



NONPROFIT PORTAL RESOURCES

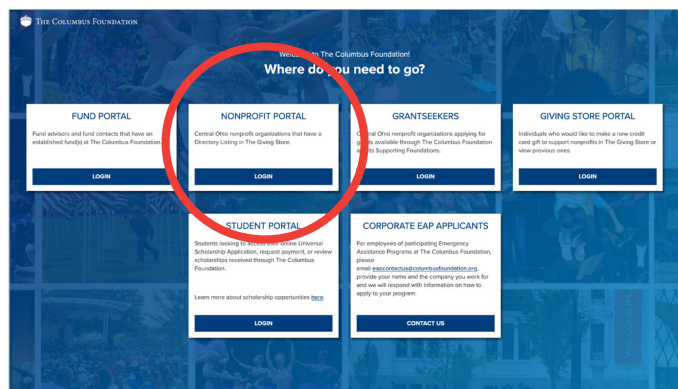
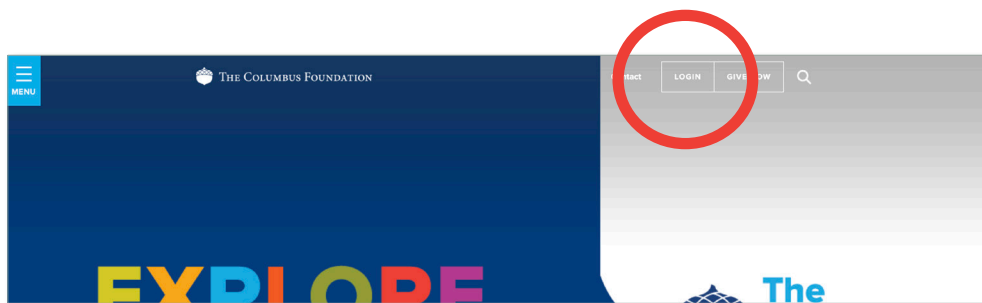
THE NONPROFIT PORTAL

NONPROFIT RESOURCES

Welcome to The Columbus Foundation’s Nonprofit Portal! We have transitioned to a new technology platform that will allow you to view grants made to your organization, review and request edits for your organization’s Giving Store Directory Listing, and more.

ACCESSING THE NONPROFIT PORTAL

You can access the Nonprofit Portal anytime by visiting columbusfoundation.org and clicking on **LOGIN** at the top right corner of the homepage.



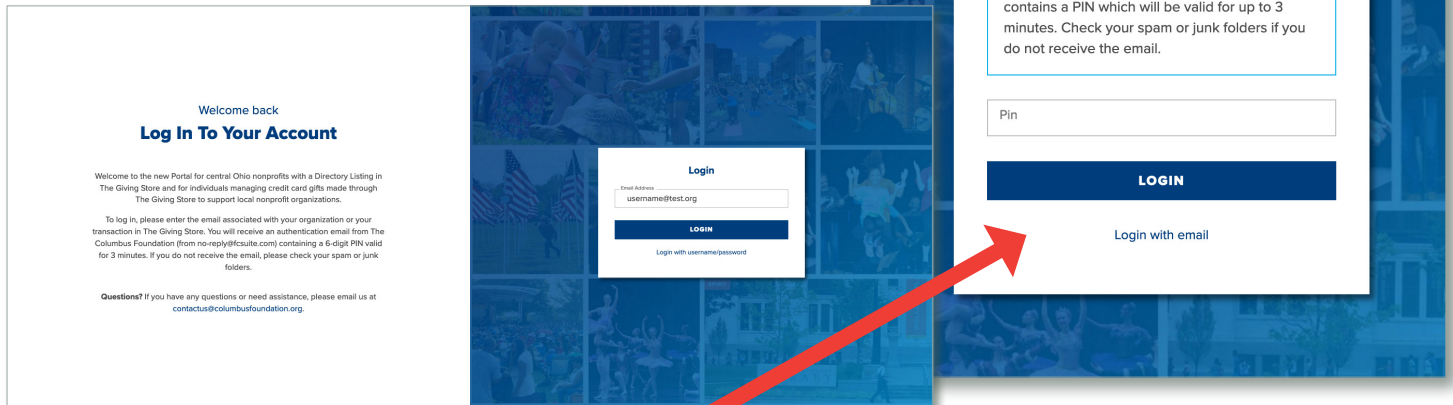
You will be directed to a login menu where you will select the **NONPROFIT PORTAL** option. Click **LOGIN**.

