Advisor Portal Step-by-Step Guide

Community Foundation for Greater Atlanta

As a fundholder of the Community Foundation for Greater Atlanta, you can access your fund information online through our Advisor Portal. Within the portal, you can easily check your fund balance, view and download fund statements, request and track grants (or scholarships), add to your fund, and more. The Advisor Portal makes it easy to manage your fund and is available 24/7 from anywhere, on any device. Need help? Contact us at help@cfgreateratlanta.org or 770.759.3190.

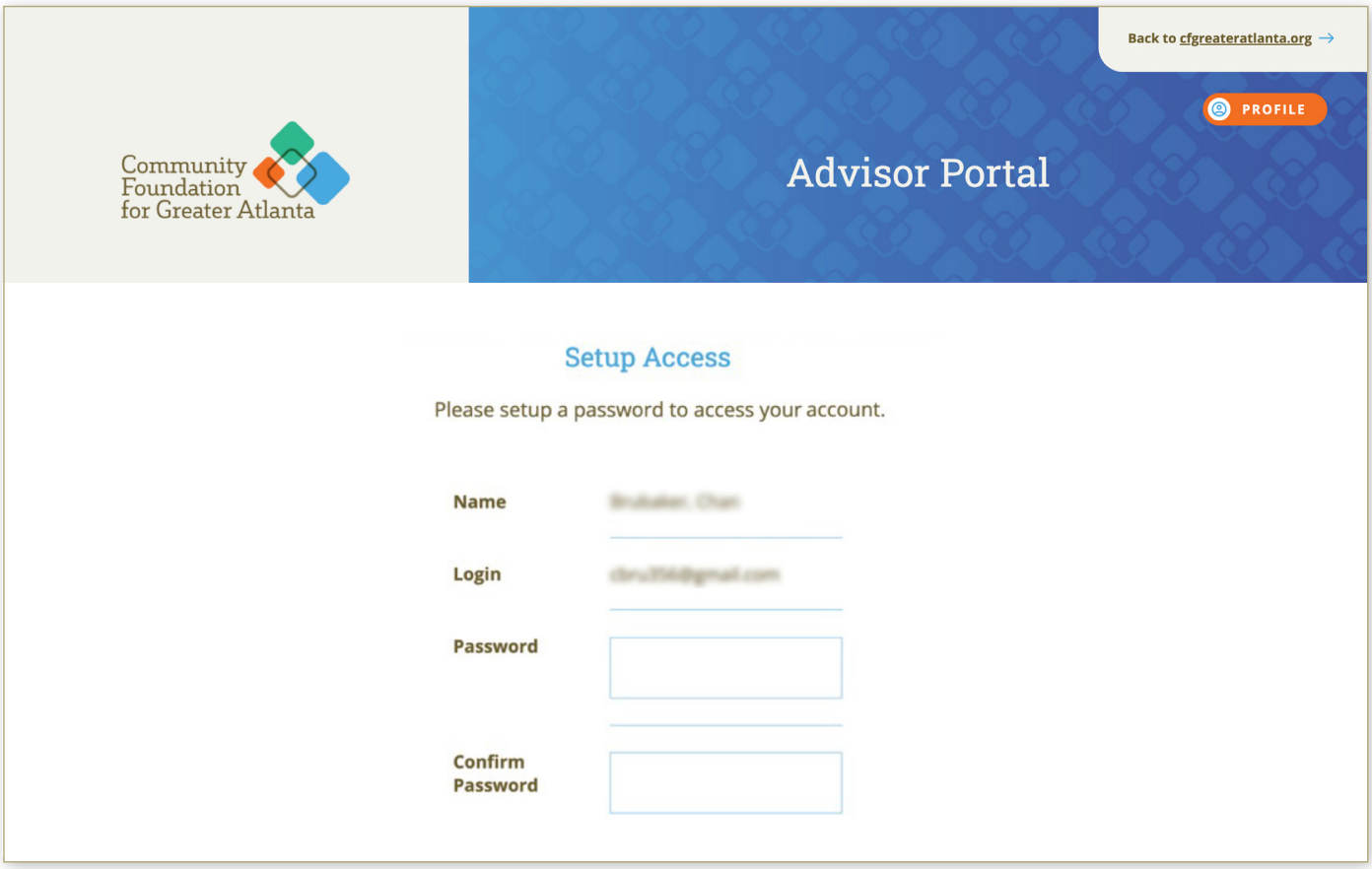
INITIAL LOGIN PROCESS AND CREATING YOUR ACCOUNT

You will receive an automated email from Community Foundation for Greater Atlanta sent as "no-reply@fcsuite.com" with a custom invitation link to create your account in the Advisor Portal. You may need to check your junk email folder. Your username will be the main email address that we have on file for your fund.

