Jewish Federation Foundation
Donor Portal Instructions

New Account Setup

Look for an email from a Rhode Island Foundation at (@rifoundation.org) with the subject line "Welcome to the Jewish Federation Foundation of Greater RI Donor Portal".

If you were notified to expect an email and haven't received it yet, please check your spam folder or contact Pamela Adams at 401.427.4059 or padams@rifoundation.org.

Follow the instructions in the welcome email. Click the link in the email to access the fund portal login page:

Subject: Welcome to the Jewish Federation Foundation of Greater RI Donor Portal

Welcome to the Jewish Federation Foundation of Greater RI Donor Portal! Your new account

Click this link to get started: https://rif.fcsuite.com/erp/portal?sorg_id=1000

Enter the username and temporary password from the welcome email.

Login

Username

Password 👁

Login

Forgot your password?

You will then be prompted to create a new password of your choosing.

Change Password

Temporary password, please enter a new one.

New Password 👁

Confirm New Password 👁
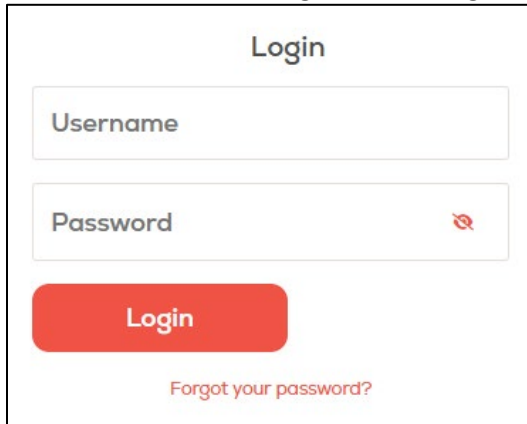
Change Password

After entering your password, click Change Password, and you'll be directed to the portal.

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Logging in to the Donor Portal

To log back into the Donor Portal at a later time, click and bookmark the following link:
https://rif.fcsuite.com/erp/portal?sorg_id=1000

On the Donor Portal login screen, log in with your credentials.

If you can't remember the password, use the "Forgot your password?" link under the Login button.

If you enter a password incorrectly five times, your account will be locked. To unlock your account or if you need assistance with logging in, please contact Pamela Adams at 401.427.4059 or padams@rifoundation.org.
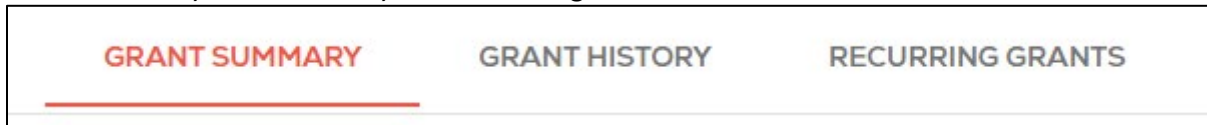
View Grants

If you have more than one fund, make sure the correct fund is selected in the fund selection dropdown menu.

To view grants from your fund, click GRANTS on the left menu.
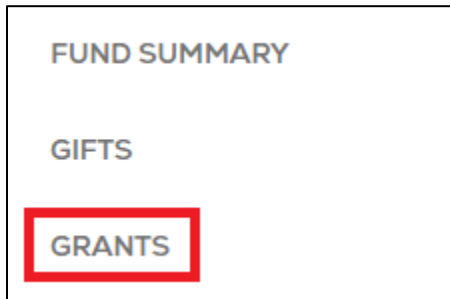
The Grants area has three sections, seen across the top:
Grant Summary, Grant History, and Recurring Grants.

1. In **Grant Summary,** all your past grantees are listed with the total number of grants and the total amount granted. Click on a grantee name to see the list of grants to that grantee.
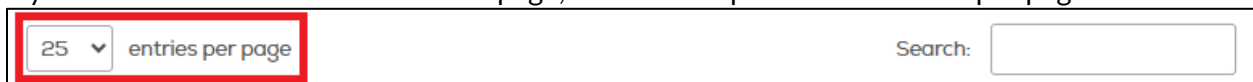
Change the sort order by clicking the field name. The arrows to the right of the field name will change indicating how the field is sorted.