PLEASE READ: If you are a primary or secondary contact who has already created a username and password for the Fund Portal, you will use the same credentials to access the **Nonprofit Portal**. For security reasons, never share your username or password, and do not use a shared email address as your primary email.

Continue using the **Fund Portal** to review contributions to and grants from your fund(s), access fund statements, and suggest grants, if applicable.

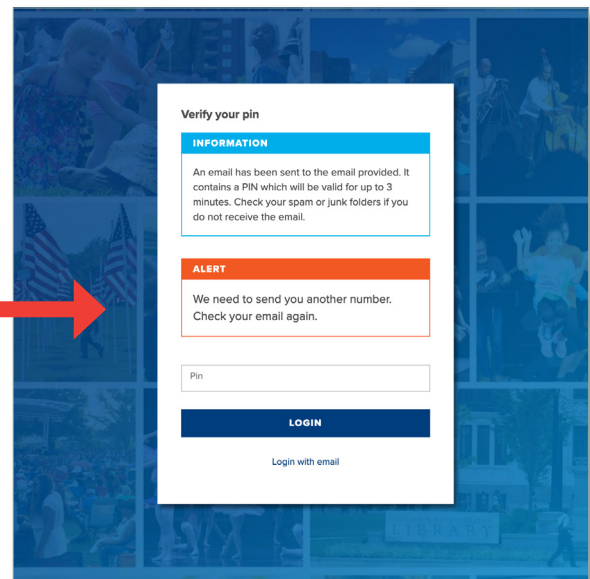
PRIMARY CONTACTS

- 1 If you are the primary contact of your organization, enter your **email address** to begin login. Unsure if you are the Primary or Secondary Contact? You may email **nonprofits@columbusfoundation.org** for clarification of roles.

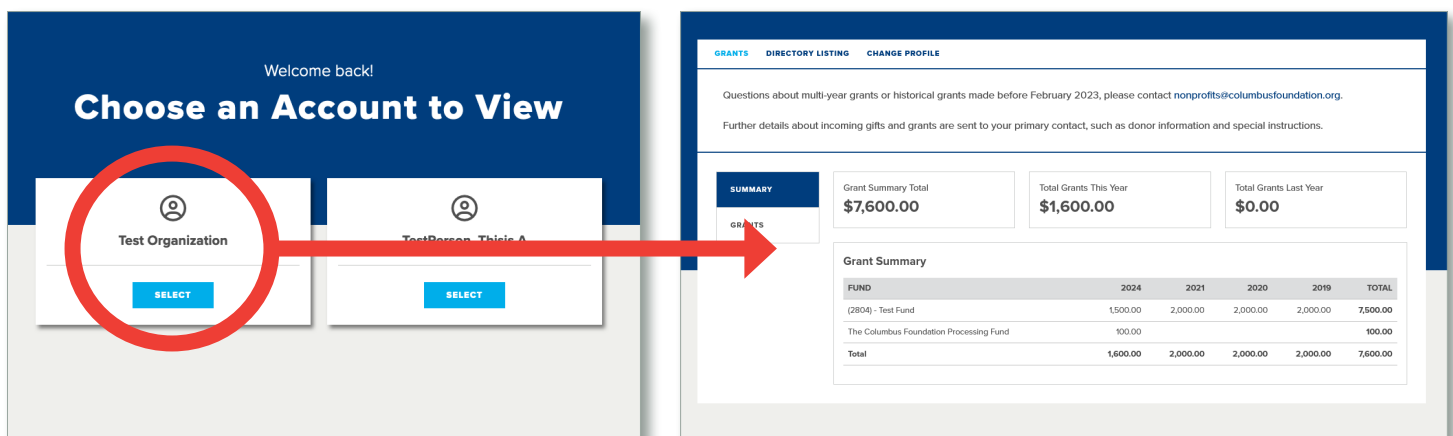


- 2 A **PIN** will be sent to your email, coming from **no-reply@fcsuite.com**. Once received, you have **3 minutes** to **access the PIN** and enter it **here**.

If you time out, you will be prompted to check your email again to access a new PIN.