Once you click on the invitation link in the email, you will be prompted to create a password of your choice. We recommend using random words, capital letters, numbers and/or special characters to keep your account secure.

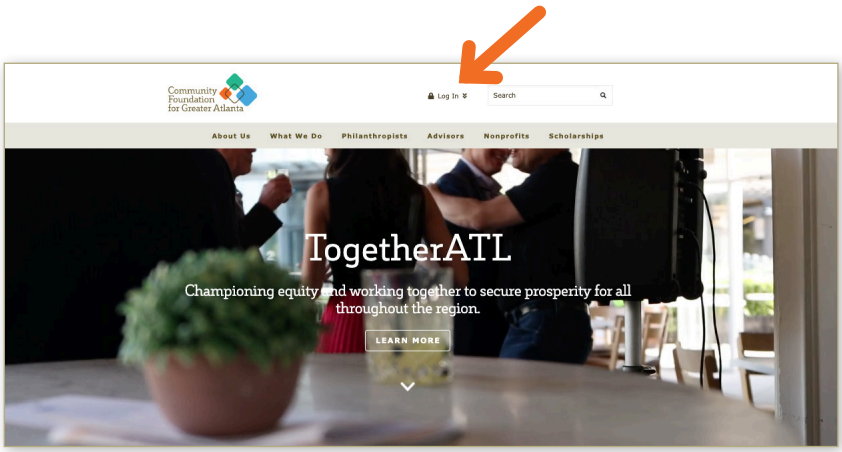
Please write down your password and put it somewhere you will remember!

Delete the initial automated email after you have successfully completed this process. The link contained in the email can only to be used once to establish your initial password.



RETURNING USERS

To access the Advisor Portal at any time (following the initial "setup access"), simply visit cfgreateratlanta.org and click on "Log In" in the header bar of our website (see arrow in sample screen to the right).

