



THE CHICAGO COMMUNITY TRUST DONOR PORTAL USER GUIDE

OVERVIEW

Welcome to The Chicago Community Trust Donor Portal Guide.

Powered by The GiftingNetwork, Donor Portal is a full-service platform that allows individuals and advisors with donor advised funds anytime access to manage their funds. Donors can use the portal to:

- View account balances
- Make grant recommendations
- Set up recurring grants
- View giving history and giving profile
- Access Fund Statements
- View pool performance
- Access and download the Fund Agreement
- See grant history and status, including pending, approved and paid grants
- Receive information and articles about philanthropy, giving opportunities and ways to make the most out of your fund.

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This document details how users navigate the portal to manage their donor advised funds. In this guide you will find:

- [How to Access the Donor Portal](#)
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- [How to Make a Grant Recommendation](#)

Please contact your philanthropic advisor or donorservices@cct.org with any questions about your Donor Advised Fund or using the Donor Portal.

HOW TO ACCESS THE DONOR PORTAL

The Donor Portal can be accessed online anytime through your desktop computer or mobile device by going to <http://donorportal.cct.org/>.

Please be sure to bookmark this page for ease of use. A direct link to the Donor Portal is also available from cct.org (see the upper right corner).

For the best user experience, we recommend using latest Google Chrome browser.

If you're accessing the donor portal for the first time, you will need to have your account established first before you set your password. See details below.

First Time Users

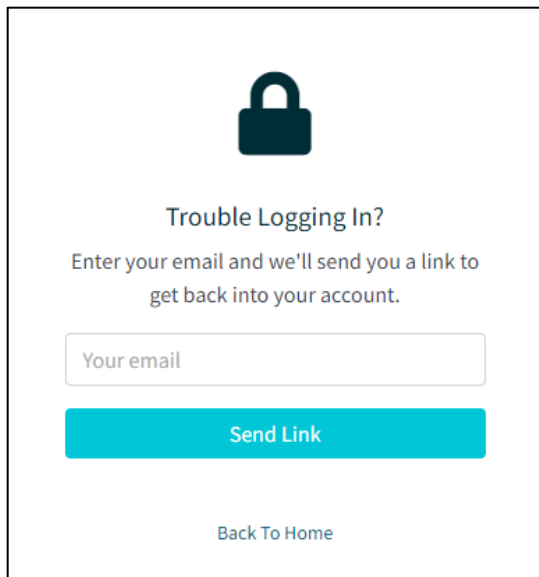
If you are a first-time user, you will need to have our admin team establish your access before you receive instructions to set your password. For questions or to enable your account, please contact your philanthropic advisor.


STEP 1. Our admin team will send you a system-generated email with a link to set up your password.

If you do not receive the email within a few minutes, check your spam folder for the email address associated with the account.

If you cannot find it or are unsure of the email address associated with your account, please contact your Philanthropic Advisor.

STEP 2: Within the email, click on the link. Once selected, a new page will launch, prompting you to enter your email address.





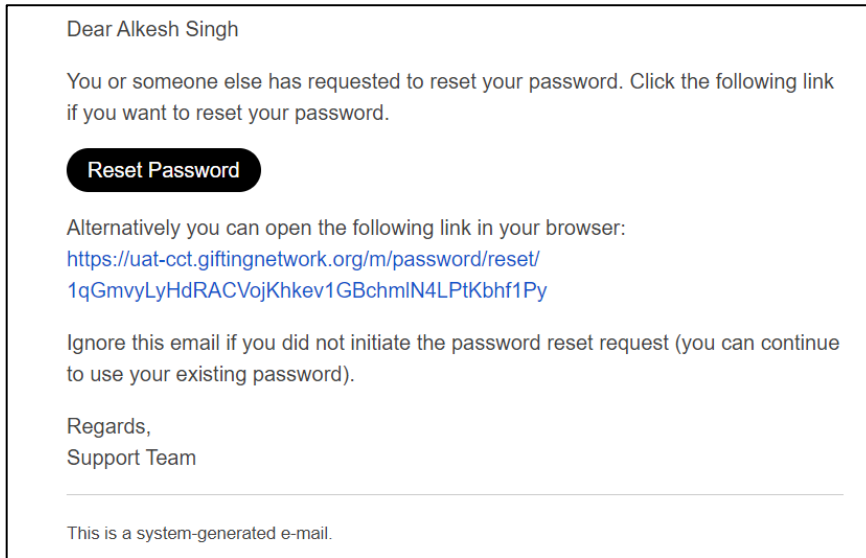
Trouble Logging In?

