

Fund Advisor Portal

for Unrestricted, Designated, Field of Interest,
Scholarship, and Agency Funds



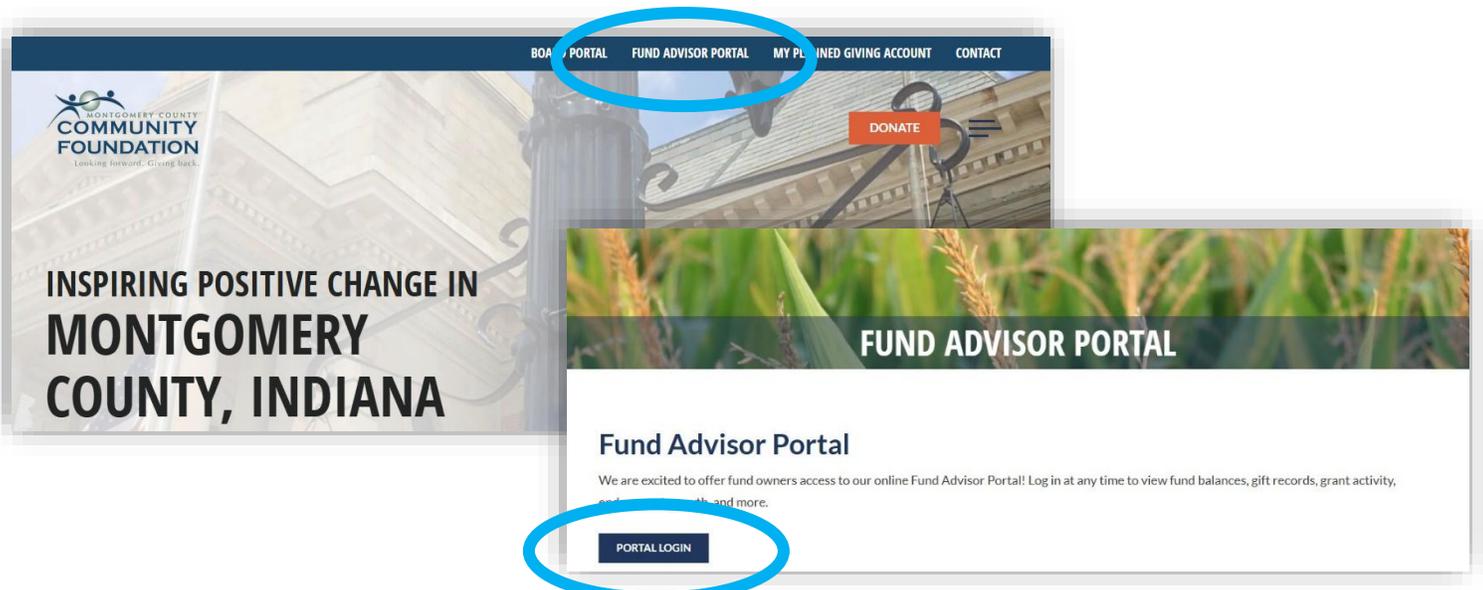
Getting Started

Fund advisors will receive an email (shown below) from the Montgomery County Community Foundation (IN) to establish an account. If you do not receive one, check your spam and junk folders. Click the link to access the main login page and create your password.

Important: If you do not have an email address on file at MCCF, or your email address has changed, please contact our office at 765-362-1267 to update your information.

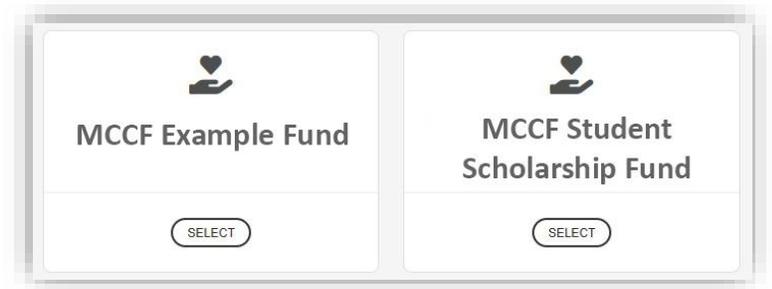
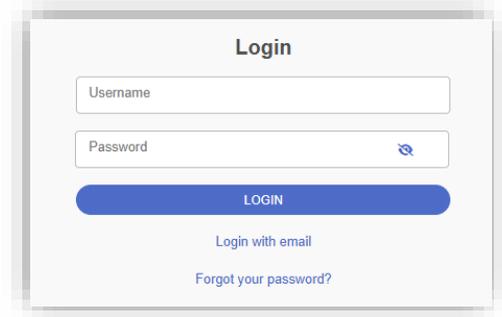


After the initial account setup, you can access the portal using the email link, or through the MCCF website. Visit www.mccf-in.org and click on “Fund Advisor Portal.” Once there, click “Portal Login” to be redirected to the portal homepage.



