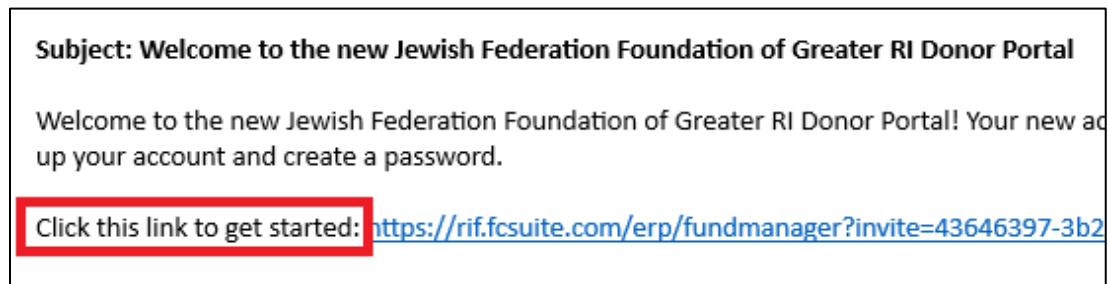


New Account Setup

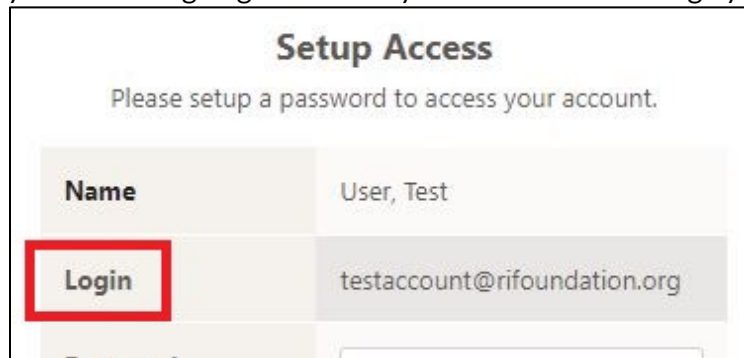
Look for an email from Rhode Island Foundation at no-reply@fcsuite.com with the subject line "Welcome to the new Jewish Federation Foundation of Greater RI Donor Portal".

If you were notified to expect an email and haven't received it yet, please check your spam folder or contact Pamela Adams at 401-427-4059 or padams@rifoundation.org.

Follow the instructions in that Welcome email. Click the link in the email to create your account password. The link will expire after 30 days. If you don't set your password within 30 days, please contact us to send a new Welcome email and link.



On the "Setup Access" page, please take note of the Login listed as that will be your username for your account going forward. If you would like to change your Login, please contact us.



Jewish Federation Foundation Donor Portal Instructions

Create your password by entering it once and then again to confirm. Listed beneath you will find the password requirements and tips for creating strong passwords.

Password	<input type="password"/>
Confirm Password	<input type="password"/>

Password Requirements

Minimum Length	The password must be at least 12 characters long
Required Characters	The password must have a character from 3 of the following types

After entering your password, click Save at the bottom of the page.

The easiest thing to do is to use a password manager like **LastPass** or **bitwarden** or **1Password** just to name a few

Save

You'll now see a page with the message "Setup Access - Complete". Click Continue to access the Donor Portal.

Setup Access - Complete

Thanks for setting up your password.

Please make sure and use the login below with your password to access this site in the future.

Login	testaccount@rifoundation.org
--------------	------------------------------

Continue

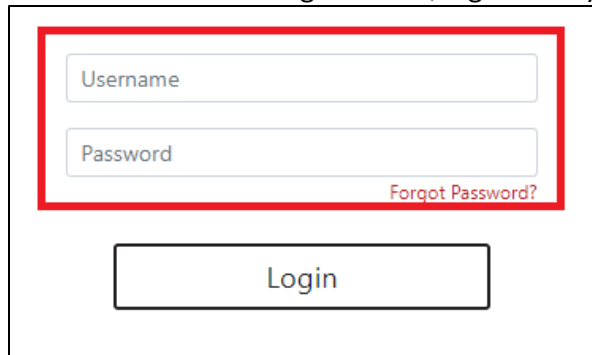
Jewish Federation Foundation Donor Portal Instructions