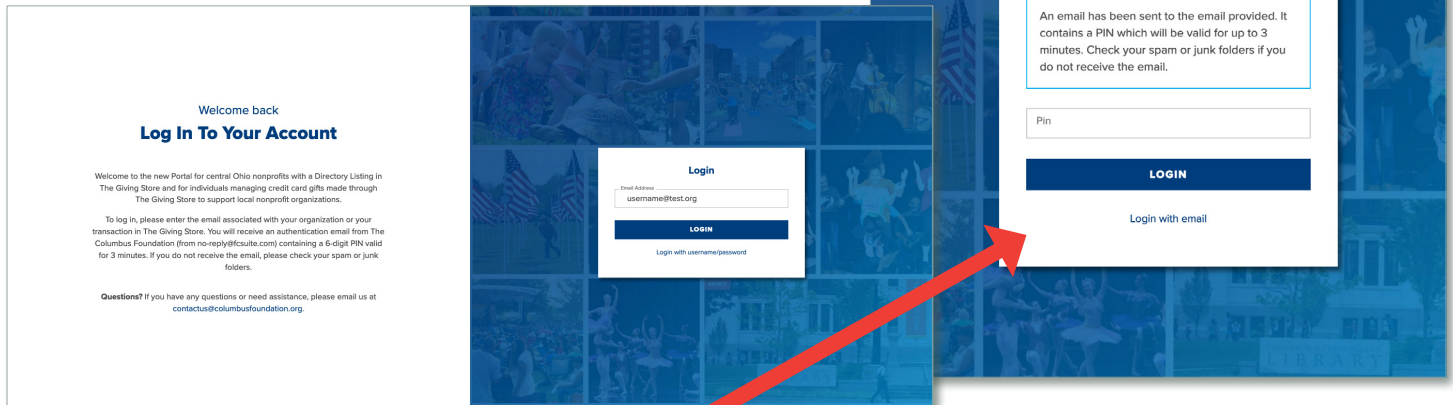


- 3 After you authenticate by entering your PIN, you will be directed to a profile list screen. **Choose the tile with your organization's name** to enter the Nonprofit Portal.



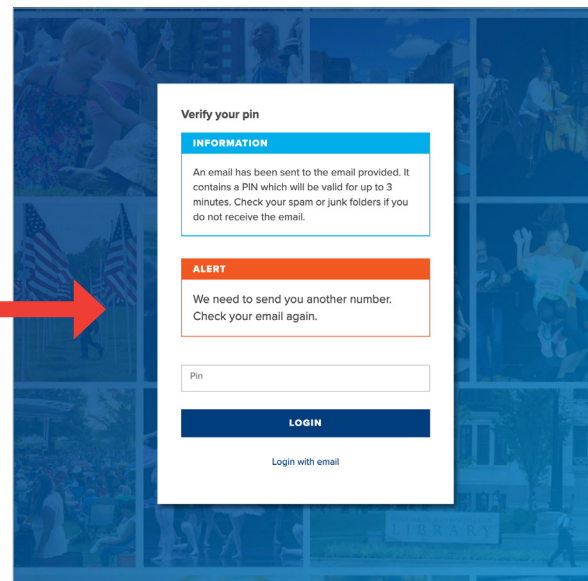
SECONDARY CONTACTS

- 1 If you are the secondary contact of your organization, enter your **email address** to begin login. Unsure if you are the Primary or Secondary Contact? You may email **nonprofits@columbusfoundation.org** for clarification of roles.



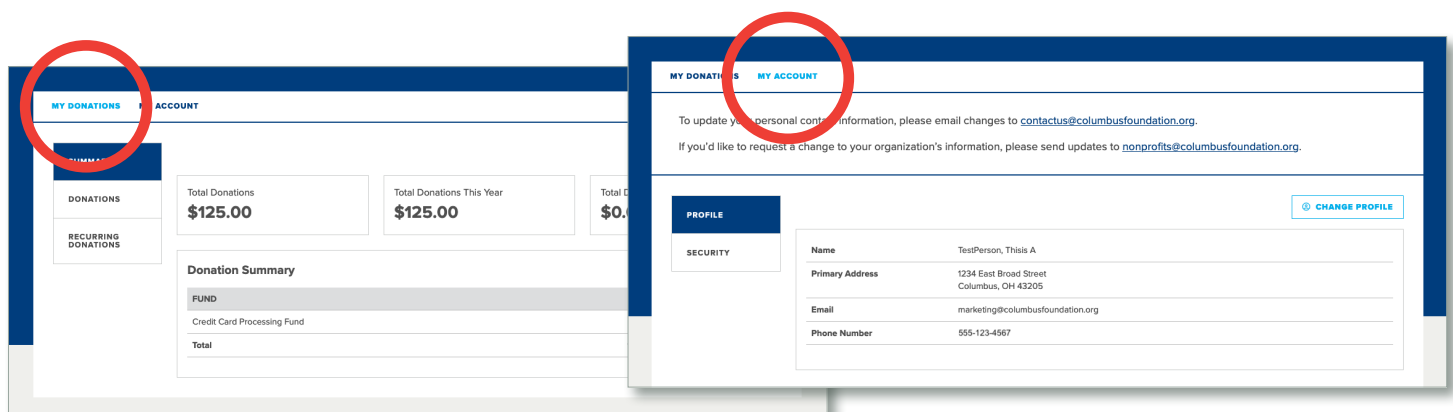
- 2 A **PIN** will be sent to your email, coming from **no-reply@fcsuite.com**. Once received, you have **3 minutes** to **access the PIN** and enter it **here**.

