

Donor Portal User Guide

Donor Advised Funds



**Jewish
Federation**
of St. Louis

**Center for
Legacy Giving**



Contents

Overview	1
Logging In.....	1
Portal Link.....	1
New Users.....	1
Returning Users.....	1
Navigation & Features.....	2
My Funds Tab	2
Profile Tab.....	3
Creating a Grant Request.....	3
Step One: Choose a Grantee	3
Step Two: Grant Details	6
Step Three: Review and Submit Request	7
Viewing/Canceling Grant Requests	8
Viewing Contributions to the Fund.....	8
Viewing Grant History.....	9
Grants by Organization	9
Grants by Date	9
Recurring Grants.....	10
Viewing Statements.....	10
Donating to Your Fund or the Annual Campaign.....	11
Updating Personal Info (Profile Tab)	11
Logout.....	11
Appendix A: Names of Local Nonprofits (That Might Be Hard to Find)	12

Overview

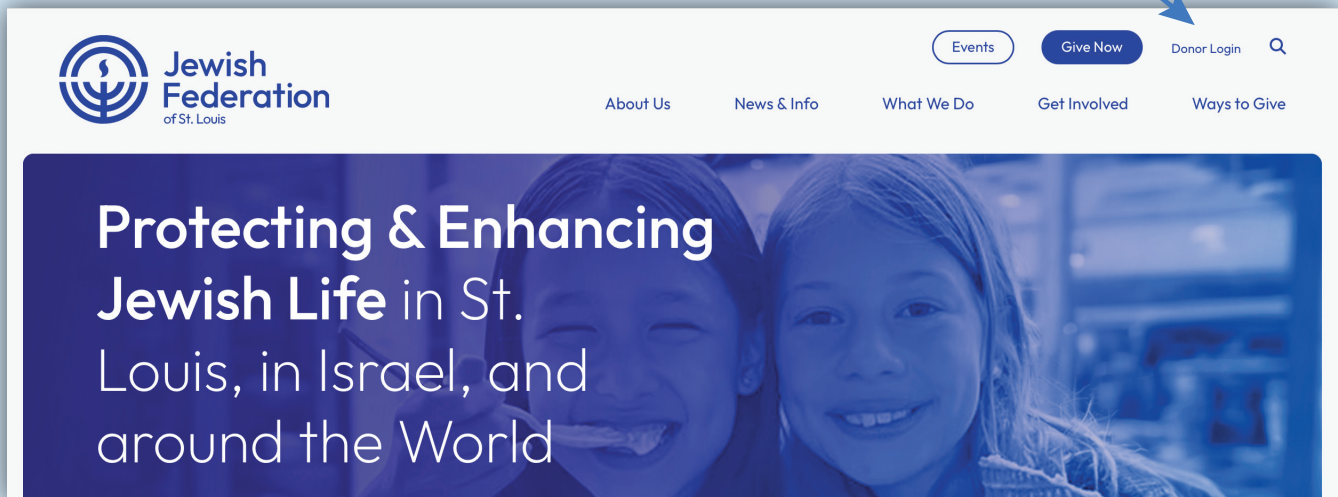
As a Jewish Federation of St. Louis Donor Advised Fund (DAF) holder, you can easily request and track grants, see your fund balance and grant history, view and download fund statements, contribute to your fund by credit card, and update your contact details. The donor portal makes it easy to manage your giving and is available 24/7 from anywhere, on any device.

Need help? Contact Shelly Azar at SAzar@JFedSTL.org or call 314-442-3829.

Logging In

Portal Link

The portal can be accessed from the button to the right. You can also visit the Jewish Federation of St. Louis website (JFedSTL.org) and click on the “Donor Login” link in the top right corner of the screen.

Donor
Portal

New Users

You will have received a unique link to access the portal. Please do not share it with anyone. Your email will be your username. If your fund has more than one fund advisor, for example if both you and your spouse are fund advisors, you will receive separate links and have separate usernames and passwords.

To create a password, go to your Profile (upper right corner of the screen) and click Security on the left side of the page. Please use a mix of capital letters, numbers, and/or special characters in your password to keep your account secure. Usernames and passwords are case-sensitive. If you want us to change the email/username for your login, please contact the office.

