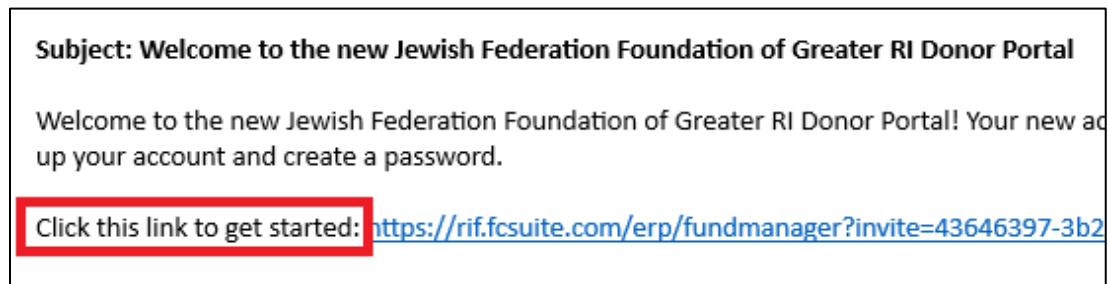# New Account Setup

Look for an email from Rhode Island Foundation at <u>no-reply@fcsuite.com</u> 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 <u>padams@rifoundation.org</u>.

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.

Subject: Welcome to the new Jewish Federation Foundation of Greater RI Donor Portal

Welcome to the new Jewish Federation Foundation of Greater RI Donor Portal! Your new ac
up your account and create a password.

Click this link to get started: https://rif.fcsuite.com/erp/fundmanager?invite=43646397-3b2

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.

Setup Access

Please setup a password to access your account.

Name	User, Test
Login	testaccount@rifoundation.org
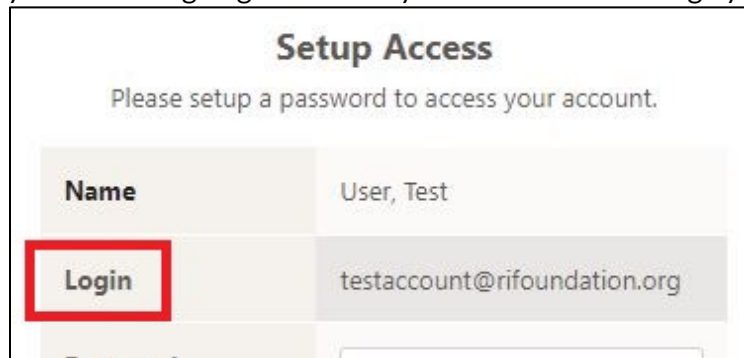
Create your password by entering it once and then again to confirm. Listed beneath you will find the password requirements and tips for creating strong passwords.

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

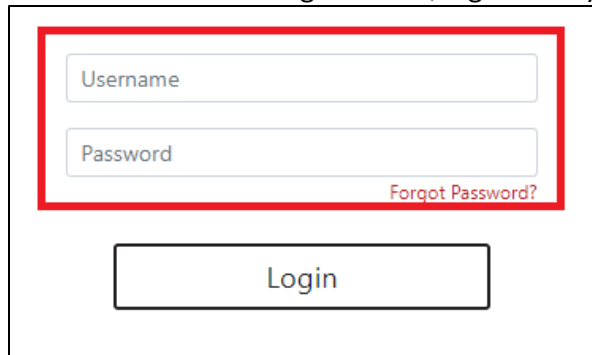You'll now see a page with the message "Setup Access – Complete". Click Continue to access the Donor Portal.

Jewish Federation Foundation
Donor Portal Instructions

Logging in to the Donor Portal

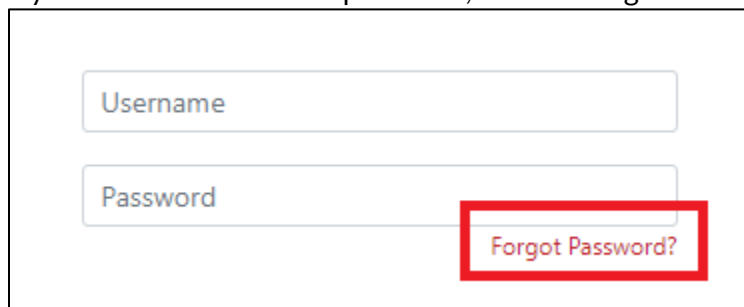To log back into the Donor Portal at a later time, click and bookmark the following link:
https://www.jewishallianceri.org/support-us/giving-options/our-endowment
The link to the portal is at the top of that page.

