

## Portal Quick Start Guide for Fund Holders & Fund Viewers

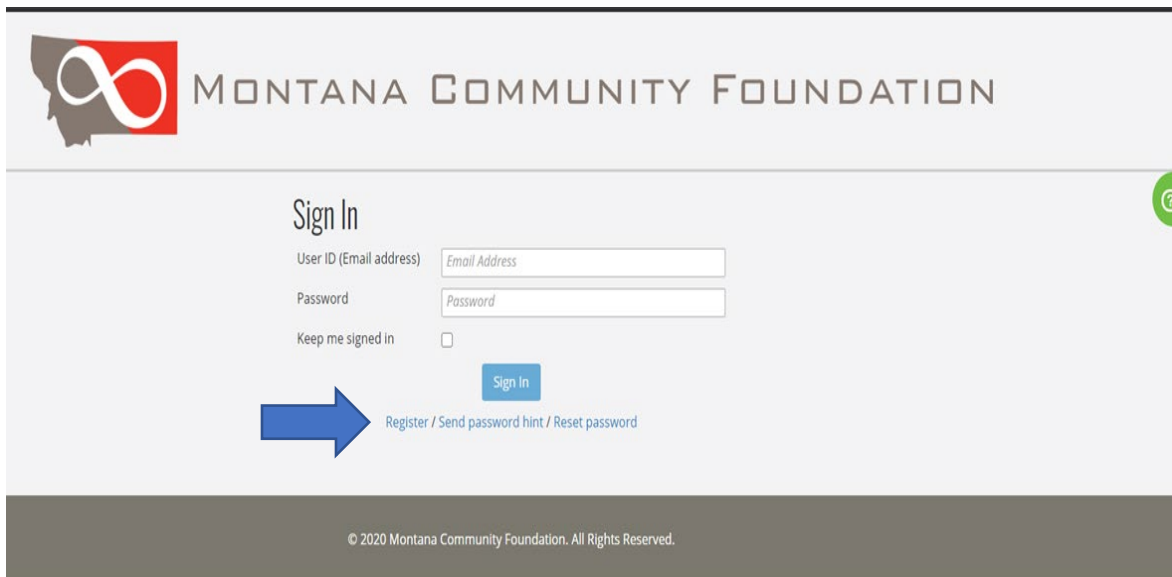
Montana Community Foundation's online portal provides you with 24/7 access to your fund account at MCF.

As a portal user, you can do the following:

- Check your fund balance and “distributable” or grantmaking balance (for advised funds).
- View your fund's financial records, including your history of contributions and distributions.
- Create quarterly statements, financial reports and save or print fund statements.
- Recommend grants and check grant history (donor advised funds).

### Get Started

1. Click on the link to access the portal: <https://mtcf.spectrumportal.net/#/donors/home>



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2. The first time you access the portal, you will need to register for an account. All users must register even if you had an account in our previous portal.
  - Under the blue **Sign In** button, click on **Register**.
  - Under **Create an account**, fill in your information and create a new username and password. Passwords must be at least 6 characters and include a number or symbol.
  - Click on **Register**.

- You will receive an email confirmation that we received your new registration.
- You will receive a second email confirmation after we have completed the set-up of your new account. Please allow at least 1-2 business days to complete the registration process.

### Tips for Registering Successfully

- **Use your own name, not the organization's** name if you are registering for access to a nonprofit fundholder account.
  - **Check for typos.** If your name or email address is spelled incorrectly, the system will not link you to your fund record.
  - **Use the same email address** we have in your database record. For example, if you work for a nonprofit organization with an endowment fund, use your work email address, not your personal email address. If you are not sure which email address is in your account, email Cathy Cooney at [ccooney@mtcf.org](mailto:ccooney@mtcf.org).
  - If you cannot access your account after we have sent you a confirmation that your registration is complete, try resetting your password. If that does not help, contact us for help. Please do not register a 2<sup>nd</sup> time. That will create a duplicate record in our system and block your access.
3. To access your account again, visit <https://mtcf.spectrumportal.net/#/donors/home> or go to [mtcf.org](http://mtcf.org) and click on **MyFund** on our home page.

## Navigate the Portal

Welcome Fund Holder

See the latest version of Montana Community Foundation's Infinity newsletter! *Infinity Newsletter May 2020*

Fund Concern for the Aged\* Select Fund

\* Indicates you are an advisor for this fund.

