



Fund Advisor Portal FAQ

- Where do I log in to the portal?
 - <https://boonecounty.fcsuite.com/erp/fundmanager>
- I didn't get the activation email. What should I do?
 - Check your spam/junk folder for an email from no-reply@fcsuite.com, it often goes there. If you still do not receive it, contact ali@communityfoundationbc.org or crystal@communityfoundationbc.org and a new link will be sent directly to you.
- The URL from the first email I got to login to the portal doesn't work anymore. What should I do?
 - The custom URL from the auto-generated email can only be used to establish your password. To get to the login page after this, you can use [this link](#) or bookmark the page on your computer.
- Forgot your username or password?
 - Your username is probably your email address. If you have forgotten your password, click Forgot Password on the login page. Enter your username and click the Reset Password button. If an account with the provided username is found, instructions to reset your password will be sent to the email address for that account. If you're still having trouble, please contact us and we can assist you.
- What is included in the current balance?
 - The current balance reflects investment activity and quarterly fees through the prior month end: as well as recent contributions and grants as listed in the portal. • I can't see all our donations and grants on the home tab.
 - The home tab shows a recent summary of donations and grants. To see a full history, click on the Donation or Grants tab respectively. There you will see a full list of donations and grants.
- What is the difference between a donation and grant request?
 - You make a grant request when you want to grant money out from the fund you advise. Whereas the donation tab will take you to the general CFBC donation portal where you, as an individual, can make a donation to a Community Foundation fund of your choice.
- I'm seeing a FASB fund in my portal. What is this?
 - Some of you will see your fund plus a FASB fund when you log on to the portal. This is a separation of your fund due to accounting regulations. If you have questions about this,

please contact Annette Jones at annette@communityfoundationbc.org • How often can I expect to see our fund statements on the portal?

- You can expect to see statements posted to the portal monthly, by the 15th of the month. If you require a statement at a different time or for a different time frame, please contact us.
- If you have any other questions about the portal, please contact Ali Maxey at ali@communityfoundationbc.org or Crystal Dimiceli at crystal@communityfoundationbc.org (765-482-0024 or 317-873-0210)
- Access the CFBC Forms and Policies for your reference [here](#)