



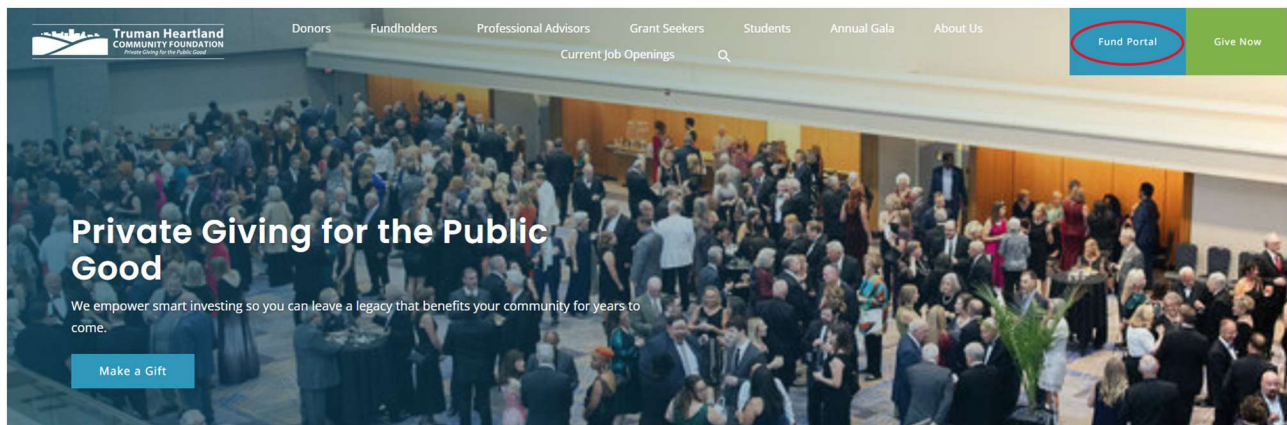
Fund Portal Guide & FAQs

As a fundholder with the Truman Heartland Community Foundation (THCF), you have 24/7 access to your fund information through our **Fund Portal**. Within the portal, you can easily check your fund balance, monitor the status of your grant recommendations, view statements, and update your profile.

* * *

INITIAL LOGIN (New Users) – ACCESSING PORTAL AND CREATING USERNAME/PASSWORD

To access your fund details online, please type <https://thcf.fcsuite.com/erp/portal> into your browser or visit <https://www.thcf.org/> and click on the **(Fund Portal Button)** on the top right of the home page. *(Homepage banner image may change)*



After entering your email address and clicking “Login”, a message will prompt you to check your email for a 6-digit THCF verification code. Enter the code and click “Login” to start. Check your spam folder for this email if not in your inbox. If you already have a password set-up you will then enter the password. ***The email address you gave THCF is your USERNAME.***

You can access the portal anytime using your email address and a newly generated 6-digit code combination. If you prefer, you can set up a permanent username and password for easier access. (Directions on page 8 of guide, question 8).



Names and Passwords are case-sensitive. If you need to reset your password, please use the forgot password link. The email address you gave THCF is your USERNAME. If you continue to have issues or have a question, please contact Diana Castillo at castillo@thcf.org or 816-912-4184. The guide for the NEW FUND PORTAL can be found on our website at <https://www.thcf.org/fundholder-resources/helpful-docs> or downloaded here.

FYI – We have found that using Google Chrome as your browser to log-in typically provides the best user-experience. Login Troubleshooting, please see page 8 of this guide.