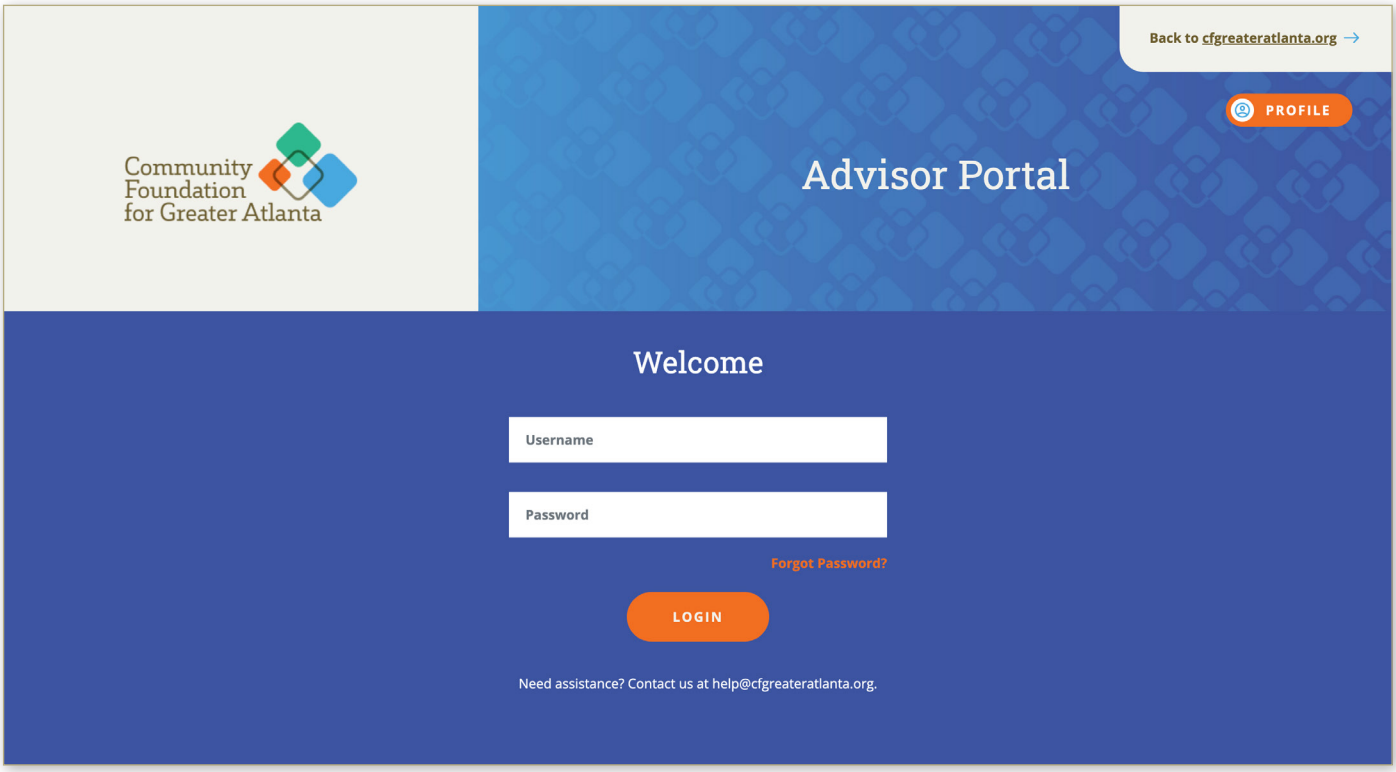


This will take you to the login screen where you will enter your username and password established in the "setup access" step outlined previously.

The Foundation team does not have the ability to access your password. If you forget your password, you can reset your password on the Advisor Portal login page by clicking on the "Forgot Password?" link.

If you still need assistance, please help@cfgreateratlanta.org or 770.759.3190.

Note: The Advisor Portal will lock you out after five unsuccessful login attempts. If you are locked out, please contact our team at help@cfgreateratlanta.org or 770.759.3190.



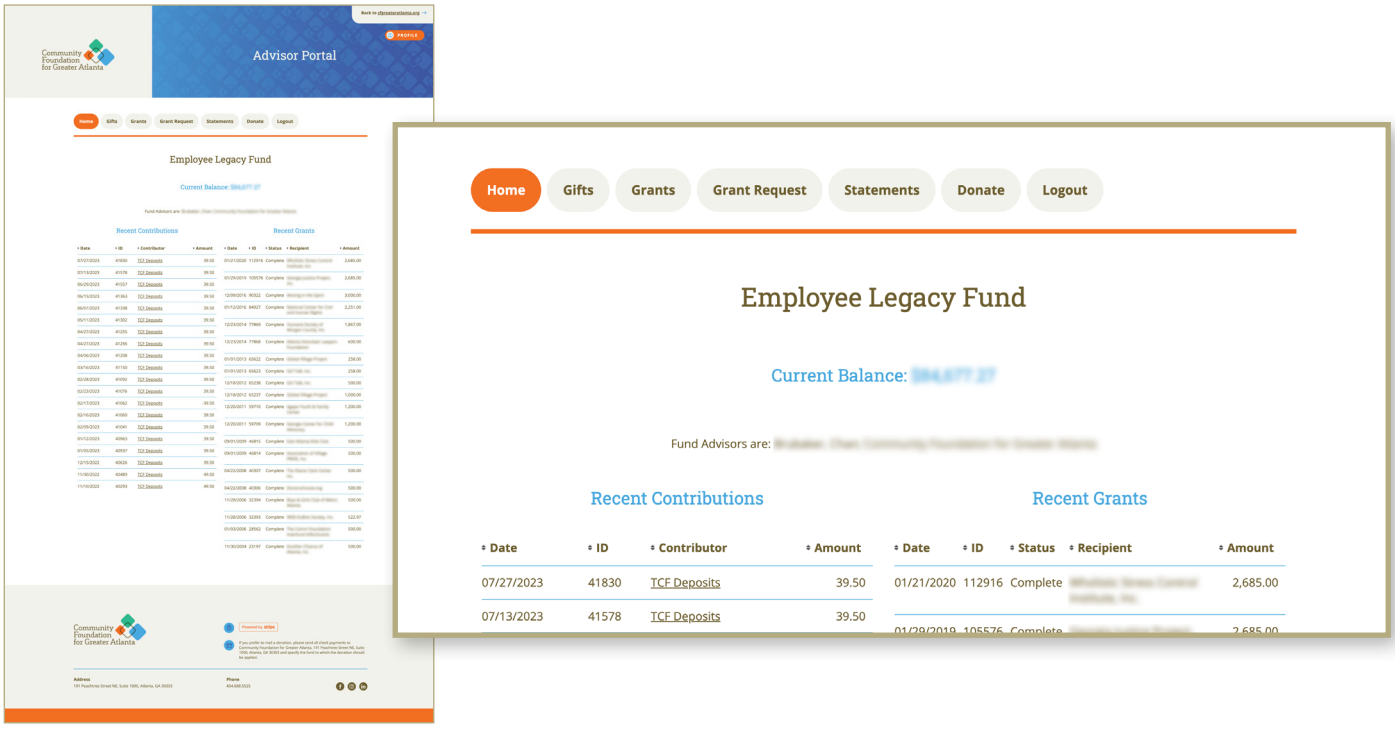
Visit cfgreateratlanta.org from any web browser or device (including smartphones and tablets) to access the Advisor Portal system.

