



Welcome to Fund Connection
Access to your fund via the Internet.

As a fundholder of El Dorado Community Foundation, you can access your fund's grants and contribution history, and view your fund statements using Fund Connection. You can make grants to the organizations you care about and learn about community needs. Fund Connection makes it simple to manage your fund and is available 24/7 from anywhere, on any device.

Initial Login Process and Creating Your Account

You will receive an email from no-reply@fcsuite.com with a custom invitation link to create your account in the Fund Connection. Your username will be your email address that we have on file. Once you click on the invitation link in the email, you will be prompted to create a password of your choice. We recommend using random words, capital letters, numbers and/or special characters to keep your account secure.

Setup Access

Please setup a password to use to access your account.

Name Smith, Mrs. Jane B.

Login jane.smith@gmail.com

Password

Confirm Password

Returning Users

Once you have successfully completed the registration process, you can visit www.eldoradocf.org and click on the **Donor Login** button on the quick access menu to access your account anytime.

If you have forgotten your username: In most cases your username is the same as your email address. If you need assistance with finding your username, please contact us at 530-622-5621 or hilary@eldoradocf.org.

If you have forgotten your password: For security reasons, our staff do not have the ability to access your password. If you need to reset your password, please use the reset password link on the login page.

Note: The Fund Connection will lock you out after five unsuccessful login attempts. If you are locked out, please contact us.

Home Screen

Once you are logged in, your homepage will appear. Your homepage is a quick snapshot of your fund's most recent activity. It will show your fund's current balance, all fund advisors, recent contributions, and recent grant history.

The tabs at the top of the page display different features available to you as a fundholder. *Note: the tabs available to you may be different depending on your fund type.*

Choose fund

If you manage multiple funds, you will see a Choose Fund menu. Choose the fund you wish to review from the drop-down menu. *Note: if you are listed as an advisor for only one fund, you will not see this screen. Instead, you will be taken directly to the main screen.*

Contributions

Provides information regarding each contribution received into your fund. Clicking on a contributor's name will bring up their history of contributions to your fund including date, and amount of the gift. *Note: an "Export" option appears on the far-right side of the menu bar. This feature will export information about each donation into a Microsoft Excel spreadsheet.*

Grants

This tab shows the history of grants awarded from your fund including date, organization name, grant purpose, and amount.

Grant Request

This tab allows you to make a grant recommendation from your fund.

Statements

This tab shows your fund's statements as they become available.

Files

This tab will show any viewable files regarding your fund.

Make Donation

This tab will show you all funds at the El Dorado Community Foundation that are accepting donations. If you click to donate, you will be allowed to donate using a credit card.

Donation Receipts

This tab will show you all contributions you have made at the El Dorado Community Foundation. If you click on ID, the tax acknowledgement letter you received will appear and you will be able to save or reprint it.

Logout

For security, if you access your Fund Connection from a shared computer or device, we strongly encourage you to use the Logout option after completing each session.

Submitting a Grant Request

To recommend a grant from your fund, click the Grant Request tab. Recommending a grant is a three-step process:

1. Choose a Grantee in one of four ways:

A Choose a Previous Grantee:

Choose the organization you wish to support from a drop-down list of organizations you have previously given to.

B Other Foundation Funds:

Choose a fund you wish to give to from this drop-down list of funds held at the El Dorado Community Foundation.

C Search for Other Grantees:

Search for the organization you want to support in GuideStar/Candid. Once you find the organization you want to support, click [Create Request](#).

D Enter Grantee Information Manually:

If you can't find the organization you wish to support, please enter the organization manually: name, address, and phone number.

The screenshot shows a form titled "Choose from previous Grantee". It has four main sections:
A: "Grantees you have given to in the past" with a dropdown menu.
B: "Other foundation funds" with a dropdown menu.
C: "Search for other Grantees" with a text input field labeled "Name" and a "Search" button.
D: "Enter Grantee information manually" with a text input field labeled "Name *".

Once you have selected your grantee, click [Submit](#) and continue to the next page.

2. Grant Details

Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details including grant description and amount.

