

Jewish Community Foundation of Greater Hartford

Online Donor Portal FAQ



JCF's Online Donor Portal provides fund advisors with secure, round-the-clock access to track their funds and make grant recommendations through an intuitive platform.

Our team has worked diligently to ensure the portal is easy to use and highly functional. However, we understand that any new system can take time to navigate. This FAQ is designed to help you get started, answer common questions, and support you as you explore the portal. We welcome your questions and feedback. Please contact us at 860-523-7460 or portal@jcfhartford.org

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*If you have additional questions or need further assistance,
please contact us at 860-523-7460 or portal@jcfhartford.org.*

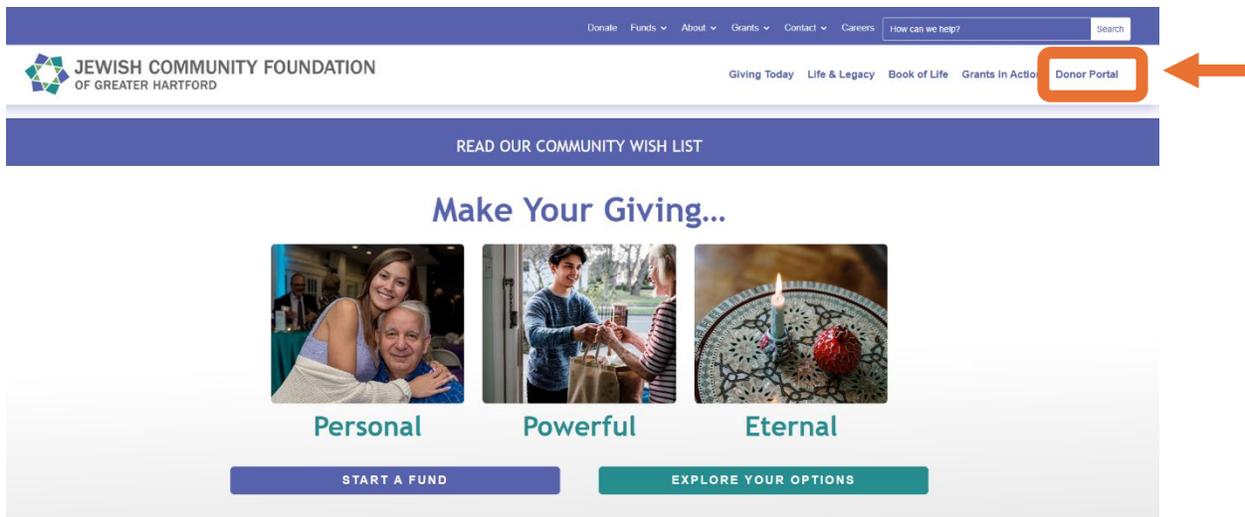
ACCESS AND LOGGING IN:

I received a portal update email. What do I do?

The new URL provided in this email (<https://jcfhartford.fcsuite.com/erp/portal>) replaces the Foundation's previous portal URL of <https://jcfhartford.fcsuite.com/erp/fundmanager>. Please update any browser bookmarks or other links you might have saved for the JCF portal to the new URL.

Where do I access the portal?

You can access the portal through our main website (<https://www.jcfhartford.org>) by clicking the “**Donor Portal**” button on the top right corner of the page.



The screenshot shows the top navigation bar of the Jewish Community Foundation of Greater Hartford website. The navigation menu includes links for Donate, Funds, About, Grants, Contact, Careers, and How can we help? A search bar is located on the right. The 'Donor Portal' button is highlighted with an orange box, and an orange arrow points to it from the right. Below the navigation bar is a blue banner with the text 'READ OUR COMMUNITY WISH LIST'. The main content area features the heading 'Make Your Giving...' and three columns: 'Personal' (with a photo of a couple), 'Powerful' (with a photo of a man and woman), and 'Eternal' (with a photo of a menorah). Below these columns are two buttons: 'START A FUND' and 'EXPLORE YOUR OPTIONS'.

Click the text that reads, “**Click here to access your fund information on our Donor Portal.**” You will then be brought to the JCF portal login page.



The screenshot shows a news article titled 'News About Our Donor Portal'. The subheading is 'UPCOMING CHANGE TO JCF'S DONOR PORTAL'. The text reads: 'On April 1st, we will be launching a newly designed portal for our fund holders. While the core features you rely on will remain the same, the updated portal will have a refreshed look and some minor improvements to navigation. Watch your email for more information!'. A link is provided: 'Click here to access your fund information on our Donor Portal.' The link is highlighted with an orange box. Below the link, the text reads: 'If you need assistance logging on, please contact Madison Leighty at mleighty at jcfhartford dot org or 860-523-7460.'

*If you have additional questions or need further assistance,
please contact us at 860-523-7460 or portal@jcfhartford.org.*

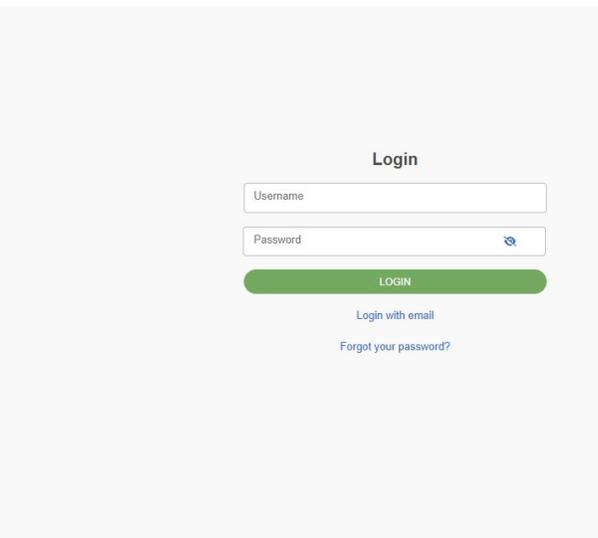
You can also access the JCF portal directly via the permanent link:

<https://jcfhartford.fcsuite.com/erp/portal>. If you are typing this address into your browser, please remember to include the full URL (including [/erp/portal](#)) so that you are directed to the correct login page.

We recommend saving this URL and bookmarking it to your web browser so that you can easily access the portal in the future.

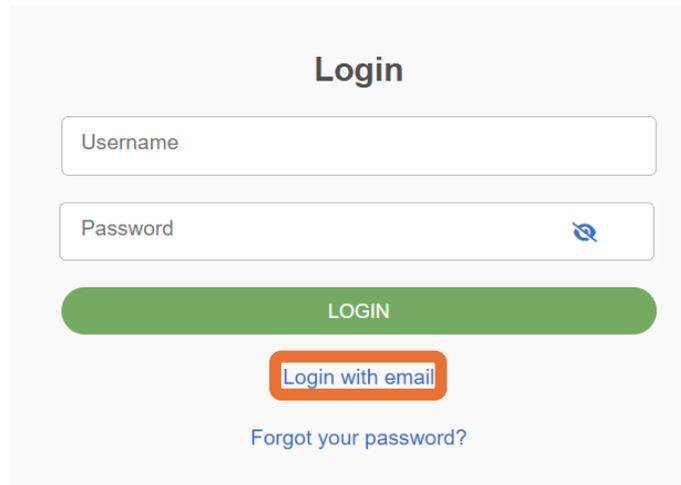
How do I log into the portal?

The new portal has two login options: username/password and email. When you first land on the JCF portal login page, you will be asked to provide a username and password.



*If you have additional questions or need further assistance,
please contact us at 860-523-7460 or portal@jcfhartford.org.*

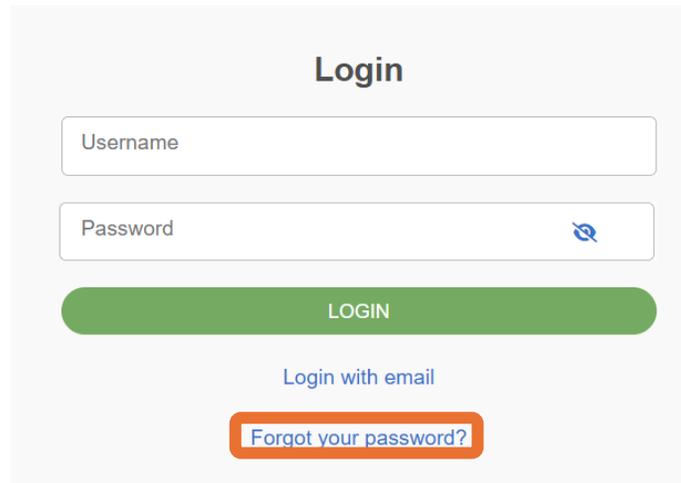
If you have used the previous version of JCF’s portal, your username and password for the new portal is the same. Alternatively, you can click “**Login with email**” to have a temporary PIN sent to your primary email address, which you can use to access your account



The screenshot shows a login form titled "Login". It contains two input fields: "Username" and "Password". Below the fields is a green "LOGIN" button. A blue link "Login with email" is highlighted with an orange box. Below that is a blue link "Forgot your password?".

I want to log in with username/password but forgot my password. What do I do?

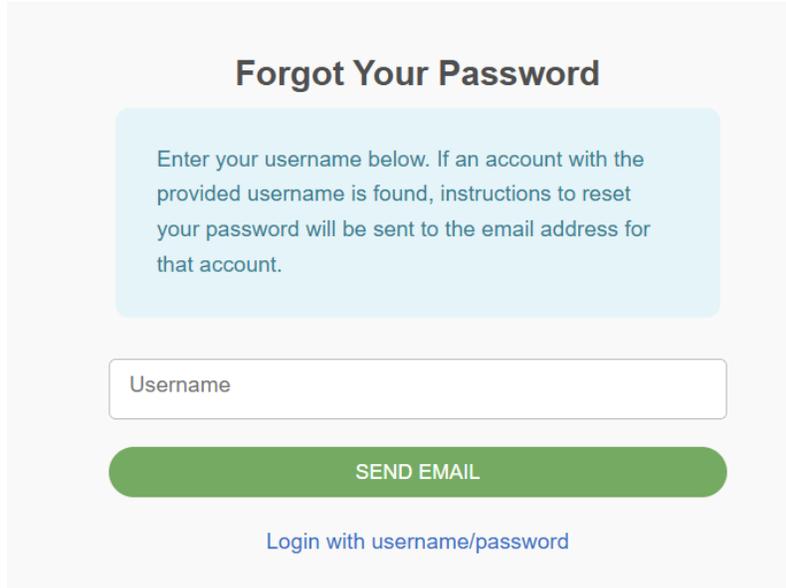
If you can’t remember your password, you can click the “**Forgot your password?**” button to have a temporary activation link sent to your email address.



The screenshot shows the same login form as above. In this version, the "Forgot your password?" link is highlighted with an orange box.

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please contact us at 860-523-7460 or portal@jcfhartford.org.*

Enter your username (by default, this is the primary email address on file with the Foundation) and click **Send Email**. If an account with the provided username is found, instructions to reset your password will be sent to the email address associated with your account.



Forgot Your Password

Enter your username below. If an account with the provided username is found, instructions to reset your password will be sent to the email address for that account.