If you time out, you will be prompted to check your email again to access a new PIN.

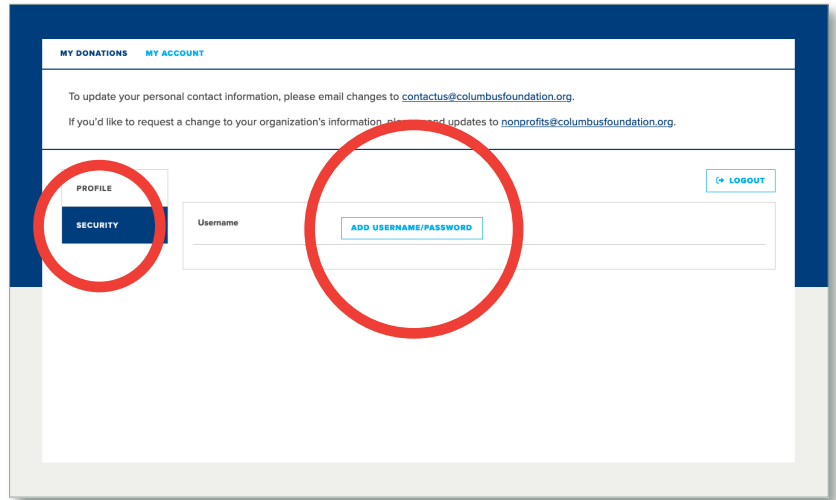


- 3 If you have made a credit card gift through The Columbus Foundation's Giving Store in the past, the default view will be **MY DONATIONS**.

To continue setting up access to your account in the Nonprofit Portal, click the **MY ACCOUNT** tab. Otherwise, you will be immediately directed to your **MY ACCOUNT** tab.

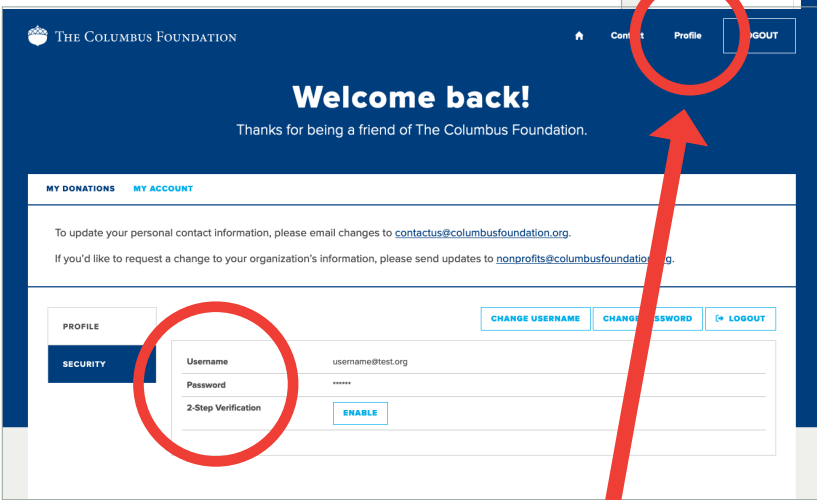
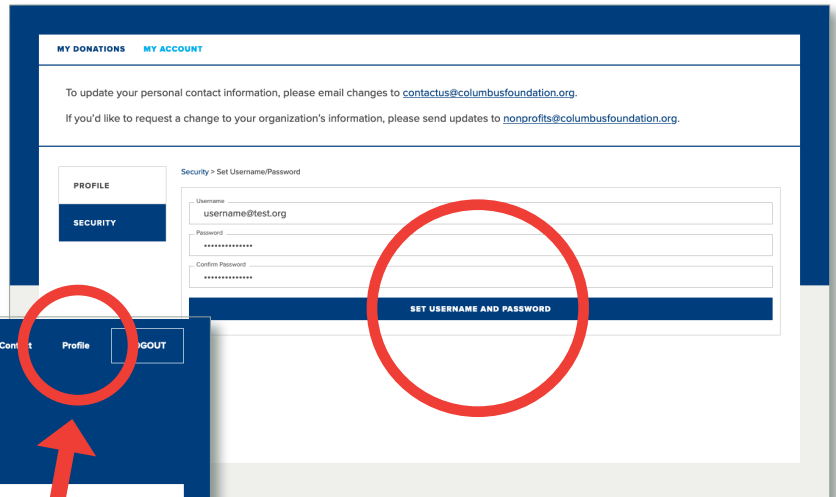