Returning Users

Returning users can access the portal at any time by visiting JFedSTL.fcsuite.com/erp/portal or by going to the Federation website (JFedSTL.org) and clicking on Donor Login in the top right corner of the screen.



When you get to the login screen, enter your username and password. If you forget your password, click “Forgot your password?” to receive a password reset link.

NOTE: If you access the donor portal from a shared computer or device, we strongly encourage you to use the Logout option in the top right of your screen after completing each session. This ensures no one other than you has access to the system.

The login screen features a white background with a blue header. At the top center is the title "Login". Below it are two input fields: "Username" and "Password". The "Password" field has a toggle icon for visibility. Below the fields is a blue "LOGIN" button. At the bottom, there is a link "Forgot your password?" in blue text.

Navigation & Features

In the upper right corner of the screen, you will see three tabs: **My Funds**, **Profile** and **Logout**.

The dashboard mockup shows a light blue header with the Jewish Federation of St. Louis logo on the left and three navigation tabs on the right: "My Fund(S)", "Profile", and "Logout". A blue arrow points to the "Profile" tab. Below the header is a sidebar with a "FUND SUMMARY" section and links for "CONTRIBUTIONS TO FUND", "GRANT HISTORY", "GRANT REQUESTS", "STATEMENTS & FILES", and "DONATE". The main content area displays a "Fund" dropdown menu set to "Family Fund", a "CREATE GRANT REQUEST" button, and several summary cards: "Fund Created 12/24/2023", "Current Balance \$,751.00", "Available Cash \$,751.00", "Total Grants \$5,000.00", and "Total Contributions \$6,751.00". At the bottom, there is a "Your Contact:" section with a photo of Shelly Azar, her name, title "Director, Legacy Giving", phone number "314-442-3829", and email "sazar@fedstl.org".

My Funds Tab

If you are a fund advisor, the **My Funds** tab takes you to your homepage (which is also called **Fund Summary** in the left navigation). If you manage multiple funds, you will have a dropdown box for your funds. If applicable, choose the fund you wish to review. If you are listed as an advisor for only one account, you will not have the Choose Fund menu but instead will see only your account information.



Within the My Funds tab, there are multiple submenu options on the left side of the screen:

Fund Summary: This homepage provides a snapshot of your fund information: current balance, spendable balance, total grants from the fund, and total contributions into the fund. If your fund has had multiple contributions and grant transactions, you may also see historical data and charts about fund activity.

Contributions to Fund: Shows all financial contributions made to your fund.

Grant History: Shows grants made from your fund in three views: Grants by Organization, Grants by Date, and Recurring Grants.

Grant Requests: Shows the status of all new and approved grant requests.

Statements & Files: Shows your fund statements and other fund-related documents, sorted by recency.

Donate: Opens a window for you to contribute by credit card to your fund or to the Federation's Annual Campaign.

Profile Tab

The Profile area is where you can go to see or edit your personal contact information, password, and communication preferences.

Creating a Grant Request

To recommend a grant from your fund, click Create Grant Request in the top right of any page (if your profile allows this ability).

Recommending a grant is a three-step process:

Step One: Choose a Grantee

Choose a grantee in one of three ways:

Previous Grantee or Fund

Choose the organization to receive your grant from a drop-down list of organizations you (or anyone else with a fund at the Federation) previously supported.



My Fund(S)

Profile

Logout

FUND SUMMARY

CONTRIBUTIONS TO FUND

GRANT HISTORY

GRANT REQUESTS

STATEMENTS & FILES

DONATE

Fund

Choose Grant Fund

CREATE GRANT REQUEST

CART (1)

While creating the grant request, put tribute information, if any, in the Description field.
Click Review Grant Requests (in the upper right corner) to review and submit all requests for approval.

Grant Request > Choose Type > Search

Choose from previous Grantees or Funds

Grantees you have given to in the past

Foundation funds you have given to in the past

Other foundation funds

Search Grantee

My Fund(S)

Profile

Logout

FUND SUMMARY

CONTRIBUTIONS TO FUND

GRANT HISTORY

GRANT REQUESTS

STATEMENTS & FILES

DONATE

Fund

Choose Grant Fund

CREATE GRANT REQUEST

CART (1)

While creating the grant request, put tribute information, if any, in the Description field.
Click Review Grant Requests (in the upper right corner) to review and submit all requests for approval.

