

Jewish Community Foundation of Greater Hartford Donor Portal Guide for Organizations

I received a donor portal activation email. What do I do?

The custom URL from this auto-generated email will allow you to activate your new donor portal account and set a password. Please click the link provided and follow the instructions given to set up your account. If you cannot locate your email, please be in touch with one of the JCF team and we will send a new one:

Kathryn Gonnerman: kgonnerman@jcfhartford.org / 413-475-0415

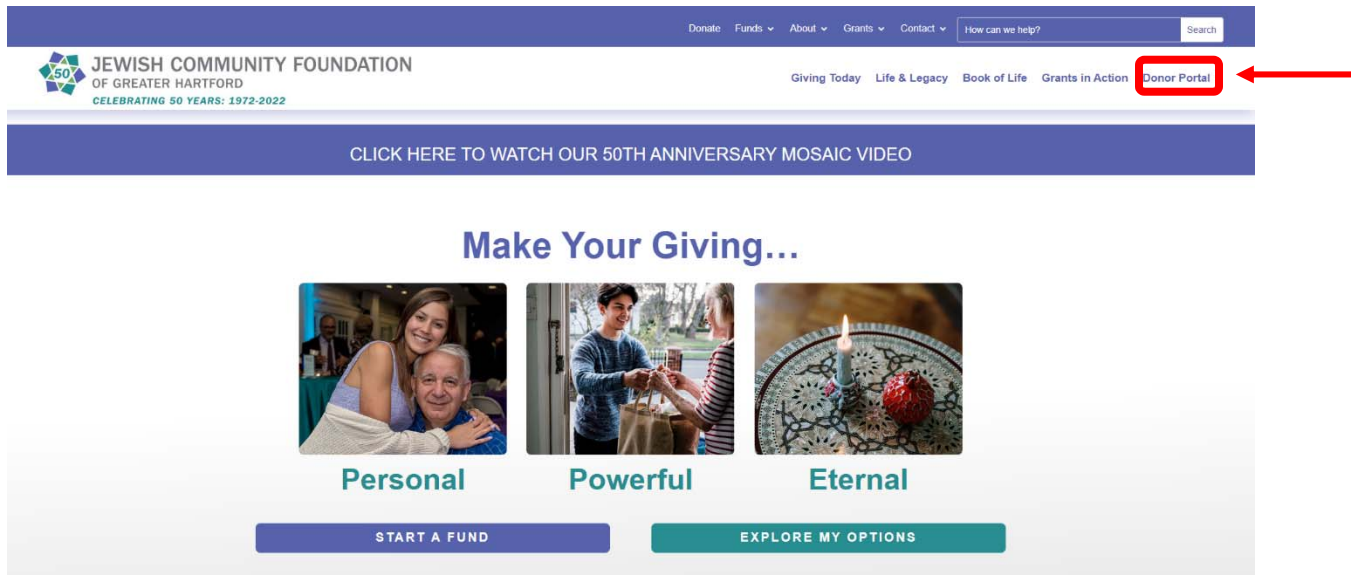
Madison Leighty: mleighty@jcfhartford.org / 860-523-7460

Susan Lotreck: slotreck@jcfhartford.org / 860-523-7460

Where and how do I log into the portal?

The custom URL provided in your activation email can only be used once and is not a permanent link to the donor portal. Once your account has been set up, you can find the JCF donor portal here:

<https://jcfhartford.fcsuite.com/erp/fundmanager>. You can also access the donor portal through our main website (<https://www.jcfhartford.org>) by clicking the **Donor Portal** button on the top right corner of the page:



