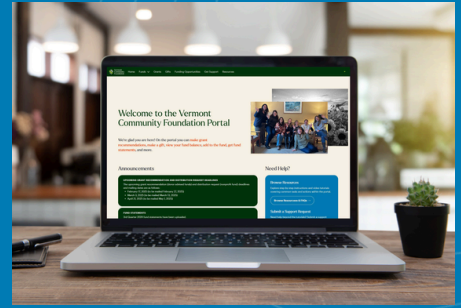




Portal Guide – Nonprofit Fund Edition



Welcome to the online portal for Vermont Community Foundation fundholders. From here you can access detailed fund information—including the current balance and fund statements—submit distribution requests, and view distribution and gift history.

More instructions and helpful tutorial videos can be found at vermontcf.org/donor-portal-resources.

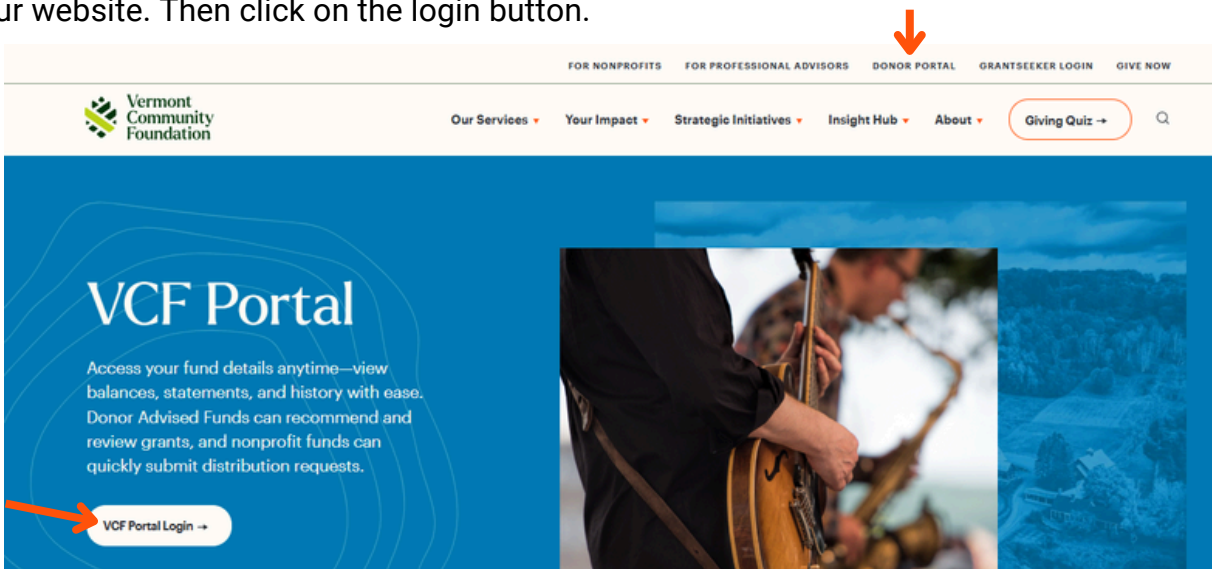
If you need assistance or have questions not addressed in these materials, please contact philanthropy@vermontcf.org. And, if you have suggestions for how this handbook could be clearer or more helpful, let us know!

[Explore the portal with this orientation video tour.](#)

How to Log In

There are a few ways to access the portal at any time:

- Go to vermontcommunityfoundation.my.site.com/login
- Visit vermontcf.org/donor-portal, or click on Donor Portal in the top right-hand section of any page on our website. Then click on the login button.



Vermont Community Foundation

To access this page, you have to log in to Fundholder Portal.

Username:

Password:

☐ Remember me

[Forgot Your Password?](#)

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Setting Up Your Portal Account & Password Requirements - [Follow along with this video tutorial](#)

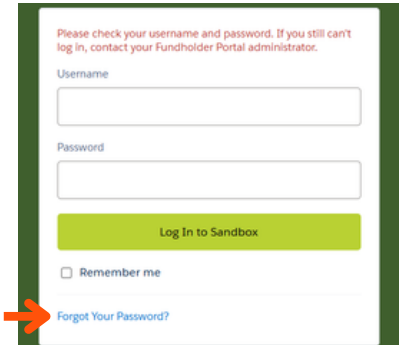
When you open a fund, you will share an email for correspondence. This will also be your username for accessing the portal. You'll receive an email at the address we have on file with a link to log in and set your password.

