

# DONOR PORTAL USER GUIDE

---

## Donor Portal

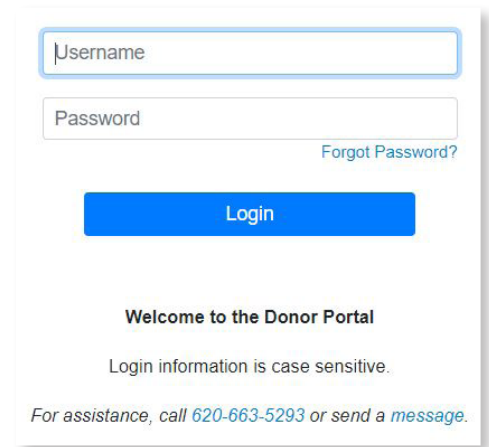
As a fundholder of Hutchinson Community Foundation, you can access your fund information online through our Donor Portal. Within the portal, you can easily check your fund balance, view and download fund statements, request and track grants, add to your fund, and more.

The Donor Portal makes it easy to manage your fund and is available 24/7 from anywhere on any device.

### Initial Login Process and Creating Your Account

You will receive an automated email from Hutchinson Community Foundation sent as “no-reply@fcsuite.com” with a custom invitation link to create your account in the Donor Portal.

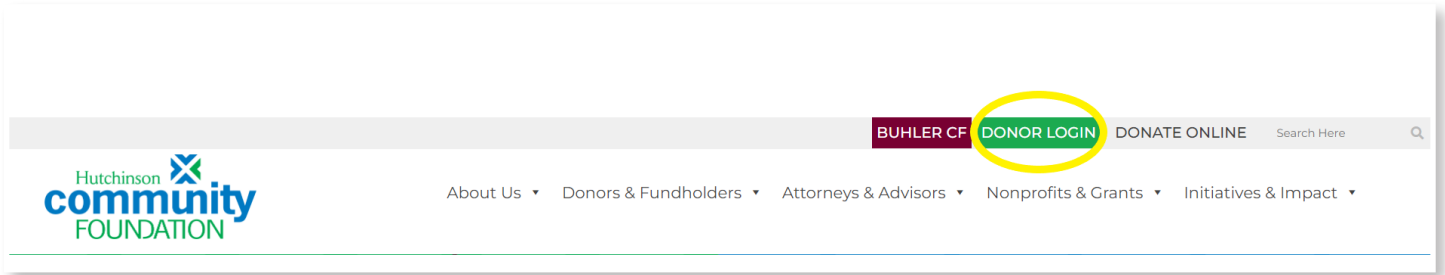
**Username** – Your username will be the email address at which you received the initial login link.



**Password** – Once you click on the invitation link, 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 record your password and store it somewhere you will remember. Usernames and passwords are case sensitive.**

The link contained in the email can only be used once to establish your initial password, so we recommend deleting the initial automated email after you have successfully completed the set-up process.





## Returning Users

To access the Donor Portal at any time (following the initial access setup), simply visit [www.hutchcf.org](http://www.hutchcf.org) and click on the green Donor Login button at the top right corner of the website. You may also access the portal login from the “Donor Portal” page under the “Donors & Fundholders” menu on our website.

The Hutch CF team cannot access your password. If you forget your password, you can reset it on the Donor Portal login page by clicking on the “Forgot Password?” link.

**Note:** You will be locked out of the Donor Portal after five unsuccessful login attempts. If this happens, please contact our team for assistance.

## Donor 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.

The tabs at the top of the page display 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 portal.





**Choose Fund** – This tab is visible if there are other funds to select and view.

**Contributions** – Unless the donor has requested to remain anonymous, this tab shows all contributions/donations made into the fund. You will note that an “Export” option appears on the far-right side of the menu bar. This feature will export information about each donation into a Microsoft Excel spreadsheet. Clicking on a contributor’s name will bring up their history of contributions, including date of gift, type and amount, as well as donor contact information.

**Grants** – Shows the history of grants awarded from your fund, including date, organization name, purpose and amount. The top section provides a summary of grants by recipient (grantee). Scroll past the summary section to see grants listed from most recent to oldest.

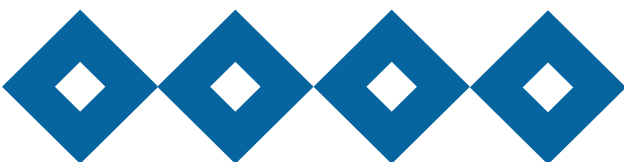
**Grant Request** – Allows you to make a grant request from your fund and see recent grant statuses, if applicable.

**Fund Statements** – Shows your fund statements from 2023 onward.

**Files** – Shows any viewable files regarding your fund, as well as a quarterly Donor Update and this user guide.

**Donate** – Opens a new window for you to contribute to your fund or other funds managed at the Community Foundation.

**Logout** – Remember to use this tab to close your Donor Portal. You will



be automatically logged out after a period of inactivity even if you do not logout.

## Submitting a Grant Request

To recommend a grant from your fund, click the Grant Request tab. Recommending a grant is a three-step process:

### 1. 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 fund you want to support from this drop-down list of funds at Hutchinson Community Foundation.

**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.



## 2. 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 \$50 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 Review.

## 3. Review and Submit Request

Review your grant request details and click Submit Request. You will then receive an automated confirmation email, and our team will begin processing the request.

### Viewing Grant History

To review your most recent grant history, click the Grant Request tab.

Under the Status column, 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 our team is currently processing your grant request.

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

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

**Completed** means the grant request has been successfully fulfilled.



## Email Notifications

We will alert you via email every time a contribution is made to your fund or a grant has been awarded from your fund. These alerts may be cancelled at any time by contacting us.

## Frequently Asked Questions

### **How often are Fund Statements posted?**

Fund statements are posted monthly. You will be notified via email when your statement is ready to be viewed in the Donor Portal. If you are not receiving these notification emails, please contact us.

### **I haven't received the auto-generated email for the new Donor 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 folders for an email from no-reply@fcsuite.com. If it hasn't arrived within a few days, please email Donor Services at donorservices@hutchcf.org.

### **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 [www.hutchcf.org](http://www.hutchcf.org) and click on the green Donor Login button at the top right corner of the homepage.

### **I've lost my password. What should I do?**

The Donor Portal does not save passwords. You can reset your password on the Donor Portal login page by clicking on the "Forgot Password?" link.

### **Questions?**

Please contact us at 620-663-5293 or email [donorservices@hutchcf.org](mailto:donorservices@hutchcf.org).