- 4 Once you are in the **MY ACCOUNT** tab, click **SECURITY** in the left side menu. Then, click **ADD USERNAME/PASSWORD**.



- 5 Once you've entered your desired username and password, click **SET USERNAME AND PASSWORD**.

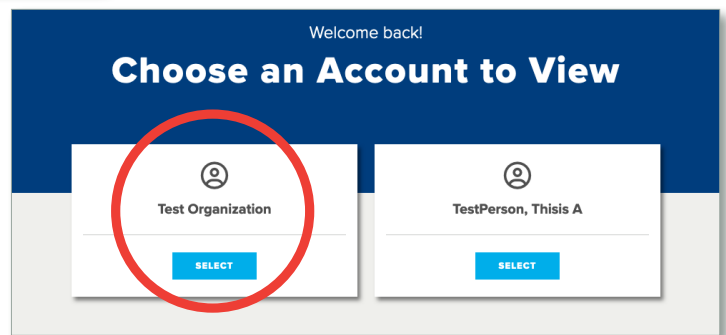
You will see a confirmation screen after you set your username and password. **You will not be able to access your organization's profile in the Nonprofit Portal until you establish a personal username and password.**



Recommendation: Set your username as the email address you used for authentication.

- 6 Once you create your username and password, click **Profile** in the upper right corner of the page.

You will be directed to a profile list screen. **Choose the tile with your organization's name** to enter the Nonprofit Portal.



TABS IN THE NONPROFIT PORTAL

Please note: Your access to various tabs in the Nonprofit Portal is based on your role and permissions for a given organization.

GRANTS	Information on grants and credit card donations received.
DIRECTORY LISTING	To view and suggest changes to your organization's Directory Listing in The Giving Store.
MY ACCOUNT <i>(this tab is only available to the primary contact on your organization's account)</i>	Information about your organization.

GRANTS TAB

- 1. Grants Summary Total** – Total amount of grants received in the featured Grant Summary table (past five years).
- 2. Total Grants This Year** – Grants made to the organization to date this calendar year.
- 3. Total Grants Last Year** – Total amount of grants made to the organization the previous calendar year.
- 4. Grants Summary Table** (past five years) - List of grants by fund or grants made by credit card through The Columbus Foundation's Giving Store.

The screenshot shows the Grants Tab interface. At the top, there are navigation tabs: GRANTS, DIRECTORY LISTING, and CHANGE PROFILE. Below the navigation, there is a header section with text: "Questions about multi-year grants or historical grants made before February 2021 please contact nonprofits@columbusfoundation.org. Further details about incoming gifts and grants are sent to your primary contact, such as donor information and special instructions." Below this, there are three summary boxes: "Grant Summary Total" showing \$7,600.00, "Total Grants This Year" showing \$1,600.00, and "Total Grants Last Year" showing \$0.00. Below these boxes is a "Grant Summary" table with columns for FUND, 2024, 2021, 2020, 2019, and TOTAL. The table contains two rows: "(2804) - Test Fund" and "The Columbus Foundation Processing Fund", followed by a "Total" row. Red callout boxes with numbers 1, 2, 3, and 4 point to the Grant Summary Total, Total Grants This Year, Total Grants Last Year, and the Grant Summary table, respectively.