Username

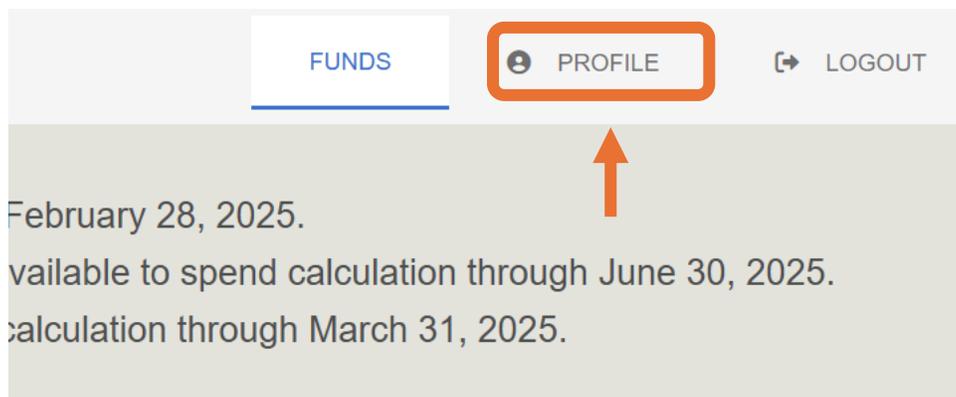
SEND EMAIL

[Login with username/password](#)

If you are still having trouble, please contact us at 860-523-7460 or portal@jcfhartford.org for further assistance.

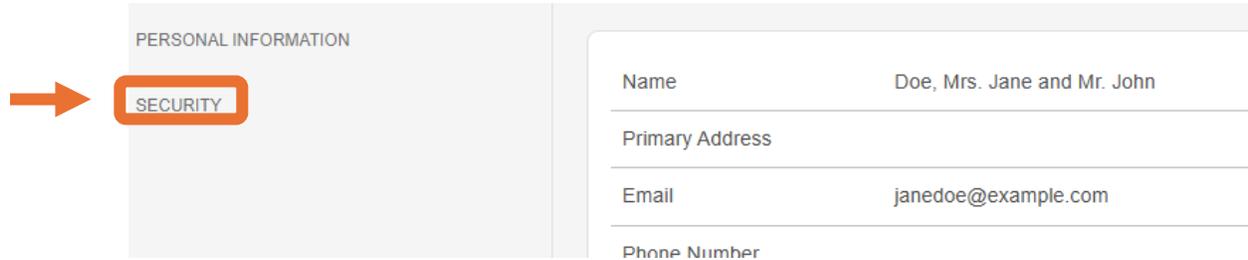
How do I change my username or password?

Once you have logged into your account, click the **Profile** tab on the top menu.

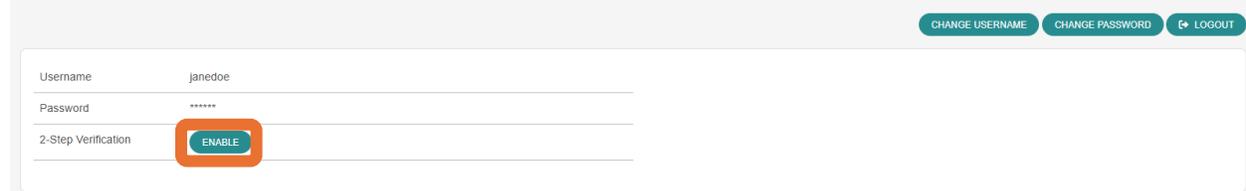


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Then select **Security** on the left side menu to change your username or set a new password.



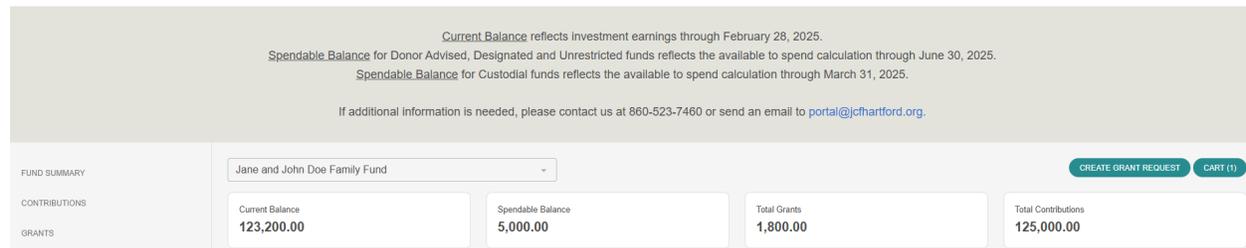
To enhance the security of your account, you can also activate 2-Step Verification for an added layer of protection during login. Click **Enable** after navigating to the Security tab to set up a 2-factor authentication process, either through an app or with your email address.



FOR INDIVIDUALS AND FAMILIES:

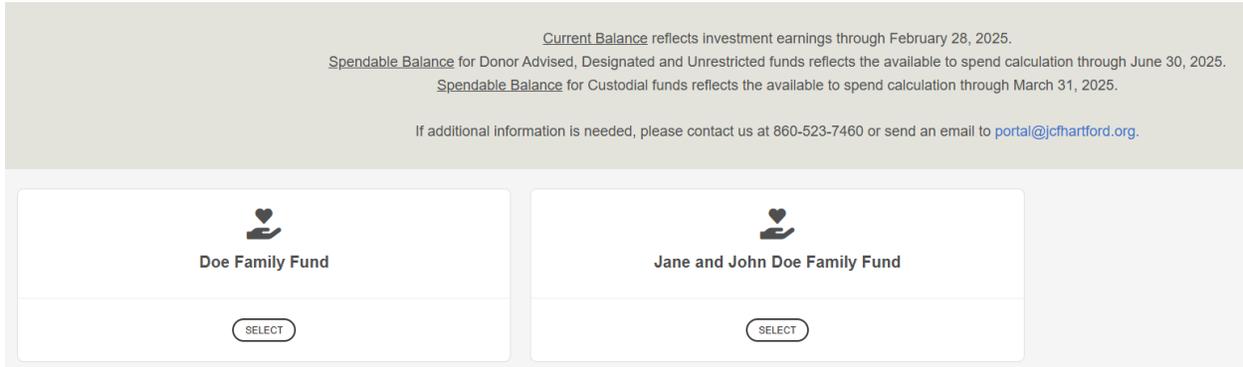
How do I check my fund balance?

Users with one fund at JCF will automatically be brought to the Fund Summary page upon logging in.

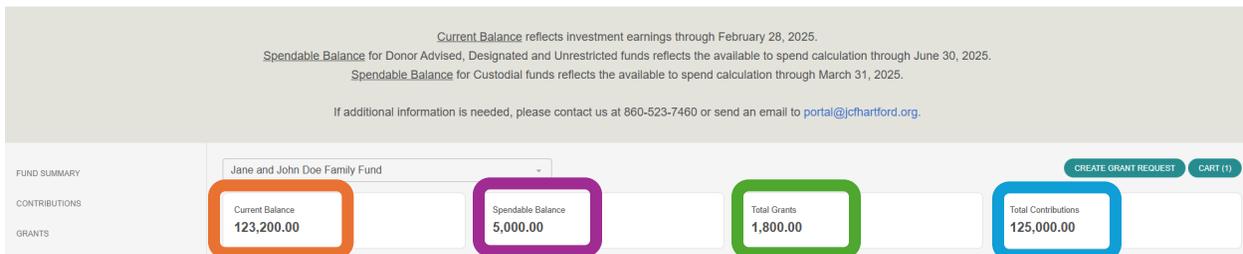


*If you have additional questions or need further assistance,
please contact us at 860-523-7460 or portal@jcfhartford.org.*

Users who have multiple JCF funds will be brought to a funds list page upon logging in. The funds are listed in alphabetical order. Press “**select**” on a fund tile to view a fund.

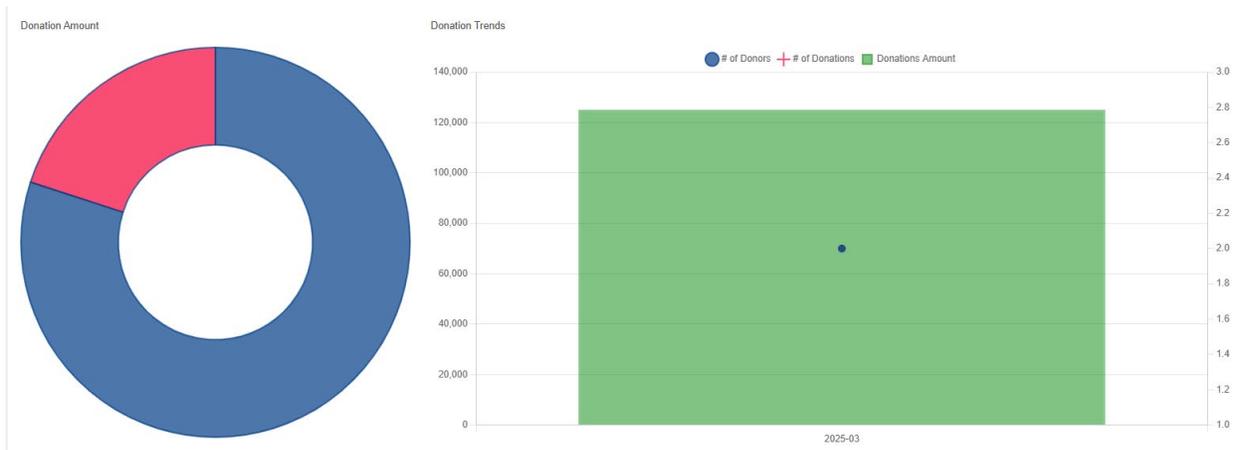


At the top of the page, you will see the fund’s **current balance** and **spendable balance** as of the day you access the summary page, along with the total amount of **grants** from and **contributions** to the fund since its inception.



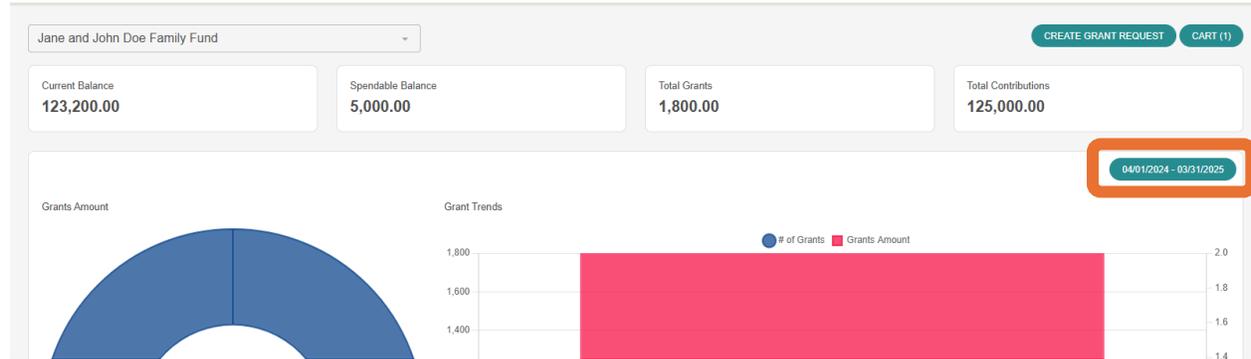
How do I view gifts made to my fund?

The total amount of contributions to your fund since its inception is listed at the top of the **Fund Summary** page. Below the balances and totals (under the charts of recent grants) are charts showing recent contributions made to your fund. Hover over a data point to see more information.



If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

Unlike the **Total Contributions** number, these charts automatically display one year of data ending at the last day of the previous month (e.g. accessing the page during April 2025 will automatically generate data for April 1, 2024—March 31, 2025). To adjust these dates, click the **button** above and to the right of the recent grants chart that displays the current date range.