When you set up your password, the following security requirements apply:

- 15 or more characters
- A combination of letters, numbers, and at least 1 special character

We recommend you use a unique password for the VCF Portal that you don't use for other services and that you change it periodically.

Please note: Links to set up your account or reset your password expire after 24 hours. If your link has expired, you will see the screen to the right. Click "Forgot Your Password?" and follow the instructions in the "Forgotten Password" section of this guide.



First time logging in? You'll be prompted to set up MFA on your next login. We recommend logging out and back in right away to complete the setup.

Setting Up Multi-Factor Authentication (MFA) - [Follow along with this video tutorial](#)

To help keep your Portal account secure, you'll be asked to choose one of the following verification methods when setting up MFA.

Text Message (SMS)

- Receive a verification code by text message each time you sign in.

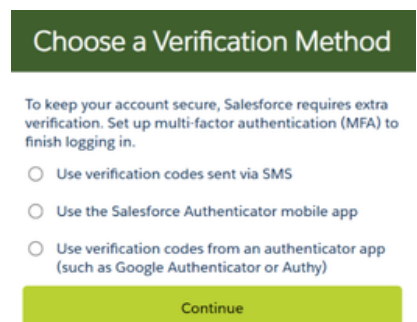
Salesforce Authenticator

- Salesforce Authenticator takes a few extra steps to set up initially, but future logins are faster because you can approve the sign-in request in the app, instead of entering a verification code.

Other Authenticator App (such as Google Authenticator) – This is the method we recommend.

- Authenticator apps provide even stronger account security than text message verification and are quick to set up. If you already use an authenticator app for other services, you can typically use that same app for the VCF Portal.

Find instructions for each option on the following page.



Step-by-Step MFA Setup

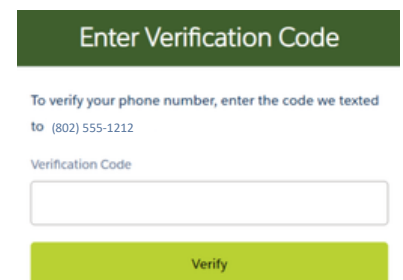
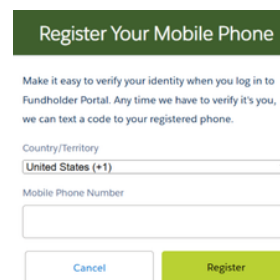
Our recommended option: An Authenticator App (such as Google Authenticator)

- If you don't already have an authenticator app, you can download Google Authenticator from the [Apple App Store](#) or [Google Play](#).
- Select **Use verification codes from an authenticator app** and click Continue.
- Open the authenticator app on your phone and scan the QR code displayed on your screen.
- Enter the verification code displayed in the app.
- Click Connect.



Option 2: Text Message (SMS)

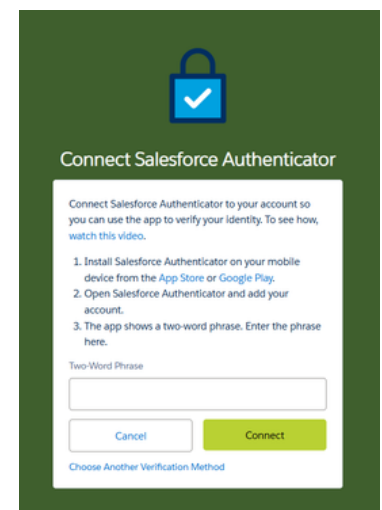
1. Select **Use verification codes sent via SMS** and click Continue.
2. Enter your mobile phone number.
3. Click Register.
4. Enter the verification code sent to your phone.
5. Click Verify.



Option 3: Salesforce Authenticator

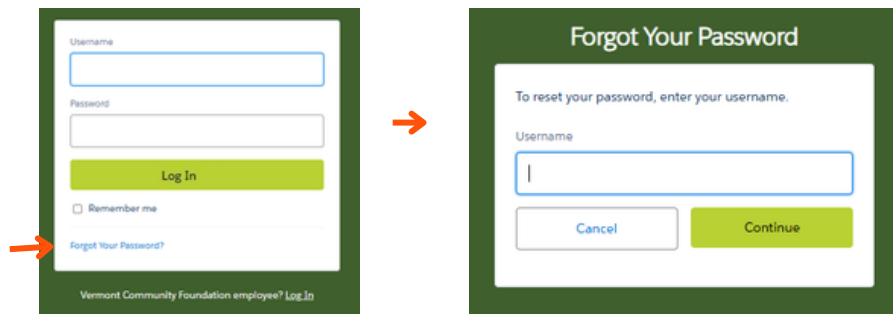
1. Download the Salesforce Authenticator app from the [Apple App Store](#) or [Google Play](#).
2. Select **Use Salesforce Authenticator mobile app** and click Continue.
3. Follow the prompts to connect the app to your account.
4. Approve the connection request in the app to complete setup.
5. For future logins, simply approve the sign-in notification in the app instead of entering a verification code.

