



# FUND PORTAL RESOURCES

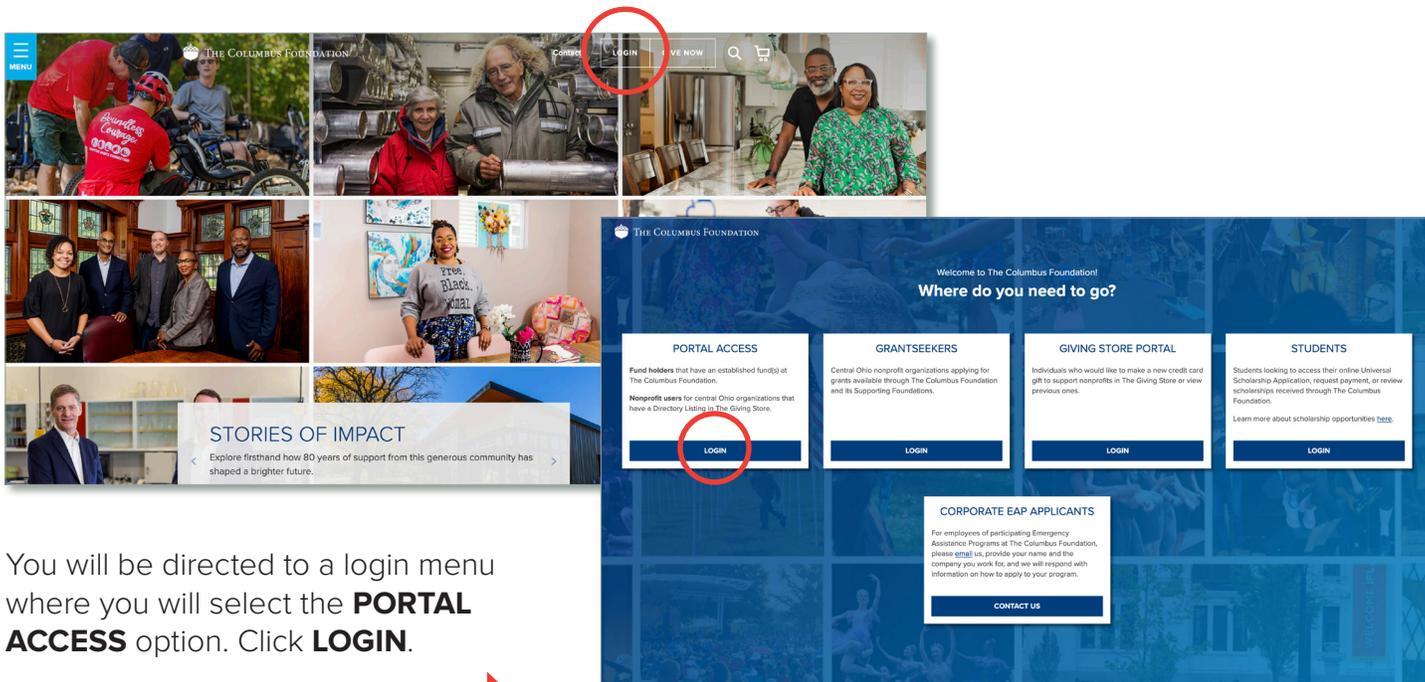
## NAVIGATING THE FUND PORTAL

DONOR RESOURCES

**Welcome to The Columbus Foundation's Fund Portal!**  
This guide will help you navigate the Fund Portal, where you can manage your fund from anywhere.

### ACCESSING THE FUND PORTAL

You can access the Fund Portal anytime by visiting [columbusfoundation.org](http://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 **PORTAL ACCESS** option. Click **LOGIN**.

This will take you to the login screen where you will enter your username (which is your email in all lowercase) and password.

Welcome!

## Log In To Your Account

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If you are a **fund holder or a returning nonprofit user**, please log in using your username and password to manage your account.

If you are a **new nonprofit user**, you will need to enter the email associated with your account and complete the authentication process before establishing your username or password and accessing nonprofit information.

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If you are an **individual managing credit card gifts made through The Giving Store**, please enter the email associated with your account. You will receive an authentication email from The Columbus Foundation (from no-reply@fcsuite.com) containing a 6-digit PIN valid for 3 minutes. If you do not receive the email, please check your spam or junk folders.