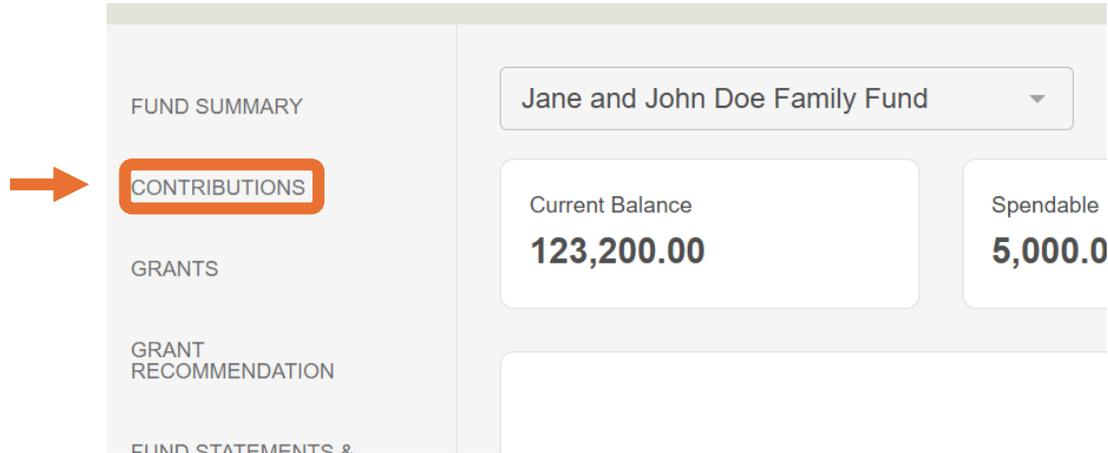
You can then select or enter a new range of dates.

Select Date Range

Range	Start Date 04/01/2024	End Date 03/31/2025	SET RANGE		
Current	WEEK	MONTH	QUARTER	YEAR	FINANCIAL YEAR
Prior	WEEK	MONTH	QUARTER	YEAR	FINANCIAL YEAR
2025	ALL	Q1	Q2	Q3	Q4 FINANCIAL
2024	ALL	Q1	Q2	Q3	Q4 FINANCIAL
2023	ALL	Q1	Q2	Q3	Q4 FINANCIAL
2022	ALL	Q1	Q2	Q3	Q4 FINANCIAL
2021	ALL	Q1	Q2	Q3	Q4 FINANCIAL
2020	ALL	Q1	Q2	Q3	Q4 FINANCIAL

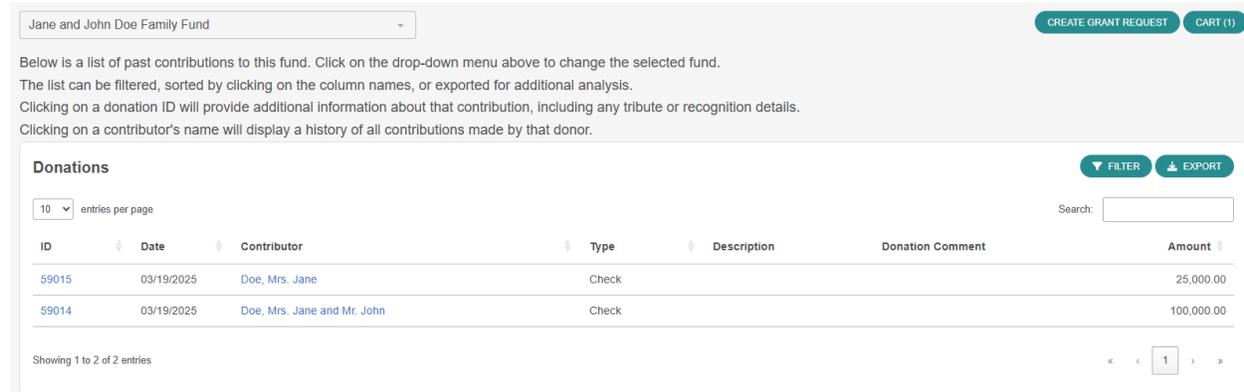
If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

To view more details and a full list of donations made to your fund, please select the **Contributions** tab.



The screenshot shows a dashboard for the 'Jane and John Doe Family Fund'. On the left is a navigation menu with options: FUND SUMMARY, CONTRIBUTIONS (highlighted with an orange arrow and box), GRANTS, GRANT RECOMMENDATION, and FUND STATEMENTS &. On the right, there's a dropdown menu for the fund name, and two summary cards: 'Current Balance 123,200.00' and 'Spendable 5,000.00'.

A list of contributions by date will be shown.



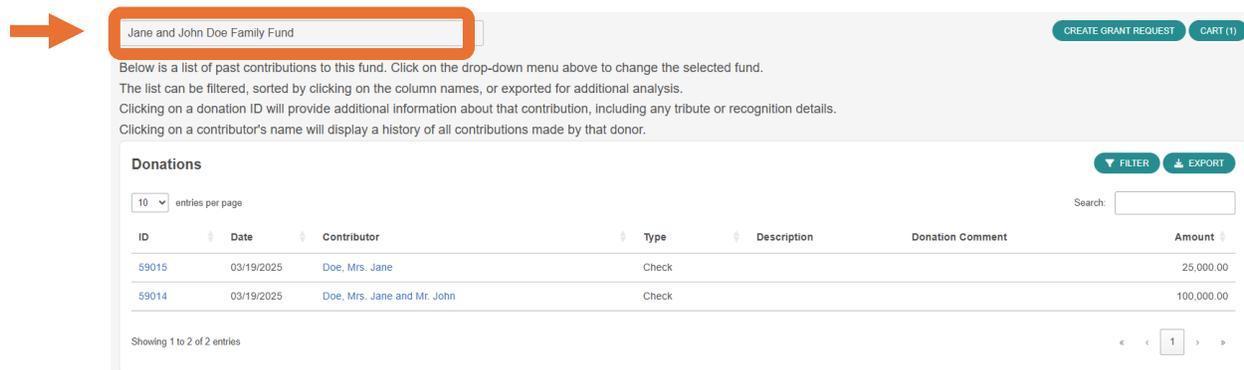
The screenshot shows the 'Donations' list for the 'Jane and John Doe Family Fund'. At the top, there's a dropdown menu for the fund name and buttons for 'CREATE GRANT REQUEST' and 'CART (1)'. Below the dropdown, there's explanatory text: 'Below is a list of past contributions to this fund. Click on the drop-down menu above to change the selected fund. The list can be filtered, sorted by clicking on the column names, or exported for additional analysis. Clicking on a donation ID will provide additional information about that contribution, including any tribute or recognition details. Clicking on a contributor's name will display a history of all contributions made by that donor.'

The 'Donations' table has columns: ID, Date, Contributor, Type, Description, Donation Comment, and Amount. It contains two entries:

ID	Date	Contributor	Type	Description	Donation Comment	Amount
59015	03/19/2025	Doe, Mrs. Jane	Check			25,000.00
59014	03/19/2025	Doe, Mrs. Jane and Mr. John	Check			100,000.00

At the bottom, it says 'Showing 1 to 2 of 2 entries' and has pagination controls.

If you have multiple funds, you can also use the **drop-down menu** at the top of the page to change the fund you want to review.

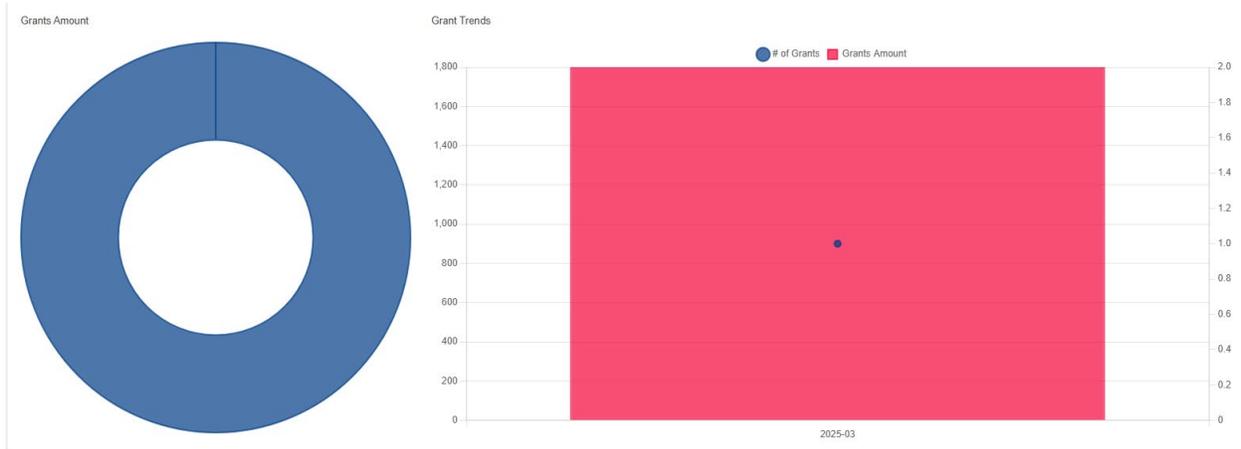


This screenshot is identical to the previous one, but with an orange arrow and box highlighting the dropdown menu at the top left of the page, which currently displays 'Jane and John Doe Family Fund'.

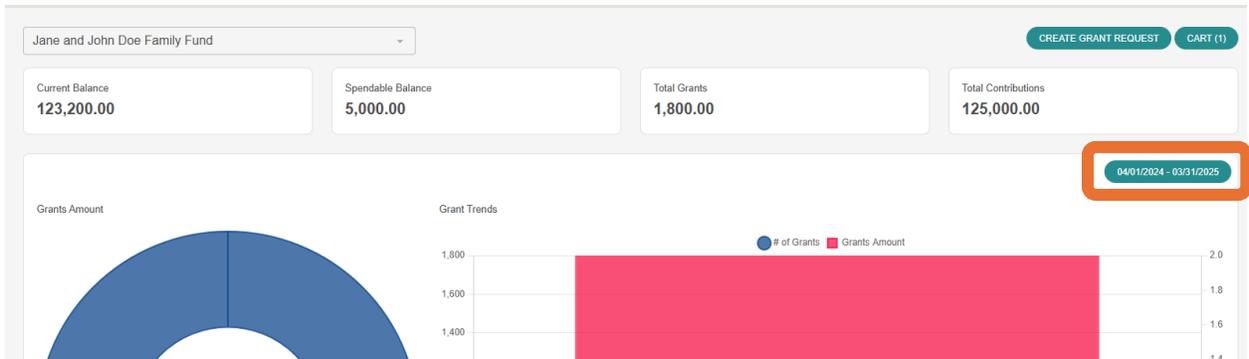
If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

How do I view grants made from my fund?

The total amount granted from your fund since its inception is listed at the top of the **Fund Summary** page. Below the balances and totals are charts showing recent grants made from your fund. Hover over a data point to see more information.



Unlike the **Total Grants** number, these charts automatically display one year of data ending at the last day of the previous month (e.g. accessing the page during April 2025 will automatically generate data for April 1, 2024—March 31, 2025). To adjust these dates, click the **button** that displays the current date range above and to the right of the chart.



If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

You can then select or enter a new range of dates.