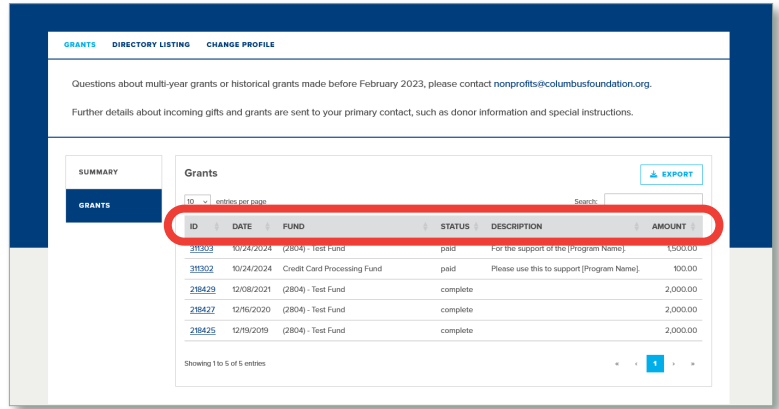
FUND	2024	2021	2020	2019	TOTAL
(2804) - Test Fund	1,500.00	2,000.00	2,000.00	2,000.00	7,500.00
The Columbus Foundation Processing Fund	100.00				100.00
Total	1,600.00	2,000.00	2,000.00	2,000.00	7,600.00

Please note: Multi-year grants do not appear in the Grant Summary table until all grant payments have been made. At that time, the full amount will appear under the year the first payment was completed.

Grants

Viewing Gift and Grant Information

DATE	Grants appear in chronological order, beginning with the most recent first.
FUND	Name of the fund from which a grant was made. Credit card gifts made through The Columbus Foundation's Giving Store will appear as Credit Card Processing Fund after the gifts are paid out as a grant.
STATUS	<ul style="list-style-type: none"> Paid/Complete: Grant payment has been sent to the organization. Voucher: Grant request has been approved but not yet paid.
DESCRIPTION	Special instructions regarding the grant.
AMOUNT	Amount of grant.
EXPORT	A select amount of data from the Grants table may be exported as a .csv file.



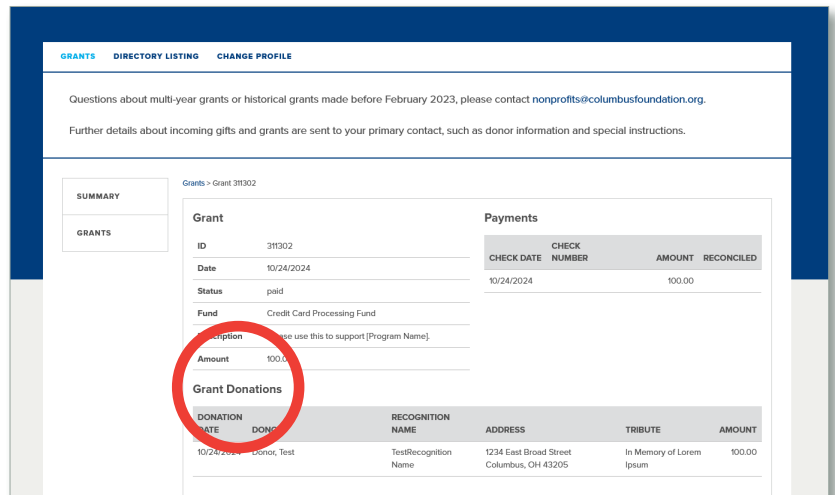
Please note: Credit card gifts will not appear in the Grants table until they are paid out as a grant.

ID	DATE	FUND
311303	10/24/2024	(2804) - Test Fund
311302	10/24/2024	Credit Card Processing Fund
218429	12/08/2021	(2804) - Test Fund
218427	12/16/2020	(2804) - Test Fund
218425	12/19/2019	(2804) - Test Fund

To view specific information on a grant, **click on the ID number** in the first table column.