E Description:

Please provide the grant purpose.

Note: if you don't designate a specific grant purpose, your grant will be earmarked for General Support.

F Amount:

A \$250 minimum is required.

G Anonymous:

Please check this box if you would like your grant to be made anonymously.

Note: checking this box ensures that your fund name will not be shared in the grantee letter.

H Attachment:

If there is a letter or other attachment you would like to submit along with your grant recommendation, please attach it here.

Note: this field is optional.

The screenshot shows a form titled "New Grant Request". It has several fields:
E: "Description" with a text area and a character count of "0/255 characters".
F: "Amount" with a text input field.
G: "Anonymous" with a checkbox.
H: "Attachment" with a "Choose Files" button and the text "No file chosen (or drag and drop anywhere on the page)".
I: "Attachment Description" with a text area.
At the bottom, there is a "Review" button and a note: "If you have not chosen the Anonymous option above, your fund name will be included in your grantee letter by default. If you wish to additionally be recognized by name in the grantee letter, please enter your name(s) as you wish them to appear."

I Donor Recognition:

If you have not chosen the Anonymous option above, your fund name will be included in your grantee letter by default. If you wish to additionally be recognized by name in the grantee letter, please enter your name(s) as you wish them to appear in this box.

Once you are finished entering this information, click [Review](#) and continue to the next page.

3. Review and Submit Request

Review your grant request details and click [Submit Request](#). Once you submit the request, you will receive an automated confirmation email and our staff will begin processing your grant recommendation.

Viewing Grant History

To review your grant history, click the Grants tab. Your grants will be displayed by organization, and below, by date.

To view all grants you have made to a specific organization, simply click on the name of the organization you wish to view. To view grants by date, scroll down this page to view all your grants, sorted by date.

Under the Status column, you will see one of six statuses for each grant:

Request means that your grant request has been sent to our staff. If you would like to cancel a pending grant request before it is processed, click the yellow Cancel button.

Canceled means your grant request has been canceled.

Pending means that our staff is currently processing your grant request.

Approved means your grant request has been approved, but not paid.

Paid means that a check is in the queue for printing and mailing.

Completed means the grant request has successfully been fulfilled, and a check has been paid out to the organization.

Email Alerts

We can alert you via automated emails every time a donation is made to your fund, or a grant has been awarded from your fund. These alerts can be canceled at any point, but the alerts are not retroactive, so you will not be notified of past grants or donations. If you would like to cancel these alerts, please contact us at 530-622-5621 or hilary@eldoradocf.org.

Fund Connection Frequently Asked Questions

How often are fund statements posted?

Fund statements are posted semiannually after investment gains or losses have been posted. You will be notified via email when your statement is ready to be viewed in Fund Connection. If you are not receiving these notification emails, please contact us at 530-622-5621 or hilary@eldoradocf.org.

I've lost my password. What should I do?

For security reasons, our staff do not have the ability to access your password. If you need reset your password, please use the reset password link on the login page.

How long does it take for my recommendation to be processed?

Most grants that are submitted by Monday at 10am will be included in that week's grant cycle. Grants submitted after that time will be included in the next week's grant cycle.

Who can I make grant recommendations to?

Grant recommendations must be made to most 501(c)(3) organizations (including schools, churches, and government entities). If you have questions about whether the organization you wish to make a grant to is eligible, please contact one of our staff and we will assist you.

What is the minimum amount for a grant recommendation?

A \$250 minimum is required for each grant recommendation.

Are there other ways to submit a grant recommendation?

Yes, you can submit grant requests via email to any of Donor Services Coordinator or our Accounting Staff. Please include your fund name, the organization you wish to support, grant amount, grant purpose and any additional instruction in the email.

How do I know if a grant I recommended has been issued?

Your most recent grants paid will be listed on your Fund Connection homepage. Alternatively, you may click on the Grant Request tab and on the right side of this page, you will see your recent grant requests with their status.

Who do I contact if I'm having issues with the Fund Connection?

If you have any questions or are experiencing issues with the Fund Connection, please contact us at 530-622-5621 or hilary@eldoradocf.org.