IMPORTANT: *If you access the Advisor Portal from a shared computer or device, we strongly encourage you to use the Logout option after completing each session. This ensures no one other than you has access to the system.*

ADVISOR PORTAL FEATURES

Once you are logged in, your fund's homepage will appear. If you manage multiple funds, you will see a "Choose Fund" menu. Choose the fund you wish to review from the drop-down menu.

If you are listed as an advisor for only one account, you will not have the "Choose Fund" menu but instead will see only your account information.



The tabs at the top of the page display different features available to you as a Fund Advisor:

Home - Your homepage is a quick snapshot of your fund's most recent activity. This tab shows your fund's current balance, all fund advisors, recent contributions, and recent grant history. Note that each Fund Advisor listed will have similar access to the Fund.

Gifts - Allows you to see and dive into your historical giving.

Grants - Shows your grant history with options to dive into your historical grants.

Grant Request - Allows you to make a grant request from your fund and see recent grant statuses.
Note: Online grant requests are only available to Donor-Advised Funds at this time.

Statements - Shows your fund statements. Next to the fund statement you wish to view, click "Print" and the system will generate a PDF in a new window that you may view, save, or print.

Donate - Opens a new window for you to contribute to your fund, or other funds managed at the Community Foundation. You may also set up a recurring donation.

Logout - Remember to use the "Logout" tab to close your Donor Portal. You will be automatically logged out after a period of inactivity even if you do not logout.

Features continued on next page

SUBMITTING A GRANT REQUEST

To recommend a grant from your fund, click the Grant Request tab.

Recommending a grant is a three-step process:

STEP ONE – CHOOSE A GRANTEE

Choose a Grantee in one of four ways:

A **Choose from Previous Grantee**
Choose the organization you want to support from this drop-down list of organizations you have previously supported.

B **Other Foundation Funds**
Choose a TogetherATL fund you want to support from this drop-down list of funds.

C **Search for Other Grantees**
Search for the organization you want to support in GuideStar, the world's largest database of nonprofit organizations. The more keywords used, the better the search results will be. Once you find the organization you want to support, click *Create Request.*

D **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 a red 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.*