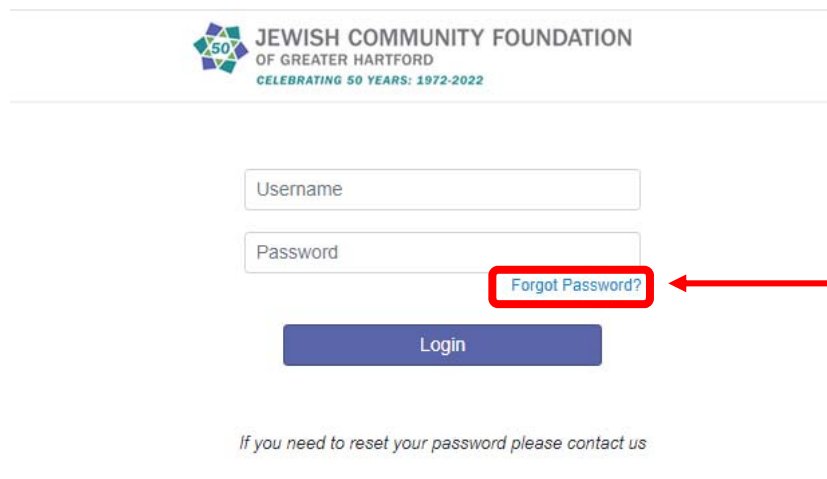
The screenshot shows the top navigation bar of the Jewish Community Foundation of Greater Hartford website. The navigation bar includes links for Donate, Funds, About, Grants, Contact, and a search box. The Donor Portal link is highlighted with a red box and a red arrow pointing to it. Below the navigation bar, there is a banner for the 50th Anniversary Mosaic Video. The main content area features the heading "Make Your Giving..." and three columns: Personal, Powerful, and Eternal. Below these columns are two buttons: "START A FUND" and "EXPLORE MY OPTIONS".

You will then be brought to the JCF donor portal login page.

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I forgot my username and password. What do I do?

By default, your username is the primary email the Foundation has on file (the address at which you received your fund portal activation email). If you have forgotten your password, click the **Forgot Password** button on the login page. Enter your username and click the Reset Password button.

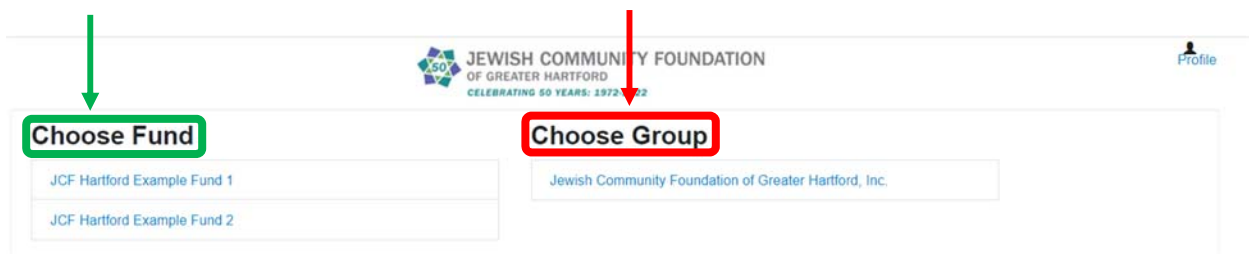


The screenshot shows the login page for the Jewish Community Foundation of Greater Hartford. At the top, the logo and text "JEWISH COMMUNITY FOUNDATION OF GREATER HARTFORD CELEBRATING 50 YEARS: 1972-2022" are displayed. Below this are two input fields: "Username" and "Password". To the right of the "Password" field is a link labeled "Forgot Password?". A red box highlights this link, and a red arrow points to it from the right. Below the input fields is a blue "Login" button. At the bottom of the page, there is a small text link: "If you need to reset your password please contact us".

If an account with the provided username is found, instructions to reset your password will be sent to the email address associated with that account. If you are still having trouble, please contact us at 860-523-7460 or mleighty@jcfhartford.org for further assistance.

How do I view my organization's fund balance(s)?

Our new donor portal features two types of views: one for an individual fund and one for your organization's funds in conglomerate. When you log in, you will be given the option to choose either a **single fund** or the **group of funds** that are affiliated with your organization.



The screenshot shows the donor portal interface after login. At the top, the logo and text "JEWISH COMMUNITY FOUNDATION OF GREATER HARTFORD CELEBRATING 50 YEARS: 1972-2022" are displayed. On the right side, there is a "Profile" icon. Below the header, there are two main options: "Choose Fund" and "Choose Group". The "Choose Fund" option is highlighted with a green box and a green arrow points to it from above. It contains two sub-options: "JCF Hartford Example Fund 1" and "JCF Hartford Example Fund 2". The "Choose Group" option is highlighted with a red box and a red arrow points to it from above. It contains one sub-option: "Jewish Community Foundation of Greater Hartford, Inc."

