



# Online Fund Access

## A Guide to Making Grants

# Table of Contents

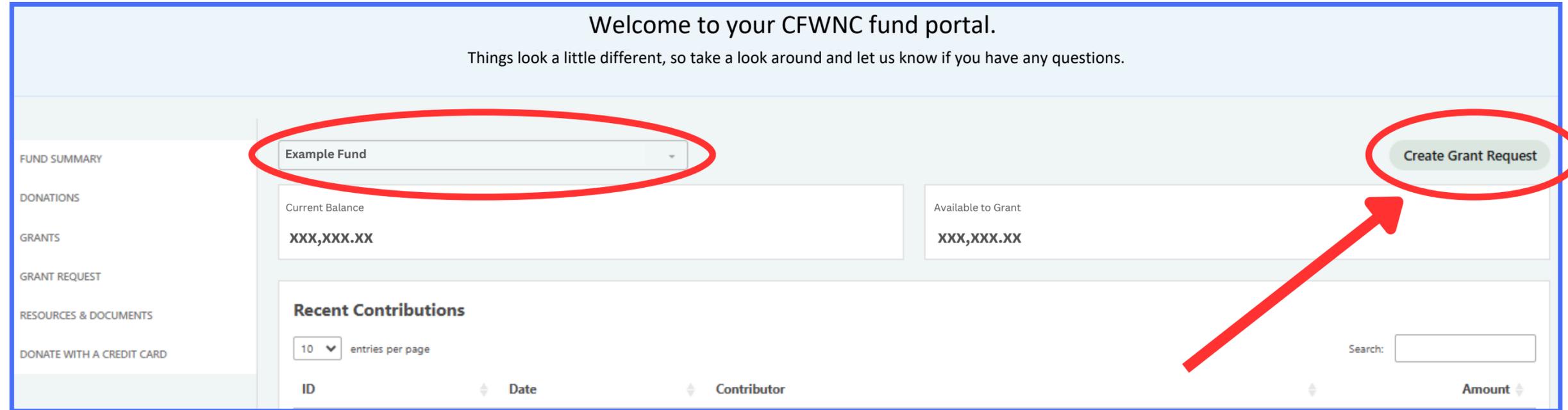
Making a Grant Request	Page 1-4
Submitted Grants and Previous Grants	Page 5
Copying a previous Grant Request	Page 7-8
Edit or Cancel a Recurring Grant	Page 9-10

# Grant Recommendation Process

Making grant recommendations in your fund portal

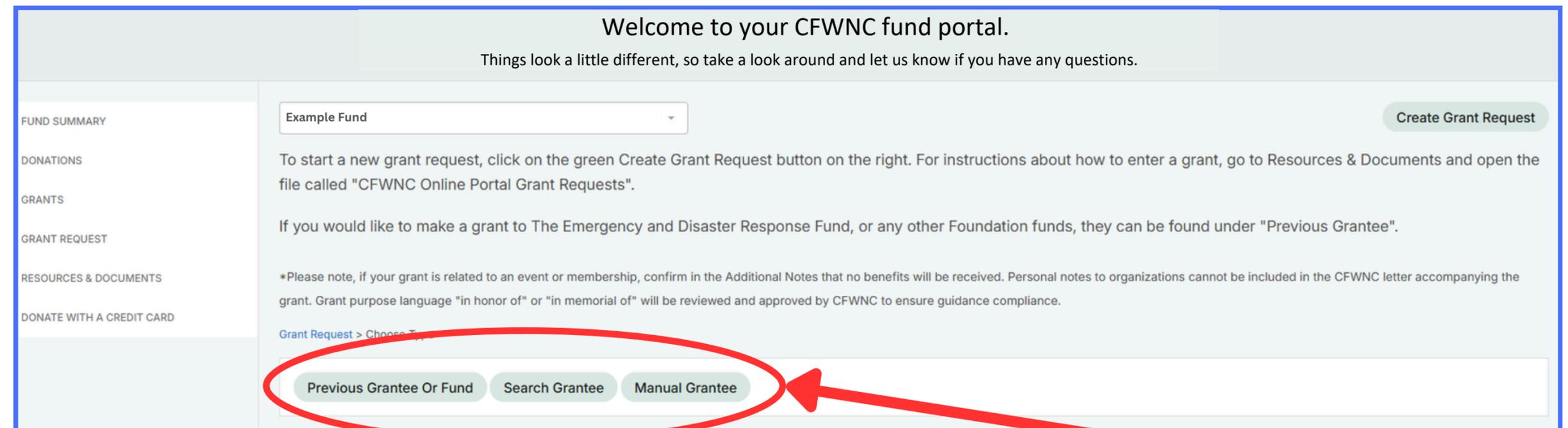
## Step 1:

- If you have more than one fund, be sure to select from the dropdown menu.
- To get started click on the green “Create Grant Request” button, located on the right hand side of the webpage.