Select Date Range

Range	Start Date 04/01/2024	End Date 03/31/2025	SET RANGE		
Current	WEEK	MONTH	QUARTER	YEAR	FINANCIAL YEAR
Prior	WEEK	MONTH	QUARTER	YEAR	FINANCIAL YEAR
2025	ALL	Q1	Q2	Q3	Q4 FINANCIAL
2024	ALL	Q1	Q2	Q3	Q4 FINANCIAL
2023	ALL	Q1	Q2	Q3	Q4 FINANCIAL
2022	ALL	Q1	Q2	Q3	Q4 FINANCIAL
2021	ALL	Q1	Q2	Q3	Q4 FINANCIAL
2020	ALL	Q1	Q2	Q3	Q4 FINANCIAL

To view more details and a full list of grants from your fund, please select the **Grants** tab.

FUND SUMMARY

CONTRIBUTIONS

GRANTS

GRANT RECOMMENDATION

Jane and John Doe Family Fund

Current Balance

123,200.00

Spendable

5,000.0

A summary of grantees will be shown. Click **Grant History** to view details of all grants made from your fund.

Jane and John Doe Family Fund

[CREATE GRANT REQUEST](#)
[CART \(1\)](#)

[GRANT SUMMARY](#)

[GRANT HISTORY](#)

[RECURRING GRANTS](#)

Below is a summary of past grantees from your fund. Clicking on the name of the grantee provides additional details including the date, description, and amount of each grant made to that grantee. To view more details and a chronological list of grants, please select **Grant History** above. The list can be filtered, sorted by clicking on the column names, or exported for additional analysis. You can also use the drop-down menu to select a different fund to view its grant history.

Grant Summary

10 entries per page

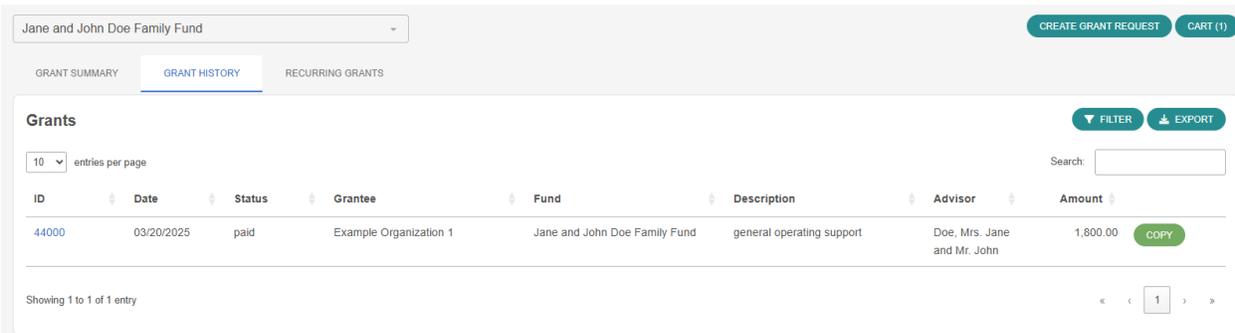
Search:

Grantee	Grants	Amount
Example Organization 1	1	1,800.00

Showing 1 to 1 of 1 entry

If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

A list of grants by date will be displayed.

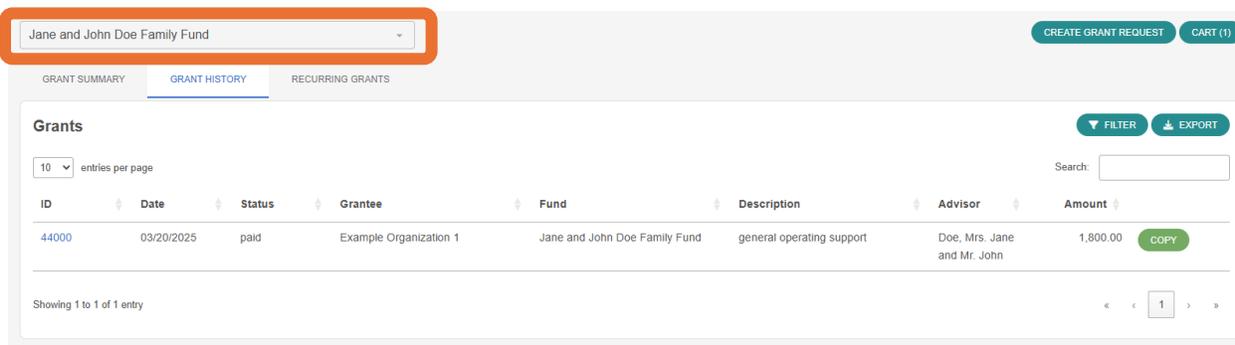


The screenshot shows the 'Grants' page for the 'Jane and John Doe Family Fund'. At the top, there is a dropdown menu with 'Jane and John Doe Family Fund' selected. To the right are buttons for 'CREATE GRANT REQUEST' and 'CART (1)'. Below the dropdown are tabs for 'GRANT SUMMARY', 'GRANT HISTORY', and 'RECURRING GRANTS'. The 'GRANT HISTORY' tab is active. The main content area is titled 'Grants' and includes a '10 entries per page' selector, a search box, and 'FILTER' and 'EXPORT' buttons. A table displays one grant entry:

ID	Date	Status	Grantee	Fund	Description	Advisor	Amount
44000	03/20/2025	paid	Example Organization 1	Jane and John Doe Family Fund	general operating support	Doe, Mrs. Jane and Mr. John	1,800.00

At the bottom of the table, there is a 'COPY' button. Below the table, it says 'Showing 1 to 1 of 1 entry' and a pagination control showing '1'.

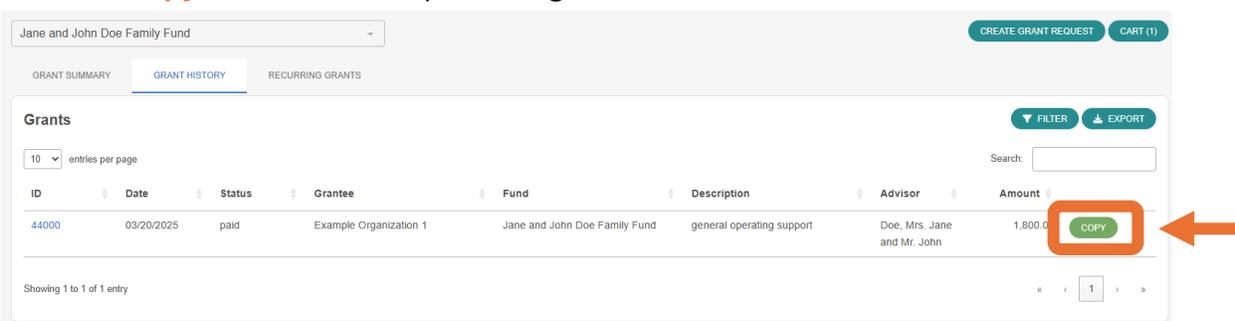
If you have multiple funds, you can also use the **drop-down menu** at the top of the page to change the fund you want to review.



This screenshot is identical to the previous one, but the dropdown menu at the top left, which currently shows 'Jane and John Doe Family Fund', is highlighted with an orange border to indicate it can be used to select a different fund.

How do I recommend a grant from my fund?

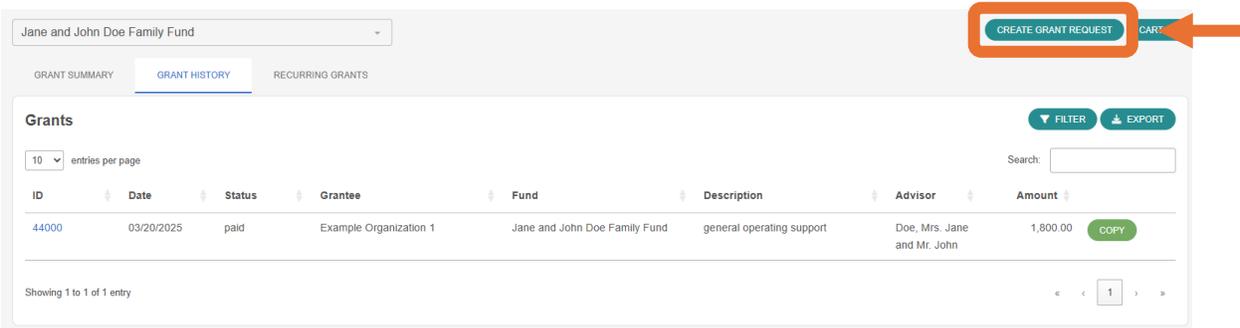
If you would like to quickly duplicate a grant you have given in the past, you can copy a grant directly from the Grant History page. Select the **Grants** tab and click **Grant History**, then click the **Copy** button next to a previous grant.



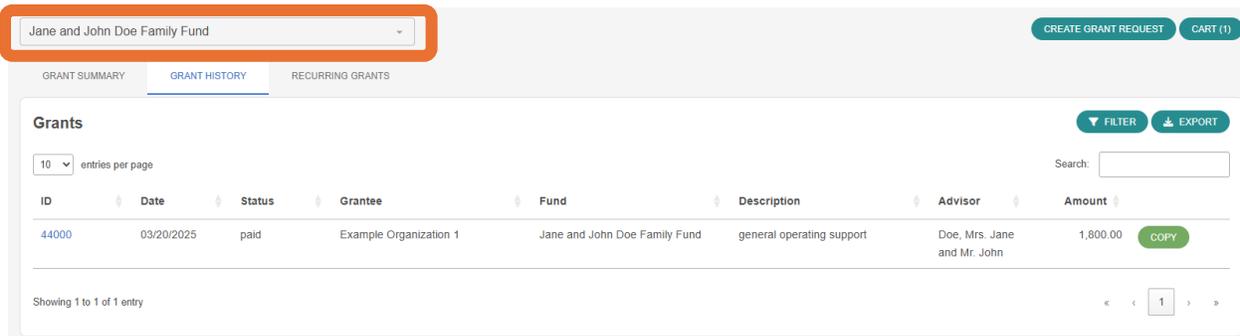
This screenshot is identical to the previous ones, but the 'COPY' button next to the grant entry in the table is highlighted with an orange border. An orange arrow points to this button from the right side of the page.

If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

Otherwise, please select the **Create Grant Request** button on the top right, which is available from any tab when viewing a donor-advised fund.

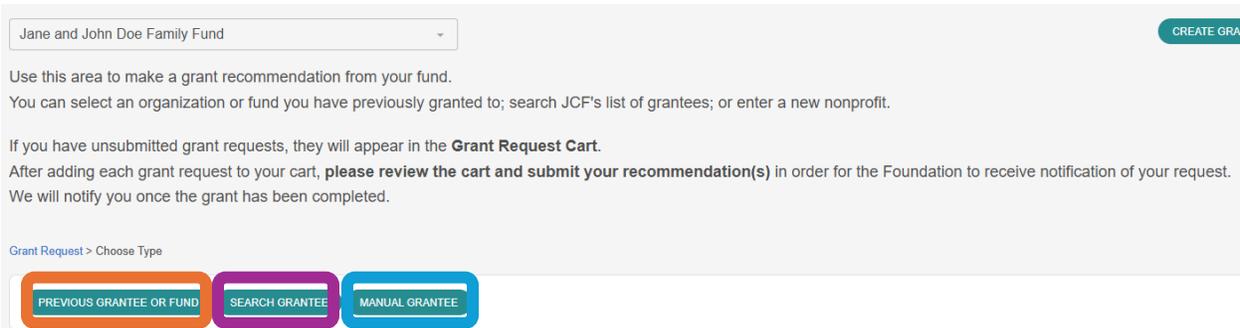


If you have multiple donor-advised funds, make sure you have selected the fund you want to grant from using the **drop-down menu** at the top of the page before clicking **Create Grant Request**.