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Selecting any of these options will bring you to the fund (or group) balance page, where you will also see an overview of fund activity. To view another fund or group, select the tab that says **Choose Fund** or **Choose Group**, depending on your current view.



**JEWISH COMMUNITY FOUNDATION
OF GREATER HARTFORD**
CELEBRATING 50 YEARS: 1972-2022



JCF Hartford Example Fund 1

Home
Choose Fund
Gifts
Grants
Logout

Date Created: 09/12/2022
 Current Balance: \$104,000.00
 Spendable Balance: \$4,000.00
 Total Contributions: \$105,000.00
 Total Grants: \$1,000.00

Fund Advisors are: Jewish Community Foundation of Greater Hartford, Inc.

Top 10 Contributors



- Jewish Community Foundation of Greater Hartford, Inc.

Contributions



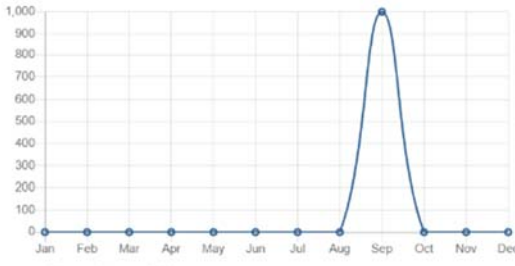
Filter by Year: 2022

Top 10 Grantees



- Jewish Community Foundation of Greater Hartford, Inc.

Grants



Filter by Year: 2022

Single Fund View. Select **Choose Fund** to review a different fund or group.

Jewish Community Foundation of Greater Hartford Donor Portal Guide for Organizations

Jewish Community Foundation of Greater Hartford, Inc.

Home
Choose Group
Gifts
Grants
Distributions
Logout
Export Fund Balances

Current Balance: \$163,500.00

Spendable Balance: \$14,000.00

Fund Advisors are: Jewish Community Foundation of Greater Hartford, Inc.

Recent Contributions

Date	ID	Contributor	Amount
09/12/2022	38455	Jewish Community Foundation of Greater Hartford, Inc.	100,000.00
09/12/2022	38456	Jewish Community Foundation of Greater Hartford, Inc.	5,000.00
09/12/2022	38458	Jewish Community Foundation of Greater Hartford, Inc.	10,000.00
09/12/2022	38457	Jewish Community Foundation of Greater Hartford, Inc.	50,000.00


Recent Grants

Date	ID	Status	Recipient	Amount
09/12/2022	22120	Approved	Jewish Community Foundation of Greater Hartford, Inc.	1,000.00


Group View. Select **Choose Group** to review a different fund or group.

How do I view gifts?

Select the **Gifts** tab from either the Fund View or the Group View to review donations to your fund(s). You can also **Export** this information for more details.