RETURNING USERS

To access the Fund Portal at any time (following the initial access setup), simply visit www.thcf.org and click on the Fund Portal button in the top right corner. **The email address you gave THCF is your USERNAME.**

Or use this direct link: <https://thcf.fcsuite.com/erp/portal>

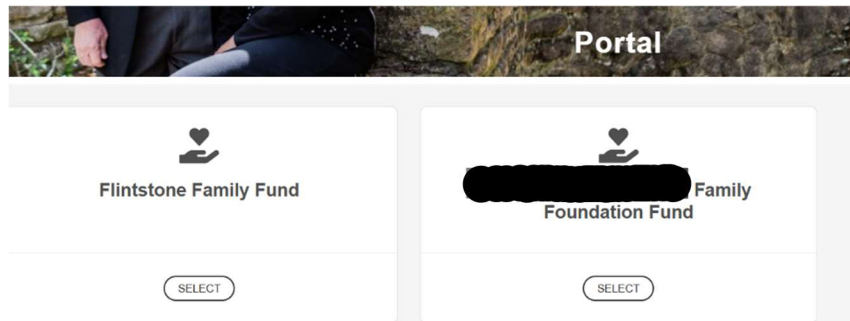
The THCF staff cannot access your password. If you forget your password, you can reset it on the Fund Portal login page by clicking on the “Forgot Password?” link.

Note: You will be locked out of the Fund Portal after five unsuccessful login attempts. If this happens, please contact THCF for assistance at (816) 912-4184.

FUND PORTAL FEATURES

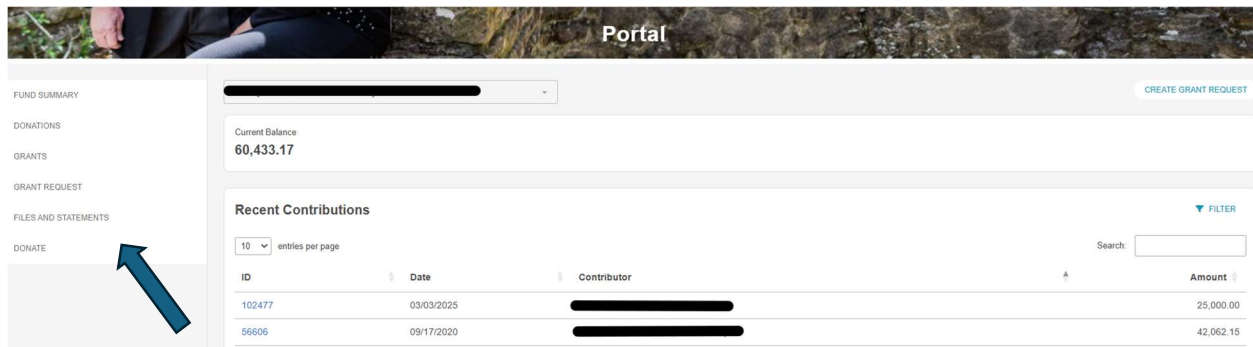
Once you are logged in, your fund’s homepage will appear. There is a **CREATE GRANT REQUEST BUTTON ON EACH PAGE ON THE RIGHT.**

If you manage multiple funds, you will see all funds along the bottom. Click “select” on which fund you would like to manage. Once selected the page will look like the image on the previous page.



If you would like to change between funds, click SELECT or use dropdown, circled on previous page.

Now that you are viewing your fund...



The tabs on the left of the page, display features available to you, as a fund advisor:

- **FUND SUMMARY** – Your Fund Summary page is a quick snapshot of your fund’s most recent activity. This tab shows your fund’s current balance, recent contributions, and recent grant history. *(scroll down to see all info)*
- **DONATIONS** – This tab shows all contributions/donations made into the fund. If someone other than yourself has contributed to the fund you can click on a contributor’s name and it will bring up their contact information and history of gifts to the fund, including the date(s) and dollar amount(s). Note that donors to the fund who want to remain anonymous will not have contact information displayed. Also note that there is a “Filter” and “Export” feature at the top-right of the page; where you can sort and produce a csv file (spreadsheet) that details the displayed information.

