Donor Portal User Guide

As a Fund Advisor, you have an online donor portal to view information about the fund(s) you manage. We will provide you a login name and a link to access your Donor Portal. You can also find it by clicking Access My Fund on our homepage (saafdn.org).

The first time that you log in, you will be prompted to create your own password.

**Setup Access**

Please setup a password to access your account.

<table>
<thead>
<tr>
<th>Name</th>
<th>Doe, John</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login</td>
<td><a href="mailto:jdoe@gmail.com">jdoe@gmail.com</a></td>
</tr>
<tr>
<td>Password</td>
<td></td>
</tr>
<tr>
<td>Confirm Password</td>
<td></td>
</tr>
</tbody>
</table>

Once your password is created, you may enter your credentials and log in.

If you serve as an Advisor for multiple funds, you will see the Choose Fund menu appear once you log in. Click the particular account with which you wish to interact.

**Choose Fund**

- John and Jane Doe Advised Fund (Test 1)
- John and Jane Doe Designated Fund (Test 3)
- John and Jane Doe Scholarship Fund (Test 2)

If you are listed as an advisor for only one fund, you will go directly to the Home tab.
The Home Tab

You navigate your donor portal by selecting a tab underneath the name of your fund. The **Home** tab shows your Fund’s Current Balance. This area also lists all fund advisors, shows recent contributions and recent grants given for the Fund.

NOTE: If you see that you need to update any Fund Advisors, please reach out to givenow@saafdn.org.

The Choose Fund Tab

The **Choose Fund** tab is only visible if you have multiple funds at the Area Foundation.

The Contributions Tab

The **Contributions** tab shows recent contributions or donations to the fund.

Clicking on a contributor’s name will bring up their history of giving to your fund as well as their name, address and email address. If you see any errors in the contact information, email givenow@saafdn.org.

Your Contributions can be exported in Microsoft Excel by clicking the **Export** tab on the far-right side.
The Grants Tab

The Grants tab shows a recent history of grant recommendations made from the fund. Here, you will see a Grantee Summary of grants/scholarships paid out as well as a more detailed view of grant activity on the bottom.

Your Grants History can be exported in Microsoft Excel by clicking the Export tab on the far-right side.

The Grant Recommendation Tab

The Grant Recommendations Tab is only visible to Fund Advisors for Agency Funds, Donor Advised Funds, and Field of Interest Funds.

These fund advisors may make a Grant Recommendation from the fund’s assets by creating a grant request here.

The first step in making a grant recommendation is to identify the Grantee (the grant recipient) using one of three methods offered on this screen

1. Choose from previous Grantee
2. Search for other Grantees or
3. Enter Grantee information manually.

NOTE: If you choose to Enter Grantee information manually, it may take the Area Foundation a little extra time to perform our due diligence process on your grant recommendation.
The Grant Recommendation Tab

Use **Choose from previous Grantee** to quickly find nonprofits that you have given to in the past using the drop-down lists.

Use **Search for other Grantees** to enter a keyword to search for the Grantee using GuideStar. Click **Create Request** on the right side of the search results provided if you see the organization that you are seeking.

**NOTE:** GuideStar is an information service specializing in reporting on U.S. nonprofit companies.

Use **Enter Grantee information manually** if you cannot find the organization using the search feature. You will need to enter the name of the Grantee, an address, zip code and a phone number to submit the recommendation for approval.
New Grant Request Screen

Once the Grantee is identified, then you may enter your grant recommendation details under New Grant Request.

- Enter a description to designate the purpose of the grant.
- If you click the Anonymous box, your fund name will not be shared with the Grantee.
- You can enter Recurring Grants by checking the box, and entering a Recurrence Start Date, the Interval and the Number of Recurring Gifts you wish you make. If you leave the “Number of Recurring” blank, the recurring grant will not have an end date.
- Use Additional Information to enter any additional information you would like to share with the nonprofit Grantee, including memorial or tribute details.

Once you Review and Submit the grant recommendation, it will appear in the Grants queue. Grant Recommendations with “request” status can be cancelled by clicking the yellow Cancel button.
The Fund Statements Tab

The Fund Statements tab will display fund statements for your fund. You will be able to view fund statements immediately after they are created as well as previous fund statements through 2018.

- Printing Statements – Click Print to generate a PDF in a new window in your web browser that you may view, save or print.

John and Jane Doe Advised Fund (Test 1)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Date Range</th>
<th>Status</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>01/01/2018 - 12/31/2018</td>
<td>Final</td>
<td>2018-05-01</td>
</tr>
</tbody>
</table>

The Messages Tab

The Messages tab is where you may securely view messages from the Area Foundation or files that you request, such as your Fund Agreement or Annual Tax Statement.

The Give Now Tab

The Give Now tab will allow you to make an online donation to your fund or any other fund at the Area Foundation.

The Tax Receipts Tab

The Tax Receipts tab will display copies of the tax receipts for your online donations.

The Logout Tab

Remember to click the “Logout” tab to close your Donor Portal. You will be automatically logged out each night even if you do not logout.
Frequently Asked Questions

What should I do if I am locked out of the Donor 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 givenow@saafdn.org.

How will I know when a grant recommendation has been paid or my fund has received a donation?
We can 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 be notified of each donation and/or grant requested and paid, email givenow@saafdn.org.