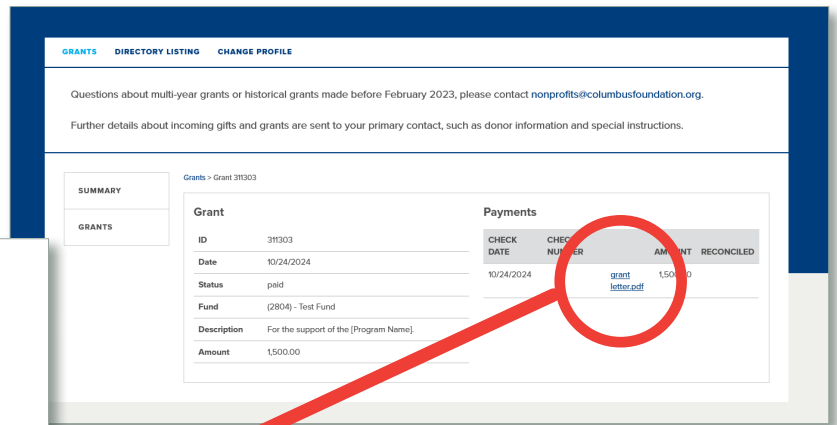
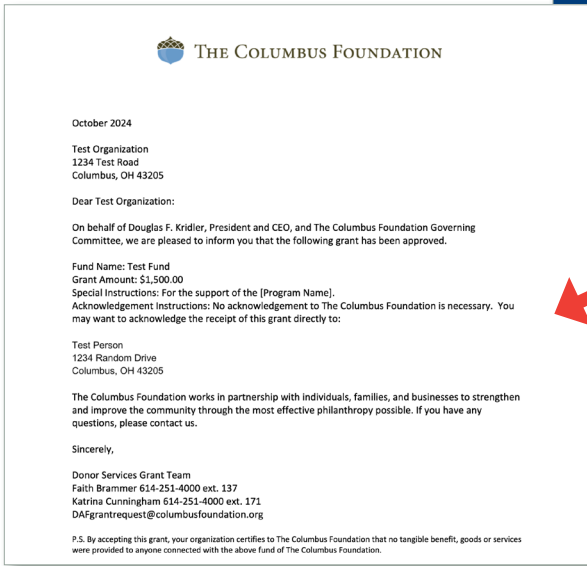
Viewing Donation Details for Credit Card Gifts Made Through The Columbus Foundation's Giving Store

Donor details for credit card gifts including tribute information can be found under **Grant Donations**.



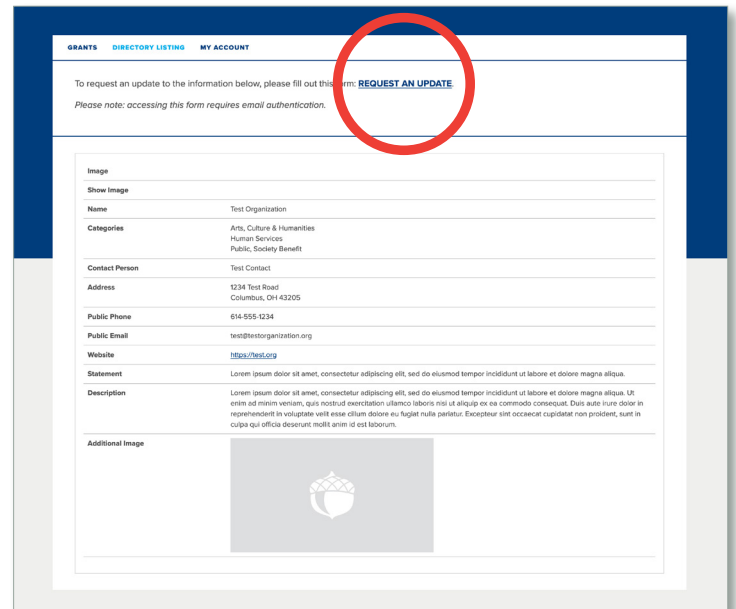
Viewing Grant Details from a Fund at The Columbus Foundation

Click “grant letter.pdf” to see additional details in the grant letter.



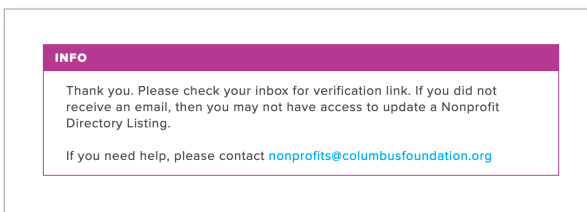
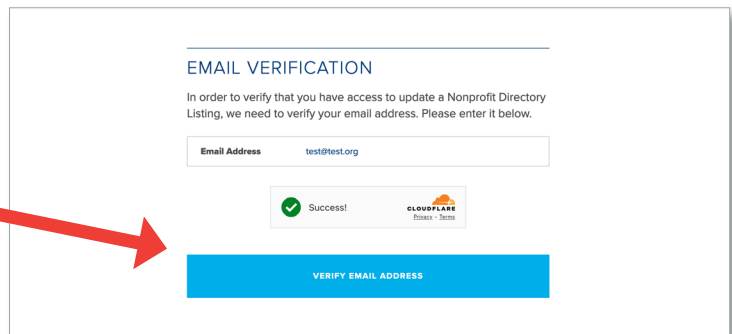
DIRECTORY LISTING TAB Viewing Directory Listing Information and Requesting Updates