- **GRANTS** – This menu option hosts three sub-tabs across, PLUS Create Grant Request to the Right (CREATE GRANT REQUEST IS ON EVERY PAGE):

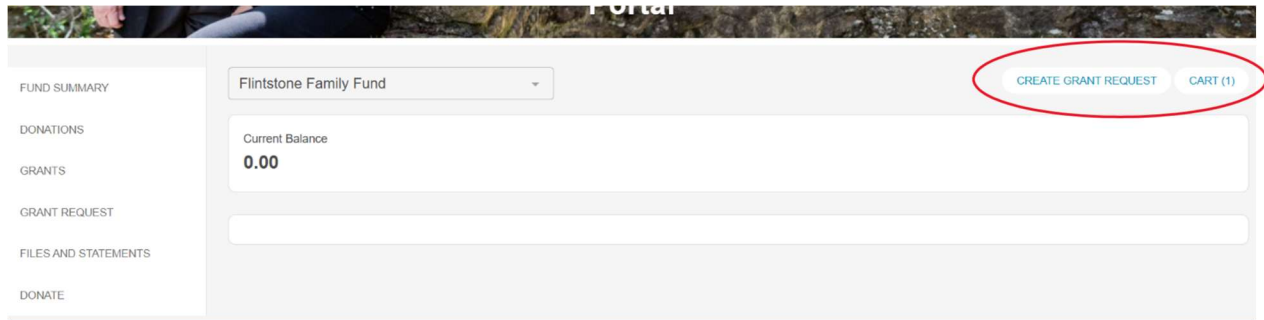


- A. **Grant Summary** - displays a summary of grants awarded from the fund by recipient (grantee), total number of grants and total dollar amount.
 - B. **Grant History** - This section displays the history of grants awarded from your fund, including the date, organization name (grantee), description (purpose), and amount. Note that there is a *copy button* which allows you to duplicate the grant recommendation. You can also modify the copied grant details, such as the dollar amount or designation, before submitting. Additionally, you have the option to sort by date or grantee name. Under the *Status* column, you will see one of six statuses for each grant:
 1. **Request** means that your grant request has been sent to our team. If you would like to cancel a pending grant request before it is processed, click the *Cancel* button.
 2. **Cancelled** means your grant request has been cancelled.
 3. **Pending** means our team is currently processing your grant request.
 4. **Approved** means your grant request has been approved but not yet paid.
 5. **Paid** means the grant request has been approved and a check has been paid out to the organization.
 6. **Completed** means the grant request has been successfully fulfilled.
 - C. **Recurring Grants** - Displays grants from your fund that are set up to be paid on an automated and regular basis (monthly, quarterly, semi-annually, annually).
- **ALL GRANT REQUESTS** (*this feature is for donor advised funds*) – Displays ALL grant request activity from your fund, and provides additional information such as the request date, recipient organization, description, dollar amount, and grant status. *Note there is a “Create Grant Request” button at the upper right corner of this page to make a request.*
 - **FILES & STATEMENTS** – This consists of two sub-tabs with each tab displaying unique information
 - **Files** – Shows any fund-related files we have made viewable to you.
 - **Fund Statements** – Shows your printable fund statements.
 - **DONATE** – This option allows you to contribute online to your fund, or other funds administered by THCF **via credit card only.**

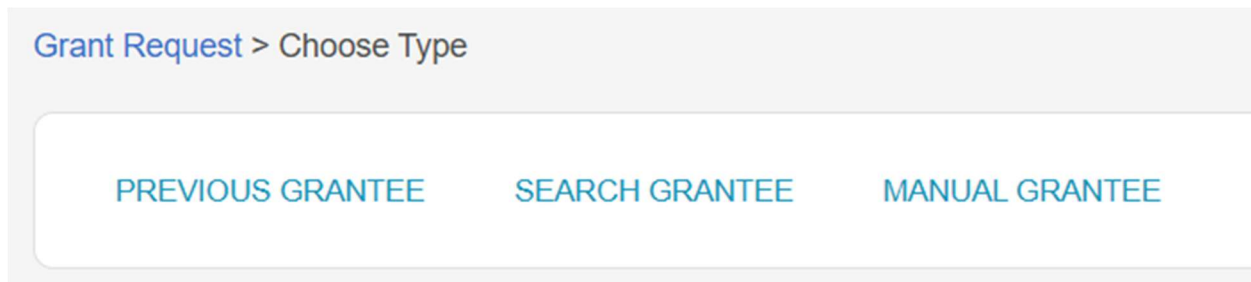
SUBMITTING A GRANT RECOMMENDATION

(for donor-advised funds)