To search for a specific grantee, type in the Search box. Matching records will be listed.
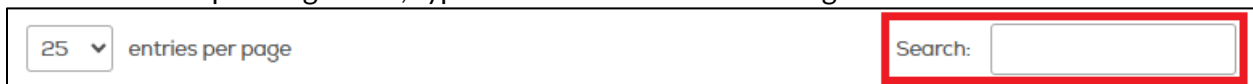
If you need to see more results on the page, click the dropdown for "entries per page".

2. In **Grant History,** all your grants are listed by date. This list can also be sorted by clicking a field name at the top.

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To filter the grants list by date, select the Filter button and enter a date range in the popup.

Grants	▼ FILTER	⬇ EXPORT

To export the list of grants to a file, click the Export button, and your browser will download a spreadsheet of the grants.

Grants	▼ FILTER	⬇ EXPORT

Within the grant list, to see more details about a grant, click the link in the ID column.

If you would like to copy a particular grant recommendation to submit again, click the Copy button.

You will have the opportunity to make changes (to the amount, designation, etc) before entering the recommendation.

| Amount ⬍	
250.00	Copy
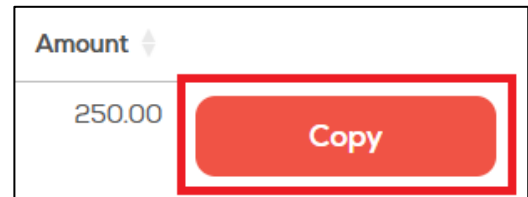
3. The **Recurring Grants** section will list the recurring grants you have set up. The same sort, search, and filter options described above apply for this list as well.

Make a Grant Recommendation

If you have more than one fund, make sure you've selected the correct fund under Choose Fund.

To make grant recommendations, click the Create
Grant Request button on the far right of the page.
**for your convenience This button is on every page.**

CREATE GRANT REQUEST
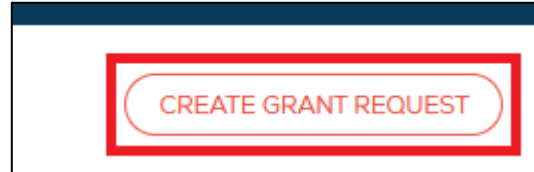
You have three options for how select a grantee for the recommendation:
Previous Grantee or Fund, Search Grantee, and Manual Grantee

Grant Request › Choose Type

PREVIOUS GRANTEE OR FUND   SEARCH GRANTEE   MANUAL GRANTEE
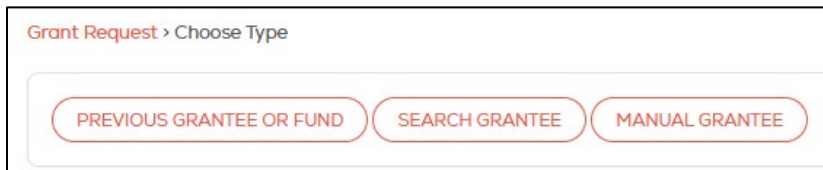
1. Previous Grantee or Fund – click in the box to select from previous grantees or
JFF/RI Foundation funds you have given to in the past.

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
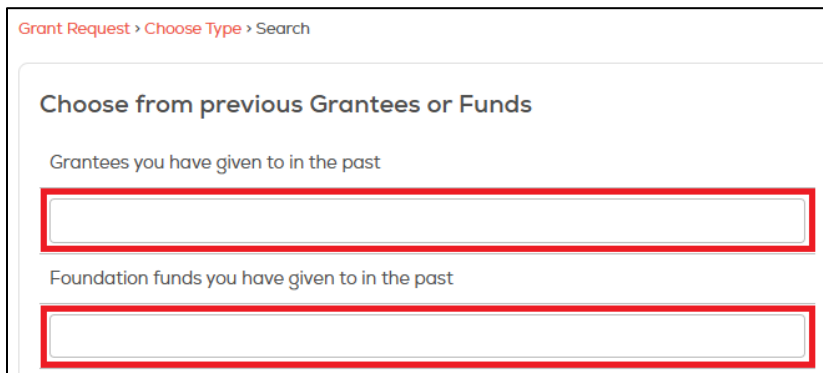
In the Grants tab, you can also select from previous
grantees by clicking Copy.