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

Username

Password

Forgot Password?

Login

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

Username

Password

Forgot Password?

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.
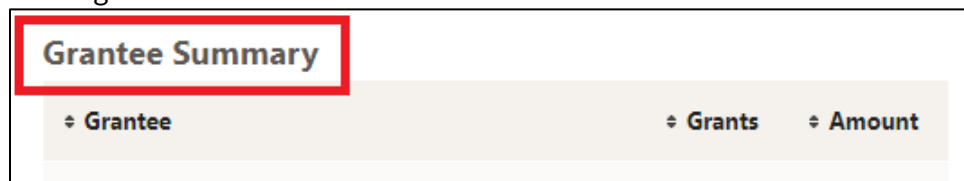

Change the sort order by clicking the field name. The arrows to the left of the field name will change indicating how the field is sorted.
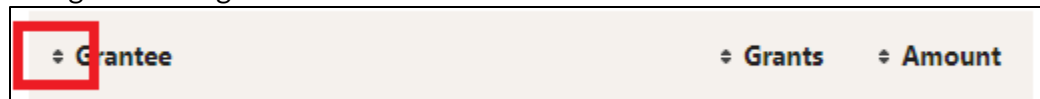
Filter the list by mousing over the field name and clicking the funnel icon. You can select only the options you would like to see listed.


Beneath Grant Summary is a Grants section where are all grants are listed by date. This list can also be sorted and filtered using the toggle icons next to the field names.
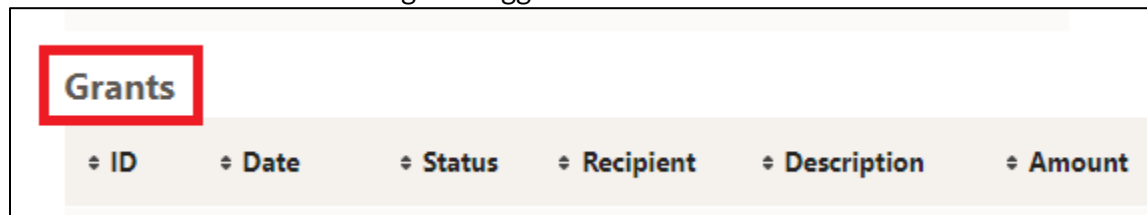
Click the grant ID link to see more details about that grant.

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.
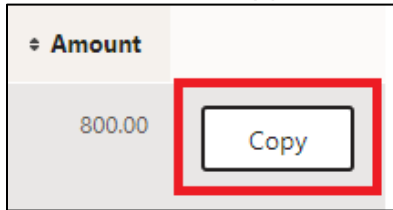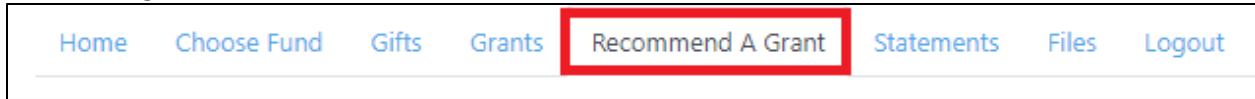

You can also export the list of grants to a file by clicking the Export tab. Your browser will download a spreadsheet of the grants.
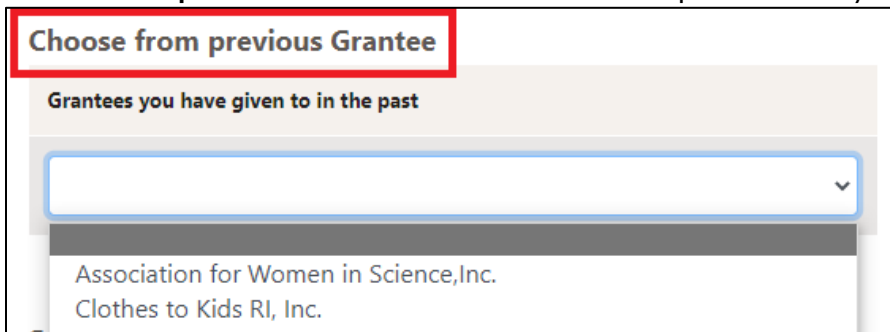
Make a Grant Recommendation