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*Questions? Please email us at [contactus@columbusfoundation.org](mailto:contactus@columbusfoundation.org).*

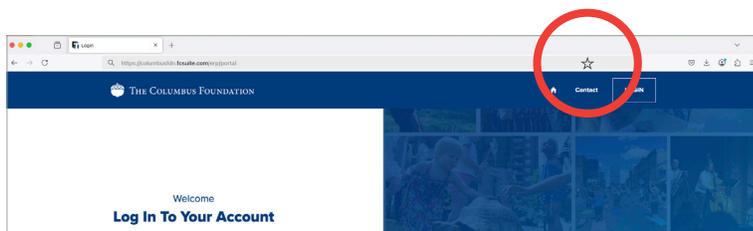
### Login

**LOGIN**

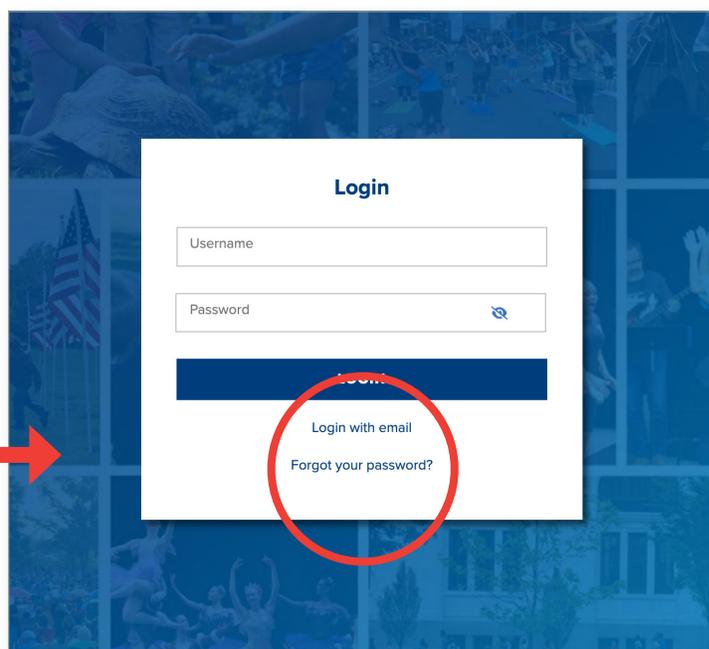
[Login with email](#)

[Forgot your password?](#)

We encourage you to bookmark the login page. In many browsers, this can be done by clicking the star icon located on the right-hand side of the address bar.



If you have not yet set up access to your Fund Portal account, please refer to our [Setting Up Access to Your Account](#) guide.



**PLEASE NOTE:** The Columbus Foundation team **does not** have the ability to access your password. If you forget your password, you can reset it on the Fund Portal login page by clicking on the **“Forgot your password?”** link.

If you still need assistance, please email [donorservices@columbusfoundation.org](mailto:donorservices@columbusfoundation.org) or call 614/251-4000.

## FUND PORTAL LANDING PAGE (FOR USERS WITH MULTIPLE ACCOUNTS)

You will manage the funds you are associated with from the Fund Portal tab under your personal profile.

**Choose an Account to View**  
Select your name to view any personal donations or funds you are affiliated with. Select the name of your nonprofit to view your organization's donation and grant history.

Lastname, Firstname  
SELECT

Organization Name  
SELECT

**PLEASE NOTE:** For those who are both **fund holders** and **nonprofit users**, you will be prompted to select the profile you wish to manage upon logging in. To switch between profiles, please use the **Profile** button at the top right corner of the portal.

**Welcome back!**  
Thanks for being a friend of The Columbus Foundation.

FUND PORTAL MY ACCOUNT

Test Fund 1  
SELECT

Test Fund 2  
SELECT

If you manage multiple funds, you will see a **CHOOSE FUND** menu. Choose the fund you wish to view.

**Welcome back!**  
Thanks for being a friend of The Columbus Foundation.

FUND PORTAL MY ACCOUNT

Test Fund 1

CREATE GRANT REQUEST

Current Balance: \$44,617.73  
Estimated Market Value Available: \$44,617.73

Recent Fund Contributions

ID	DATE	CONTRIBUTOR	AMOUNT
223065	02/15/2024	Test Donor 1	15,359.40
205557	01/27/2023	Lastname, Firstname	41,463.62
205556	02/17/2022	Lastname, Firstname	39,650.13
205554	12/11/2020	Lastname, Firstname	20,316.39
205559	11/20/2020	Lastname, Firstname	34,927.20
205558	12/17/2019	Lastname, Firstname	54,957.85

Showing 1 to 6 of 6 entries

Recent Grants

ID	DATE	STATUS	GRANTEE
321935	11/18/2024	complete	Nonprofit Or
319822	10/30/2024	complete	Nonprofit Or
187528	12/20/2023	complete	Nonprofit Or

CONTACT INFORMATION

Lisa M. Jolley, JD, CAP®, AEP®  
Senior Director for Donor Services  
614-545-3244  
Email

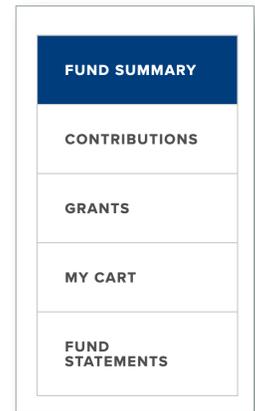
Once you are logged in, your fund's landing page will appear.

