Fund statements are posted to the portal each month. You will receive an email when the statements are ready to be viewed in the portal. If you are not receiving these notification emails, please notify us at 405-488-1450.

### How do I change my password?

You may change your password by clicking “Forgot Password” on the login page for the portal. You may also contact staff by calling 405-488-1450. Please note that while our staff can assist you in resetting your password, we cannot access user passwords and cannot look up your current password for you.

### I am a Donor Advised Fund advisor and have made a grant recommendation. How long does it take for the grant to be processed?

Grant recommendations received before 3 P.M. on Mondays will be processed the same week, with the check being sent out no later than Thursday. For grant recommendations received after the deadline, they will be held for processing until the following week. If you have any questions about making a grant recommendation from your Donor Advised Fund, please email Erika Warren at [ewarren@cfok.org](mailto:ewarren@cfok.org). Please note grant recommendations may only be made to 501(c)(3) organizations (including schools, churches, and government entities).

### Who do I contact if I am having issues with the portal?

Our staff will be happy to assist you with any issues concerning the donor portal or with any questions you might have. Please give us a call at 405-488-1450.