Amount

250.00   Copy
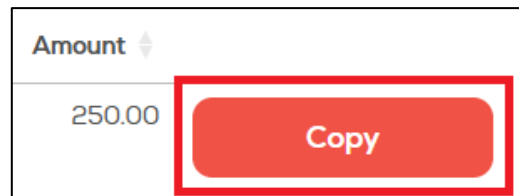
2. Search Grantee – If you're submitting a grant for a grantee you haven't previously given to, enter an organization name here to search the Rhode Island Foundation database. Entering the words for the organization name in the correct order with give you better results. You can also provide City, State, and EIN (Employer Identification Number) to provide better search results.

If your recipient isn't found, then click on Candid (formally GuideStar). You can click back and forth to see the different search results.

If you see your desired organization, click the CREATE REQUEST button. If you don't see it, click on Manual Grantee

3. **Manual Grantee –** If you cannot find your grantee by Search Grantee or you want to bypass searching, you may enter their details in the form

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Once you have your recipient set, you'll be sent to a new form. Enter the information listed under Grant Request:

- **Additional Grantee Contact** – click the checkbox if you want to specify a contact at the organization.
- **Description** – provide a designation, campaign/program name, name of person being honored, etc.
- **Amount** – provide the grant amount.
- **Anonymous** – select if you wish to remain anonymous.
- **Recurring** – if you would like the grant to be recurring, select the start date, recurrence interval, and number of recurrences (leave blank if there is no end date).
- **Attachment** – provide any files you would like to include with the recommendation.
- **Attachment Description** – provide a description for any attached files.
- **Additional Instructions** – provide any special request information. If you'd like the donor name(s) to appear a certain way in the grant letter (ex. if you're sending the grant on behalf of a family member), please provide it here.

Certain text boxes, like Additional Instructions, are expandable by dragging the bottom right corner of the box. Doing this allows you to see more of your entered text.

When all information has been entered, click the Add to Cart button.
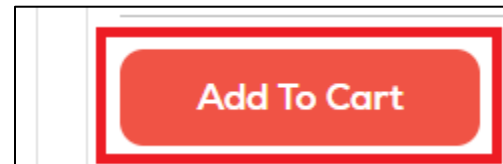
The recommendation is now listed under "Grant Request Cart" and has not submitted. You can now either move forward with submitting that recommendation or add more recommendations to your cart.

To add another recommendation before submitting, go through the same steps as above, starting with entering the grantee.

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When ready to submit, click the Review Grant Requests button in the Grant Request Cart section.

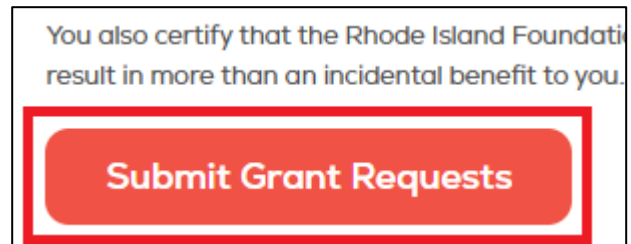| Grant Request Cart	Review Grant Requests
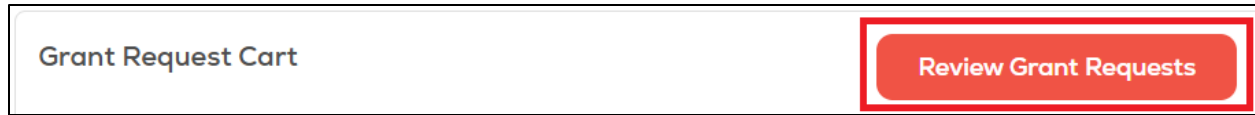
Review the information on the Review Grant Requests screen. If edits need to be made, select the CART button to return to the list under Grant Request Cart. Click the Edit button for the grant request to edit.

| Description	Attachment	Amount	
		100.00	Edit

After making updates, select Update Cart.

Update Cart
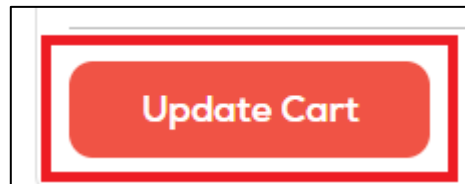
Click the Review Grant Requests button to return to the Review Grant Requests screen. After reviewing information, click Submit Grant Requests.