On the landing page, you can view the name of the fund you are managing. If you manage multiple funds, use the dropdown arrow to navigate to the one you wish to access.

Test Fund 1  
Test Fund 2

## TABS ON THE FUND PORTAL

**Please note:** Your access to various tabs on the Fund Portal is a reflection of your role and permissions for a given fund and might not be as extensive as those listed below.

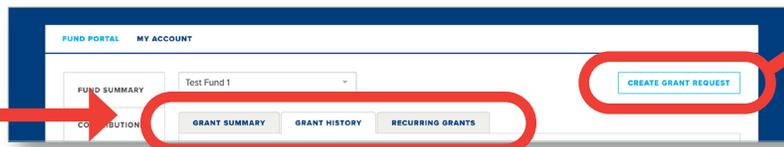


**FUND SUMMARY** The landing page provides a quick snapshot of a fund's most recent activity. It lists current balance and estimated market value, recent fund contributions, recent grants, and contact information for your Donor Services Advisor.

**CONTRIBUTIONS** This tab provides details on gifts made to the fund. You can also export this information into a spreadsheet to save and/or print.

**GRANTS** This tab:

- Shows the **GRANT SUMMARY**, **GRANT HISTORY**, and **RECURRING GRANTS** information.
- Enables you to view **GRANT HISTORY** with options to review details about previous grants by organization or fund name and by date.
- Allows advisors of Donor Advised Funds to **COPY** the details of previous grants to suggest a new grant.
- Gives you the option to export information on previous grants into a spreadsheet to save and/or print.
- Enables you to view and edit upcoming recurring grants.



### CREATE A GRANT REQUEST:

Click this button on any page to suggest a grant from a fund.

**MY CART** This tab is where advisors of Donor Advised Funds can submit their cart of grant suggestions and see the status of recent grant submissions.

**FUND STATEMENTS** This tab displays quarterly fund statements. Click **PRINT**, to generate a PDF in a new window that you may view, save, and/or print. To view historic statements, please contact your Donor Services Advisor.

# SUBMITTING AND MANAGING GRANTS FROM DONOR ADVISED FUNDS

**Please note:** The remainder of this guide is related to **Donor Advised Funds**. To suggest a grant from a fund, click the **CREATE GRANT REQUEST** button in the upper right corner of the Fund Portal and follow these steps.

## PART ONE — CHOOSE A GRANTEE

You may choose a Grantee in one of four ways:

1. Choose from previous Grantees or Funds—select a grantee to support from a drop-down list of organizations.
2. Other foundation funds—from this drop-down menu, you may select one of The Columbus Foundation’s featured funds to support.
3. Search for Grantees—search for a specific organization or fund to support. The more information included, the better the search results will be.