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

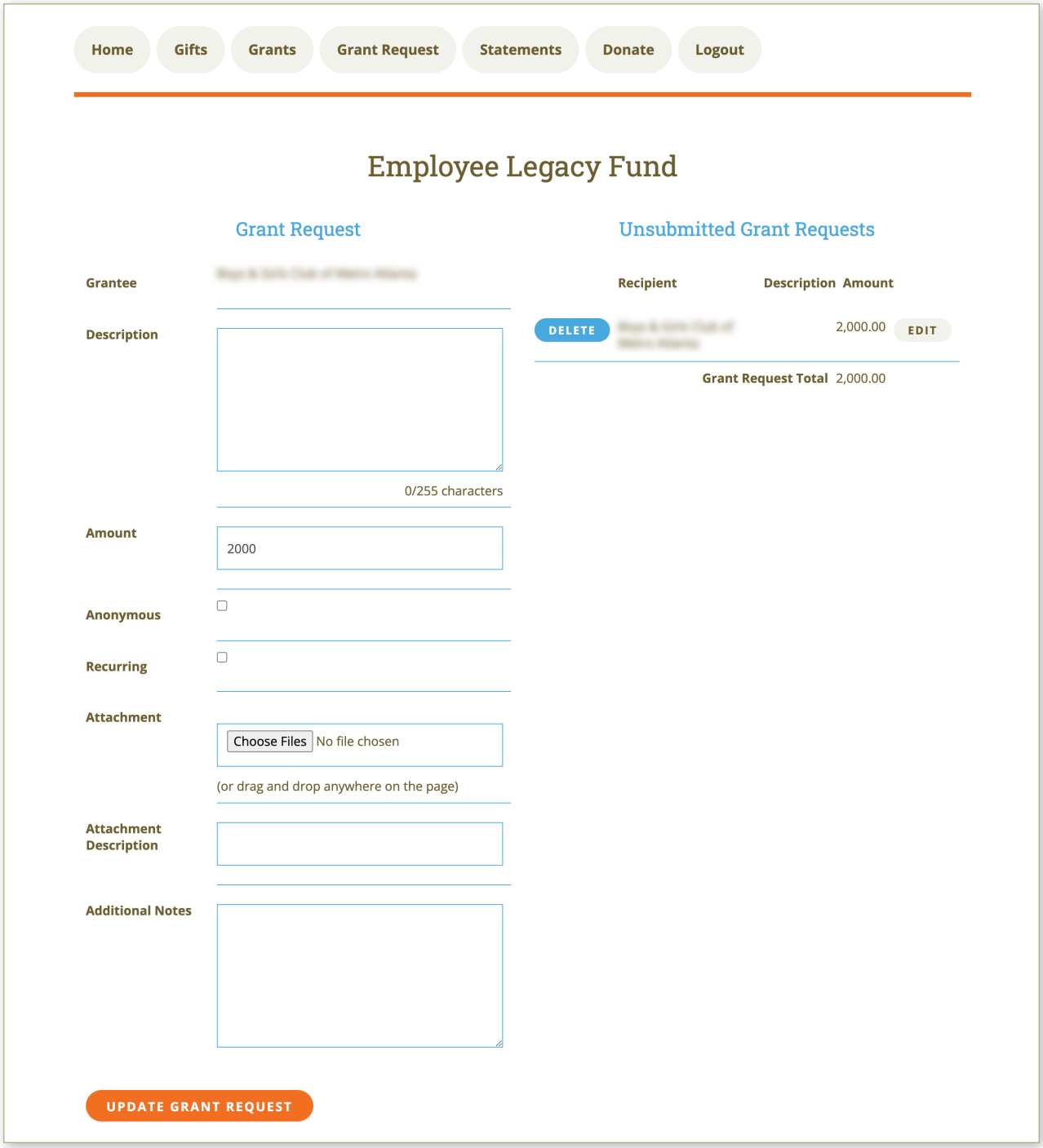
Grant request continued on next page

STEP TWO – GRANT DETAILS

In the description field, please provide the grant purpose and any special handling. Keep in mind that if you don't designate a specific grant purpose, your grant will be designated for unrestricted use.

A $100 minimum is required for each grant request. You can also choose to remain anonymous by selecting the Anonymous checkbox.