Logging in to the Donor Portal

To log back into the Donor Portal at a later time, click and bookmark the following link:
<https://www.jewishallianceri.org/support-us/giving-options/our-endowment>

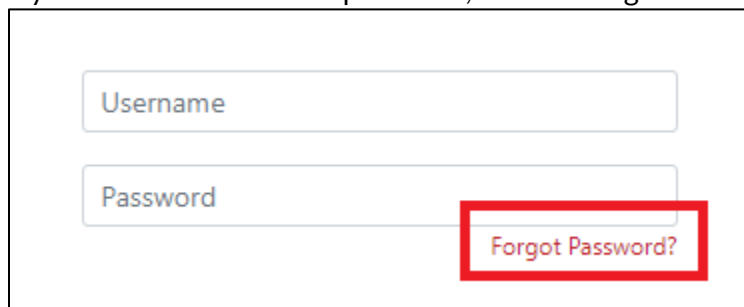
The link to the portal is at the top of that page.

On the Donor Portal login screen, log in with your credentials.



A screenshot of the Donor Portal login screen. It features a red rectangular box highlighting the 'Username' and 'Password' input fields. Below these fields is a 'Forgot Password?' link in red text. At the bottom of the highlighted area is a 'Login' button.

If you can't remember the password, use the Forgot Password link.



A screenshot of the Donor Portal login screen. It shows the 'Username' and 'Password' input fields. The 'Forgot Password?' link is highlighted with a red rectangular box.

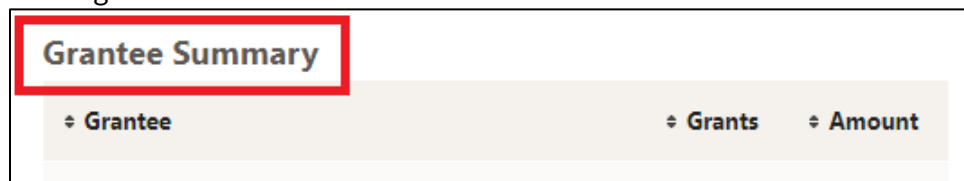
If you enter a password incorrectly five times, your account will be locked. To unlock your account or if you need assistance with logging in, please contact Pamela Adams at 401-427-4059 or padams@rifoundation.org.

View Grants

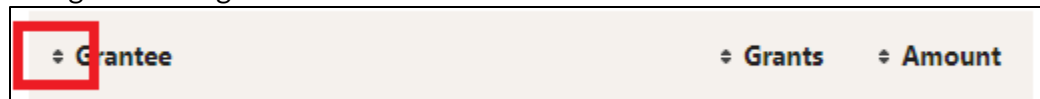
To view grants from your fund, click the Grants tab. If you have more than one fund, also make sure the correct fund is selected under Choose Fund.



The Grants tab includes a Grantee Summary page at the top. All grantees are listed with the total number of grants and the total amount. Click on a grantee name to see the list of grants to only that organization.



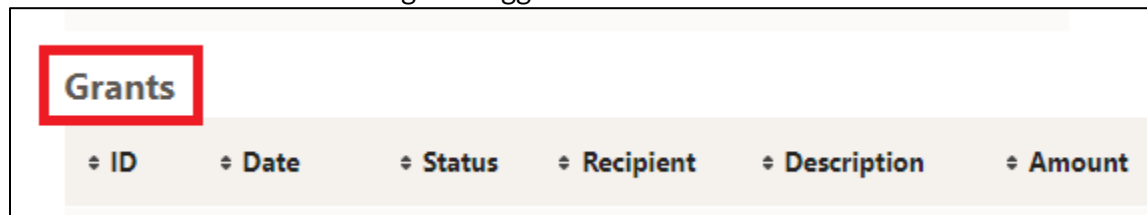
Change the sort order by clicking the field name. The arrows to the left of the field name will change indicating how the field is sorted.



Filter the list by mousing over the field name and clicking the funnel icon. You can select only the options you would like to see listed.