You will then be given the choice to select from three options:

- **Previous Grantee or Fund:** click this button to select an organization or JCF fund that you have made a grant to in the past.
- **Search Grantee:** click this button to search for an organization or JCF fund from the full list of grantees.
- **Manual Grantee:** click this button to enter a new organization if you can't find it using the **Search Grantee** function.



If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

Once you have selected a grantee, complete the grant recommendation by filling in the description (grant purpose), amount, and any other information you want to add. Click **Add to Cart** to save the recommendation.

Grant Request

Grantee

Additional Grantee Contact

Description 17/255 characters

Amount

Anonymous

Recurring

Attachment No file chosen
(or drag and drop anywhere on the page)

Attachment Description

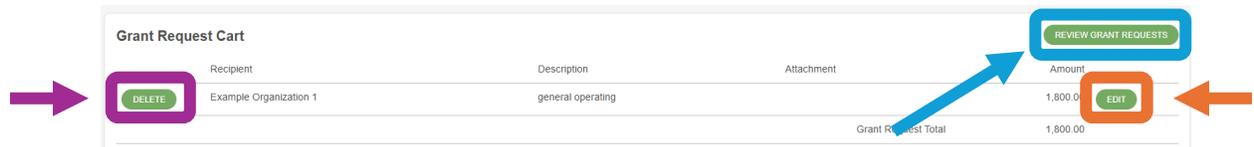
Grant Recommendation Notes

ADD TO CART

If you want to add more recommendations, you can click the **Create Grant Request** button again. Otherwise, click the **Cart** button on the top right, next to the **Create Grant Request** button.



Click **Edit** or **Delete** to make changes to a recommendation or select **Review Grant Requests** to view a final summary page of your unsubmitted grant recommendations.



If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

Be sure to click **Submit Grant Requests** at the bottom of the summary page to ensure that the Foundation receives your recommendation.

Grant Request Cart

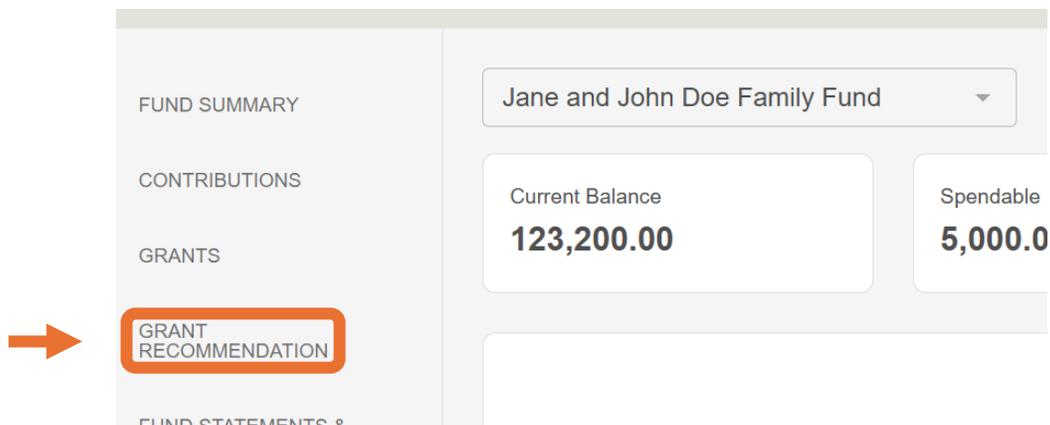
Grantee	Description	Attachment	Amount	Anonymous
Example Organization 1	general operating		\$ 1,800.00	No
Total			\$ 1,800.00	

Submitting this request confirms your understanding that the grant(s) you recommended will not be used to satisfy the payment of any pledge or other personal or corporate financial obligation or provide goods or services or benefits of a personal or corporate nature to any individuals or entities as a condition of the grant(s).

SUBMIT GRANT REQUESTS

How do I view the status of past grant recommendations?

Click the **Grant Recommendation** tab on the left side menu.



Scroll past the **Grant Request Cart** (if applicable) to display a list of past grant recommendations and their status.

REVIEW GRANT REQUESTS

	Recipient	Description	Attachment	Amount
DELETE	Example Organization 1	general operating		1,800.00
Grant Request Total				1,800.00

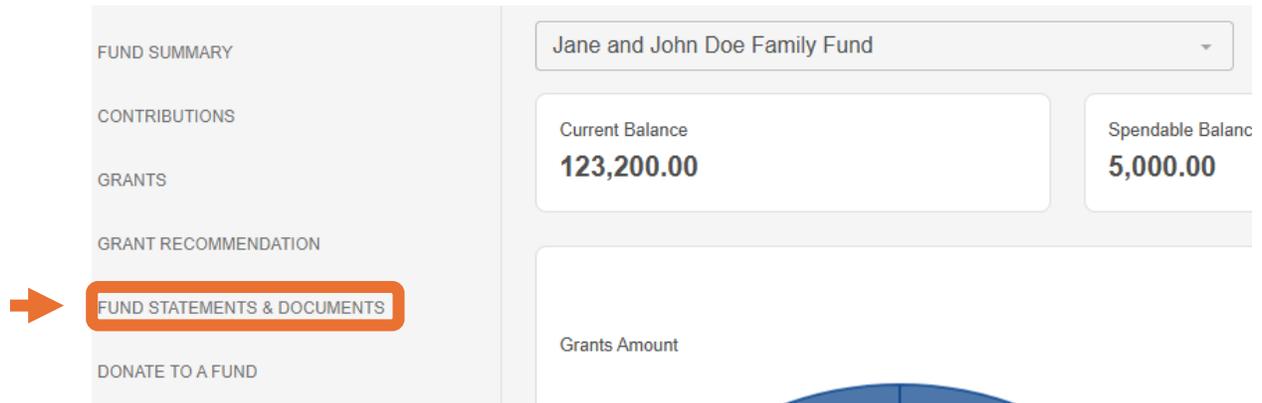
Grants

Request Date	Status	Recipient	Description	Amount
03/20/2025	Paid	Example Organization 1	general operating support	1,800.00

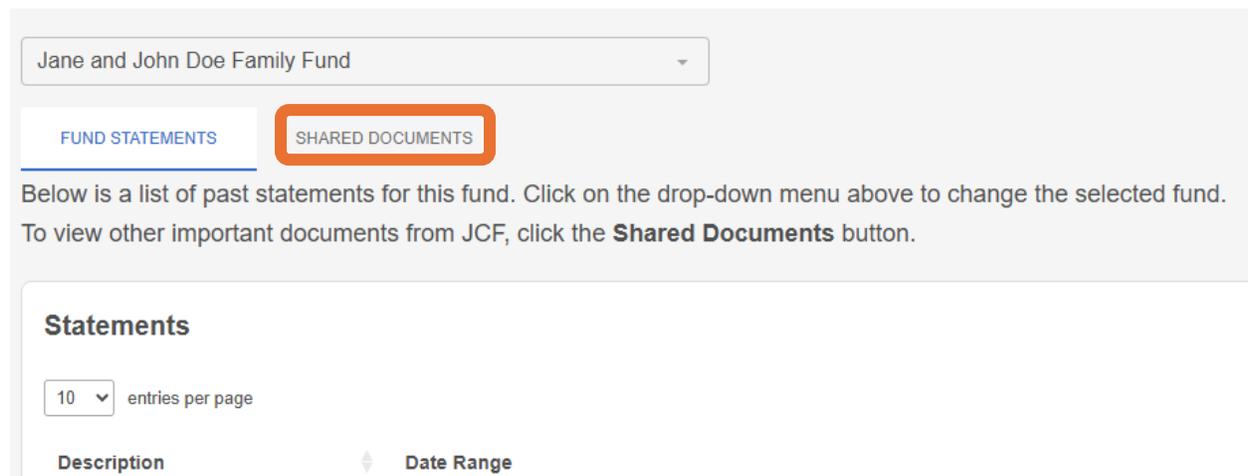
If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

How do I view published statements from my fund and other important documents?

Navigate to the **Fund Statements & Documents** tab to view published statements and other important documents shared by JCF.



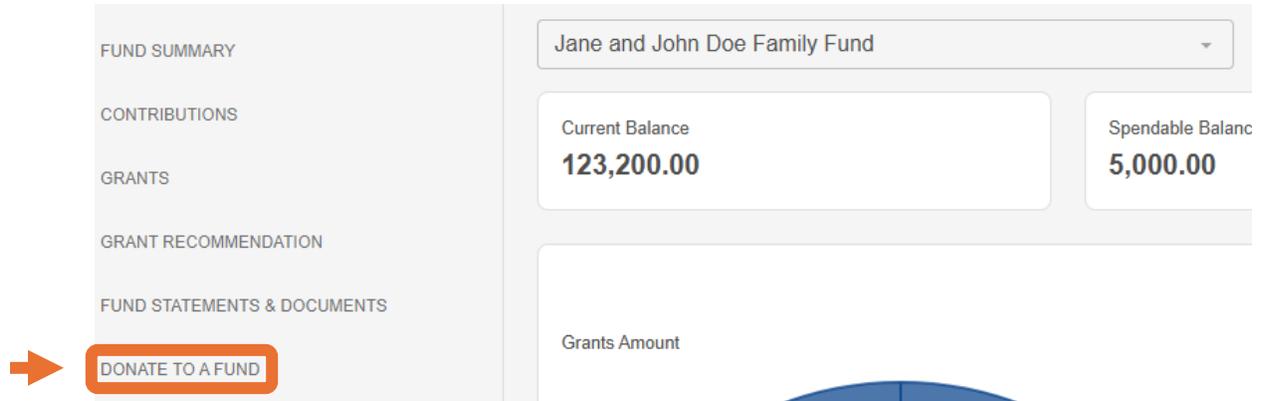
Previous fund statements are displayed as soon as the tab is opened. To view other important documents (such as quarterly investment updates or the JCF Community Wishlist), please select **Shared Documents**.



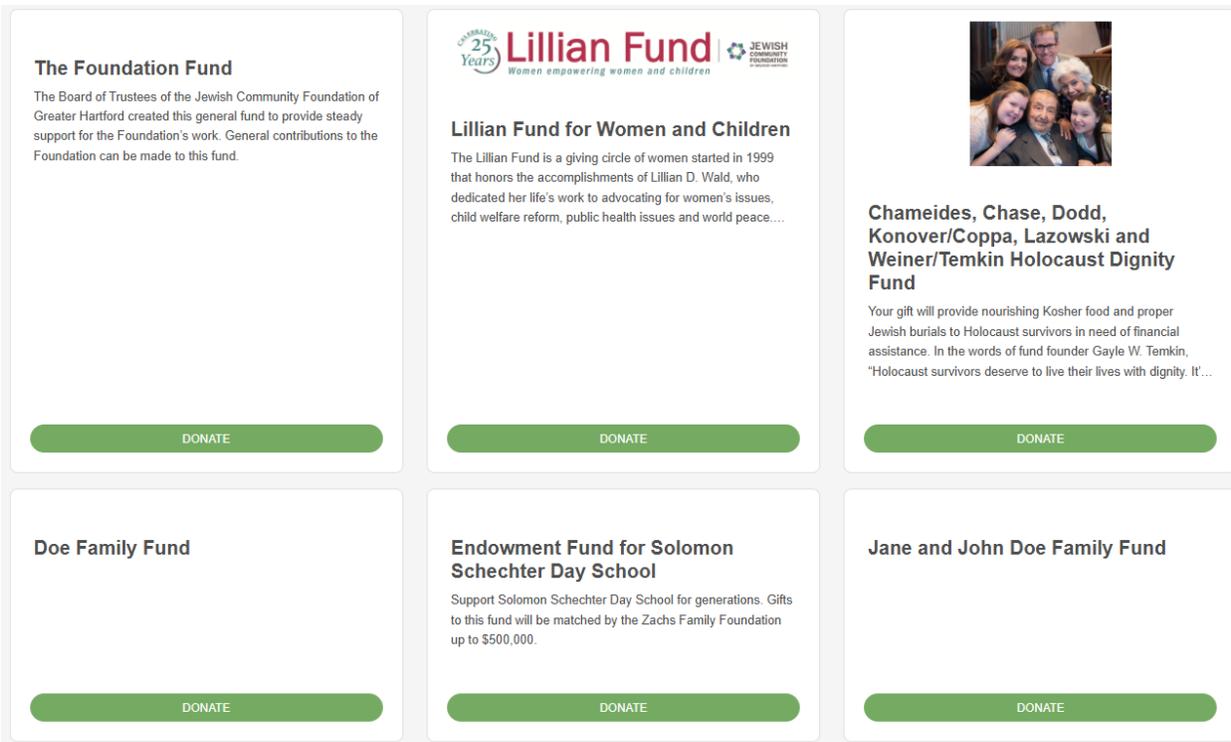
*If you have additional questions or need further assistance,
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How do I add more money to my fund?