## Step 2:

- Select a grantee by clicking either:
  - Previous Grantee or Fund
  - Search Grantee
  - Manual Grantee



# Grant Recommendation Process

Making grant recommendations in your fund portal

## Step 2a:

### Choosing a Previous Grantee or Fund

Past grantees of your fund can be found by clicking on the box below “Grantees you have given to in the past”.

CFWNC Field of Interest funds you have given to in the past can be found by clicking on the box below “Foundation funds you have given to in the past”.

If you wish to make a grant to one of CFWNC’s Field of Interest funds, click on the box below “Other Foundation Funds”.

**Choose from previous Grantees or Funds**

Grantees you have given to in the past

Foundation funds you have given to in the past

Other foundation funds

## Step 2b:

### Searching a Grantee

If you have not yet made a grant, or if you would like to choose a new grantee, search for the organization name by entering the information and clicking “Search”.

If your grantee appears in the list, click the “Create Request” button.

**Tip:** City and State are not always needed in the search. Entering fewer words tends to work better in the search engine. Ex: “MANNA” instead of “MANNA Food Bank”

**Search for Grantees**

Grantee Name

City State

EIN

Search

## Step 2c:

### Manual Grantee

If your grantee does not appear in the search, they may not be in our database. If that’s the case, use the “Enter Grantee information manually” section. Once the section is completed, click “Submit”

**Enter Grantee information manually**

Grantee Name \*

Street Address \* Apartment, Suite, Building, other

City \* State \* Zipcode \*

Email Phone

EIN

\* These fields are required.

Submit

# Grant Recommendation Process

Making grant recommendations in your fund portal

## Step 3:

Once you have selected your grantee, you will be directed to a Grant Request page.

- If the grant has a specific purpose, please include it in the “Description” field.
- If the grant is related to an event or membership, please confirm in the “Additional Notes” section that no benefits will be received.
- If the grant is in honor of or in memory of someone, or if a tribute letter should be sent, please include their information in the “Additional Notes” section.

Once the fields are filled out, click on the “Review” button.

Please be advised: Personal notes to an organization cannot be included in the letter accompanying the grant.

The screenshot shows a web form titled "Grant Request" with a breadcrumb trail "Grant Request > Choose Type > Create Request". The form contains the following fields and options:

- Grantee:** Example Nonprofit
- Description:** A text input field with a character count of 0/255 characters. A red arrow points to this field.
- Amount:** A text input field.
- Anonymous:** An unchecked checkbox.
- Recurring:** An unchecked checkbox.
- Attachment:** A "Choose Files" button with the text "No file chosen" and "(or drag and drop anywhere on the page)".
- Attachment Description:** A text input field.
- Additional Notes:** A large text input area. A red arrow points to this area.
- Review:** A blue circular button at the bottom left. A red arrow points to this button.

# Grant Recommendation Process

Making grant recommendations in your fund portal

## Step 4:

### Final Step: Review

After reviewing the information, click on the “Submit Request” button as the final step to submit a grant request.

Click the “Edit Request” button to make changes to your grant request before submitting.

Grant Request > Choose Type > Create Request

### Review New Grant Request

Grantee	Example Nonprofit
Description	Example
Amount	\$xxxxxx
Anonymous	No
Additional Notes	

I (we) recommend the following grants to the Board of Directors. I (we) understand that the final judgment rests with the Board, whose charge it is to see that all grants are within the charitable purposes of The Community Foundation of Western North Carolina. I (we) attest that no tangible benefit, goods or services, such as dinners, tickets, etc. were or will be received by any individual or entities connected with the Fund (as described above).

[Edit Request](#) [Submit Request](#)

# Submitted Grants and Previous Grants

## Submission:

Once you see the “Grant Request Submitted’ banner in green, your grant(s) have been successfully submitted. Click “Continue” to view your Grant Request Submissions.