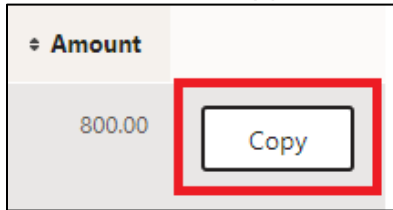
Beneath Grant Summary is a Grants section where all grants are listed by date. This list can also be sorted and filtered using the toggle icons next to the field names.



Click the grant ID link to see more details about that grant.

Jewish Federation Foundation Donor Portal Instructions

If you would like to make a recommendation to the same organization and to copy over the details, click the Copy button.



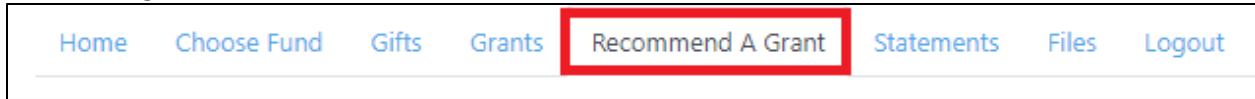
You can also export the list of grants to a file by clicking the Export tab. Your browser will download a spreadsheet of the grants.



Make a Grant Recommendation

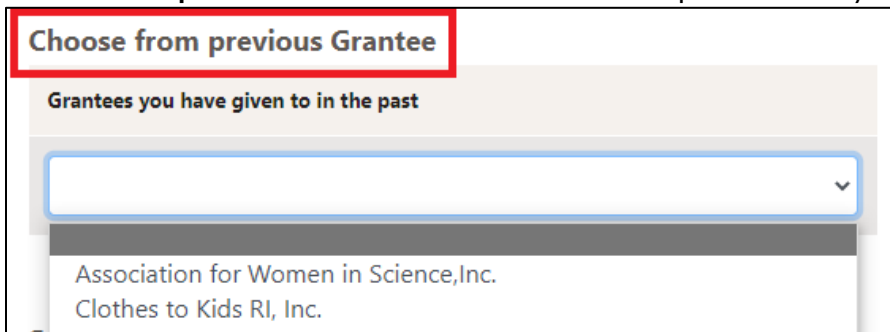
If you have more than one fund, make sure you've selected the correct fund under Choose Fund.

To make a grant recommendation, click the Recommend A Grant tab.

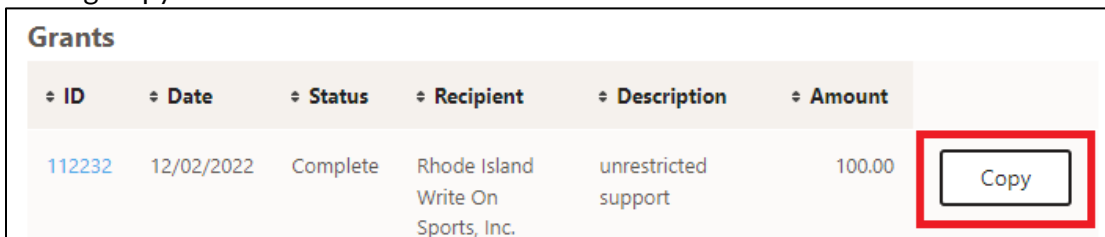


There are a few options to enter the grantee:

1. **Choose from previous Grantee** – select from the dropdown list of your previous grantees



In the Grants tab, you can also select from previous grantees in the Grants section by clicking Copy.



A screenshot of a table titled 'Grants'. The table has columns: ID, Date, Status, Recipient, Description, and Amount. A 'Copy' button is located to the right of the table, highlighted with a red box.

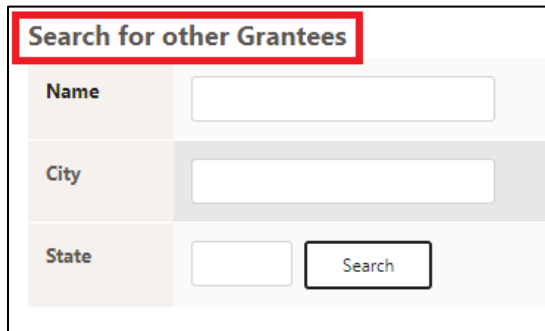
ID	Date	Status	Recipient	Description	Amount
112232	12/02/2022	Complete	Rhode Island Write On Sports, Inc.	unrestricted support	100.00

2. **Search for other Grantees** – If you're submitting a grant for a new grantee, enter a organization name here to search the Rhode Island Foundation database. If your recipient isn't found, then click on "GuideStar Results."