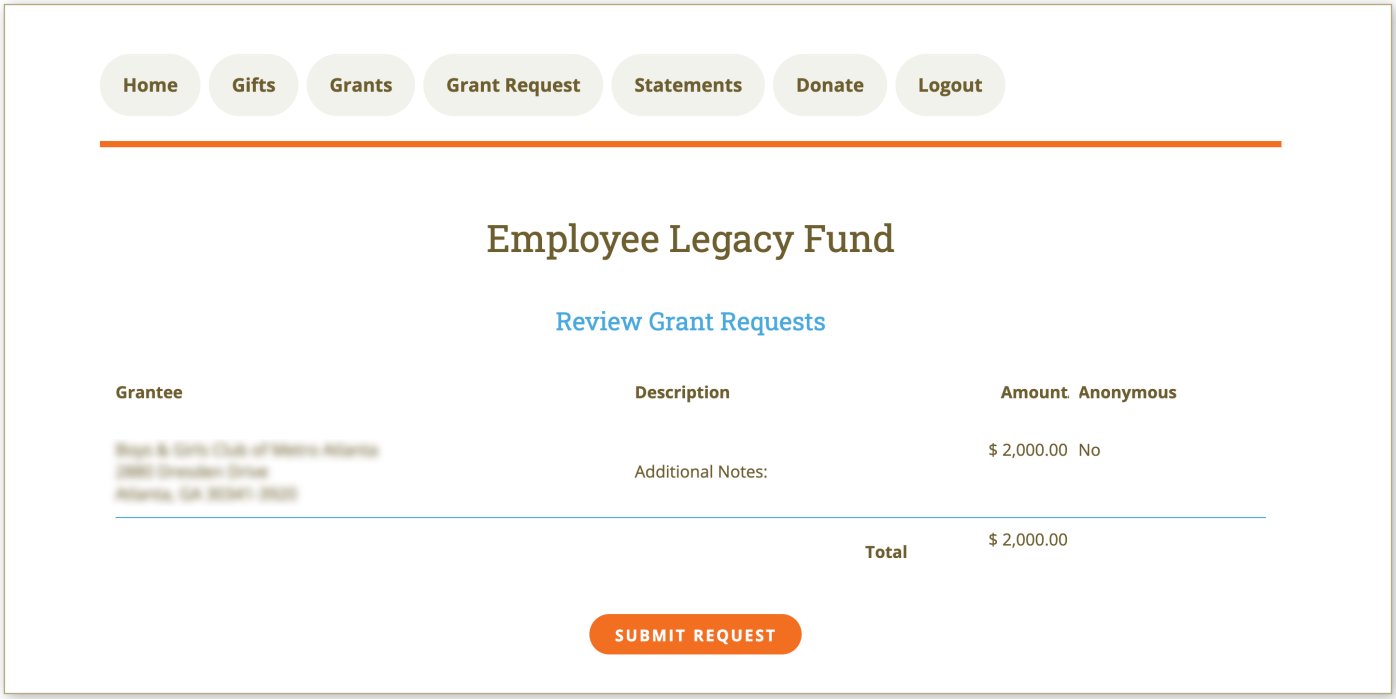
Once you are finished entering this information, click *Update Grant Request.*



Grant request continued on next page

STEP THREE – REVIEW AND SUBMIT REQUEST

Review your grant request details and click **Submit Request**. Once you submit the request, our team will begin processing the grant request.



VIEWING GRANT HISTORY

To review your most recent grant history, click the Grants tab. Under the Status column (see arrow), you will see one of six statuses for each grant:

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 yellow Cancel button.