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

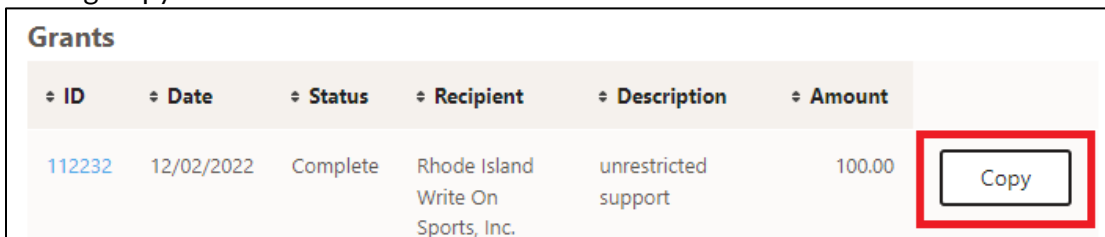To make a grant recommendation, click the Recommend A Grant tab.

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.
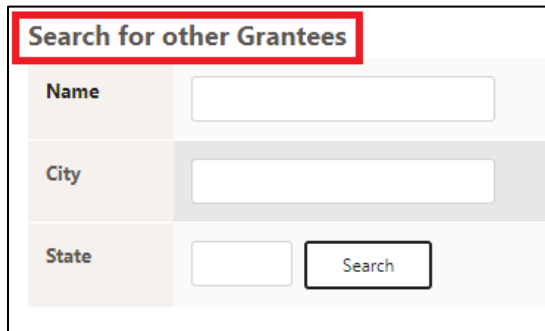
2. **Search for other Grantees** – If you're submitting a grant for a new grantee, enter a organization name here to search the Rhode Island Foundation database. If your recipient isn't found, then click on "GuideStar Results."
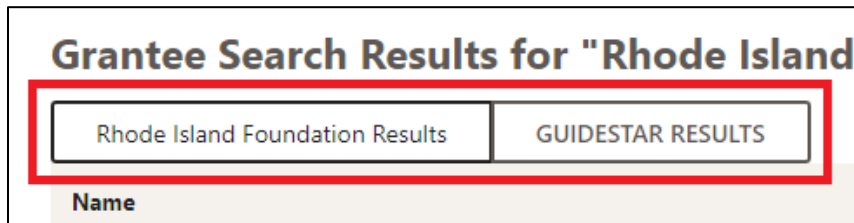
   TIPS:
   a. Entering the words for the organization name in the correct order will get better results.
   b. Providing the city and state is optional but will provide more refined search results.
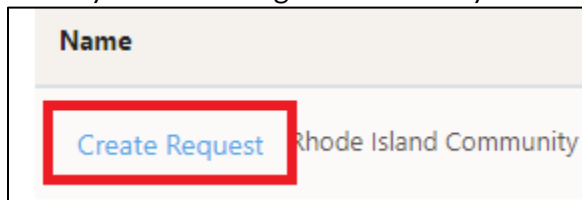
Search for other Grantees

Name	
City	
State	Search

Click on the Rhode Island Foundation and GuideStar buttons to see the two sets of results.
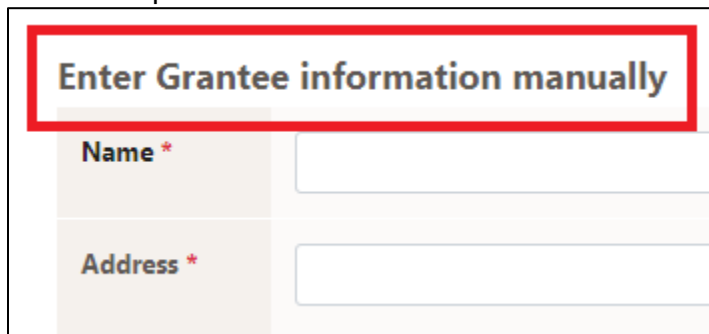
Grantee Search Results for "Rhode Island