To recommend a grant from your fund, click the **Create Grant Request** tab on the right of the screen (found on every page, except *DONATIONS*). Recommending a grant request is a [three-step process](#). ***\$50.00 is the minimum grant.***



STEP 1. Choose a grantee in one of four ways:



A1. Choose previous Grantee or Funds – Choose the organization you want to support from this drop-down list of organizations you have previously supported. **IF YOU HAVE NEVER MADE A GRANT FROM YOUR FUND, THERE ARE NO PREVIOUS GRANTEES.** However, you will see “*other foundations funds*” that are held at THCF. Click inside the blank dropdown to populate agency names. (see next page)

A2. Other foundation funds – Choose a fund you want to support from this drop-down list of funds held at the foundation. THIS IS AN INTERFUND – no checks are written.

B. Search for Grantees – Search for the organization you want to support. The first results will show those agencies in the THCF system. If they are not in the THCF system, you can click on the Candid Results (to the right) for the world's largest database of nonprofit organizations. Once you find the organization you want to support, click Create Grant Request to the left of name.

C. Enter Grantee information manually – If you can't find the organization you wish to support, you will need to enter the organization's information manually: organization name, address, and phone number. The fields marked with an asterisk (*) are required; providing all the requested information allows us to ensure your grant recommendation is processed as accurately and efficiently as possible. Once you enter this information, click *Submit*.

Choose from previous Grantees or Funds

Grantees you have given to in the past

[Click inside to populate agency name](#)

Foundation funds you have given to in the past

[Click inside to populate agency name](#)

Other foundation funds

[Click inside to populate agency name](#)

Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details, including the grant description, amount and special handling/mailling instructions.

STEP 2. Grant Details – agency & address will self-populate

1. In the description field, please provide the grant purpose. This information is printed directly on the check stub. Keep in mind that if you don't designate a specific grant purpose, your grant will be designated for general support.
2. Enter the amount of your grant request. E.g. \$250.00 *(If you want to donate to the same organization for several purposes, please make one grant for the total amount and list the breakdown in the description of the grant. (example: Gift of \$500 to ABC Organization. Description: \$250 for general support, \$250 for XYZ program)*
3. You can choose to remain anonymous by selecting the *Anonymous* checkbox.
4. By checking the *Recurring* box, you may choose further options to make this grant automatically paid on a regular schedule.
5. The attachment field allows you to upload a document related to the grant, such as a program description or a donation request form.
6. Special Handling Instructions for THCF staff OR important notes of grant. *E.g. Please don't mail, we would like to pick up and deliver.*
7. Once you have finished entering this information, click *Add to Cart*.

*** You CANNOT use funds from a DAF to pay for tables, tickets, or memberships.**

STEP 3. Grant Request Cart (to the right of Create Grant Request button)

[CREATE GRANT REQUEST](#)[CART \(2\)](#)

This view allows you to review all recommendations before submitting them for staff processing. If you have additional requests, click on the **Create Grant Request** and repeat steps. After all grants are entered, click *Review Grant Requests at the top right*. From here, you can delete or edit a grant recommendation. When satisfied, click “submit grant request”.