**JEWISH COMMUNITY FOUNDATION
OF GREATER HARTFORD**
CELEBRATING 50 YEARS: 1972-2022

 Profile

JCF Hartford Example Fund 1

Home
Choose Fund
Gifts
Grants
Logout
Export

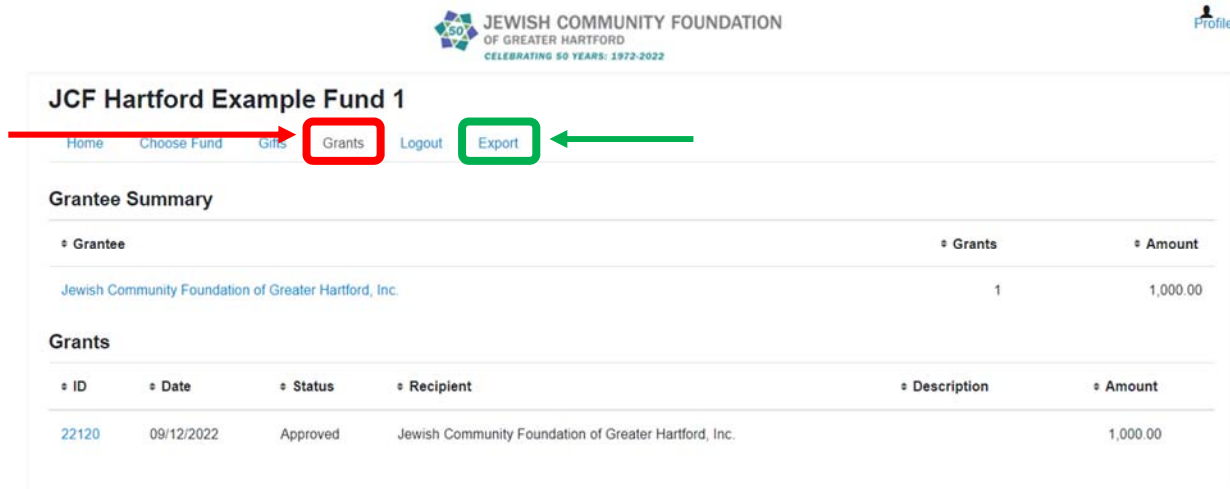
Contributions

Date	ID	Contributor	Description	Type	Amount
09/12/2022	38455	Jewish Community Foundation of Greater Hartford, Inc.		Check	100,000.00
09/12/2022	38456	Jewish Community Foundation of Greater Hartford, Inc.		Check	5,000.00

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How do I view grants?

Select the **Grants** tab from either the Fund View or the Group View to review grants made from your fund(s). You can also **Export** this information for more details.



JCF Hartford Example Fund 1

Home Choose Fund Gifts **Grants** Logout **Export**

Grantee Summary

Grantee	Grants	Amount
Jewish Community Foundation of Greater Hartford, Inc.	1	1,000.00

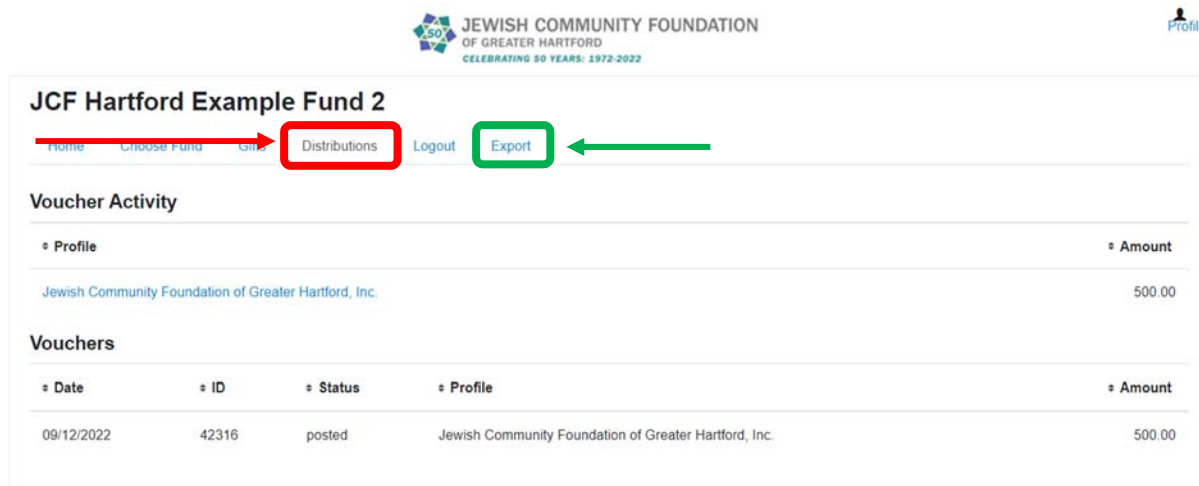
Grants

ID	Date	Status	Recipient	Description	Amount
22120	09/12/2022	Approved	Jewish Community Foundation of Greater Hartford, Inc.		1,000.00

Note that you will see the combined grant amounts in the summary section, and individual grants by date in the section below.

How do I view non-grant distributions?

Select the **Distributions** tab from either the Fund View or the Group View to review distributions made from your fund(s). This tab reflects any dollars sent out from a custodial fund. You can also **Export** this information for more details.



JCF Hartford Example Fund 2

Home Choose Fund Gifts **Distributions** Logout **Export**

Voucher Activity

Profile	Amount
Jewish Community Foundation of Greater Hartford, Inc.	500.00

Vouchers

Date	ID	Status	Profile	Amount
09/12/2022	42316	posted	Jewish Community Foundation of Greater Hartford, Inc.	500.00

Note that you will see the combined distribution amounts in the summary section, and individual distributions by date in the section below.