For a complete walkthrough, watch this [Salesforce setup video](#).



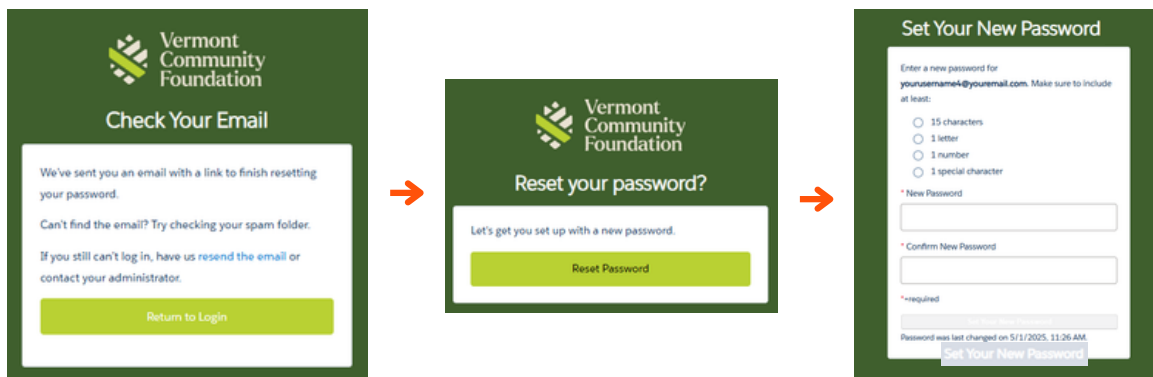
Forgotten Password - [Follow along with this video tutorial](#)

If you have forgotten your password, click on “Forgot Your Password?” on the portal login page and enter the email address you have on file with the VCF in the “Username” field.



The diagram illustrates the initial steps of the password reset process. It starts with the login page, where the 'Forgot Your Password?' link is highlighted by an orange arrow. This leads to the 'Forgot Your Password' screen, which prompts the user to enter their username and click the 'Continue' button.

Check your inbox for an email from info@vermontcf.org. If you don't see it within a few minutes, check your spam or promotions folders. Open the email and click the password reset link. When the portal window opens, Click **Reset Password** to continue. Enter a new password. Click **Set Your New Password**, and you will be brought to your home page. Be sure to save your new password in a safe place for the next time you log in.



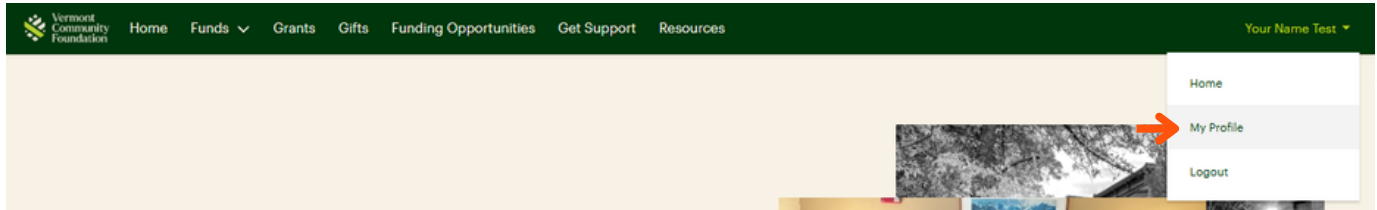
The diagram continues the password reset process. It shows the 'Check Your Email' screen, followed by the 'Reset your password?' screen where the user clicks 'Reset Password'. This leads to the 'Set Your New Password' screen, which requires the user to enter a new password and confirm it, meeting specific security requirements.