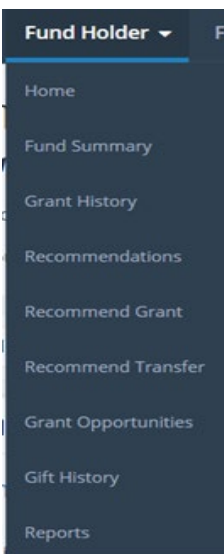
Expand All Collapse All

Fund Summary	Grant Summary	Contacts														
<p><a href="#">View Fund Summary Screen</a></p> <p>Current Net Assets: \$28,097.82</p> <p>Current Available Balance: -\$0.06</p>	<p><a href="#">Make a Grant Recommendation</a></p> <p><a href="#">Grant Recommendations</a></p> <p><a href="#">Grant History</a></p> <p>All numbers are for the selected fund.</p> <table border="1"> <tr><td>Submitted Recommendations</td><td>0</td></tr> <tr><td>Grants Pending Approval</td><td>0</td></tr> <tr><td>Grants in Processing</td><td>0</td></tr> <tr><td>Grant History</td><td></td></tr> <tr><td>Total Payments Scheduled</td><td>\$0.00</td></tr> <tr><td>Payments Paid Last Month</td><td>\$0.00</td></tr> <tr><td>Payments Due This Month</td><td>\$0.00</td></tr> </table>	Submitted Recommendations	0	Grants Pending Approval	0	Grants in Processing	0	Grant History		Total Payments Scheduled	\$0.00	Payments Paid Last Month	\$0.00	Payments Due This Month	\$0.00	<p>If you have questions or need help with your fund, please contact Cathy Cooney at the Montana Community Foundation at 406-441-4954, <a href="mailto:ccooney@mtcf.org">ccooney@mtcf.org</a>.</p>
Submitted Recommendations	0															
Grants Pending Approval	0															
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Grant History																
Total Payments Scheduled	\$0.00															
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Payments Due This Month	\$0.00															
<p><a href="#">Giving Opportunities</a></p> <p><a href="#">View Grant Opportunities Screen</a></p>	<p><a href="#">Grant History</a></p> <p><a href="#">View Grant History Screen</a></p> <p>There is no chart data for this fund for the last 12 months.</p>	<p><a href="#">Gift History</a></p> <p><a href="#">View Gift History Screen</a></p> <p>There is no chart data for this fund for the last 12 months.</p>														

### Option #1: Click on menu options listed on the tiles (seen above)

1. **Fund Summary** (See additional section below)  
View fund balance, current available balance and fund statements.
2. **Grant Summary** (See additional section below)  
Make grant recommendations (advised funds only) and view grant history.
3. **Contacts**  
Who to contact for questions.
4. **Giving Opportunities**  
See new grantmaking opportunities.
5. **Grant History** (See additional section below)  
View history of grants/scholarships (advised funds only) or endowment distributions (nonprofit partners).
6. **Gift History** (See additional section below)  
View a history of contributions to your fund.

### Option #2: Find the same menu items in the drop-down menu



# Navigate the Menu Options

## 1. Fund Summary

The fund summary section gives you a quick view of your **Current Net Assets** and **Current Available Balance** (for grantmaking-donor advised, scholarship funds only).

*Note: Nonprofit & designated funds will always show a \$0 Current Available Balance.*

In addition to checking your fund balance, you may view your fund statements by clicking on **Report- Fund Statement**.

The **Fund Statement** viewer allows you to select a custom reporting period. Click on **View Report** after you have chosen your start and end date.

### Fund Statement

Select Fund: <Select a Value> Enter Period Start: 7/1/2019 View Report

Select Period End: 6/30/2020

After you view the fund statement, you may download the statement in a variety of formats. You must first download the statement to print it from your computer.

### Fund Statement

Select Fund: CFAG: Concern for the Aged Enter Period Start: 1/1/2020 View Report

Select Period End: 3/31/2020

1 of 1 Find | Next

- XML file with report data
- CSV (comma delimited)
- PDF
- MHTML (web archive)
- Excel
- TIFF file
- Word

Time Period: 1/1/2020 to 3/31/2020

Statement for the Concern for the Aged  
January 1, 2020 - March 31, 2020

	Current Period
<b>Balance</b>	
Beginning Balance - January 1, 2020	\$30,695.04
<b>Revenue</b>	
Interest Income	\$111.45

## 2. Grant Summary

The grant summary tile allows you to:

- Recommend a grant (advised funds only).
- View pending grant recommendations.
- View your grant/distribution history. You may also view grant history on the separate grant history tile.