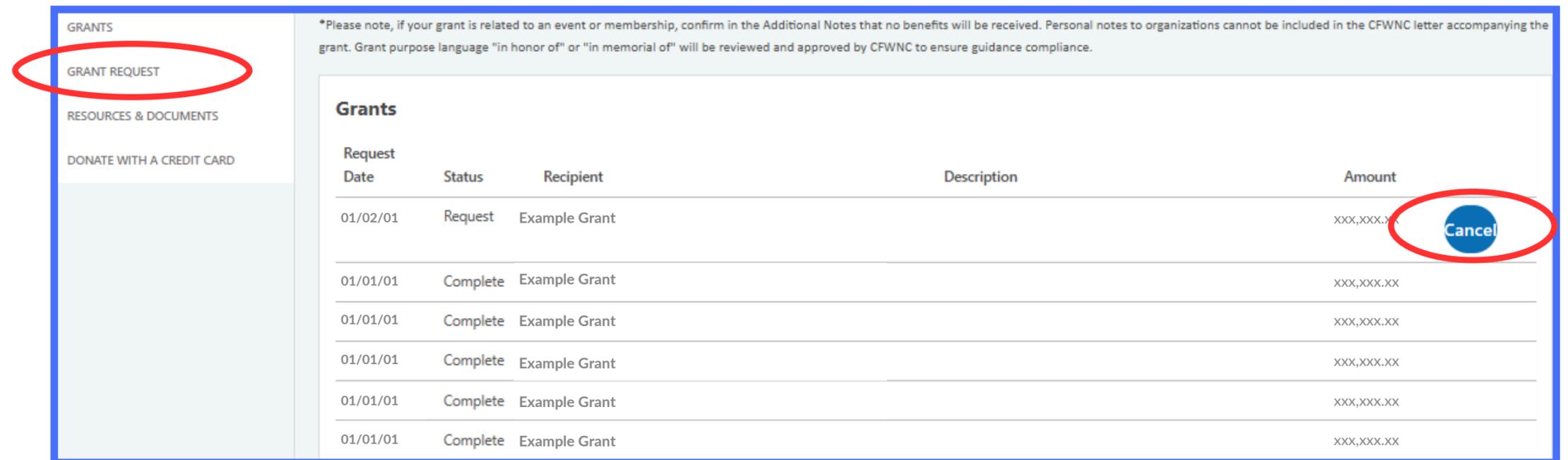


If you DO NOT complete the final Grant Submission step and see the “Grant Request Submitted’ banner, then your grant(s) have not been submitted. I

## Previous Grant Requests:

To view your Grant Request Submissions, select the “Grant Request” section on the left-hand side.

A recently requested grant can be canceled by selecting the green “Cancel” button, otherwise it will be processed.



Need help? Contact Eliana Rodriguez, Donor Relations Associate, [rodriguez@cfwnc.org](mailto:rodriguez@cfwnc.org) (828) 785-4741

# Copying a Grant

Copying a previously made grant

## Step 1

To copy previous Grant Requests made:

- Select the “Grants” section on the left-hand side.
- Towards the center you will see a list of previous Grantees. Click on the Grantee name highlighted in blue.
- From the list of previous grants to this grantee and select the blue “Copy” button on the grant you’d like to copy.

Welcome to your CFWNC fund portal.  
Things look a little different, so take a look around and let us know if you have any questions.

Fund: Example Fund

GRANT SUMMARY | GRANT HISTORY | RECURRING GRANTS

Here you will find recent grants made from your fund, and any recurring grants you have set.

### Grant Summary

10 entries per page

Grantee	Grants	Amount
Example Grantee	1	\$XXXXXX.XX

Welcome to your CFWNC fund portal.  
Things look a little different, so take a look around and let us know if you have any questions.

Fund: Example Fund

GRANT SUMMARY | GRANT HISTORY | RECURRING GRANTS

### Grants

10 entries per page

Filter Export

ID	Date	Status	Grantee	Fund	Description	Advisor	Amount
XXXXXX	01/01/2000	complete	Example Grantee	Example Fund			\$XXXXXX.XX

Copy

# Copying a Grant

Copying a previously made grant

## Step 2

Once you have selected to copy your previous grant, you will be directed to a pre-filled Grant Request page.

- The “Description” field from your previous grant will populate, however you are able to make changes.
- The “Amount” field from your previous grant will populate, however you are able to make changes.
- If the grant is in honor of or in memory of someone, or if a tribute letter should be sent, please include their information in the “Additional Notes” section.
- Once the fields are filled out, click on the “Review” button.

The screenshot shows a web form titled "Grant Request" with a breadcrumb trail "Grant Request > Choose Type > Create Request". The form contains the following fields:

- Grantee:** Example Grantee
- Primary Contact:** Example Contact
- Address:** Example Address, XXX, XXX
- Description:** A text box containing "Previous Description" with a character count of 48/255 characters.
- Amount:** A text box containing "Previous Amount".
- Anonymous:** An unchecked checkbox.
- Recurring:** An unchecked checkbox.
- Attachment:** A "Choose Files" button, "No file chosen", and the instruction "(or drag and drop anywhere on the page)".
- Attachment Description:** An empty text box.
- Additional Notes:** A large empty text area.
- Review:** A blue button at the bottom of the form.

Red arrows point from the text in the "Step 2" section to the Description, Amount, and Review fields in the form.