If you still cannot log in, please contact philanthropy@vermontcf.org

Change Your Password & User Access

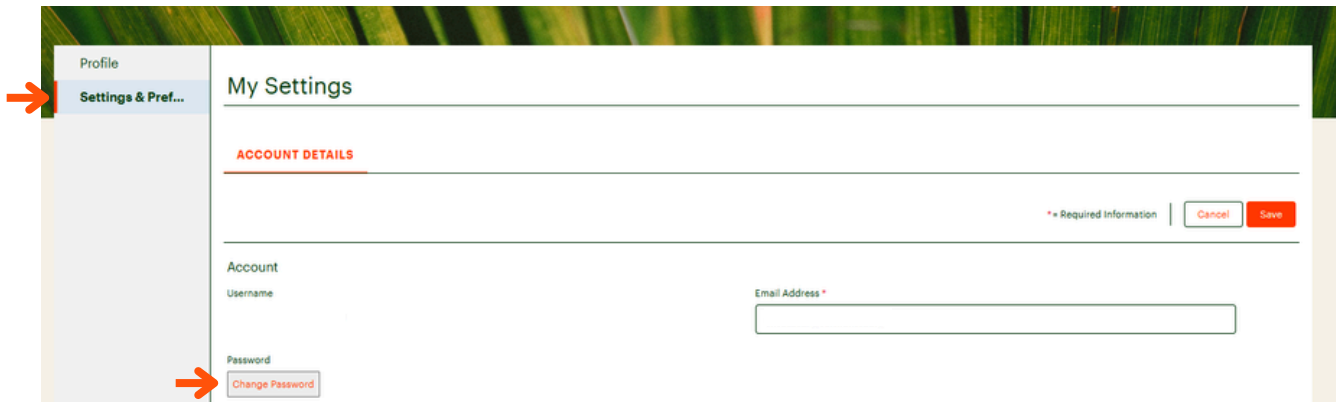
If you're already logged in and simply want to update your password, you can do that too!

1. Click My Profile from the dropdown menu in the top-right corner of the page.



2. Select **Settings and Preferences**.

3. Click **Change Password**.



4. Enter your current password and the new password you would like to use.

5. Re-type the new password to verify.

6. Click **Save**.

A screenshot of the 'Change My Password' form. The title 'Change My Password' is centered at the top. Below it, a message states: 'You must adhere to the following password rules:'. Two rules are listed: '* Your password must be at least 8 characters long.' and '* Your password must include letters and numbers'. Below the rules, there are three input fields: 'Current Password', 'New Password', and 'Verify New Password'. At the bottom right, there are 'Cancel' and 'Save' buttons, with an orange arrow pointing to the 'Save' button.

Access for Other Users

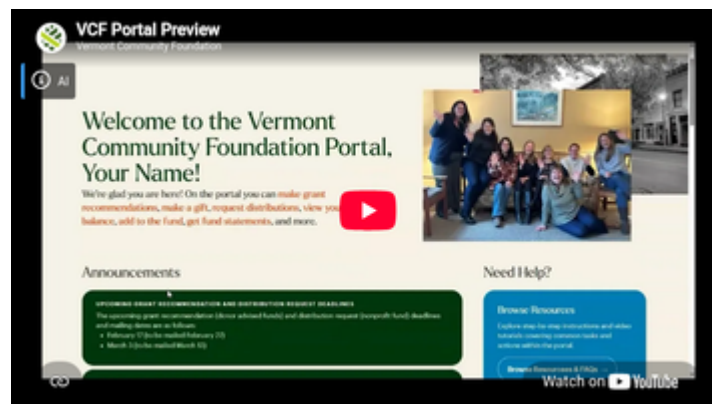
If you would like to give portal access to other staff or board members, please contact us through the support request form. We'll set up their access for you, including view-only permissions if appropriate. Likewise, if someone is no longer with your organization, just let us know so we can remove their access and add the appropriate new person.

Homepage

Here's a quick preview of what your homepage looks like! You will find shortcuts to key actions, important announcements, access to tutorials and the support request form, contact information for the Philanthropy team, fund details, and recent stories and news from the VCF.