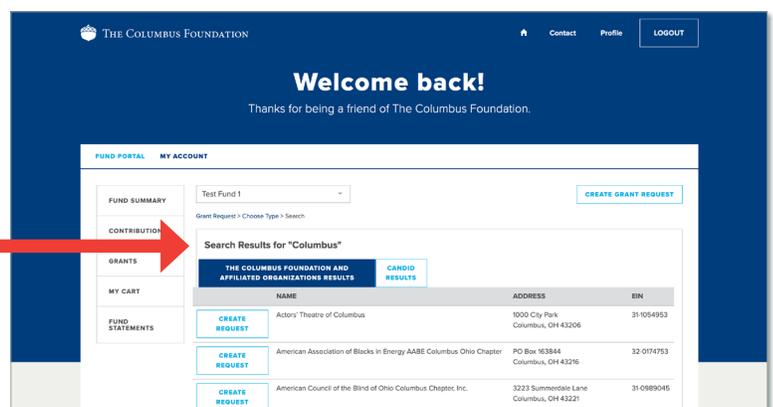
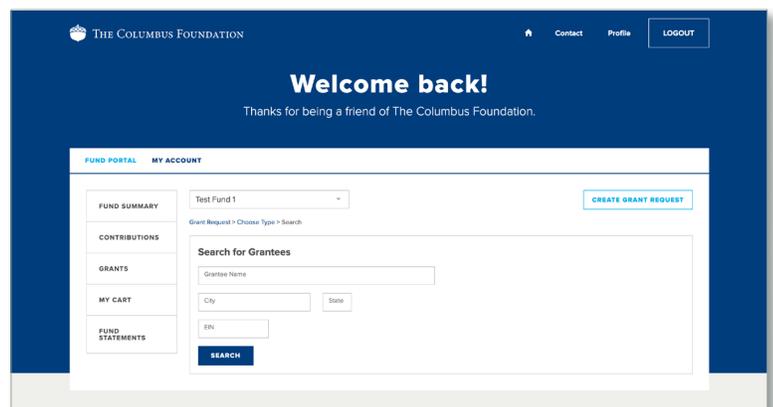
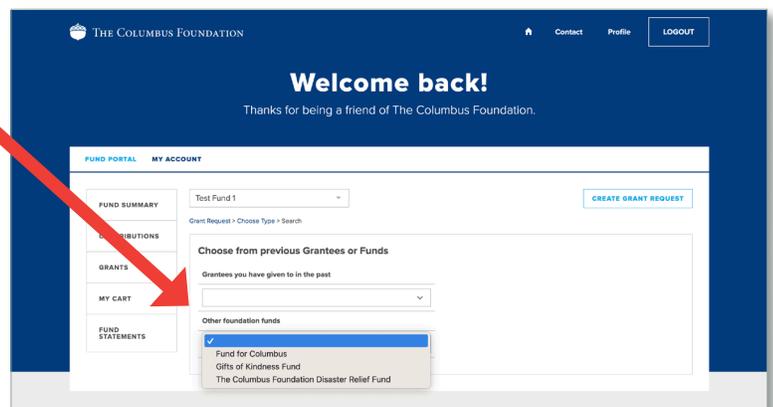
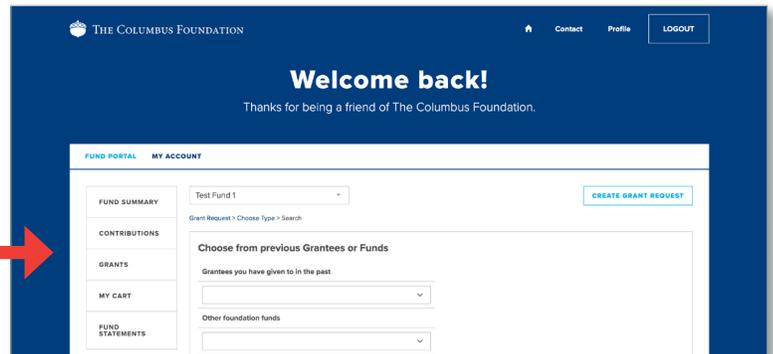
To search for a fund, include the following information:

- Fund Name Only

To search for an organization, include the following information:

- Organization Name
- City
- State

**NOTE:** The search results default to those organizations that The Columbus Foundation has already supported. If you do not see the organization you want to support, click on **CANDID RESULTS** to see results from a search of a national database of IRS-recognized tax-exempt organizations and thousands of faith-based nonprofits.



From the Search Results, please note whether you are selecting a nonprofit or fund to support. Only nonprofits will display a City/State and an EIN next to the name.

Once you select your desired fund or organization, you will be automatically redirected to the grant request form to enter your grant details (see next section).

4. *Enter Grantee information manually*—if you aren't able to locate the organization you'd like to support through The Columbus Foundation and Affiliated Organizations or Candid's results, you will need to enter the organization's information manually. This includes the organization's name, address, and phone number. The fields marked with a red asterisk are required. Once you enter this information, click **SUBMIT**. You will be redirected to a new page to fill in grant details (this will appear on the next page).



## PART TWO – ENTER GRANT DETAILS

In the **Description** field, if applicable, provide the grant purpose and instructions for the recipient.

Enter the **Amount** of your grant. A **\$100 minimum** is required for each suggested grant.

If you would like to remain anonymous, select the **Anonymous** checkbox.

Using the **Attachment** feature, attach any backup or additional information to a grant request (e.g., nonprofit event information related to a grant).

If you would like to make the grant in honor or in memory of someone, please include that information, along with their contact details if you would like them to be notified, in the **Additional Instructions for TCF Staff** field.

Once you are finished entering this information, click **ADD TO CART**.

