MONTANA COMMUNITY FOUNDATION
all about Montana's future

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

2. The first time you access the portal, you will need to register for an account. <u>All users must register even if you had an account in our previous portal.</u>
    - 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.

- 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 2nd 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 and click on **MyFund** on our home page.
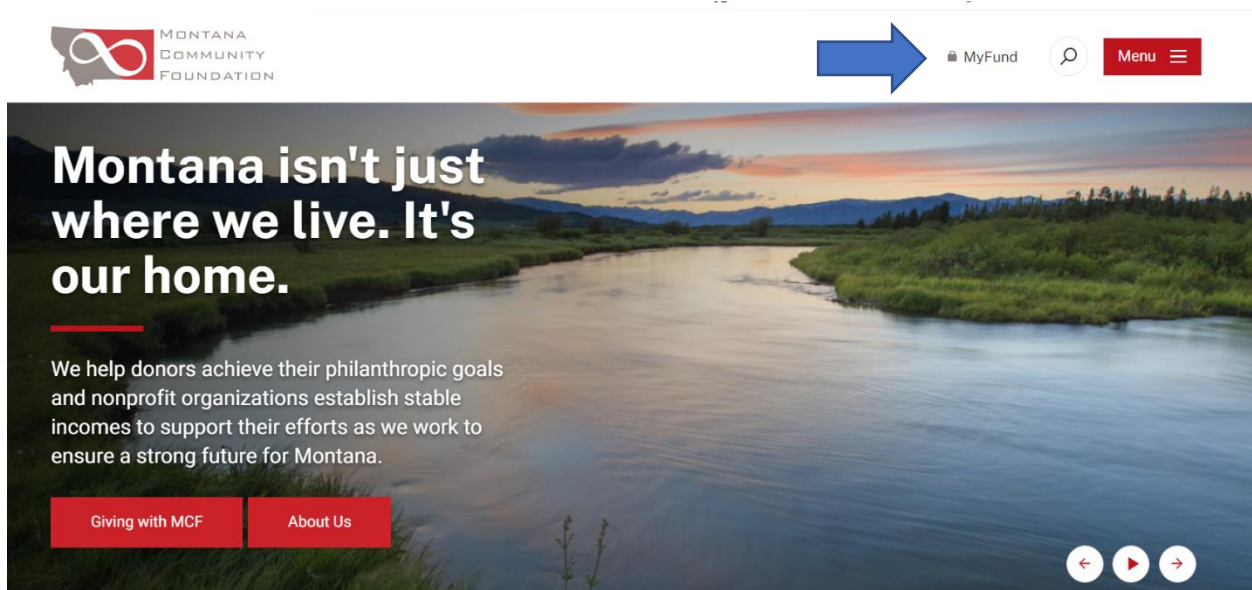
Navigate the Portal

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
View Fund Summary Screen	Make a Grant Recommendation	If you have questions or need help with your fund, please contact Cathy Cooney at the Montana Community Foundation at 406-441-4954, ccooney@mtcf.org.
Current Net Assets: $28,097.82	Grant Recommendations	
Current Available Balance: -$0.06	Grant History	

Grant Summary:
All numbers are for the selected fund.
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

Giving Opportunities	Grant History	Gift History
View Grant Opportunities Screen	View Grant History Screen	View Gift History Screen
	There is no chart data for this fund for the last 12 months.	There is no chart data for this fund for the last 12 months.

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
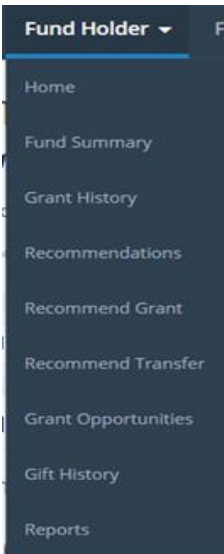
Navigate the Menu Options