To explore the homepage and see some of its features, check out this [preview video](#):

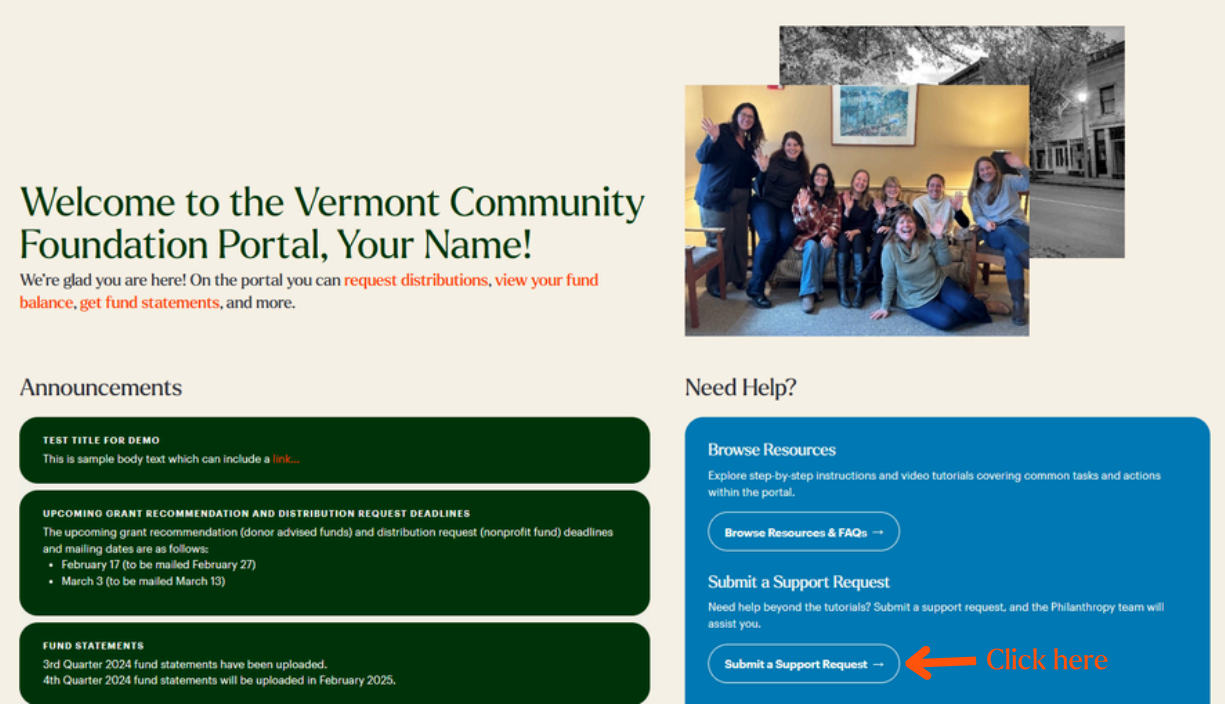


How to Submit a Support Request

Support Request

You can submit a support request and contact our team of philanthropic advisors directly from the home page.

1. Start by clicking **Submit a Support Request** in the blue box under **Need Help?** Alternatively, you can click **Get Support** in the top navigation menu.



Welcome to the Vermont Community Foundation Portal, Your Name!

We're glad you are here! On the portal you can [request distributions](#), [view your fund balance](#), [get fund statements](#), and more.

Announcements

TEST TITLE FOR DEMO
This is sample body text which can include a [link...](#)

UPCOMING GRANT RECOMMENDATION AND DISTRIBUTION REQUEST DEADLINES
The upcoming grant recommendation (donor advised funds) and distribution request (nonprofit fund) deadlines and mailing dates are as follows:

- February 17 (to be mailed February 27)
- March 3 (to be mailed March 13)

FUND STATEMENTS
3rd Quarter 2024 fund statements have been uploaded.
4th Quarter 2024 fund statements will be uploaded in February 2025.

Need Help?

Browse Resources
Explore step-by-step instructions and video tutorials covering common tasks and actions within the portal.

[Browse Resources & FAQs →](#)

Submit a Support Request
Need help beyond the tutorials? Submit a support request, and the Philanthropy team will assist you.

[Submit a Support Request →](#) **Click here**

2. Enter the type of support you need under the Support Type dropdown and a description of your request.

3. Click **Create Support Request**.

Get Support

Enter Request Details Below

*Support Type
--None--

*Description

[Create Support Request](#)

[Show Filters](#) [Hide](#)