**Note**—after you click **Add to Cart**, you will be redirected back to the **MY CART** page, shown below.

The screenshot shows the 'Grant Request' form in the donor portal. The form is titled 'Grant Request' and is part of the 'MY ACCOUNT' section. It includes a navigation menu on the left with options: FUND SUMMARY, CONTRIBUTIONS, GRANTS, MY CART, and FUND STATEMENTS. The main form area contains the following fields and options:

- FUND SUMMARY:** Test Fund 1 (dropdown menu)
- CREATE GRANT REQUEST** button
- Grant Request > Choose Type > Create Request** breadcrumb
- Requested By:** Lastname, Firstname M. (dropdown menu)
- Grantee:** Gifts of Kindness Fund
- Description:** To support to [placeholder] program. (37255 characters)
- Amount:** 100
- Anonymous:**
- Recurring:**  (marked with a red star icon)
- Attachment:** Shows... No files selected. (or drag and drop anywhere on the page)
- Attachment Description:** (text input field)
- Additional Instructions for TCF Staff:** (text area)
- ADD TO CART** button



### NEW FEATURE:

Make a recurring grant by selecting **Recurring** and choosing the start date and recurrence interval and/or number of occurrences. If you would like to make changes after the grant has been approved, please go to the **RECURRING GRANTS** tab under **GRANTS** in the left navigation menu. Please contact your Donor Services Advisor or email [DAFgrantrequest@columbusfoundation.org](mailto:DAFgrantrequest@columbusfoundation.org) with questions about recurring grants.

The screenshot shows the 'My Recent Grants' page in the donor portal. The page is titled 'Welcome back!' and includes a navigation menu on the left with options: FUND PORTAL, MY ACCOUNT, FUND SUMMARY, CONTRIBUTIONS, GRANTS, MY CART, and FUND STATEMENTS. The main content area is divided into two sections:

- Grant Request Cart:** A table with columns: RECIPIENT, DESCRIPTION, AMOUNT. It shows one grant request for 'Gifts of Kindness Fund' with an amount of 100.00. There are 'DELETE' and 'EDIT' buttons for this grant, and a 'CONTINUE TO CHECKOUT' button.
- My Recent Grants:** A table with columns: REQUEST DATE, STATUS, RECIPIENT, DESCRIPTION, AMOUNT. It shows two recent grants:

REQUEST DATE	STATUS	RECIPIENT	DESCRIPTION	AMOUNT
11/18/2024	Complete	Nonprofit Organization 1	This grant is an Annual Contribution suggested by Firstname Lastname.	10,000.00
10/30/2024	Complete	Nonprofit Organization 2	This grant is an Annual Gift. It was suggested by Firstname Lastname.	1,000.00

## PART THREE — REVIEW AND SUBMIT REQUEST

Under **MY CART** in the left navigation menu, you will see the grant(s) you have suggested.

**Grant Request Cart**

RECIPIENT	DESCRIPTION	AMOUNT
Gifts of Kindness Fund	To support to [placeholder] program.	100.00
<b>Grant Request Total</b>		<b>100.00</b>

**My Recent Grants**

REQUEST DATE	STATUS	RECIPIENT	DESCRIPTION	AMOUNT
1/18/2024	Complete	Nonprofit Organization 1	This grant is an Annual Contribution suggested by Firstname Lastname.	10,000.00
10/30/2024	Complete	Nonprofit Organization 2	This grant is an Annual Gift. It was suggested by Firstname Lastname.	1,000.00

**You're not done yet!** Your grant will not be initiated until you review and submit the request.

**If you click DELETE, your grant request will be immediately and permanently deleted.**

Click **EDIT** to make changes to your grant request.

To continue, click **CONTINUE TO CHECKOUT.**

**Grant Request Cart**

GRANTEE	DESCRIPTION	AMOUNT	ANONYMOUS
Gifts of Kindness Fund	To support [placeholder] program. Additional instructions for TCP Start:	\$ 100.00	No
<b>Total</b>		<b>\$ 100.00</b>	

By clicking submit, you acknowledge that the above suggestion(s) does not represent the payment of financial obligation (other than a charitable pledge) and that you do not expect any personal benefit from this charitable distribution.

Once you have reviewed your grant request(s), click **SUBMIT GRANT REQUESTS**. Once submitted, The Columbus Foundation team will begin processing the grant request.

You will be redirected to the confirmation page, shown below. Click **CONTINUE** to return to your **MY CART** page where you will see your recent grant submissions awaiting approval.

**ALERT**

Grant Request Submitted

**CONTINUE**

# MANAGE AND VIEW GRANT SUGGESTIONS

## MANAGE CURRENT GRANT SUGGESTIONS

You can review your current and pending grant requests on the My Recent Grants table in the **MY CART** section. Under the **STATUS** column, you will see one of five statuses for each grant:

### REQUEST

A grant suggestion has been submitted to The Columbus Foundation team for processing. To cancel a grant request before it is processed, click the **CANCEL** button.

### CANCELED

A grant suggestion has been canceled.