Enter your email and we'll send you a link to get back into your account.

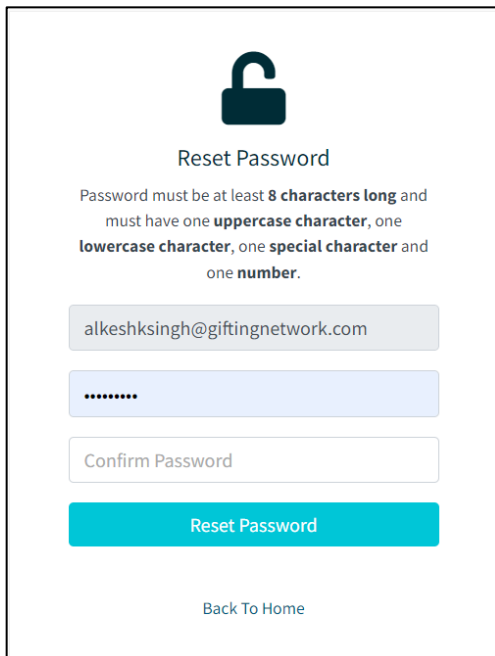
STEP 3: Within the field provided, enter your email address and click on “Submit/Send Link” button.

STEP 4: You will receive an email from the Donor Portal with a link to a password reset function. Click on the link, which will launch the Reset Password page prompting you to set your password.

If you do not receive the email within a few minutes, check your spam folder for the email address associated with the account. If you cannot find it or are unsure of the email address associated with your account, please contact your Philanthropic Advisor.




STEP 5: On the Reset Password page, create a new password following the guidelines provided and confirm by reentering the password in the field provided. Then click “Reset Password.”



STEP 6: Once you have set your password, the Donor Portal login page will launch. Enter your email address and password to log in.

Your password has been saved. Please login with your new password.



COMMUNITY TRUST
EQUITY • OPPORTUNITY • PROSPERITY

Philanthropy & Giving

The Chicago Community Trust works with individuals, families, businesses, foundations, and trusted financial advisors to build charitable giving plans and transform your generosity into powerful, meaningful impact.


If you are a current DAF (Donor Advised Fund) holder and have access to it, you can log in to view your grant and gift history, submit grant recommendations, contribute to your fund and view fund activities.

For any additional help, contact us at info@cct.org



Login

[Forgot Password?](#)


STEP 7: Once you have logged in for the first time, you will be prompted to establish multi-factor authentication with your email address or with SMS text messaging.




Choose a verification process to verify your identity.

-  **Text me a temporary code**
We will send a code to (***)***-7299
-  **Mail me a temporary code**
We will mail a code to as*****6@giftingnetwork.com

By selecting my mobile number, I consent to receiving a one-time text message containing a code to validate my account.



Check your email, we've sent you a code.

Please enter the 4 digit code sent to  **as*****6@giftingnetwork.com**

Code will expire in 15 minutes.