0 of 0 items

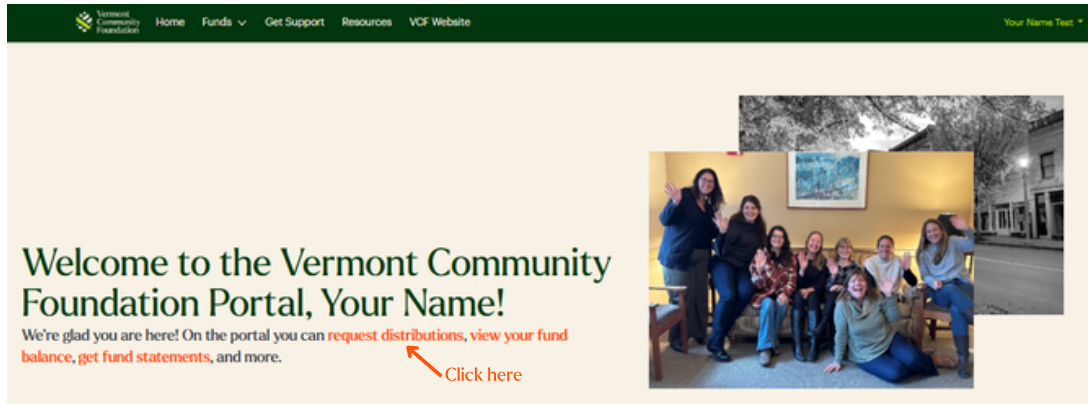
Case Number	Submitted Date	Subject	Case Type	Description	Status
No items to display.					

You'll find all your support requests, replies, and their status saved at the bottom of the page so you can refer back to them anytime.

How to Request a Distribution

Distribution requests can be submitted through this portal only by the nonprofit organization's Executive Director and a Board Officer, or two Board Officers. [Follow along with this video tutorial.](#)

1. Starting on the Home page, click the **request distributions** link.



2. If you have multiple funds, select the one you'd like to request a distribution from. If you have only one fund, simply click on it.

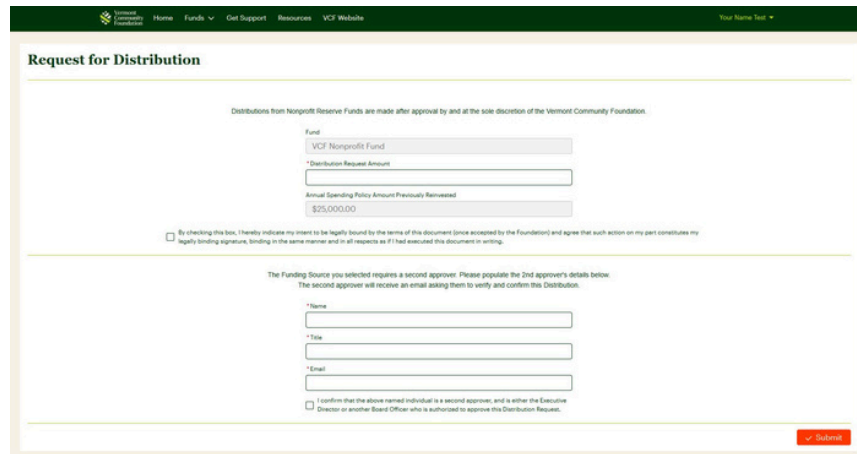
Please select a Fund

VCF Nonprofit Fund	
Fund Balance	\$500,000
Spendable Balance	\$25,000
Reinvested Distributions	\$25,000

Instructions continue on the next page.

3. Enter the details of your distribution request, including the amount and your title as it relates to the nonprofit organization. Check the box to indicate your intent to be legally bound by the terms of this document.

4. Provide contact information for the secondary approver and check the box to confirm they are the Executive Director or an authorized Board Officer. They will receive an email asking them to approve or decline your request.



The screenshot shows the 'Request for Distribution' form. At the top, there is a navigation bar with links: Home, Funds, Get Support, Resources, and VCF Website. The form title is 'Request for Distribution'. Below the title, a note states: 'Distributions from Nonprofit Reserve Funds are made after approval by and at the sole discretion of the Vermont Community Foundation.' The form contains several input fields: 'Fund' (with a dropdown menu showing 'VCF Nonprofit Fund'), '*Distribution Request Amount', and 'Annual Spending Policy Amount Previously Reinvested' (with a value of '\$25,000.00'). There is a checkbox for legal agreement. Below this, a section for the second approver's details includes fields for '*Name', '*Title', and '*Email'. A checkbox at the bottom confirms the second approver's role. A red 'Submit' button is located at the bottom right of the form.