### PENDING

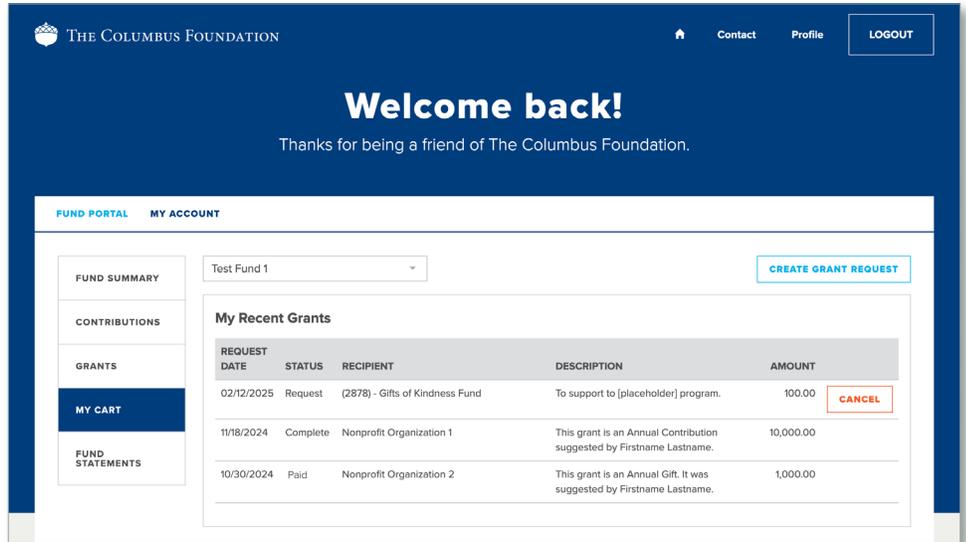
The Columbus Foundation team is currently processing the grant request.

### APPROVED

The grant request has been approved but not yet paid.

### PAID/ COMPLETE

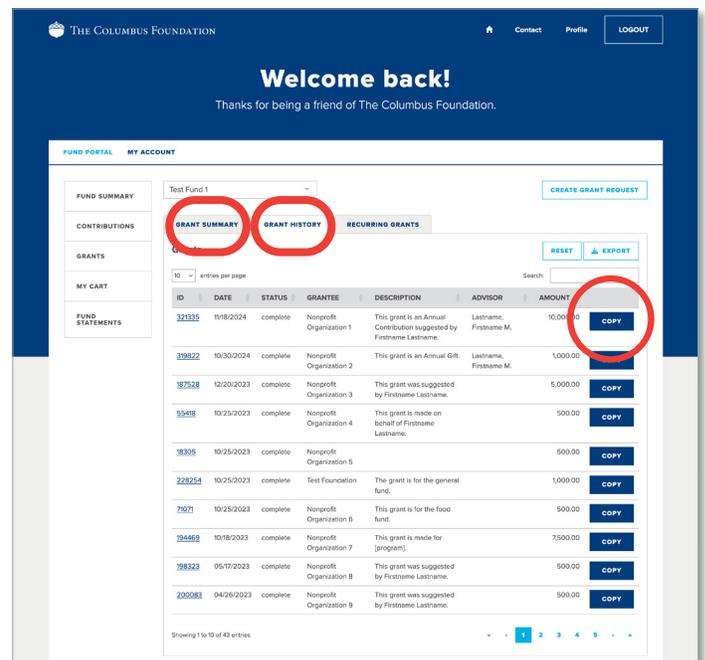
The grant request has been approved, and a payment has been made to the organization.