### Recommending a Grant (advised funds only)

To make a grant recommendation, you have three options.

1. To make a grant recommendation to a previous grantee:
  - Click on grant history.
  - Find the grantee on the list of previous grantees.
  - Click on the box with 3 dots to the left of the grantee you wish to recommend a grant to.
  - Click on “Create a grant recommendation.”
  - Under the Grant Information tab, edit the amount, grant purpose, and click Save.
2. To make a grant recommendation to a new or previous grantee:
  - On the **Grant Summary** tile, click on **Make a Grant Recommendation**.
  - Complete the information on the following tabs:
    - Recipient
    - Grant Information
    - Acknowledgement
    - Submission

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### Grant Recommendation

<b>Donor Name</b>	Catherine Cooney	<b>Recipient</b>
<b>Donor Email</b>	ccooney@mtcf.org	<b>Amount</b>
<b>Status</b>	NEW (6/17/2020 7:50 PM)	

Delete Save

Please select each tab to view/edit your Grant Request details.

Fund Details Recipient Grant Information Acknowledgement Submission

Edit  
**Source Fund \*** Concern for the Aged  
**Cash Available** - \$0.06  
As of 6/17/2020 12:00 AM

Next Tab

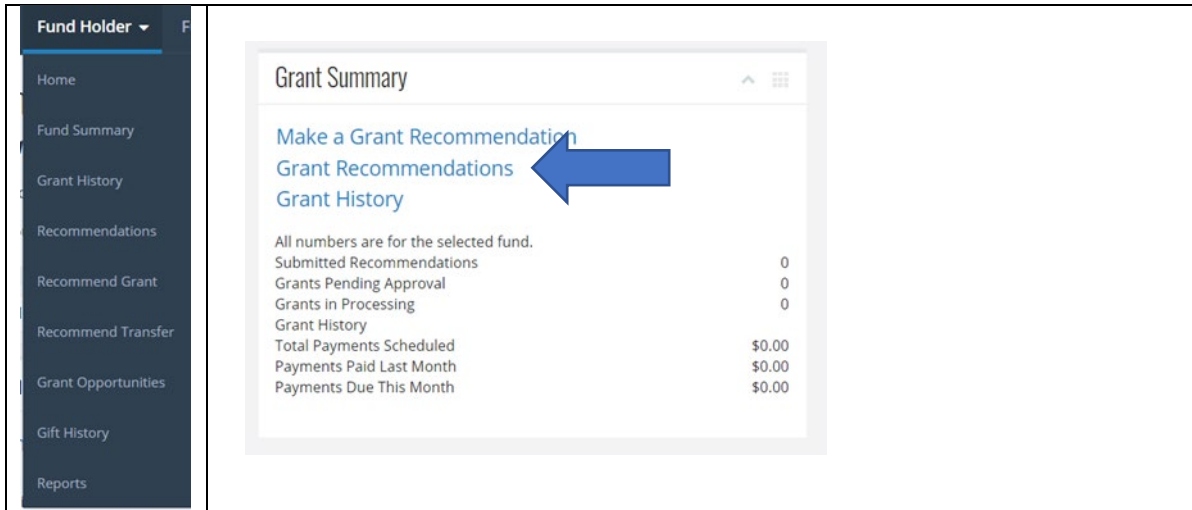
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3. To make a grant recommendation for an interfund transfer to another fund at Montana Community Foundation (e.g. Women's Foundation of Montana):
  - Use the drop-down menu and select **Recommend Transfer**.
  - Complete the information on the following three tabs:
    - Recipient
    - Grant Information
    - Submission