# Copying a Grant

Making grant recommendations in your fund portal

## Final Step

After reviewing the information, click on the “Submit Request” button as the final step to submit a grant request.

Click the “Edit Request” button to make changes to your grant request before submitting.

Grant Request > Choose Type > Create Request

### Review New Grant Request

Grantee	Example Nonprofit
Description	Example
Amount	\$xxxxxx
Anonymous	No

Additional Notes

I (we) recommend the following grants to the Board of Directors. I (we) understand that the final judgment rests with the Board, whose charge it is to see that all grants are within the charitable purposes of The Community Foundation of Western North Carolina. I (we) attest that no tangible benefit, goods or services, such as dinners, tickets, etc. were or will be received by any individual or entities connected with the Fund (as described above).

[Edit Request](#) [Submit Request](#)

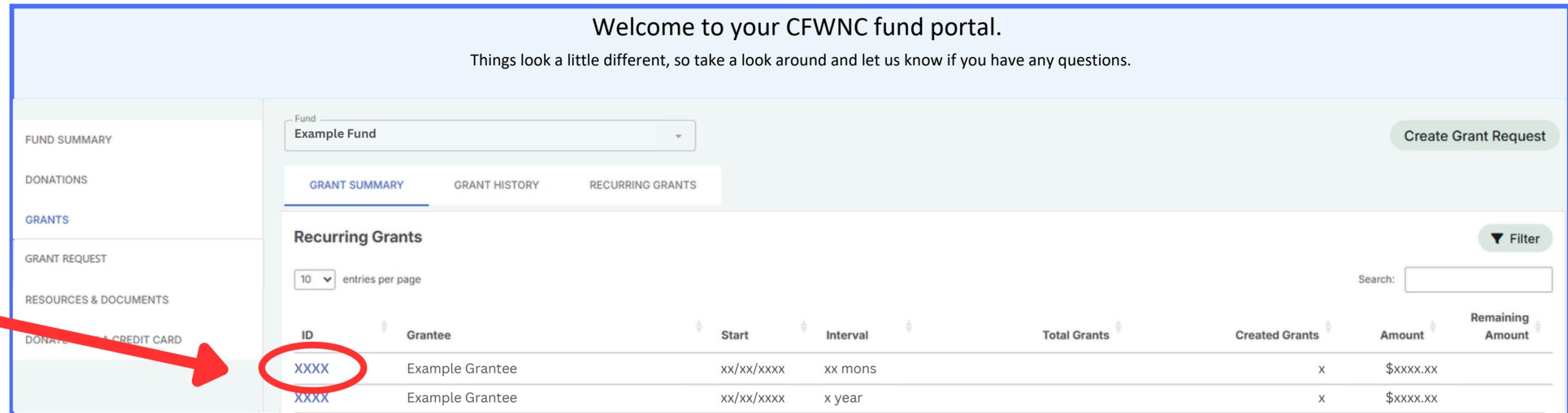
# Edit or Cancel a Recurring Grant

Making changes to or cancelling a recurring grant

## Step 1

To make edits or cancel a recurring grant:

- Select the “Grants” section on the left-hand side.
- Towards the top center you will select the “Recurring Grants” tab.
- From the list of active recurring grants, to review or edit a recurring grant, click on the blue “ID” number.



# Edit or Cancel a Recurring Grant

Making changes to or cancelling a recurring grant

## Step 2

After reviewing the information, you can:

- Select “Edit Recurring Grant”, to edit the next grant date, the grants total, and/or the anonymity.
- Select “Cancel Recurring Grant” to cancel future recurring grants of this type.

Please note that when you select the “Cancel Recurring Grant” button, you will not be asked to confirm the cancellation, it will be done automatically.

The screenshot displays a web interface with a navigation bar at the top containing three tabs: "GRANT SUMMARY", "GRANT HISTORY", and "RECURRING GRANTS". The "RECURRING GRANTS" tab is active. In the top right corner, there are two buttons: "Edit Recurring Grant" (with a pencil icon) and "Cancel Recurring Grant" (with a trash can icon). Both buttons are circled in red. Below the navigation bar, the interface is divided into two main sections: "Recurring Grant" and "Grants Created".

Recurring Grant	
ID	XXXX
Recipient	Example Grantee
Start Date	xx/xx/xxxx
Next Date	xx/xx/xxxx
Interval	xx mons
Total Grants	
Created Grants	xx
Anonymous	
Description	
Amount	\$xxxx.xx
Remaining Amount	

Grants Created		
GrantID	Grant Date	Amount
XXXX	xx/xx/xxxx	\$xxxx.xx
XXXX	xx/xx/xxxx	\$xxxx.xx
XXXX	xx/xx/xxxx	\$xxxx.xx