## VIEW OR COPY PAST GRANT DETAILS

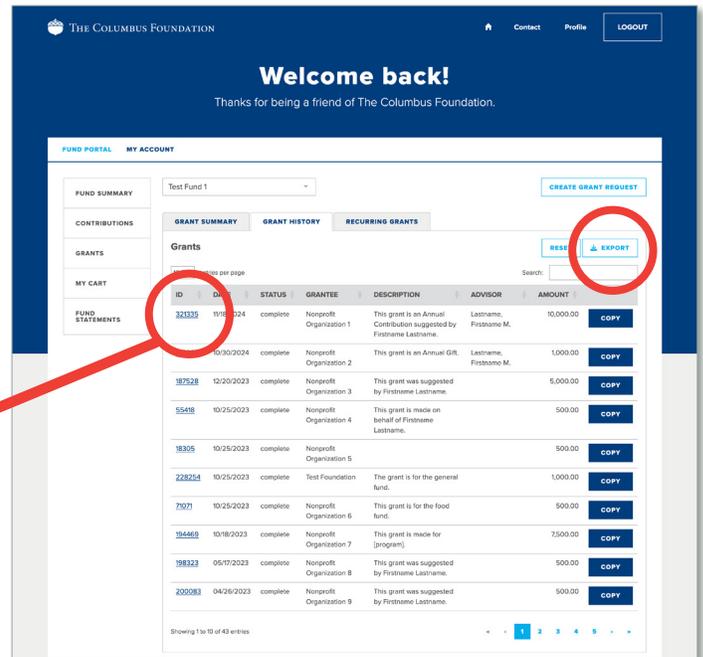
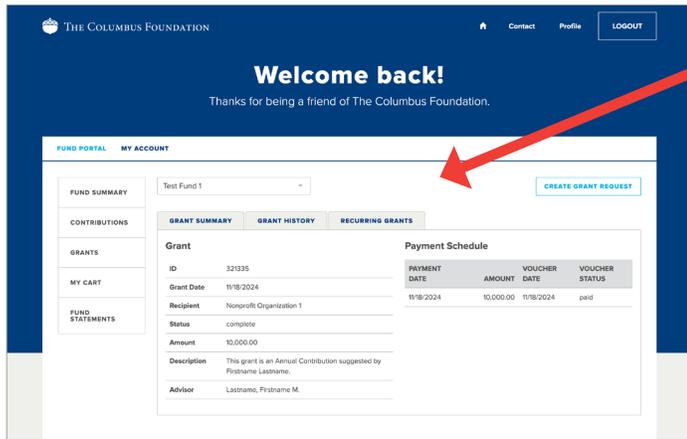
Once you click **GRANTS** in the left navigation menu, you will go to **GRANT HISTORY** to view your previous grants. This is sorted by grant date. If you'd like to suggest a grant to that organization or fund, you can click **COPY**, and it will auto-populate a grant suggestion with the same description and amount.

The first section, **GRANT SUMMARY**, allows you to view your grants grouped by organization or fund name, listed alphabetically. It also includes the number of grants and the total grant amount that has been issued from your fund to each grantee.

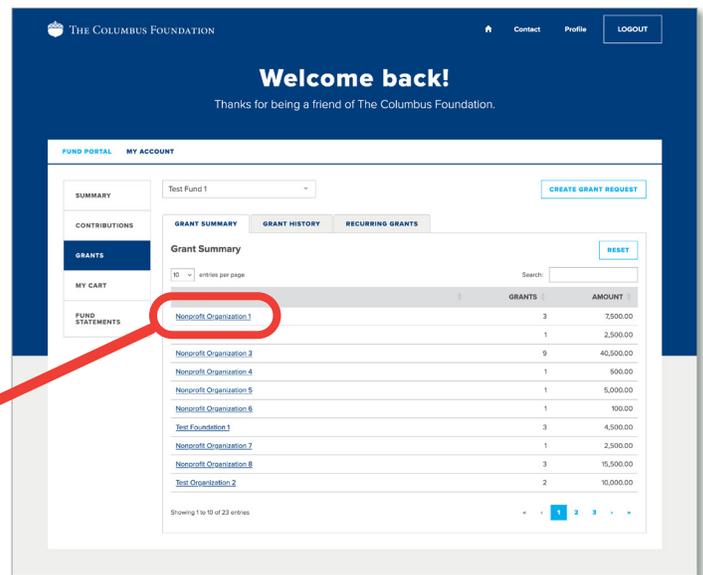
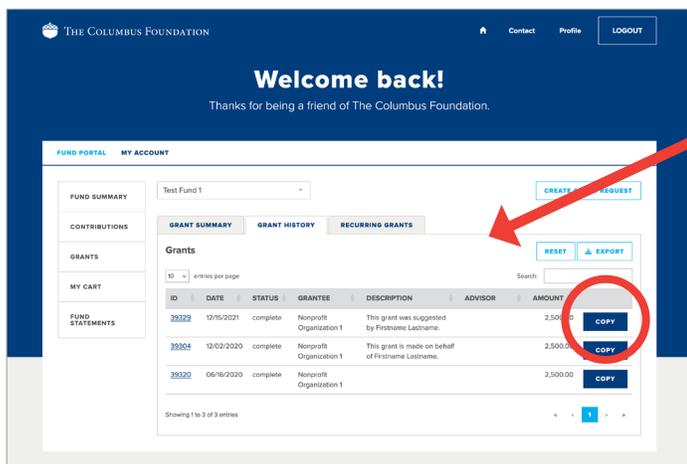


To export the information listed on the **GRANT HISTORY** tab into a spreadsheet to save and/or print, click the **EXPORT** button at the top of the table.

If you click on the grant identification number on the left side, it will bring up additional details about this grant, including payment information.



You can also view or copy past grant suggestions by clicking the grantee name in the **GRANT SUMMARY** section of the page. A list of your grants to that organization or fund will appear.