5. Once you have reviewed all the details, click **Submit**.

The Status will be “Pending Second Approval.” Once the secondary approver reviews and approves the request, you will both receive a confirmation email and the status will change to “Submitted”

If the ED and/or a board officer requesting the distribution is not registered for the donor portal to initiate a request, please use this [fillable PDF request form](#) found on the [portal resources page](#).

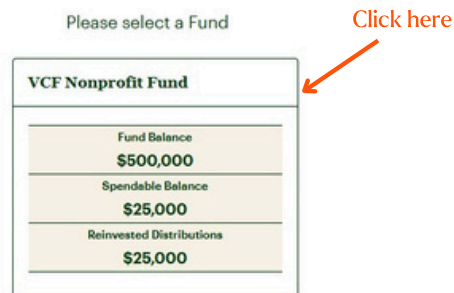
How to See Distribution History

Easily access your distribution history anytime.

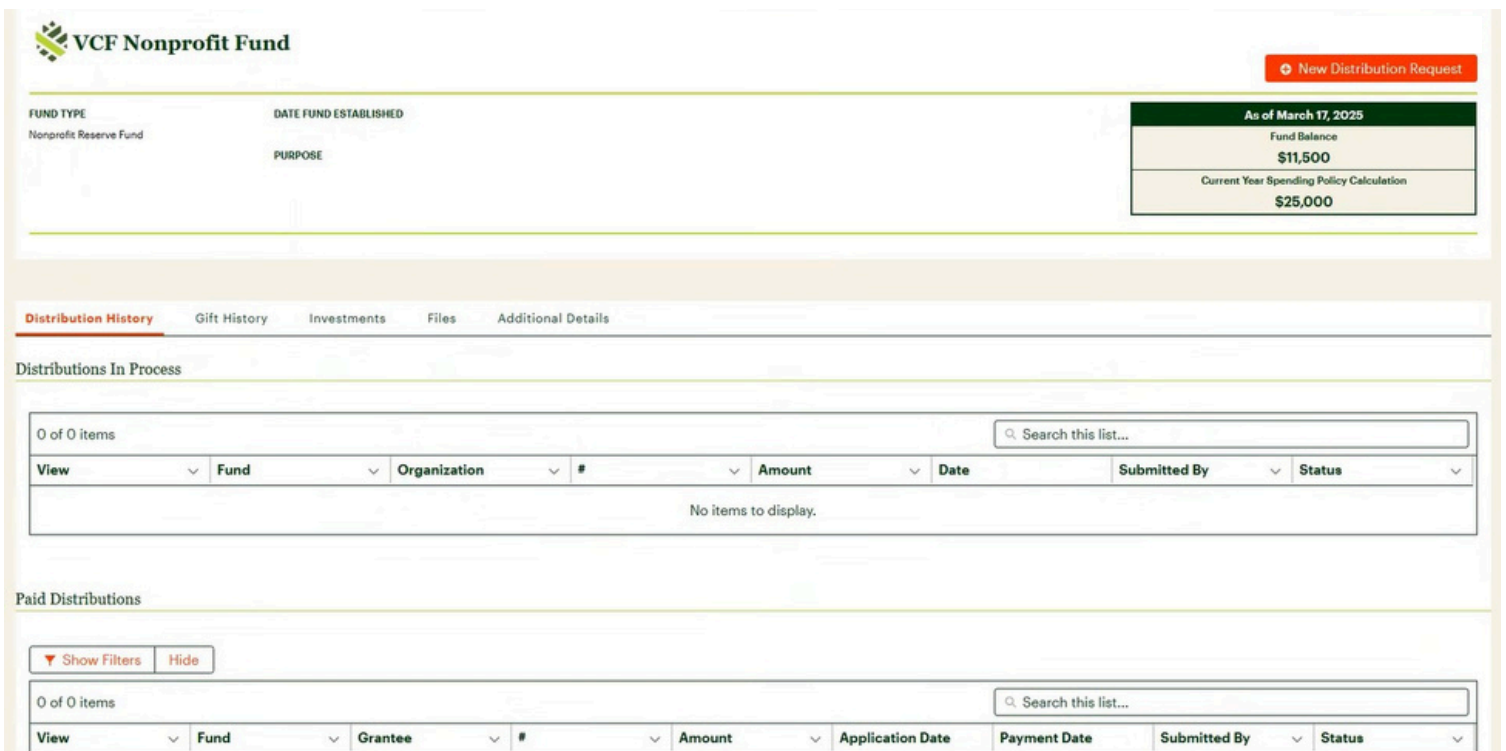
1. Starting on the Home page, click **Funds** under the **Funds** dropdown in the header.