1 To request an update to the information included in your organization’s Directory Listing in The Giving Store, click **REQUEST AN UPDATE**.



2 You will be prompted to enter your email to verify that you have access to update a Nonprofit Directory Listing.

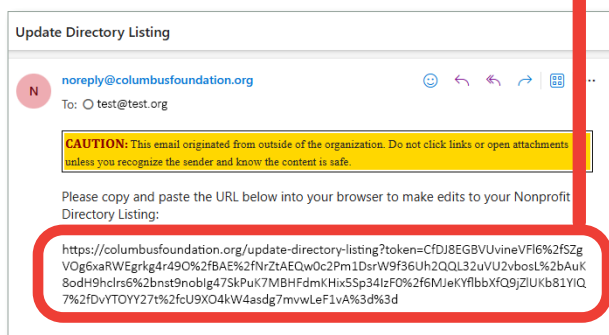
Currently, only primary and secondary contacts are authorized to request an update.



3 If authorized, you will receive an email with a verification link from noreply@columbusfoundation.org.

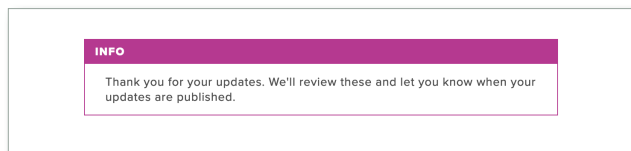
Copy and paste this link into your browser to proceed to the **Update Directory Listing** form.

If you did not receive an email, then you may not have access to update a Nonprofit Directory Listing. If you need help, please contact nonprofits@columbusfoundation.org.

A form titled "UPDATE DIRECTORY LISTING" with a warning: "Please provide the updated information in the form below. You only need to provide information in the fields you wish to update. Any fields that do not require an update can be left blank." Below this is a note: "This form cannot be saved." The form includes fields for Organization (with a "Test Organization" dropdown), Mission Statement (with a rich text editor), Contact Name, Contact Email, Address Line 1, Address Line 2, City, State/Territory (dropdown), ZIP, County (dropdown), Website, and Quote. There are also sections for Logo and Featured Image, each with an upload button and instructions. At the bottom, a blue button labeled "UPDATE DIRECTORY LISTING" is circled in red.

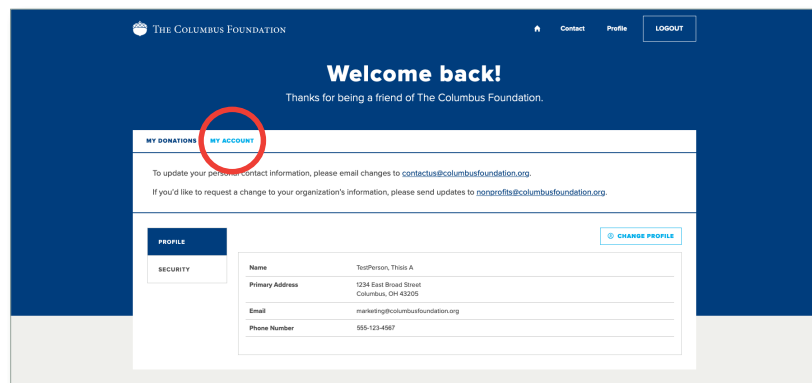
4 Enter only the information that needs updated. Click **UPDATE DIRECTORY LISTING** at the bottom to submit your request. You will see a confirmation message that your request has been submitted.

Columbus Foundation staff will review your request and let you know when your updates are live.



MY ACCOUNT TAB Viewing Your Organization's Profile Information

The organization's profile information on the **MY ACCOUNT** tab will only be visible to the primary contact. To make edits to the general information listed here, email nonprofits@columbusfoundation.org.



Directory Listing Tab | My Account Tab