The screenshot displays the 'Fund Transfer Recommendation' page. On the left, a dark navigation menu includes options like 'Home', 'Fund Summary', 'Grant History', 'Recommendations', 'Recommend Grant', 'Recommend Transfer', 'Grant Opportunities', 'Gift History', and 'Reports'. A blue arrow points to 'Recommend Transfer'. The main content area features a header with the title and a printer icon. Below this, donor information is listed: Donor Name (Catherine Cooney), Donor Email (ccooney@mtcf.org), and Status (NEW (6/17/2020 7:56 PM)). A 'Target Fund' section is partially visible. Action buttons for 'Delete' and 'Save' are present. A instruction bar reads 'Please select each tab to view/edit your Fund Transfer Request details.' Below this are five tabs: 'Fund Details' (active), 'Recipient', 'Grant Information', 'Acknowledgement', and 'Submission'. The 'Fund Details' tab shows an 'Edit' button, 'Source Fund' as 'Ernie Nunn' Helena Chamber Endowment, and 'Cash Available' as '\$0.00' as of 6/17/2020 12:00 AM. A 'Next Tab' button is at the bottom. The URL 'https://mtcf.spectrumportal.net' is visible at the very bottom.

## Pending Grant Recommendations

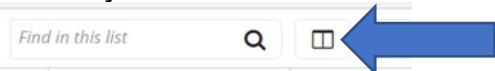
If you are unable to complete a grant recommendation in one sitting, you can access it later by selecting **Recommendations** from the drop-down menu or click on Grant Recommendations on the **Grant Summary** tile. Check this section anytime to make sure that you completed your grant recommendations and they were submitted for payment.



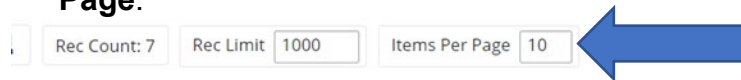
### 3. Grant History

The **Grant History** tile provides many ways to search your grant history (2012 to present) and to organize the information.

- Click on **Grant History** on the **Grant Summary** tile.
- You may search by grantee name or use the filter function to narrow your search.
- You may choose the columns that will show in the list by clicking on the column icon.



- To adjust the number of grants on each page, adjust the number on **Items per Page**.



- To download the data, click on the download button and choose the format you wish to use.



#### 4. Gift History

To access your gift history (history of contributions to your fund), click on **View Gift History Screen**.

Gift History

If you are an advisor for the selected fund then you can set Gift Source to "All" to see gifts made by all donors. If you chose "All" funds then you must be an Advisor for all of the funds in order to see gifts made by others. If you made a gift that was split between multiple recipients it will appear as multiple gifts here.

Fund CFAG - Concern for the Aged\*

\* Indicates you are an advisor for this fund.

Gift Source  Mine  All

Find in this list      Rec Count: 5 Rec Limit 1000 Items Per Page 10

Open	Date	Type	Donor	Amount	Reference
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- You may choose the columns that will show in the list by clicking on the column icon.



- To adjust the number of grants on each page, adjust the number on **Items per Page**.



- To download the data, click on the download button and choose the format you wish to use.

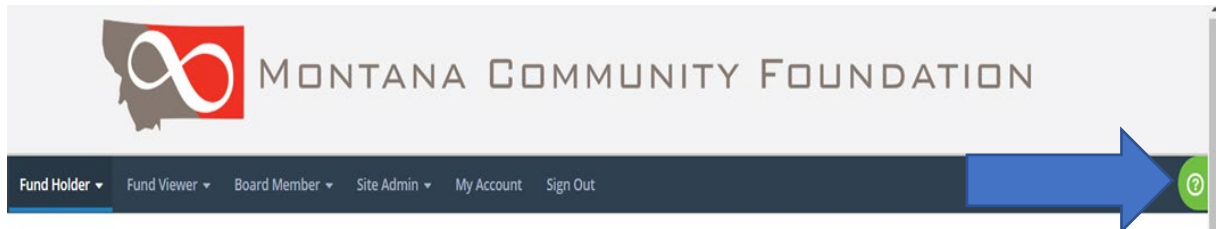


### Find Additional Resources

- To **change your password or edit contact information**, click on **My Account** from the navigation bar at the top of your home screen.
- To **view MCF's monthly newsletter**, click on *Infinity Newsletter* under **Welcome Fund Holder** on your home page. To receive those newsletters directly, contact Teal Whitaker at [teal@mtcf.org](mailto:teal@mtcf.org).



- Each page on the portal has help topics to answer your questions. Click on the green half circle on the upper right-hand side of your screen for additional information.



- For staff assistance, contact Cathy Cooney, Director of Donor Services, at [ccooney@mtcf.org](mailto:ccooney@mtcf.org) or at (406) 441-4954.

**Thank you for partnering with Montana Community Foundation!**