Click the **Donate to a Fund** tab on the left side menu to navigate to the giving hub.



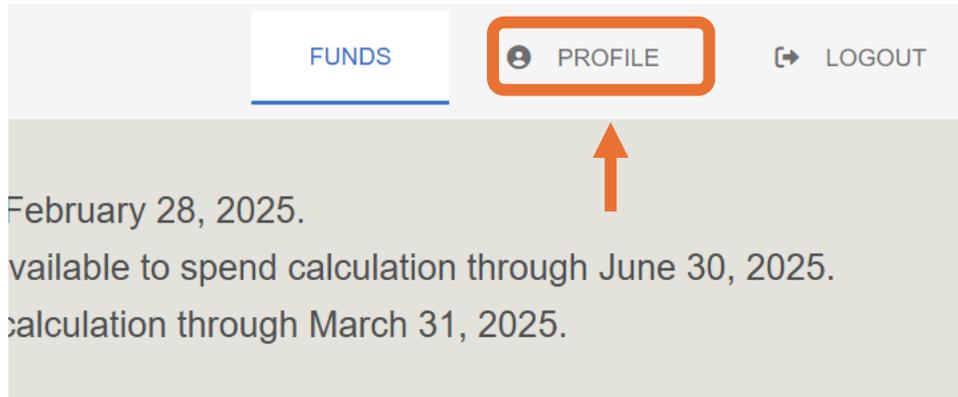
Since you are logged in, you will see your own funds alongside the Foundation’s highlighted funds on the giving hub home page. Click **Donate** on a fund tile to make a credit card contribution to that fund.



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please contact us at 860-523-7460 or portal@jcfhartford.org.*

I also have permission to view an organization’s fund(s) at JCF. How do I access this view?

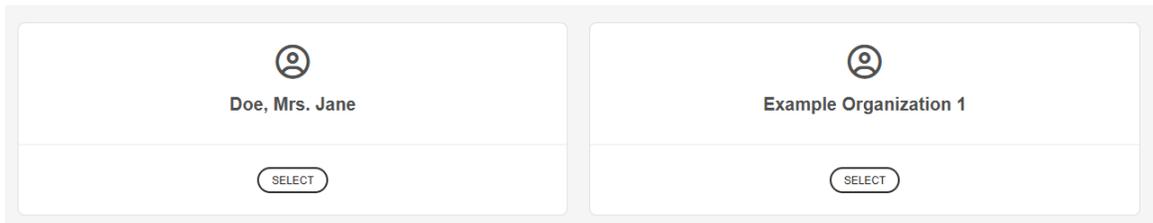
Click the Profile tab on the top menu.



If you have permission to access an organization’s portal view, you will see a button that says **Change Profile** at the top right of the profile page. Click this button to see all available profiles.



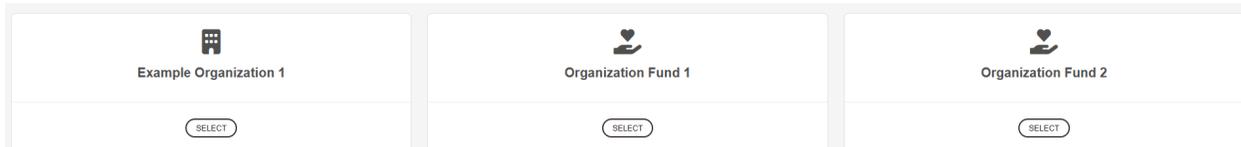
Click **Select** on the tile of the profile whose funds you want to view.



FOR ORGANIZATIONS:

How do I view my organization’s fund balance(s)?

On an organization’s funds list page, the first tile will list the organization name with a building icon, followed by tiles with the name of each fund the organization holds at JCF, in alphabetical order by fund name.



If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

Select the first tile to see the conglomerate view of all funds in your organization’s portal. Otherwise, select a single fund to view information for that fund. At the top of the page, you will see the fund’s **current balance** and **spendable balance** as of the day you access the summary page, along with the total amount of **grants** from and **contributions** to the fund since its inception.

Current Balance reflects investment earnings through February 28, 2025.
Spendable Balance for Donor Advised, Designated and Unrestricted funds reflects the available to spend calculation through June 30, 2025.
Spendable Balance for Custodial funds reflects the available to spend calculation through March 31, 2025.

If additional information is needed, please contact us at 860-523-7460 or send an email to portal@jcfhartford.org.

Organization Fund 2

Current Balance 996,800.00	Spendable Balance 35,072.00	Total Grants 5,000.00	Total Contributions 1,001,800.00
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You can switch between viewing a single fund and the conglomerate at any time by using the drop-down menu at the top of the page.

Current Balance reflects investment earnings through February 28, 2025.
Spendable Balance for Donor Advised, Designated and Unrestricted funds reflects the available to spend calculation through June 30, 2025.
Spendable Balance for Custodial funds reflects the available to spend calculation through March 31, 2025.

If additional information is needed, please contact us at 860-523-7460 or send an email to portal@jcfhartford.org.

Organization Fund 2

Current Balance 996,800.00	Spendable Balance 35,072.00	Total Grants 5,000.00	Total Contributions 1,001,800.00
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Alternatively, click the Funds tab on the top menu to return to the funds list page.

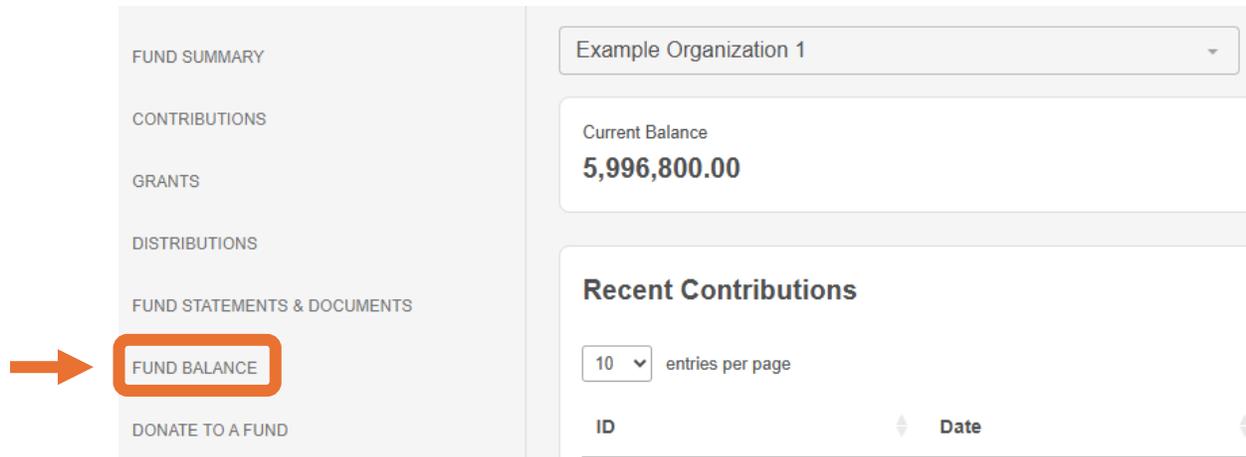
FUNDS PROFILE LOGOUT

February 28, 2025.
available to spend calculation through June 30, 2025.
calculation through March 31, 2025.

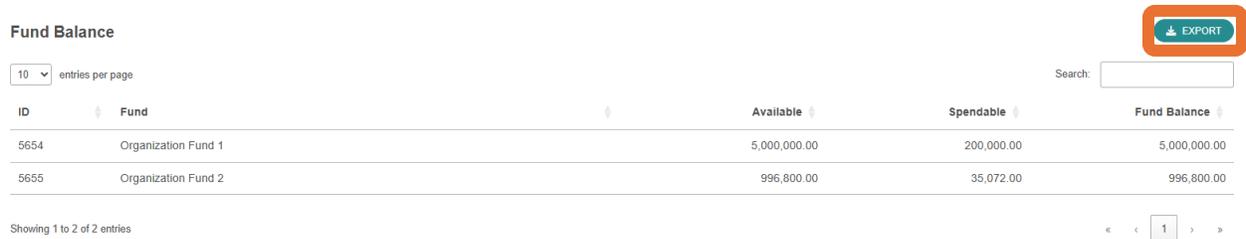
If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

How do I export fund balances for all of my organization’s funds?

While in the organization conglomerate view, select the **Fund Balance** tab on the left side menu to view a summary of fund balances (including spendable balances) by fund.

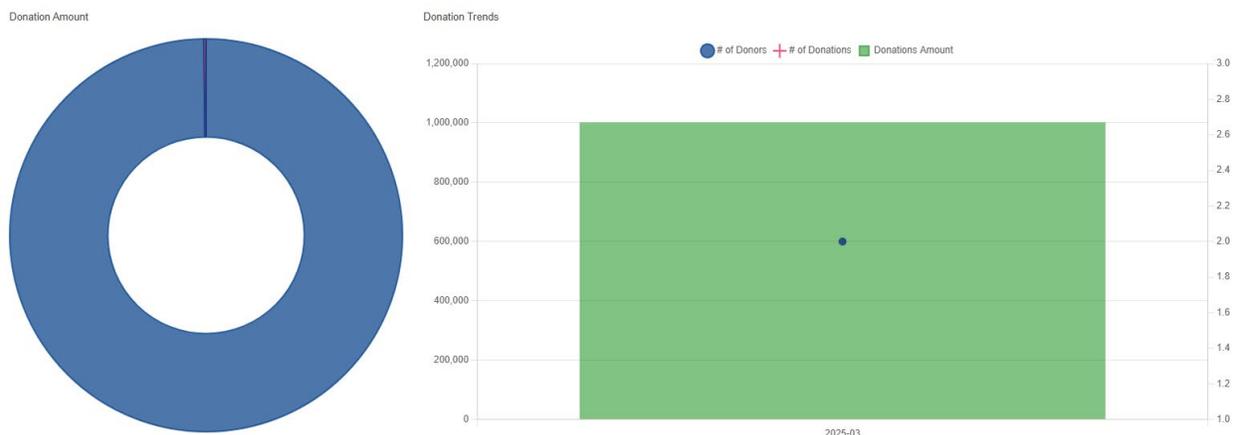


Click **Export** to generate a CSV file of this information.



