

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.

Name	Doe, John
Login	jdoe@gmail.com
Password	<input type="password"/>
Confirm Password	<input type="password"/>

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.

John and Jane Doe Advised Fund (Test 1)

Home	Choose Fund	Contributions	Grants	Grant Recommendations	Fund Statements	Messages	Give Now	Tax Receipts	Logout
Current Balance: \$687,824.00									
Fund Advisors are: Doe, Jane; Doe, John									
Recent Contributions					Recent Grants				
Date	ID	Contributor	Amount	Date	ID	Status	Recipient	Amount	
09/09/2020	49962	Doe, John and Jane	275,000.00	09/09/2020	70445	Paid	The Children's Shelter	5,000.00	
09/09/2020	49961	Doe, John and Jane	300,000.00	09/09/2020	70448	Paid	San Antonio Food Bank, Inc.	1,000.00	

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.

John and Jane Doe Advised Fund (Test 1)

Home	Choose Fund	Contributions	Grants	Grant Recommendations	Fund Statements	Messages	Give Now	Tax Receipts	Logout	Export
Contributions										
Date	ID	Contributor	Description	Type	Amount					
09/09/2020	49962	Doe, John and Jane		Check	275,000.00					
09/09/2020	49961	Doe, John and Jane		Check	300,000.00					

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.

John and Jane Doe Advised Fund (Test 1)

Home	Choose Fund	Contributions	Grants	Grant Recommendations	Fund Statements	Messages	Give Now	Tax Receipts	Logout	Export	
Grantee Summary											
Grantee							Grants	Amount			
San Antonio Children's Center							2	41,000.00			
San Antonio Food Bank, Inc.							3	42,000.00			
The Children's Shelter							3	11,500.00			
Grants											
Date	ID	Status	Recipient	Description			Amount				
09/09/2020	70445	Paid	The Children's Shelter	for the kids			5,000.00				
09/09/2020	70448	Paid	San Antonio Food Bank, Inc.	for general operating			1,000.00				

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

John and Jane Doe Advised Fund (Test 1)

[Home](#) [Choose Fund](#) [Contributions](#) [Grants](#) [Grant Recommendations](#) [Fund Statements](#) [Messages](#) [Give Now](#) [Tax Receipts](#)

Use this form to request a new grant recommendation from your fund.

Choose from previous Grantee

Grantees you have given to in the past

Other foundation funds

or

Search for other Grantees

Name

or

Enter Grantee information manually

Name *

Address *

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.

John and Jane Doe Advised Fund (Test 1)

[Home](#) [Choose Fund](#) [Contributions](#) [Grants](#) [Grant Recommendations](#) [Fund Statements](#) [Messages](#) [Give Now](#) [Tax Receipts](#)

Grantee Search Results for "food bank"

[San Antonio Area Foundation Results](#) [Guidestar Results](#)

Name	City / State
Create Request Alameda County Community Food Bank, Inc.	Oakland, CA
Create Request Capitol Area Food Bank	Austin, TX

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](#).

John and Jane Doe Advised Fund (Test 1)

[Home](#) [Choose Fund](#) [Contributions](#) [Grants](#) [Grant Recommendations](#) F

New Grant Request

Grantee	San Antonio Children's Center
Description	<input type="text"/>
Amount	<input type="text"/>
Anonymous	<input 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"/>
Additional Information	<input type="text"/>

- 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.

Grants

↕ Date	↕ Status	↕ Recipient	↕ Description	↕ Amount	↕
09/15/2020	Request	Capitol Area Food Bank	COVID19	500.00	<input type="button" value="Cancel"/>

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)

[Home](#) [Choose Fund](#) [Contributions](#) [Grants](#) [Grant Recommendations](#) [Fund Statements](#)

Statements

Statement	Date Range	Status	
2018	01/01/2018 - 12/31/2018	Final	Print 

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.