Grant Request > Choose Type > Search

Search Results for " "

JEWISH FEDERATION OF ST. LOUIS RESULTS

CANDID RESULTS

	Name	Address	EIN
CREATE REQUEST	70 Faces Media	Ami Eden 24 W 30th St, 4th Floor New York, NY 10001	13-0887610
CREATE REQUEST	AARP Foundation	P.O. Box 93207 Long Beach, CA 90809-3207	52-0794300
CREATE REQUEST	Abraham Joshua Heschel School	Chani Radinsky Development Office, 6th Floor, 20 West End Avenue New York, NY 10023	13-3091539
CREATE REQUEST	Abraham Lincoln Presidential Library Fd	500 E Madison St Ste 200 Springfield, IL 62701-1011	36-4385644
CREATE REQUEST	Academy of Science of St. Louis	5050 Oakland Ave.	43-0718799

Search for the organization you want to support by name, city and state, or EIN. You will get two sets of results: “Jewish Federation of St. Louis Results” and “Candid Results.”

“Jewish Federation Results” will be organizations who have received DAF grants from the Jewish Federation of St Louis in the past—either from you or from another fundholder.



“Candid Results” pull from public data and include all 501(c)(3) organizations that match your search keywords. This feature allows you to contribute to new organizations you haven’t supported before, without needing to gather the address, EIN, organization name, or other basic details themselves. [The company that maintains the database is named Candid.]

Manual Grantee

If you can’t find the organization you wish to support through the first two options, you will need to manually enter the organization’s information: organization name, address, and phone number. The fields marked with an asterisk are required. Providing all requested information allows us to ensure your

grant recommendation is processed as accurately and efficiently as possible.

Note: Some local nonprofits may not be listed as you might think. For example, the Harvey Kornblum Food Pantry should be listed as Jewish Family Services. If you can’t find your nonprofits in the lists, check Appendix A at the back of this document to see how some popular organizations are formally listed. If you think more organizations should be added to the list, just let us know!

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.

Enter Grantee information manually

* These fields are required.

SUBMIT



Step Two: Grant Details

Description

(required): Provide a short (up to 255 characters) description of the grant purpose and any special instructions. For example, you can write “general support” or list a tribute message (mentioning the name of the honoree and any message you want conveyed to the honoree and/or their family members).

Amount (required):

Enter the donation amount.

Anonymous: If checked, the fund name will not be included on the check or grantee notification.

Recurring: If checked, select recurrence start date, recurrence interval, and number of recurring donations.

Attachment: Enter any supporting documentation (typically there is none).

Attachment Description: Enter details about the attached documentation, if any.

Additional Notes: Add any optional notes you may have for the Federation’s staff. These notes will not be sent to the grantee.

Once you have finished entering this information, click Add to Cart.

Your grant is not yet submitted! See the next step.

Grant Request

Grantee	Jewish Federation of St. Louis
Address	12 Millstone Campus Saint Louis, MO 63146
Description	0/255 characters
Amount	
Anonymous	☐
Recurring	☐
Attachment	Choose Files No file chosen (or drag and drop anywhere on the page)
Attachment Description	
Additional Notes to the Federation Staff	

ADD TO CART



Step Three: Review and Submit Request

Repeat steps one and two for any additional grant requests. You can add as many grants as you want to the cart.

Fund: My Fund(S)

CREATE GRANT REQUEST CART (1)

While creating the grant request, put tribute information, if any, in the Description field.
Click Review Grant Requests (in the upper right corner) to review and submit all requests for approval.