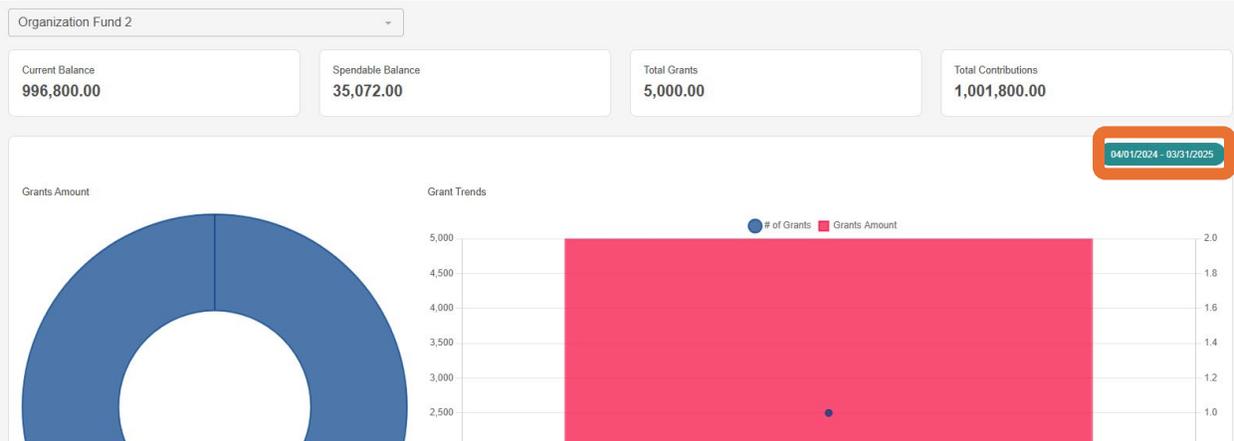
How do I view gifts?

Recent contribution information is displayed on the **Fund Summary** page. The total amount of contributions to the fund (or group of funds if in the conglomerate view) since inception is shown alongside the current and spendable balance at the top of the page. Below the balances and totals (under the grant charts) are charts showing recent contributions made to the fund. Hover over a data point to see more information.



If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

Unlike the **Total Contributions** number, these charts automatically display one year of data ending at the last day of the previous month (e.g. accessing the page during April 2025 will automatically generate data for April 1, 2024—March 31, 2025). To adjust these dates, click the **button** above and to the right of the Grants chart that displays the current date range.



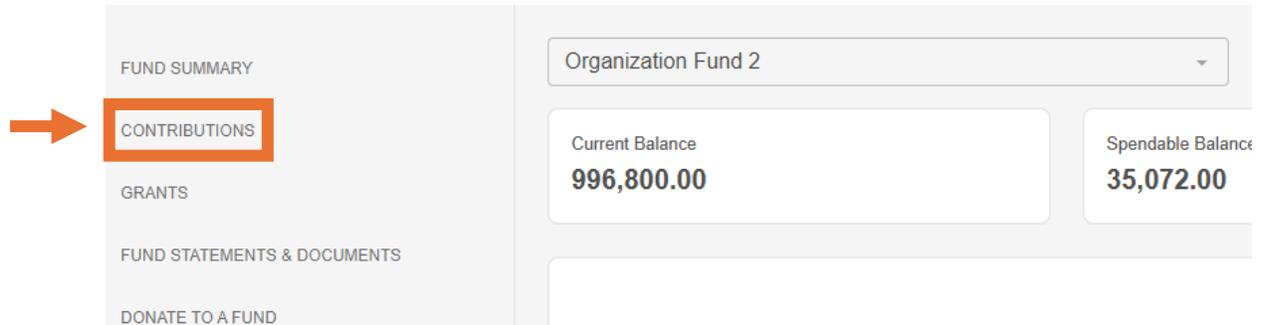
You can then select or enter a new range of dates.

Select Date Range

Range	Start Date 04/01/2024	End Date 03/31/2025	SET RANGE			
Current	WEEK	MONTH	QUARTER	YEAR	FINANCIAL YEAR	
Prior	WEEK	MONTH	QUARTER	YEAR	FINANCIAL YEAR	
2025	ALL	Q1	Q2	Q3	Q4	FINANCIAL
2024	ALL	Q1	Q2	Q3	Q4	FINANCIAL
2023	ALL	Q1	Q2	Q3	Q4	FINANCIAL
2022	ALL	Q1	Q2	Q3	Q4	FINANCIAL
2021	ALL	Q1	Q2	Q3	Q4	FINANCIAL
2020	ALL	Q1	Q2	Q3	Q4	FINANCIAL

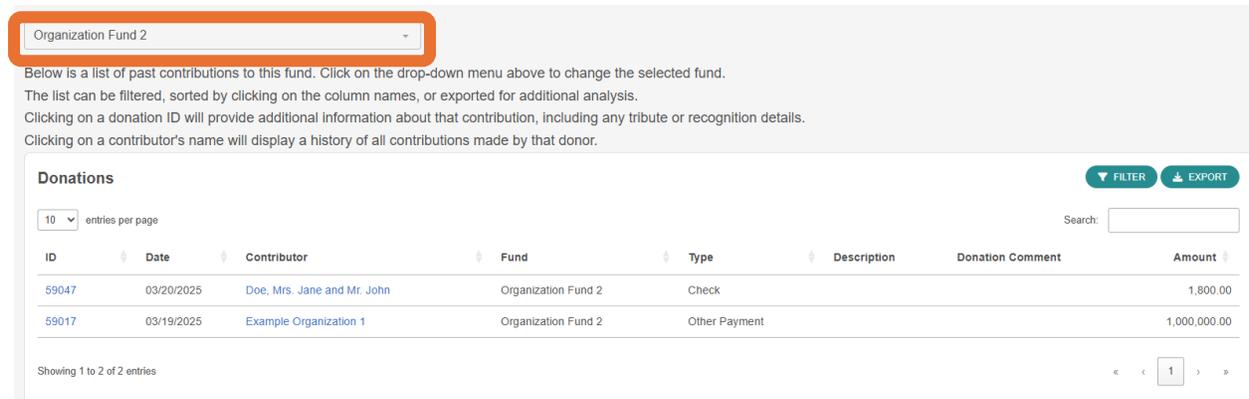
*If you have additional questions or need further assistance,
please contact us at 860-523-7460 or portal@jcfhartford.org.*

To view more details and a full list of donations, please select the **Contributions** tab from the left menu.



The screenshot shows a left-hand navigation menu with the following items: FUND SUMMARY, CONTRIBUTIONS (highlighted with an orange arrow and box), GRANTS, FUND STATEMENTS & DOCUMENTS, and DONATE TO A FUND. To the right of the menu, there is a dropdown menu set to 'Organization Fund 2', and two summary boxes: 'Current Balance 996,800.00' and 'Spendable Balance 35,072.00'.

A list of contributions by date will be shown. You can also use the **drop-down menu** at the top of the page to change the fund you want to review or access the conglomerate view for a summary of contributions to all funds.



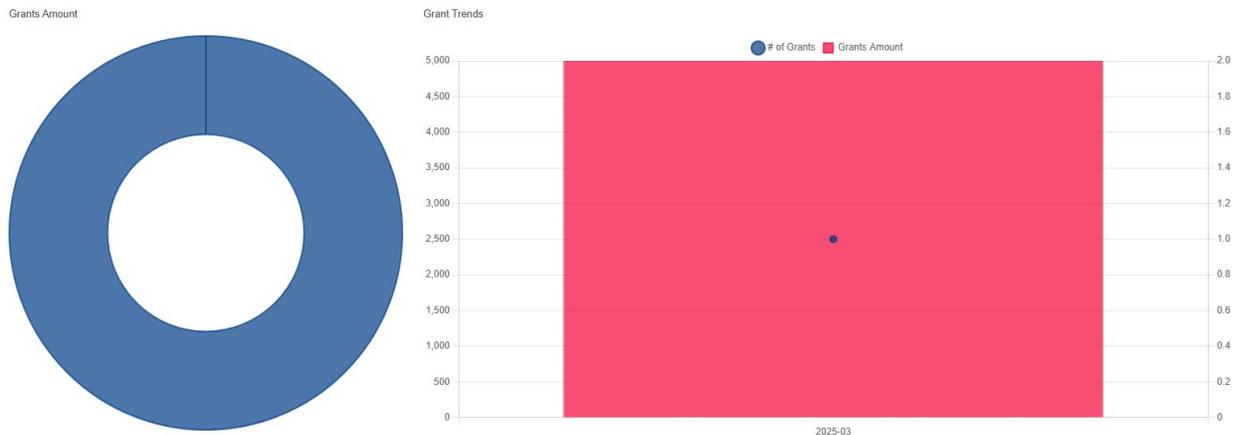
The screenshot shows a 'Donations' table with a drop-down menu at the top set to 'Organization Fund 2', which is highlighted with an orange box. Below the menu, there is explanatory text: 'Below is a list of past contributions to this fund. Click on the drop-down menu above to change the selected fund. The list can be filtered, sorted by clicking on the column names, or exported for additional analysis. Clicking on a donation ID will provide additional information about that contribution, including any tribute or recognition details. Clicking on a contributor's name will display a history of all contributions made by that donor.' The table includes columns for ID, Date, Contributor, Fund, Type, Description, Donation Comment, and Amount. Two rows of data are visible. At the top right of the table area are 'FILTER' and 'EXPORT' buttons. At the bottom left, it says 'Showing 1 to 2 of 2 entries'. At the bottom right, there is a pagination control showing '1'.

ID	Date	Contributor	Fund	Type	Description	Donation Comment	Amount
59047	03/20/2025	Doe, Mrs. Jane and Mr. John	Organization Fund 2	Check			1,800.00
59017	03/19/2025	Example Organization 1	Organization Fund 2	Other Payment			1,000,000.00

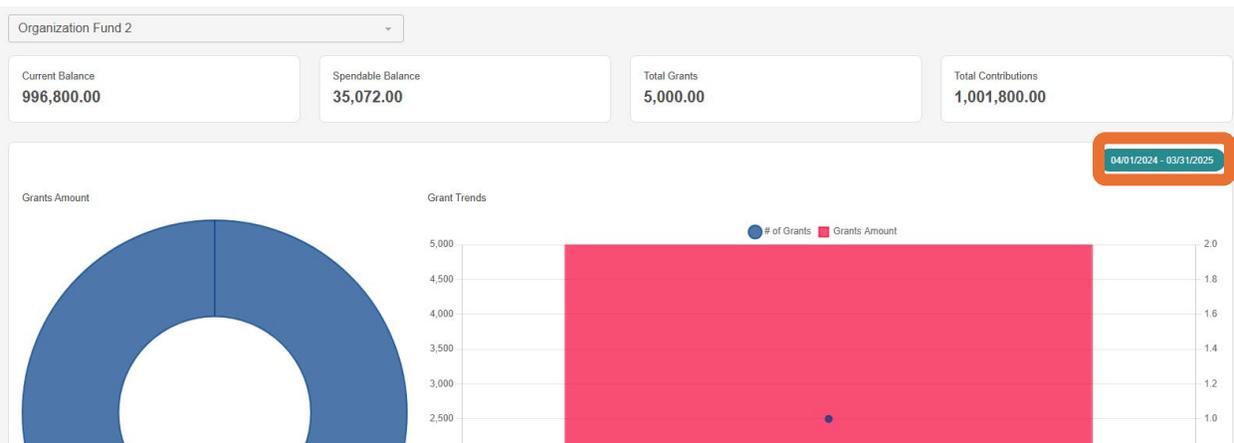
If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

How do I view grants?