You also certify that the Rhode Island Foundati[on] result in more than an incidental benefit to you.

Submit Grant Requests

After submitting, you'll see the message "Grant Request Submitted". You will also receive a confirmation email with the subject line "Request Confirmation".

You may click the Continue button to be brought to the RECOMMEND A GRANT/RECENT GRANT ACTIVITY section.

Grant Request Submitted

Continue
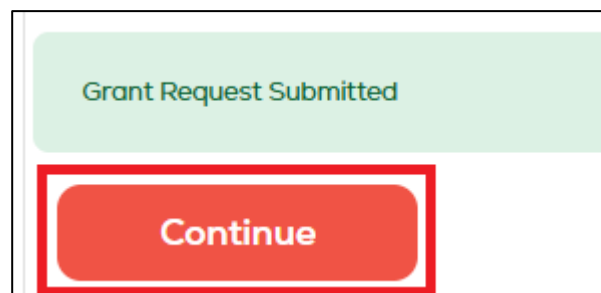
Your recommendation will now be listed on the RECOMMEND A GRANT/RECENT GRANT ACTIVITY page with its current status. The status will change as it moves through the grant process. To view when a grant recommendation has been paid, check back to this page or the GRANTS tab to view the status.

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At any point before the grant has been paid,
you may cancel the recommendation by
clicking the Cancel button.

Amount	
100.00	Cancel

If you have any questions related to the grant recommendation process, please contact Claire
Uziel, Endowment/Campaign Operations Manager, at endowment@jewishallianceri.org or
401.421.4111 x109.

View Gifts

If you have more than one fund, be sure the correct fund is selected under Choose Fund.

To view gifts to your fund, click GIFTS in the left menu.
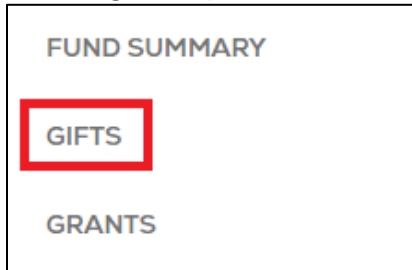
To see more details on a donor and a list of their contributions to the fund, click the donor's name that appears as a link in the Contributor column
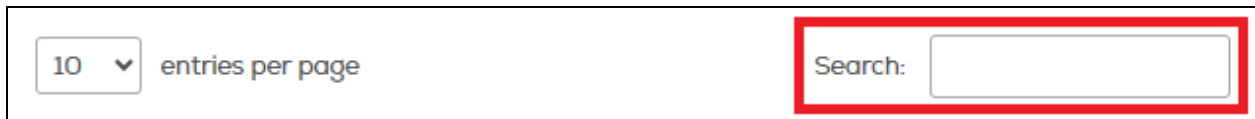
Change the sort order by clicking the field name. The arrows to the left of the field name will change indicating how the field is sorted.
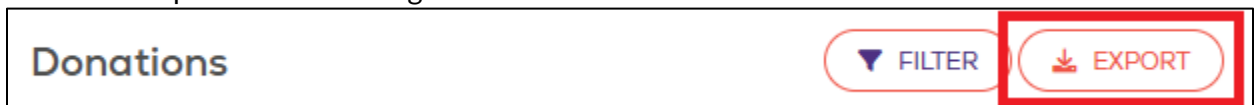

Filter the list by selecting the FILTER button and entering filter values in the pop-up.
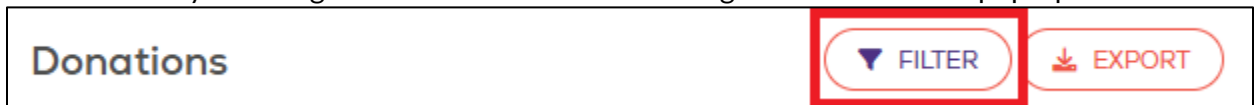
To search for specific donations, type in the Search box. Records where a match is found in any column will be listed.

You can also export the list of gifts to a file by clicking the Export button. Your browser will download a spreadsheet of the gifts.

If you need to see more results on the page, click the dropdown for "entries per page".