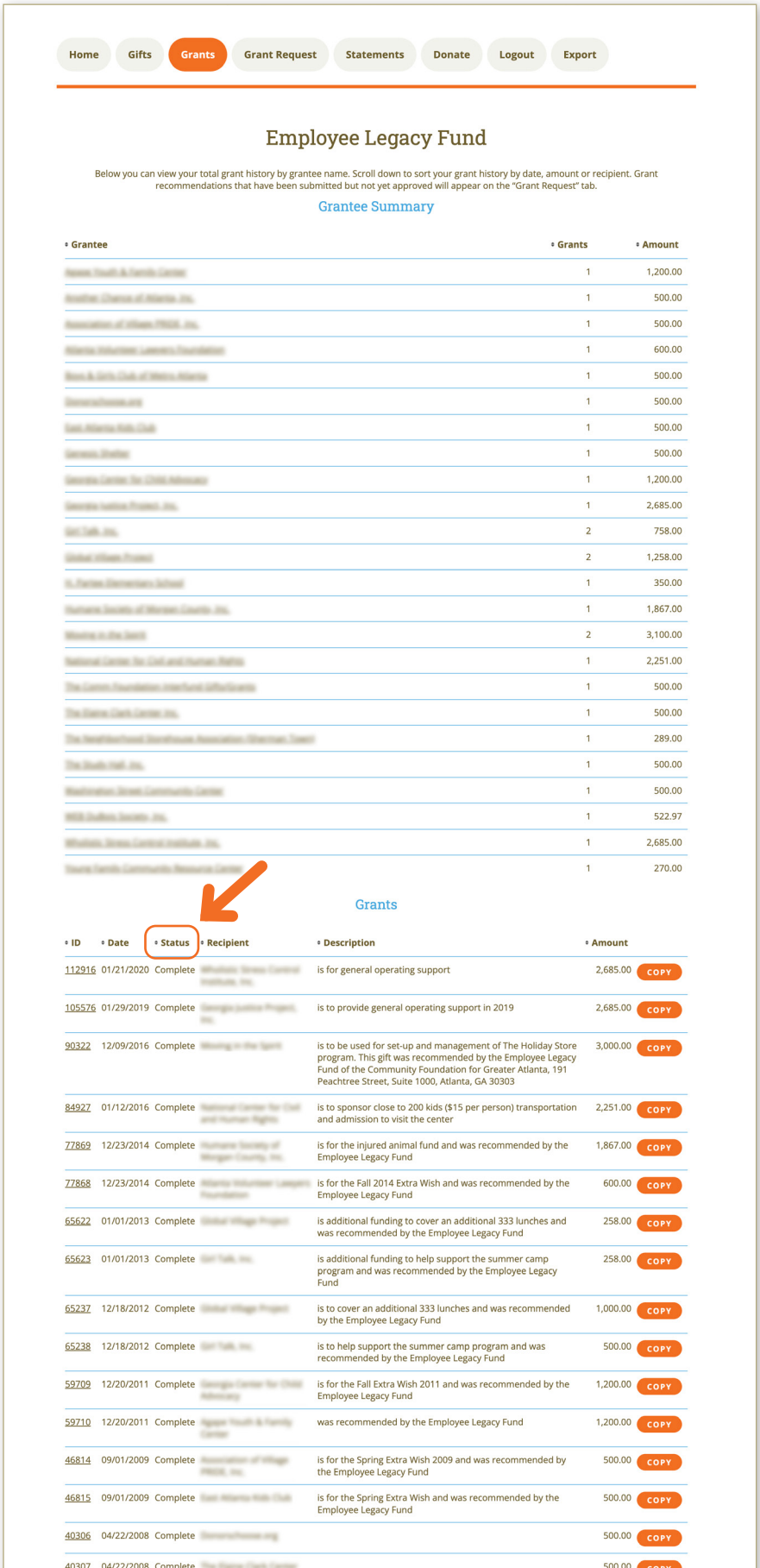
Cancelled means your grant request has been cancelled.

Pending means that our team is currently processing your grant request.

Approved means your grant request has been approved but not yet paid.

Paid means that the grant request has been approved and a check has been paid out to the organization.

Completed means the grant request has successfully been fulfilled.



Home | Gifts | Grants | Grant Request | Statements | Donate | Logout | Export

Employee Legacy Fund

Below you can view your total grant history by grantee name. Scroll down to sort your grant history by date, amount or recipient. Grant recommendations that have been submitted but not yet approved will appear on the "Grant Request" tab.

Grantee Summary

Grantee	Grants	Amount
[illegible]	1	1,200.00
[illegible]	1	500.00
[illegible]	1	500.00
[illegible]	1	600.00
[illegible]	1	500.00
[illegible]	1	500.00
[illegible]	1	500.00
[illegible]	1	500.00
[illegible]	1	1,200.00
[illegible]	1	2,685.00
[illegible]	2	758.00
[illegible]	2	1,258.00
[illegible]	1	350.00
[illegible]	1	1,867.00
[illegible]	2	3,100.00
[illegible]	1	2,251.00
[illegible]	1	500.00
[illegible]	1	500.00
[illegible]	1	289.00
[illegible]	1	500.00
[illegible]	1	500.00
[illegible]	1	522.97
[illegible]	1	2,685.00
[illegible]	1	270.00

