

Online Fund Portal

FOR FUNDHOLDERS



The online fund portal offers easy access your NCCF fund information and provides a convenient, reliable and secure way to manage your philanthropy. It is protected by your own unique log-in information.

- *If you need to change your User ID/email address or password, please email support@nccommunityfoundation.org.*

Here are some brief descriptions of the information that you can find on the online fund portal, which may vary based on your relationship to the fund.

HOME TAB

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Grants

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This tab displays your live current balance, remaining spendable balance and designated fund advisors, as well as an overview of recent contributions and grants.

CONTRIBUTIONS TAB

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Export

This tab shares the history of contributions made to the fund in chronological order, including the date processed, name of donor, and the amount donated. You can click on the donor's name to see their contact information.

 *Tip: Click on the "Export" tab to download a spreadsheet of contribution information.*

GRANTS TAB

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Export

This tab shares the history of grant distributions from the fund a) by organization and b) in chronological order. Scroll down to view the date processed, status, name of organization receiving the grant, grant purpose, and grant amount. You may also click on the "Export" tab to download a spreadsheet of grants information.

 *Tip: If you plan to make a grant to the same organization, click the green "COPY" button. It will replicate the information for a new grant request.*

GRANT REQUEST TAB

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This tab allows you to make grant requests:

1. You may “choose from previous grantees” listed in a drop-down box
2. You may “search for other grantees” by typing the organization name into the box
3. You may “enter the grantee information manually”

Once a grantee is selected, you will enter the grant’s purpose in the “Description” box and the “Amount” you would like to request, then click the green “Review” button. You will review the request and either click on “Submit Request” or “Edit Request.”

When your request is submitted, our grants team will review it and begin processing or let you know if additional information is needed.



Tip: The “Status” will evolve from Request to Pending to Paid. If the grant is in Request or Pending status, it can still be canceled by clicking the Cancel button.

STATEMENTS TAB

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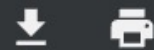
Statements

Logout

This tab provides access to your quarterly fund statements, listed in chronological order by year and quarter. Click “Print” to view the statement. Follow the steps below if you would like to print it.



Tip: If you would like to download the statement to your computer, click the downward-facing arrow in the upper right corner of the page. If you would like to print out the statement, click the printer image in the upper right corner of the page.



LOGOUT TAB

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This tab logs you out of your Online Fund Portal account.