Grant Request Cart

REVIEW GRANT REQUESTS

	Recipient	Description	Amount	
DELETE	Youth Advisory Council Fund	special sponsorship - in honor of Fred's b-day	500.00	EDIT
DELETE	Leadership Foundation	general support	200.00	EDIT
	Liberty, MO 64068			
Grant Request Total			700.00	

Grant Request Cart

Grantee	Description	Attachment	Amount	Anonymous
			\$ 500.00	No
Total			\$ 500.00	

SUBMIT GRANT REQUESTS

FREQUENTLY ASKED QUESTIONS

1. **How often are fund statements posted?** Fund statements are posted quarterly. You will be notified via email when your statement is ready to be viewed in the Fund Portal. If you are not receiving these notification emails, please contact us.
2. **Which URL can I bookmark on my Internet browser?** <https://thcf.fcsuite.com/erp/portal>
3. **If I've lost my password. What should I do?** The Fund Portal and Foundation staff do not save passwords. You can reset your password on the Fund Portal login page by clicking on the “Forgot Password?” link.
4. **How long does it take for my recommendation to be processed?** We request seven to ten business days to process grant recommendations.
5. **Who can I make grant recommendations to?** Grant recommendations must be made to 501(c)(3) organizations (including schools, churches and government entities). The agency must be in good standing with the IRS.
6. **What is the minimum amount for a grant recommendation?** A \$50 minimum is required for each grant recommendation.

7. **Are there other ways to submit a donor recommendation?** Yes, recommendations may be submitted by mail or email with a Grant Recommendation Form. Download the Grant Recommendation Form, which is located on the Foundation's website at <https://www.thcf.org/fundholder-resources/helpful-docs> within the Fundholder section. You can fill out the form and save your changes, then print, mail (THCF 4200 Little Blue Pkwy #340, Indp., MO 64057) or email (castillo@thcf.org) the form to the Community Foundation. You can also call the VP of Community Impact at (816) 912-4184. She will work with you to get a written request submitted, however it is easiest for you.

8. **Can I change my contact information in my profile and/or portal security?** Yes, at the top right of your homepage, there is a PROFILE tab, next to LOGOUT – click EDIT Information

The image displays two screenshots of the THCF Fundholder Portal. The top screenshot shows the 'EDIT INFORMATION' link in the top right corner, highlighted with a blue arrow. The bottom screenshot shows the 'PERSONAL INFORMATION' and 'SECURITY' tabs on the left, with the 'CHANGE USERNAME', 'CHANGE PASSWORD', and 'LOGOUT' links highlighted in the top right.

What if I am having issues logging in?

If you do not receive an email, there may be a few reasons why:

- Usernames and passwords are case-sensitive (upper and lowercase letters must match)
- The email may have landed in your junk/spam folders, as the emails are system-generated and may be flagged by your software
- We may have a different primary email address linked to your fund access. Please call THCF at (816) 912-4184 or email castillo@thcf.org to check your email on file.

I'm still having trouble logging in on a Mac or iPad (Apple products). Are there other steps I should consider?

Please consider using Google Chrome or Microsoft Edge browsers to access the portal. Foundant has seen that these browsers work best for accessing the Fund Portal.

- If you don't have access to the above browsers and use Safari:
- Open a "private window" in Safari to access the portal

If you are still unable to log in... Block 3rd party cookies, but not all cookies, in Settings:

1. Open Safari and click on Safari > Preferences.
2. Click on Privacy.
3. Select “Prevent cross-site tracking” to prevent trackers from using cookies and website data to track you.
4. Select “Block all cookies” to always block cookies.
5. Deselect “Block all cookies” to always allow cookies.

I’m still having trouble logging in on a Windows or Android device. Are there other steps I should consider?

If you enter your email address, received a 6-digit pin, and still cannot get into the portal, please

- Please contact Rachael Watkins, Director of Scholarships, with any questions regarding your **Scholarship Fund/s** and portal access. watkins@thcf.org or 816-912-4185
- All other Fundholder questions can be directed to Diana Castillo, VP Community Impact. castillo@thcf.org or 816-912-4184



Truman Heartland
COMMUNITY FOUNDATION

For Your Records:

Name/Name of Fund: _____

Username: _____

Password: _____