Grants

ID	Date	Status	Recipient	Description	Amount	
112916	01/21/2020	Complete	[illegible]	is for general operating support	2,685.00	COPY
105576	01/29/2019	Complete	[illegible]	is to provide general operating support in 2019	2,685.00	COPY
90322	12/09/2016	Complete	[illegible]	is to be used for set-up and management of The Holiday Store program. This gift was recommended by the Employee Legacy Fund of the Community Foundation for Greater Atlanta, 191 Peachtree Street, Suite 1000, Atlanta, GA 30303	3,000.00	COPY
84927	01/12/2016	Complete	[illegible]	is to sponsor close to 200 kids ($15 per person) transportation and admission to visit the center	2,251.00	COPY
77869	12/23/2014	Complete	[illegible]	is for the injured animal fund and was recommended by the Employee Legacy Fund	1,867.00	COPY
77868	12/23/2014	Complete	[illegible]	is for the Fall 2014 Extra Wish and was recommended by the Employee Legacy Fund	600.00	COPY
65622	01/01/2013	Complete	[illegible]	is additional funding to cover an additional 333 lunches and was recommended by the Employee Legacy Fund	258.00	COPY
65623	01/01/2013	Complete	[illegible]	is additional funding to help support the summer camp program and was recommended by the Employee Legacy Fund	258.00	COPY
65237	12/18/2012	Complete	[illegible]	is to cover an additional 333 lunches and was recommended by the Employee Legacy Fund	1,000.00	COPY
65238	12/18/2012	Complete	[illegible]	is to help support the summer camp program and was recommended by the Employee Legacy Fund	500.00	COPY
59709	12/20/2011	Complete	[illegible]	is for the Fall Extra Wish 2011 and was recommended by the Employee Legacy Fund	1,200.00	COPY
59710	12/20/2011	Complete	[illegible]	was recommended by the Employee Legacy Fund	1,200.00	COPY
46814	09/01/2009	Complete	[illegible]	is for the Spring Extra Wish 2009 and was recommended by the Employee Legacy Fund	500.00	COPY
46815	09/01/2009	Complete	[illegible]	is for the Spring Extra Wish and was recommended by the Employee Legacy Fund	500.00	COPY
40306	04/22/2008	Complete	[illegible]		500.00	COPY
40307	04/22/2008	Complete	[illegible]		500.00	COPY

ADVISOR PORTAL FREQUENTLY ASKED QUESTIONS

How long does it take for my grant request to be processed?
Grant requests submitted by 5 p.m. on Mondays will be processed that Thursday. Requests submitted after 5 p.m. on Mondays will be processed the following Thursday.

Who can I make grant requests to?
Grant recommendations must be made to qualified 501(c)(3) organizations (including schools, churches and government entities).

What is the minimum amount for a grant request?
A $100 minimum is required for each grant request.

How often are Fund Statements posted?
Fund statements are posted quarterly. You will be notified via email when your fund statement is ready to be viewed in the Advisor Portal. If you are not receiving these notification emails, please contact our team at help@cfgreateratlanta.org or 770.759.3190.

I haven't received the auto-generated email for the new Advisor Portal yet. What should I do?
It could take an entire day for the system to fully process each custom URL and send the autogenerated email. Check your Spam or Junk folder for an email from no-reply@fcsuite.com.

If it hasn't arrived within a few days, please email help@cfgreateratlanta.org so that we can manually resend the information you will need to get up-and-going.

The URL only worked the first time. How do I return to the portal?
The custom URL inside the auto-generated email was only provided to establish your password.

To access the portal, go to cfgreateratlanta.org and click on the green Advisor Portal button at the top right corner of our website. This will take you to the login screen where you will enter your username and password.

I've lost my password. What should I do?
Our team does not have the ability to access your password. You can reset your password on the Advisor Portal login page by clicking on the "Forgot Password?" link.

If you still need assistance, please contact our team at help@cfgreateratlanta.org or 770.759.3190.

QUESTIONS

If you have any questions about the Advisor Portal, please contact our team at help@cfgreateratlanta.org or 770.759.3190.