1. Fund Summary

The fund summary section gives you a quick view of your **Current Net Assets a**nd **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**.
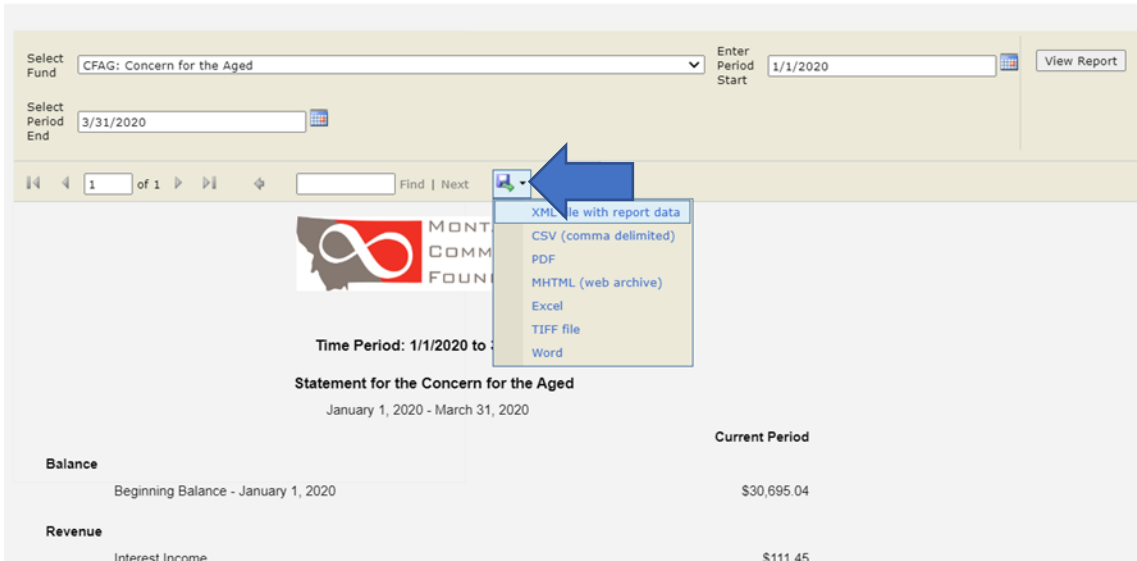
The **Fund Statement** viewer allows you to select a custom reporting period. Click on **View Report** after you have chosen your start and end date.

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.

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:

- o Recipient
- o Grant Information
- o Acknowledgement
- o Submission

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

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.
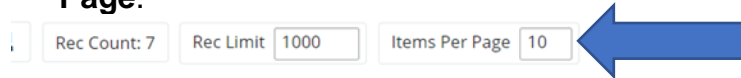
3.Grant History

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.

Find in this list	Q	▢ ◀

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

Rec Count: 7	Rec Limit	1000	Items Per Page	10	◀

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

Find in this list	Q	▢	▼	⬇	◀		Items Per Page	10

4. Gift History

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

- You may choose the columns that will show in the list by clicking on the column icon.
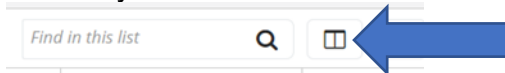
- To adjust the number of grants on each page, adjust the number on **Items per Page**.
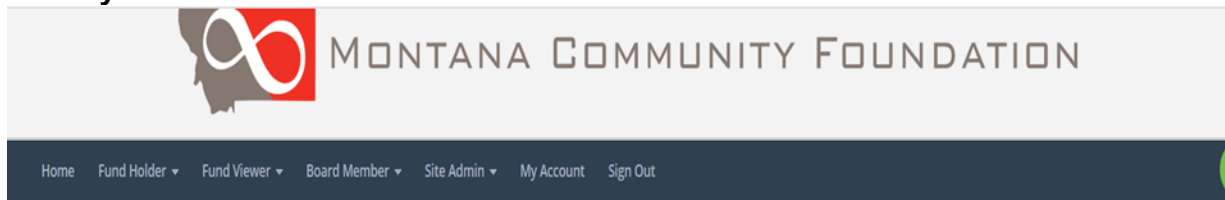

- To download the data, click on the download button and choose the format you wish to use.

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.

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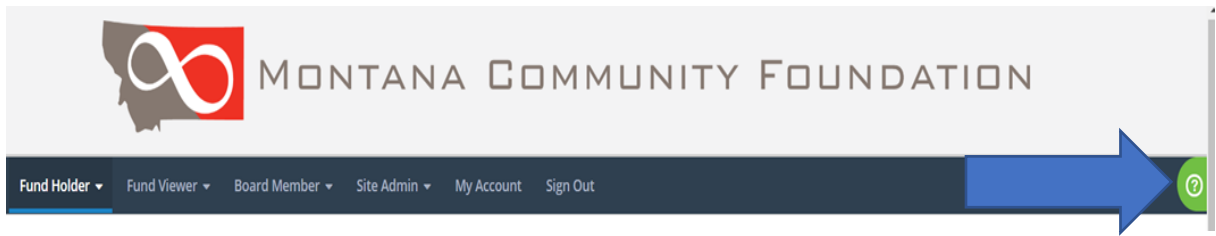
- For staff assistance, contact Cathy Cooney, Director of Donor Services, at ccooney@mtcf.org or at (406) 441-4954.

Thank you for partnering with Montana Community Foundation!