Recent grant information is displayed on the **Fund Summary** page. The total amount of grants from the fund (or group of funds if in the conglomerate view) since inception is shown alongside the fund balance at the top of the page. Below the balances and totals are charts showing recent grants made from the fund. Hover over a data point to see more information.



Unlike the **Total Grants** number, these charts automatically display one year of data ending at the last day of the previous month (e.g. accessing the page during April 2025 will automatically generate data for April 1, 2024—March 31, 2025). To adjust these dates, click the **button** that displays the current date range above and to the right of the chart.



If you have additional questions or need further assistance, please contact us at 860-523-7460 or portal@jcfhartford.org.

You can then select or enter a new range of dates.

Select Date Range

Range	Start Date 04/01/2024	End Date 03/31/2025	SET RANGE			
Current	WEEK	MONTH	QUARTER	YEAR	FINANCIAL YEAR	
Prior	WEEK	MONTH	QUARTER	YEAR	FINANCIAL YEAR	
2025	ALL	Q1	Q2	Q3	Q4	FINANCIAL
2024	ALL	Q1	Q2	Q3	Q4	FINANCIAL
2023	ALL	Q1	Q2	Q3	Q4	FINANCIAL
2022	ALL	Q1	Q2	Q3	Q4	FINANCIAL
2021	ALL	Q1	Q2	Q3	Q4	FINANCIAL
2020	ALL	Q1	Q2	Q3	Q4	FINANCIAL

To view more details and a full list of grants, please select the **Grants** tab on the left menu.

FUND SUMMARY

CONTRIBUTIONS

GRANTS

FUND STATEMENTS & DOCUMENTS

DONATE TO A FUND

Organization Fund 2

Current Balance

996,800.00

Spendable Balance

35,072.00

A summary of grantees will be shown. Click **Grant History** to view the details of all grants made from the fund.

Organization Fund 2

GRANT HISTORY
RECURRING GRANTS

Below is a summary of past grantees from your fund. Clicking on the name of the grantee provides additional details including the date, description, and amount of each grant made to that grantee. To view more details and a chronological list of grants, please select **Grant History** above. The list can be filtered, sorted by clicking on the column names, or exported for additional analysis. You can also use the drop-down menu to select a different fund to view its grant history.

Grant Summary

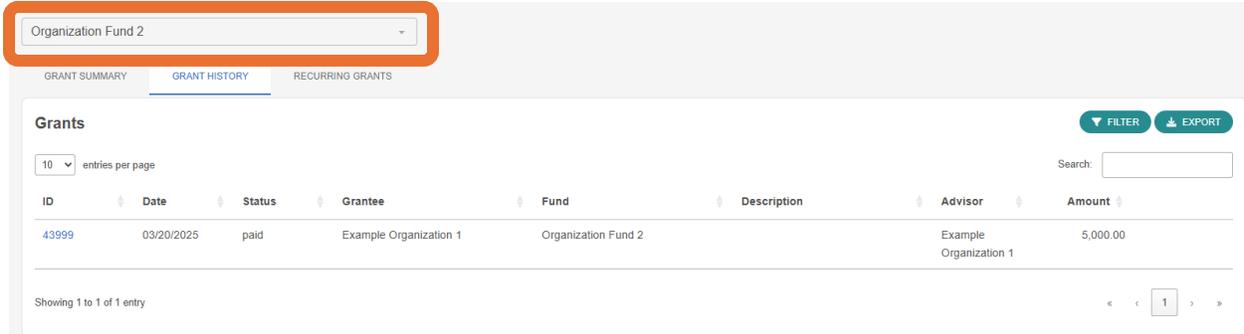
10 entries per page Search:

Grantee	Grants	Amount
Example Organization 1	1	5,000.00

Showing 1 to 1 of 1 entry < 1 >

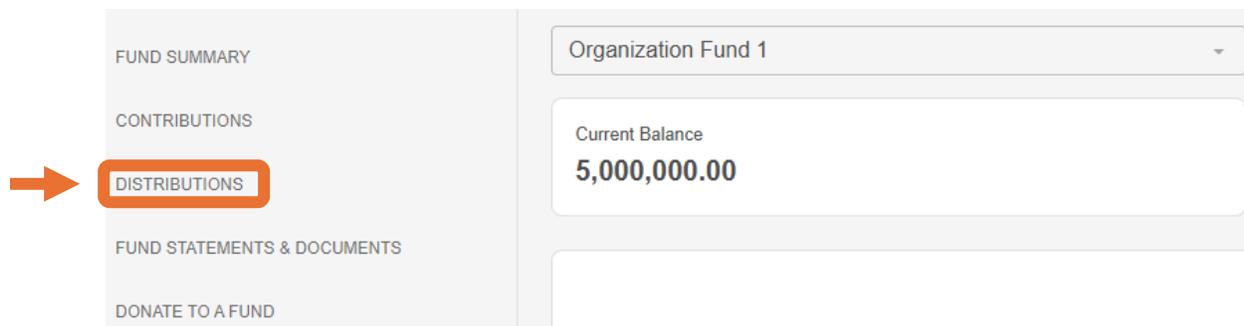
*If you have additional questions or need further assistance,
please contact us at 860-523-7460 or portal@jcfhartford.org.*

A list of grants by date will be displayed. You can use the **drop-down menu** at the top of the page to change the fund you want to review or access the conglomerate view for a summary of grants from all funds.

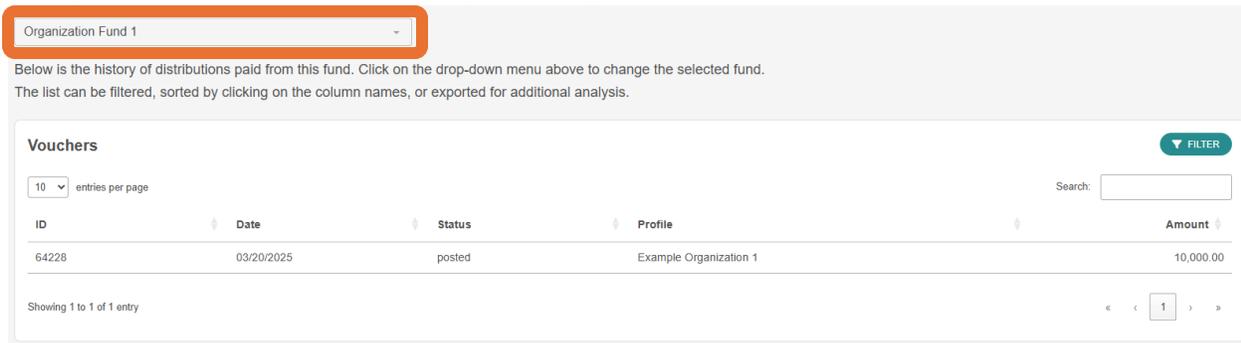


How do I view non-grant distributions?

Select the **Distributions** tab from the left menu. This tab reflects any dollars sent out from custodial funds.



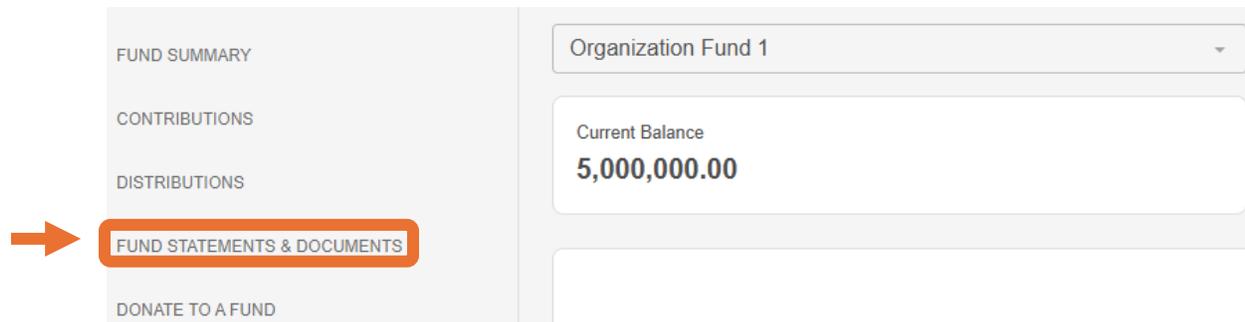
A list of non-grant distributions by date will be displayed. You can use the **drop-down menu** at the top of the page to change the fund you want to review or access the conglomerate view for a summary of non-grant distributions from all funds.



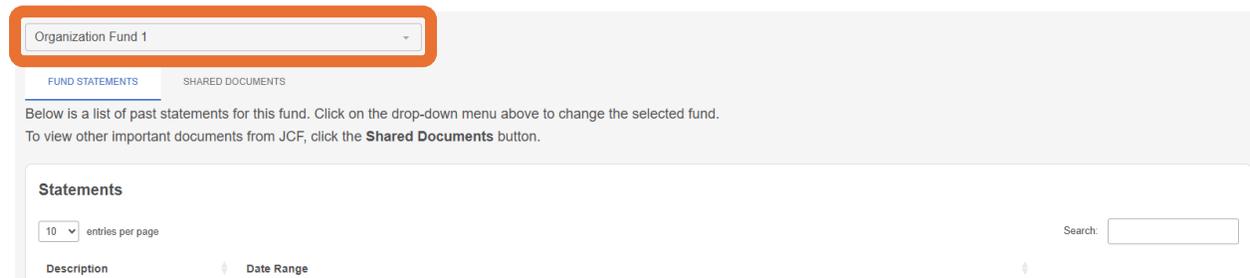
*If you have additional questions or need further assistance,
please contact us at 860-523-7460 or portal@jcfhartford.org.*

How do I view published fund statements and other important documents?

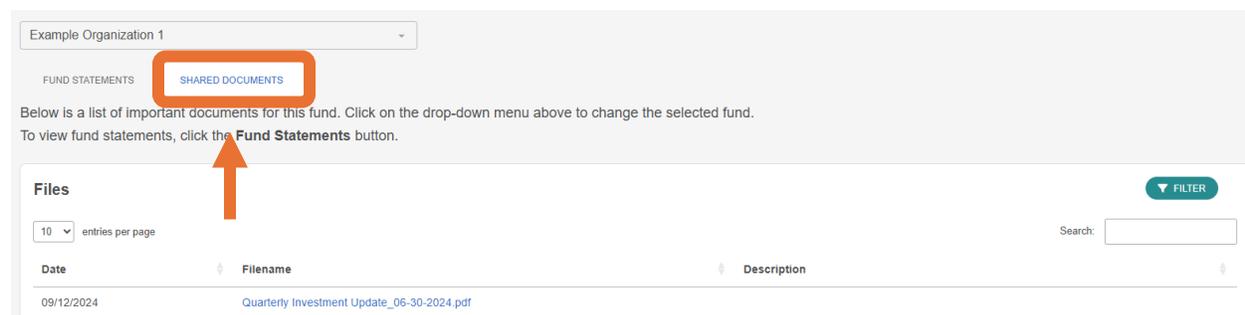
Click on the **Fund Statements & Documents** tab on the left menu.



Fund statements are available from the individual fund view and the conglomerate view. To view other important documents, please use the **drop-down menu** to access the conglomerate view.



Then click **Shared Documents** to view summary reports and other important documents from the Foundation.



*If you have additional questions or need further assistance,
please contact us at 860-523-7460 or portal@jcfhartford.org.*