Login Options

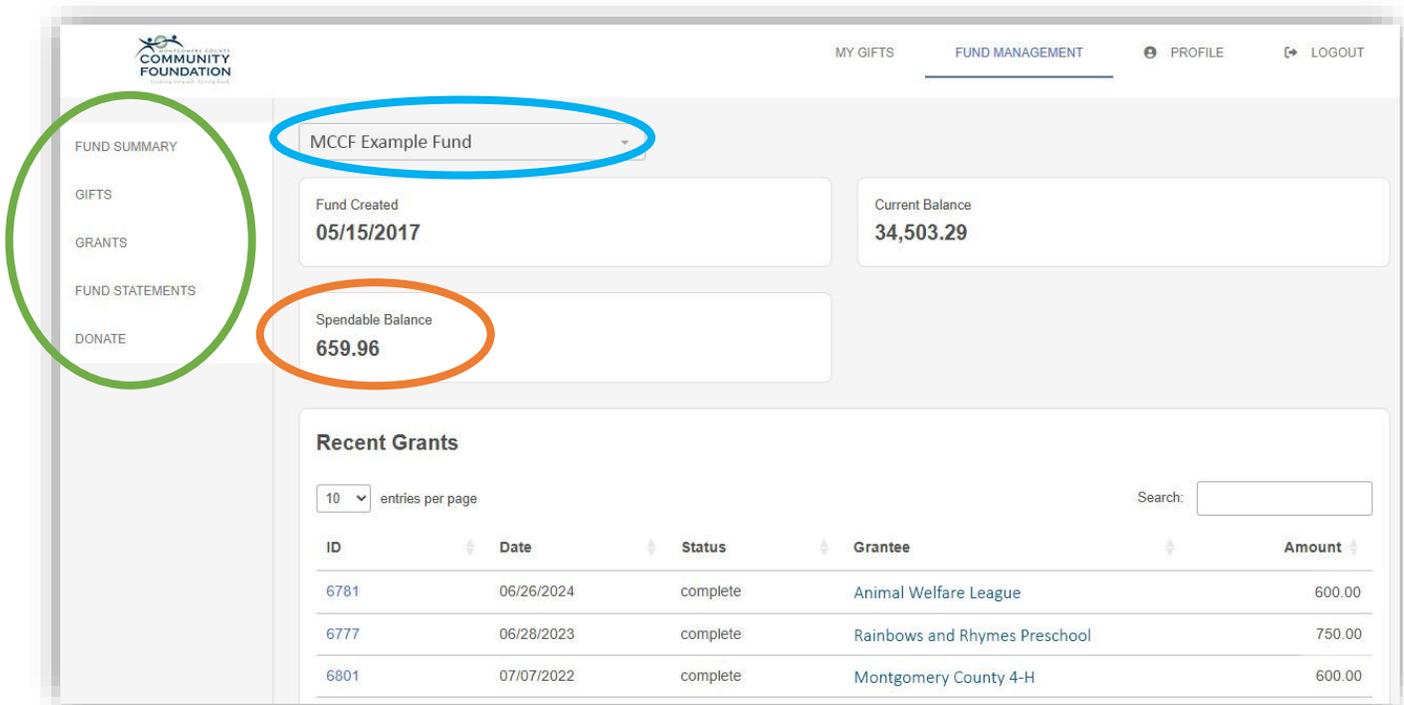
- Fund advisors can also use “login with email.” This will send an automated email to your inbox with a pin number; when the pin number is entered, it will autofill your password.
- To reset login information, click “forgot your password?”
- If you have multiple funds, select the fund you would like to view first after logging in.



Fund Summary

Once logged in, the portal will show a fund summary dashboard. This is a basic overview of fund activity, including the current balance, spendable balance, grants, and recent gifts.

- **Spendable balance** (orange) is the amount available to distribute as a grant or scholarship from the fund.
- If you have multiple funds, **click on the fund name** (blue) to switch to a different fund summary.
- Click on any category in the **navigation toolbar** (green) for more details in a specific area of fund activity.



COMMUNITY FOUNDATION
Looking Forward. Giving Back.

MY GIFTS FUND MANAGEMENT PROFILE LOGOUT

FUND SUMMARY
GIFTS
GRANTS
FUND STATEMENTS
DONATE

MCCF Example Fund

Fund Created
05/15/2017

Current Balance
34,503.29

Spendable Balance
659.96

Recent Grants

10 entries per page Search:

ID	Date	Status	Grantee	Amount
6781	06/26/2024	complete	Animal Welfare League	600.00
6777	06/28/2023	complete	Rainbows and Rhymes Preschool	750.00
6801	07/07/2022	complete	Montgomery County 4-H	600.00

Navigation Toolbar

Gifts: Fund advisors can view donations to their fund but not the amount given. **Click on the donor name** (green) to view a donor's contact information and giving history.

The screenshot shows the 'MCCF Example Fund' page under 'FUND MANAGEMENT'. The left sidebar has 'GIFTS' circled in blue. The main content area shows a 'My Gifts' section with a 'Donations' table. The table has columns for ID, Date, Contributor, Type, and Amount. The first row is circled in green, showing ID 31954, Date 03/27/2025, and Contributor 'Smith, John and Jane'. A pop-up window titled 'Contributor' shows details for 'Smith, John and Jane', including their address and a list of contributions.

