

## Donor Portal Tutorial

As a Fundholder, you are privy to an online portal where you can access information about the funds you hold with the Oakville Community Foundation. You should have received, via email, a login name and a link to access your portal. Alternatively, to access this link, visit our website and in the top left corner, click Donor Online. Once linked, you will be prompted to create your own password for the site. Please make note of this password as The Foundation will not have access or record of it since it is personal to you. Follow the prompts to log into your page.

Once logged in, you can peruse the tabs at the top of the page to view the different information available to you.

- The “**Home**” tab provides the following information:
  - the Fund’s Current Balance plus the Spendable balance (if applicable).
  - all Fund Advisors associated with the fund (if you wish additional Fund Advisors to the Fund, please let us know and we can set them up in the system)
  - recent contributions
  - recent grants given for the Fund.
  
- The “**Choose Fund**” tab is visible if there are other funds to select and view. If you only hold one Fund, you will go directly to the homepage where you will find your Fund information. If you hold multiple funds, you will see the “Choose Fund” menu once you have successfully signed into the portal system. Choose the particular account with which you wish to interact.
  
- The “**Contributions**” tab shows all contributions or donations made to the fund.
  - Clicking on a Contributor’s name will bring up their history of contributions.
  
- The “**Grants**” tab will show the history of Grants made from the fund.
  
- As a Fundholder you may be able to make Grant Requests from the fund’s assets by clicking into the “**Grant Request**” Tab.
  - This tab will show a list of Grants requested to be paid out on the right with the current status.
  - Grant Requests still in the “request” status can be canceled from this screen.
  - The left side of the screen is where Grant Requests are created.
  - Previous Grantees and Funds that you have given to can be selected from drop down lists.
    - There is an option to “enter Grantee information manually”. You will need to enter the name of the new Grantee, an address, postal code and a phone number to move the grant request forward to the Community Foundation for approval. Note that Grants can only be made to charities

sanctioned by and in good standing with the Canadian Revenue Agency (CRA approved)

- The option to 'Search for other Grantees' is also available. This is helpful if you are uncertain of a charities name as it only requires some keywords before you click the "Search" button.
  - Once the Grantee information has been added, you can complete the request by clicking the "Submit" button at the bottom of the page.
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- The "**GIVE Oakville**" tab will be active each fall when the Foundation highlights local charities seeking funding. The catalogue is a crowdfunding tool that you may search for funding opportunities and projects to give to from your Fund.
  - The "**Statements**" tab will show your fund statements. Fundholders will be able to view newly created fund statements immediately after they are created as well as past fund statements.
    - "Print" Statements will allow you to view the content - The system will generate a PDF in a new window in your web browser that you may save or print.
  - Remember to use the "**Logout**" tab to close your Donor Portal. You will be automatically logged out each night even if you do not logout.

### **Locked Out of your Donor Portal?**

The system will lock you out after five unsuccessful login attempts. If you are locked out please contact Michelle Collins at [michelle@theocef.org](mailto:michelle@theocef.org) or 905-844-3562 ext. 306.

### **Alerts**

The Foundation will automatically alert you every time a Donation is made or a Grant is paid out from your Fund. These alerts can be utilized or cancelled at any point, but the alerts are not retroactive.