TIPS:

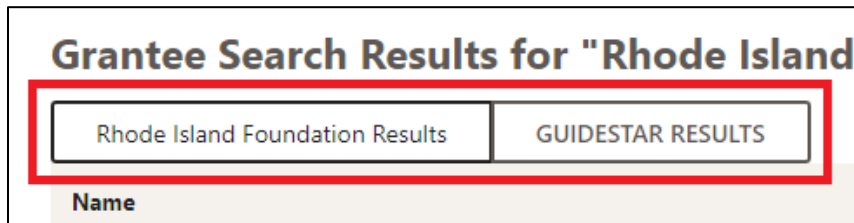
- a. Entering the words for the organization name in the correct order will get better results.
- b. Providing the city and state is optional but will provide more refined search results.

Jewish Federation Foundation Donor Portal Instructions



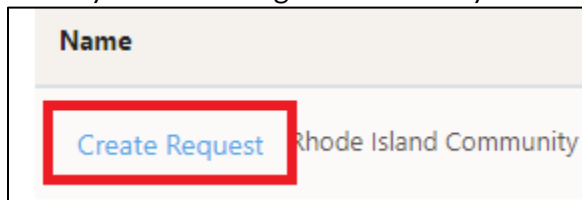
A search form titled "Search for other Grantees" with a red border. It contains three input fields: "Name", "City", and "State". A "Search" button is located to the right of the "State" field.

Click on the Rhode Island Foundation and GuideStar buttons to see the two sets of results.



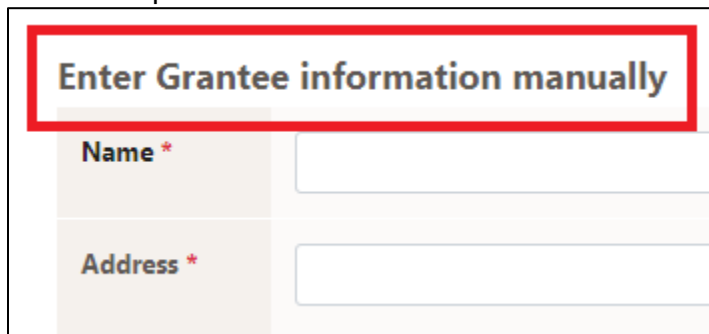
A section titled "Grantee Search Results for 'Rhode Island'" with a red border. It contains two buttons: "Rhode Island Foundation Results" and "GUIDESTAR RESULTS". Below the buttons is a "Name" label.

When you see the organization that you're looking for, click Create Request.



A button labeled "Create Request" with a red border, located next to the text "Rhode Island Community".

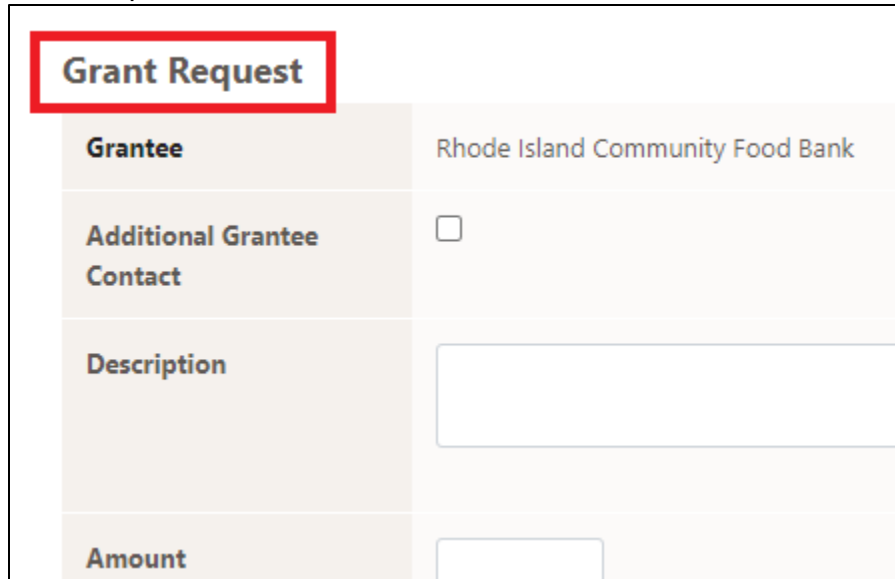
3. **Enter Grantee information manually** – enter the information for the grantee and click Submit. Required fields have asterisks.