ID	Date	Contributor	Type	Amount
31954	03/27/2025	Smith, John and Jane	Check	Hidden
30999	02/14/2025	Tester, Joseph P	Check	Hidden
29688	12/18/2024	Sample, Caroline A	Check	Hidden
29687	12/18/2024	Test Accounts, Inc.	Check	Hidden

Contributor		Contributions		
Name	Smith, John and Jane	Date	Amount	Description
Address	119 E Main Street Crawfordsville, IN 47933	03/27/2025		

Grants: The grants tab offers a brief summary of distributions from the fund and grantees. **Click on "grant history"** (green) for dates and other details.

The screenshot shows the 'MCCF Example Fund' page under 'FUND MANAGEMENT'. The left sidebar has 'GRANTS' circled in blue. The main content area shows a 'GRANT SUMMARY' section with 'GRANT HISTORY' circled in green. The 'Grant Summary' table shows a list of grantees and their grant amounts.

Grantee	Grants	Amount
Animal Welfare League	1	600.00
Rainbows and Rhymes Preschool	1	750.00
Montgomery County 4-H	1	600.00
Crawfordsville Main Street	1	650.00
Lew Wallace Preservation Society	1	600.00

Fund Statements: Monthly and annual fund statements can be viewed or downloaded using this tab of the navigation toolbar. Click **“manual statement”** (green) to create a custom report using a specific date range.

The screenshot shows the MCCF website interface. On the left is a navigation menu with 'FUND STATEMENTS' circled in blue. The main content area shows 'MCCF Example Fund' with tabs for 'FUND STATEMENTS', 'FILES', and 'FINANCIALS'. The 'FUND STATEMENTS' tab is active, displaying a table of statements for May, April, and March 2025. A 'MANUAL STATEMENT' button is circled in green. An inset window titled 'Manual Fund Statement' contains a form with the following fields:

- Statement Type: Radio buttons for Monthly, Quarterly, Yearly, and Custom Date Range.
- Start Date: A text input field with a calendar icon.
- A blue 'CREATE' button.

Donate: Clicking this tab redirects users to the Online Giving Portal, where donors can conveniently make gifts to any MCCF fund using a credit or debit card.

The screenshot shows the 'Online Giving Portal' banner for the Montgomery County Community Foundation. The banner includes the MCCF logo and the text 'Online Giving Portal'. Below the banner, there is a message: 'Thank you for considering the Montgomery County Community Foundation as an option for your charitable giving. Donors can select a specific fund using the search bar below, or browse all funds at MCCF by clicking the "show additional funds" button below.' At the bottom, there is a search bar with the placeholder text 'Search Funds' and a small text line: 'For questions and additional help, please contact our office at 765-362-1267 or email sarah@mccf-in.org.'

Other Tools

My Gifts: The “My Gifts” tab (blue) provides a summary of your own donations. Click on “donations” (green) for an itemized list and full gift history.

- Click “filter” (orange) to view gifts within a specific date range or “export” (purple) to generate an Excel document with all gift information.

The screenshot displays the MCCF portal interface. At the top, the navigation menu includes 'MY GIFTS' (circled in blue), 'FUND MANAGEMENT', 'PROFILE', and 'LOGOUT'. On the left sidebar, 'DONATIONS' is circled in green. The main content area features a 'Donation Summary' section with three summary cards: 'Total Donations 200.00', 'Total Donations This Year 50.00', and 'Total Donations Last Year 75.00'. Below these is a table listing various funds. An inset window shows the 'My Gifts' page with a table of donations and 'FILTER' (orange) and 'EXPORT' (purple) buttons highlighted.

ID	Date	Fund	Recurring	Anonymous	Type	Description	Amount
14601	05/16/2025	Cornerstone - Operating Fund					25.00
14602	03/23/2025	Building Fund					25.00
14603	06/10/2024	Cornerstone - Operating Fund					25.00

Profile: Update your personal information, username/password (security), and contact preferences at any time using the edit buttons (green); MCCF will be automatically notified of profile changes.

The screenshot displays the MCCF portal interface for the 'Profile' section. The navigation menu includes 'MY GIFTS', 'FUND MANAGEMENT', 'PROFILE' (circled in blue), and 'LOGOUT'. On the left sidebar, 'PERSONAL INFORMATION', 'SECURITY', and 'CONTACT PREFERENCES' are listed. The main content area shows a profile card with the following details: Name John Smith, Primary Address 119 E Main St, Crawfordsville, IN 47933, Email johnsmith@gmail.com, and Phone Number 765-362-1267. An 'EDIT INFORMATION' button (circled in green) is located at the bottom right of the profile card.

Need Help?

If you have issues accessing the portal or questions about how it works, feel free to contact Sarah Storms at 765-362-1267 or sarah@mccf-in.org. If technology isn't your thing, we also invite fund advisors to bring their devices to the MCCF office and we will be happy to walk you through the setup process.

To do this, schedule an appointment with Sarah by calling our office at 765-362-1267. You can also scan the QR code or visit www.calendly.com/sarah-mccf-in to schedule online.