2. Select your fund.



2. View your full Distribution History. You'll see any distributions in process at the top (for example, if a second approval is still pending) and any paid distributions below that.



How to See Gift History and Other Fund Details

Easily see the gifts that have made into your fund anytime.

1. Starting on the Home page, click **Funds** under the **Funds** dropdown in the header.



2. Select your fund.

Please select a Fund

VCF Nonprofit Fund

Fund Balance	\$500,000
Spendable Balance	\$25,000
Reinvested Distributions	\$25,000

An orange arrow points to the 'VCF Nonprofit Fund' header with the text 'Click here'.

Instructions Continue on the next page.

How to See Gift History and Other Fund Details Continued

3. At the top of the page, you can see your Fund Balance, Current Year Spending Policy Calculation and Annual Spending Policy Amount Previously Reinvested (if applicable).

5. The default view will show you your Distribution History. Click on the “Gift History” tab to view the records of gifts that have been made into the fund over time.

6. You can also click on the “Investments” tab to view monthly account balances, the “Files” tab to view Fund Statements and other documents, and the “Additional Details” tab to view your Investment Pool, Supporting Fees, and Spending Policy.

7. Scroll down to see Market Value History and Investment Details, updated quarterly.

FUND TYPE
Nonprofit Reserve Fund

DATE FUND ESTABLISHED

PURPOSE

As of March 17, 2025

Fund Balance
\$11,500

Current Year Spending Policy Calculation
\$25,000

[New Distribution Request](#)

[Click here](#)

Distribution History **Gift History** Investments Files Additional Details

[Show Filters](#) [Hide](#)

2 of 2 Items

Search this list...

View	Donor(s)	Fund	Type	Payment Method	Date	Amount
View	Your Name and User Test and Other Family Members	VCF Nonprofit Fund	One-time gift	Cash	Feb 28, 2025	\$1,500.00
View	Your Name and User Test and Other Family Members	VCF Nonprofit Fund	One-time gift	Stock	Jan 1, 2025	\$10,000.00

Distribution Summary

Total Distributions Paid	\$0
Total Distributions	0
Suggested Distribution Budget	\$42,482
Distributions This Year	\$0
Distributions to be Paid	\$0
Distributions in Process	\$0

Gift Summary

Total Gifts	\$1,801,389
Total # Gifts	36
Gifts This Year	\$0
Gifts in Process	\$0
Last Gift Date	January 17, 2024

Market Value History

Quarterly Balances

As of Today at 4:05 PM

How to View & Print Fund Statements

Easily access, download, print, or email your fund statements in just a few steps.

1. Starting on the Home page, click the **get fund statements** link or go to the **Fund** dropdown in the header and select **Statements & Fund Documents**.

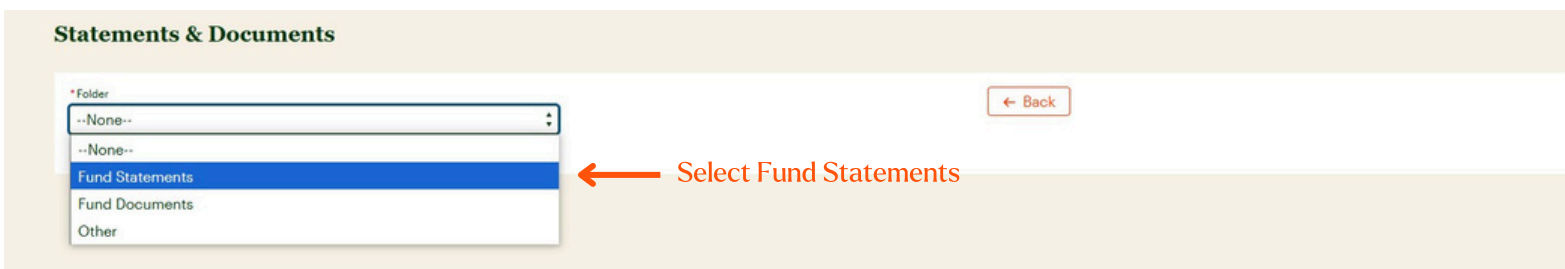


2. Select your fund.



3. Select **Fund Statements** from the dropdown menu.

4. Access your statements—when posted by the VCF, you can download, email, or print them from this page.



5. For a helpful explanation of terms on your fund statement, visit vermontcf.org/terms