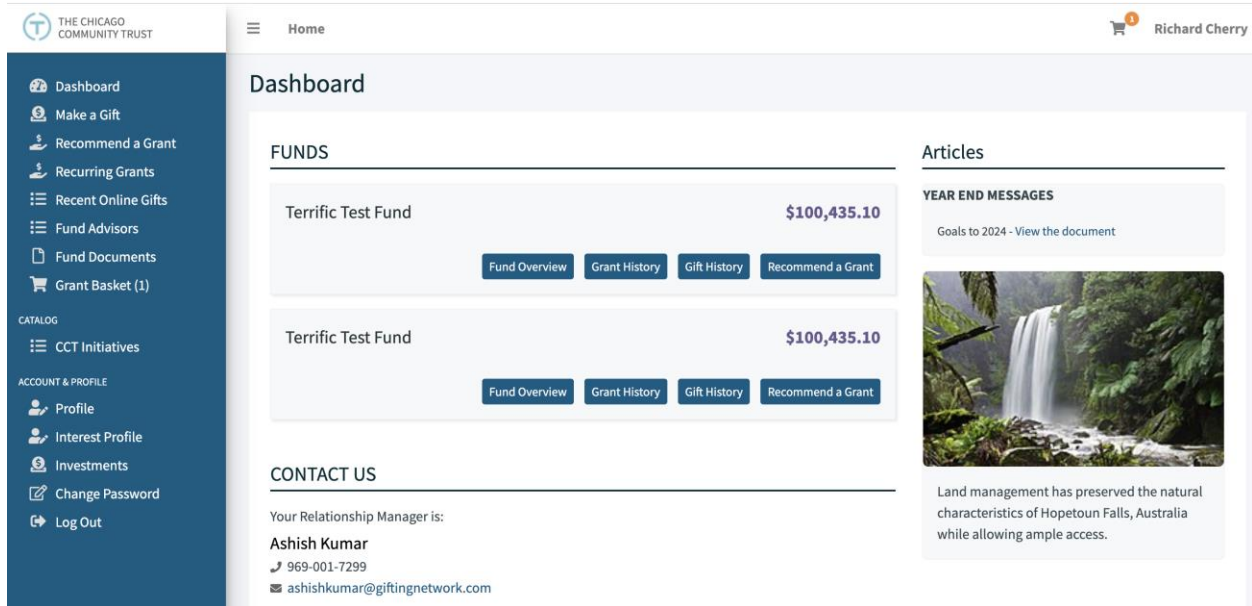
[Send me a new code](#)

[Home](#)

HOW TO NAVIGATE THE DONOR PORTAL

When you log into the Donor Portal, you will launch your Dashboard. This dashboard provides timely fund information, including your account balances, your relationship manager, recent grants and more.

On the right side of the dashboard, you will see key messages, giving opportunities and articles about making a philanthropic impact.



From the navigation tool bar on the left, you will be able to manage your personal information, make grant recommendations, and more by clicking the associated button. The navigation bar is visible on every page of the donor portal.

You can return to the homepage from any area of the donor portal simply by clicking on the Dashboard button:



Your important documents, including statements, fund agreement, gift acknowledgements or tax receipts and grant award letters all can be accessed by clicking the My Documents button:



HOW TO MAKE A GRANT RECOMMENDATION

The easiest way to make a grant recommendation is through the donor portal. You can access the portal at any time and complete the recommendation form and submit for payment or save for later.

STEP 1: From the left navigation, go to **Recommend a Grant**.



STEP 2: The user will be presented with a form to provide the grant details.

STEP 3: On the grant information page, you can specify what fund the grant will come out of, the organization that is to receive the grant, the amount of the grant, granting frequency, and purpose.

After completing the form with the grant information and recognition details, select **Add to Cart**.

Please provide the grant information in the form below.

| | | |
|---------------------------|--|---|
| Fund | AROS Fund | ▼ |
| Organization Name | <input type="text"/> | |
| Amount (\$) | 100 or more | |
| Granting Frequency | One Time | ▼ |
| Purpose | <input type="text"/> | |
| | <i>Purpose will be included on the grant check</i> | |
| Note | <input type="text"/> | |
| | <i>Internal note for staff</i> | |
| Donor Identity | <input type="checkbox"/> Anonymous | |
| | From Phil Sheehy | |
| | | ▼ |

Add to Cart

Cancel

STEP 4: On the My Cart page, you may review information for the grant and either submit or save for later. Additionally, you may also make another grant recommendation by selecting **Make Another Grant**.

STEP 5: Select the check box next to the grant(s) you wish to process for payment and select **Proceed to Checkout**.

My Cart (2)

[Make Another Grant](#)

\$3,000.00

From AROS Fund (Non-anonymous)
Granting Frequency: One Time

Autism Center of Milwaukee
12760 W Burleigh Rd,
Brookfield, Wisconsin, - 53005

From Phil Sheehy

EDIT REMOVE

\$1,000.00

From AROS Fund (Non-anonymous)
Granting Frequency: One Time

ARC Milwaukee
7203 W. Center Street,
Milwaukee, Milwaukee, Wisconsin, USA - 53210-1126

Purpose purpose
Note notes
From Phil Sheehy

EDIT REMOVE

Total Recommended: **\$4,000.00** [Proceed to Checkout](#)

If you choose to not process the grants at this time, they will stay in your cart. You can view unprocessed grant recommendation(s) at anytime by clicking the My Cart button.



Please note: you will only be able to see the grant recommendations you have added to your cart. You will not be able to see grant recommendations added by other grant advisors on the account until they have been submitted.