Rhode Island Foundation Results	GUIDESTAR RESULTS

Name

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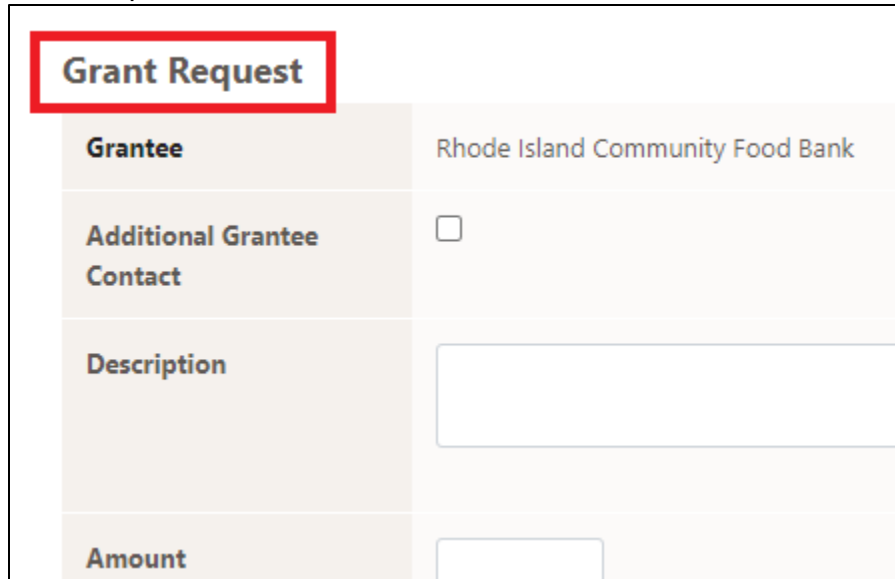
Name

Create Request   Rhode Island Community

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

Enter Grantee information manually

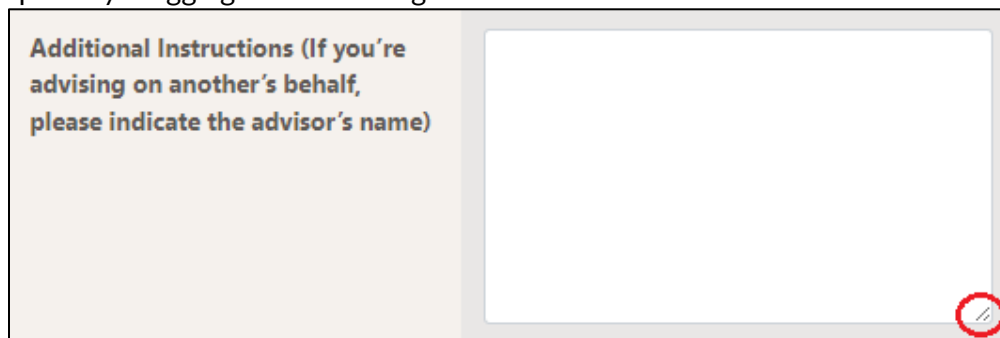| Name *	
Address *	

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:

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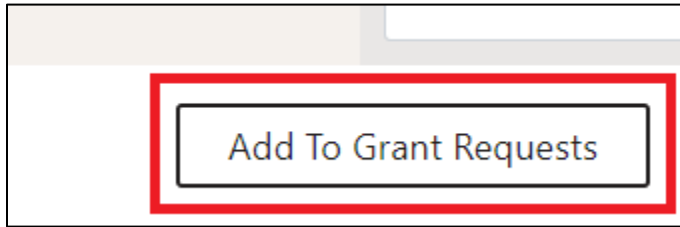
Certain text boxes, like Additional Instructions, allow you to expand the text box to provide more space by dragging the bottom right corner of the box.

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

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.

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".
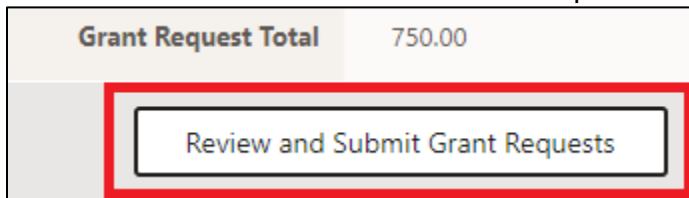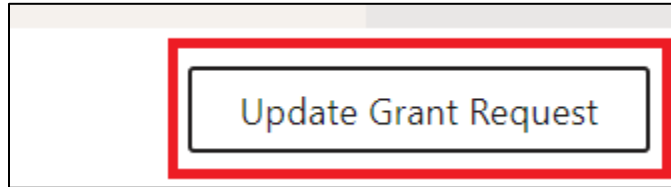

Review the information on the "Review Grant Requests" screen. If edits need to be made, click on the "Recommend a Grant" tab to return to Unsubmitted Grant Requests. Click the "Edit" button for the grant request to make changes.

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.
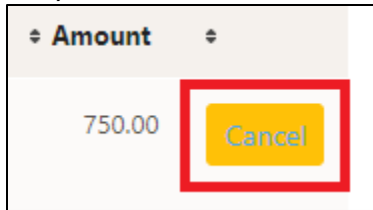
Jewish Federation Foundation
Donor Portal Instructions

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.