Grant Request Cart

Recipient	Description	Attachment	Amount
DELETE	Jewish Federation of St. Louis 12 Millstone Campus Saint Louis, MO 63146	Additional Notes to Staff Note to Recipient	\$1,000.00 EDIT
Grant Request Total			\$1,000.00

Grants

Request Date	Status	Recipient	Description	Amount
10/15/2020	Paid	Jewish Federation of St. Louis	2020 Annual Campaign	\$1,000.00
10/15/2020	Paid	Jewish Federation of St. Louis	2020 Annual Campaign	\$1,000.00

Once finished, click **Cart** in the top right corner of the screen. Then select **Review Grant Requests** to see all your recommendations at once before submitting them. If you want to make any corrections, click the Cancel button to the right of each grant recommendation. If everything is okay, then click **Submit Grant Requests**. Once you submit the request, our team can begin processing the grant request. You will receive a confirmation email upon submission. If you submit multiple grants at once, you will receive one combined confirmation email.

Fund: My Fund(S)

CREATE GRANT REQUEST CART (1)

While creating the grant request, put tribute information, if any, in the Description field.
Click Review Grant Requests (in the upper right corner) to review and submit all requests for approval.

Grant Request Cart

Grantee	Description	Attachment	Amount	Anonymous
Jewish Federation of St. Louis 12 Millstone Campus Saint Louis, MO 63146	Additional Notes to Staff Note to Recipient		\$1,000.00	No
Total			\$1,000.00	

Before hitting submit, please ensure you have provided all applicable tribute information in the "Description" field above. Use the "Additional Notes to Staff" field to clarify instructions to staff that you would **NOT** like included in the award letter sent to the grant recipient.

[SUBMIT GRANT REQUESTS](#)



Viewing/Canceling Grant Requests

If you have already submitted grant recommendations (recently or in the past) and want to check their status, you can go to **Grant Requests** in the left navigation.

Grant Requests that are still in the **“Request”** status can be canceled from this screen.

These are the explanations of terms you will see in the **Status** column:

- **Request** means that your grant request has been sent to our team. If you would like to cancel a request before it is processed, click the blue Cancel button on the right.
- **Canceled** means your grant request has been canceled.
- **Pending** or **New** means that our team is currently processing your grant request.
- **Approval** means your grant request has been processed and is awaiting approval.
- **Paid** or **Complete** means that a check has been sent to the organization and your grant is complete.

Note: Both the **Grant History** and **Grant Requests** sections provide similar information, but there are differences:

	Grant Requests	Grant History
View Past Grant Requests	View ALL grant requests including those recently submitted (Request status)	View only grant requests that have been accepted
Cancel a Grant Request	Click on the blue Cancel button next to those in the Request status	Not applicable here
Copy a Grant Request	Not applicable here	Click on the blue Copy button next to a previous grant

Viewing Contributions to the Fund

Click on **Contributions to Fund** in the left navigation panel. You will see a list of all contributions that have been made to your fund. Click the hyperlinked ID for details of a specific grant. Click the hyperlinked Contributor to see a list of all additions to your fund made by the same contributor. You can sort any of the columns by clicking on the arrows next to each column header.



Viewing Grant History

To see previous grants that have been completed, click **Grant History** in the left navigation. You will see three tabs: **Grants by Organization**, **Grants by Date**, or **Recurring Grants**. You can sort any of the columns within these sections by clicking on the arrows next to each column header.

Click Export in the upper right corner of this screen to download your grant history in a CSV format (which can be saved for Excel).

Grants by Organization

This section lists grantees (recipient organizations) alphabetically. The Grants column shows how many grants you made to each organization, and Amount shows the cumulative value of your grants.

Click the hyperlinked Grantee name to see all individual grants made to that organization.

Grants by Date

These grants are sorted by date. Click the ID for details of a specific grant.

If you see a previous grant that you would like to recommend again, click the blue Copy button to the right of each grant to start a new grant request with the same details. You will be able to edit the amount.

These are the explanations of terms you will see in the Status column:

- **Request** means that your grant request has been sent to our team. If you would like to cancel a request before it is processed, click the blue Cancel button on the right.
- **Canceled** means your grant request has been canceled.
- **Pending** or **New** means that our team is currently processing your grant request.
- **Approval** means your grant request has been processed and is awaiting approval.
- **Paid** or **Complete** means that a check has been sent to the organization and your grant is complete.



Recurring Grants

These are grants that are scheduled to repeat appear. This page will be populated with data if you specified a recurrence when you made a grant recommendation.