A form titled "Enter Grantee information manually" with a red border. It contains two input fields: "Name *" and "Address *".

Jewish Federation Foundation Donor Portal Instructions

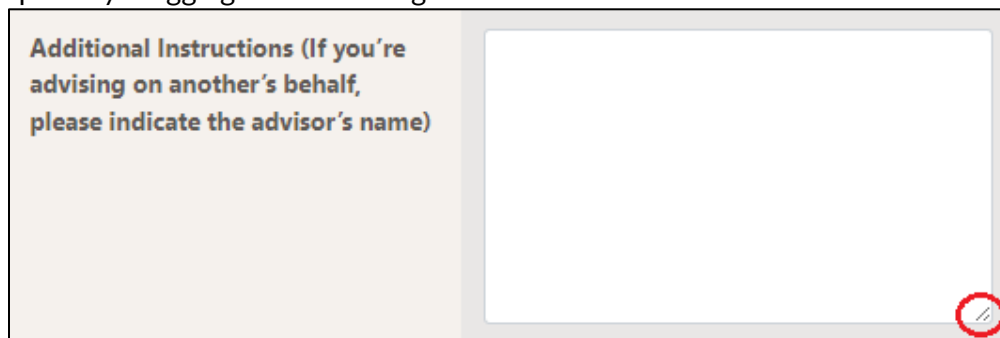
Once you have your recipient set, you'll be sent to a new form. Enter the information listed under Grant Request:



The screenshot shows a web form titled "Grant Request" in a red-bordered box. The form has a light gray background and is divided into several sections. The first section is labeled "Grantee" and contains the text "Rhode Island Community Food Bank". Below this is a section labeled "Additional Grantee Contact" with a checkbox. The next section is labeled "Description" and contains a large text input area. The final section is labeled "Amount" and contains a smaller text input area.

- **Additional Grantee Contact** – click the checkbox if you want to specify a contact at the organization.
- **Description** – provide a description for the grant.
- **Amount** – provide the grant amount.
- **Anonymous** – select if you wish to remain anonymous.
- **Recurring** – if you would like the grant to be recurring, select the start date, recurrence interval, and number of recurrences (leave blank if there is no end date).
- **Attachment** – provide any files you would like to include with the recommendation.
- **Attachment Description** – provide a description for any attached files.
- **Additional Instructions** – provide any special request information. If you'd like the donor name(s) to appear differently in the grant letter, please provide it here.

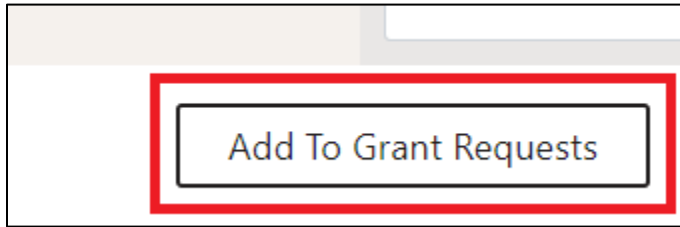
Certain text boxes, like Additional Instructions, allow you to expand the text box to provide more space by dragging the bottom right corner of the box.



The screenshot shows a text box titled "Additional Instructions (If you're advising on another's behalf, please indicate the advisor's name)". The text box is large and has a light gray background. A red circle with a double-slash icon is located at the bottom right corner of the text box, indicating that it can be expanded by dragging.