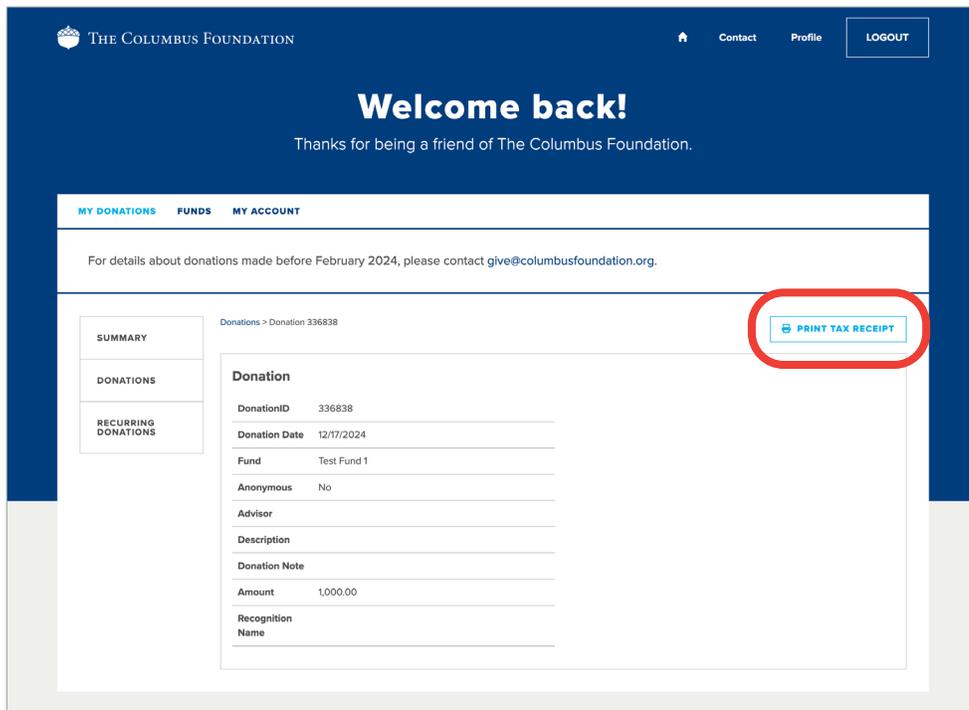
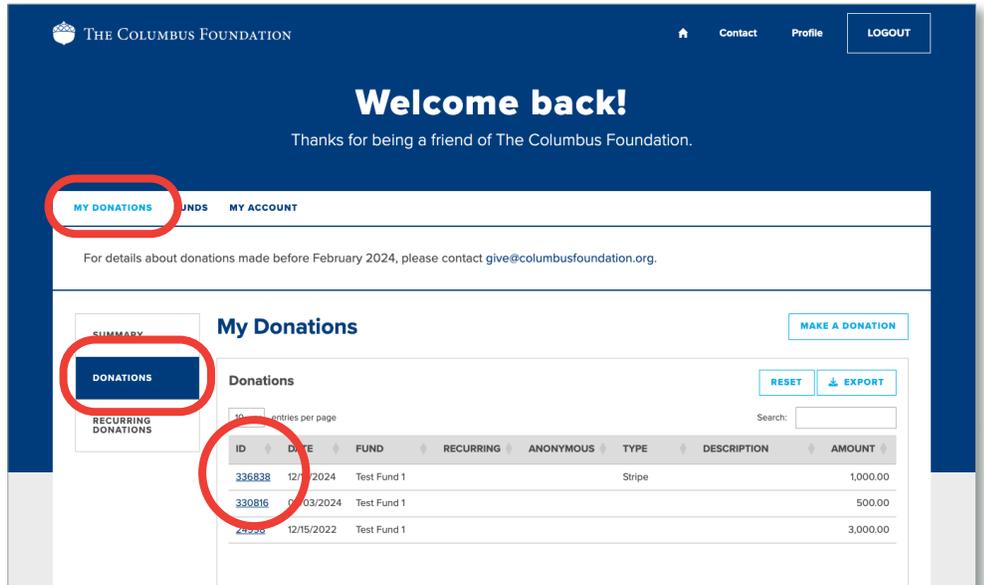


If you click **COPY**, a grant suggestion will auto-populate with the same description and amount for you to edit and submit.

## VIEW TAX RECEIPTS

Navigate to the **My Donations** tab in your Portal. Here you will see a summary of your individual donation information, including credit card gifts and contributions to a fund.

Go to **DONATIONS** in the left navigation menu and click on the **donation identification number** on the left side to bring up additional details about a donation.



To view a tax receipt, click **PRINT TAX RECEIPT** in the upper right corner of the Donation Details section.

To view tax receipts from donations before February 2024, please contact [give@columbusfoundation.org](mailto:give@columbusfoundation.org).

*View Tax Receipts*