Note: Both the **Grant History** and **Grant Requests** sections provide similar information, but there are differences:

	Grant Requests	Grant History
View Past Grant Requests	View ALL grant requests including those recently submitted (Request status)	View only grant requests that have been accepted
Cancel a Grant Request	Click on the blue Cancel button next to those in the Request status	Not applicable here
Copy a Grant Request	Not applicable here	Click on the blue Copy button next to a previous grant

Viewing Statements

Select **Statements & Files** from the left navigation. Your fund statements will appear with the most recent listed first. You can view the statements any time you want.

Should you desire to create a statement with customized dates, just enter the date range that you desire. Please note that manual statements may not include the most recent financial performance of your investments.

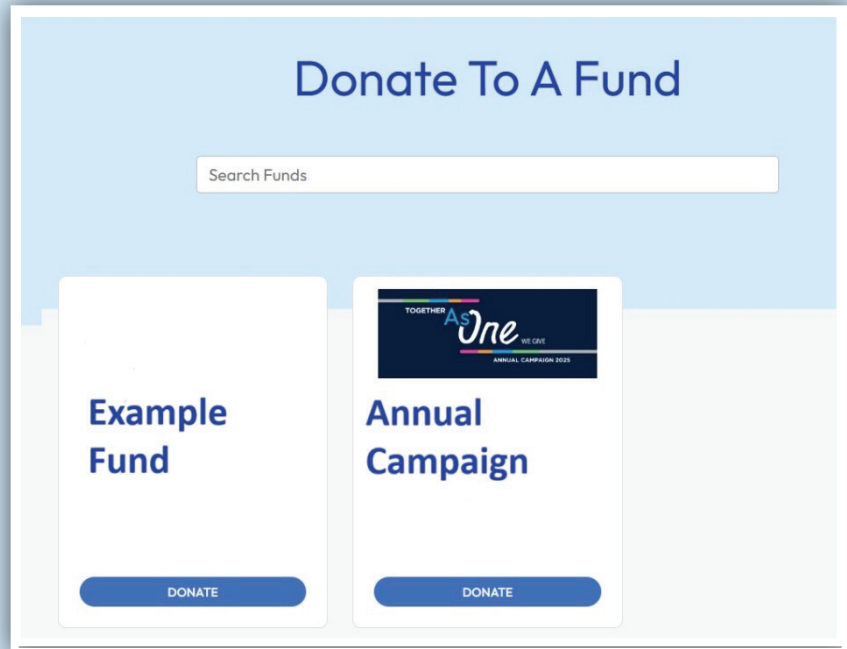
By default, you will receive an email containing an electronic version of your quarterly fund statement when it is ready. If you desire to receive a paper statement by mail, please reach out to Shelly Azar (SAzar@JFedSTL.org).



Donating to Your Fund or the Annual Campaign

Click on **Donate** in the left navigation. Here you can use your credit card to contribute to your fund or to the Federation's Annual Campaign. Click the blue Donate button next to a fund to start the donation process.

When you click **Donate**, a new window will open. You will still be able to access the portal in the first window.



Updating Personal Info (Profile Tab)

You can find the **Profile** tab in the upper right corner of the screen. This area of the portal gives you the opportunity to view and edit your personal contact info, password, and communication preferences.

There are three submenu options on the left side of the page:

Personal Information: Shows the personal information on file for you such as your name, address, email, and phone number. Click Edit Information to modify your home address or phone number. Your name and email address are tied to your profile and cannot be changed. If you need to change them, contact Shelly Azar at SAzar@JFedSTL.org.

Security: Allows you to create or edit your username and password.

Contact Preferences: Allows you to mark your profile as Do Not Email, Do Not Call, or Do Not Mail for the Jewish Federation of St. Louis communications. Note that your philanthropic advisor may still contact you for fund management and personal outreach.

Logout

Remember to click Logout after your session on the top right of your screen.

Appendix A: Names of Local Nonprofits (That Might Be Hard to Find)

Popular Name for the Nonprofit	Formal Name to Write for Grantee
Harvey Kornblum Jewish Food Pantry	Jewish Family Services
Friends of KWMU	St. Louis Public Radio
MUNY	Municipal Theatre of St. Louis
Nine Network	Nine PBS