When all information has been entered, click the Add to Grant Requests button.

Jewish Federation Foundation
Donor Portal Instructions

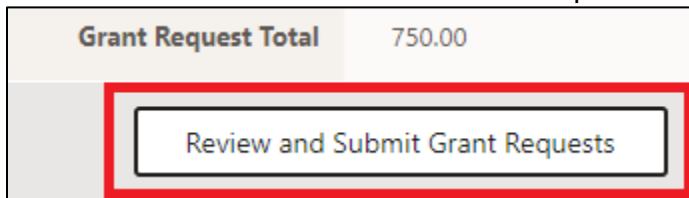


The recommendation is now listed in the right column under "Unsubmitted Grant Requests". You can now either progress with submitting that recommendation or add others to the list.

Unsubmitted Grant Requests			
	Recipient	Description	Amount
Delete	Rhode Island Community Food Bank		750.00
Grant Request Total			750.00
Review and Submit Grant Requests			

To add more recommendations to the list, go through the same steps as above, starting with entering the grantee.

When you've prepared all the recommendations, click "Review and Submit Grant Requests" below the list under "Unsubmitted Grant Requests".

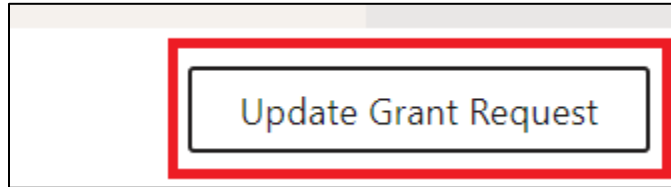


Review the information on the "Review Grant Requests" screen. If edits need to be made, click on the "Recommend a Grant" tab to return to Unsubmitted Grant Requests. Click the "Edit" button for the grant request to make changes.

Unsubmitted Grant Requests			
	Recipient	Description	Amount
Delete	Rhode Island Community Food Bank		750.00
			EDIT

Jewish Federation Foundation Donor Portal Instructions

After fixing your request, click “Update Grant Request.”



Then click “Review and Submit Grant Requests” to return to the “Review Grant Requests” screen. After reviewing information, click Submit Grant Requests.



After submitting, you’ll see the message “Grant Request Submitted”. You will receive a confirmation email with the subject line “Request Confirmation”. Click Continue to return to the “Recommend A Grant” main page.



Your recommendation will now be listed on the “Recommend A Grant” page with its current status. The status will change as it moves through the grant process. To view when a grant recommendation has been paid, the status can be seen on the “Recommend A Grant” and “Grants” tab. Also, staff will email you a copy of the grant letter within a business day of the grant distribution.

Recommend A Grant

Statements

Files

Logout

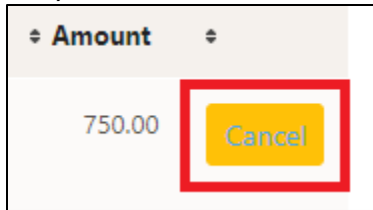
fund. We will receive notification of your
e the grant has been completed.

Grants

÷ Date	÷ Status	÷ Recipient	÷ Description	÷ Amount	÷
05/13/2023	Request	Rhode Island Community Food Bank		750.00	Cancel

Jewish Federation Foundation Donor Portal Instructions

If at any point before the grant has been paid you would like to cancel the recommendation, click the yellow "Cancel" button.



If you have any questions related to the grant recommendation process, please contact Claire Uziel, Endowment/Campaign Operations Manager, at endowment@jewishallianceri.org or 401.421.4111 x109.

View Gifts

If you have more than one fund, be sure the correct fund is selected under Choose Fund.

To view gifts to your fund, click the Gifts tab.



To see more details on a donor and a list of their contributions to the fund, click the donor's name that appears as a link.

Change the sort order by clicking the field name. The arrows to the left of the field name will change indicating how the field is sorted.



Filter the list by mousing over the field name and clicking the funnel icon. You can select only the options you would like to see listed.



You can also export the list of gifts to a file by clicking the Export tab. Your browser will download a spreadsheet of the gifts.

