

ClientConnect User Guide

ClientConnect is the online portal to your fund information. From here you can view your current fund balance, make grant recommendations, review your giving history and access your quarterly fund statements.

Getting Started

You will receive an email with a unique link to the ClientConnect login setup page (see right, top image). Your login name will be the email address the Community Foundation has on file for you.

Follow the instructions to create your ClientConnect password. Once you have entered your preferred password, please click the **Save** button at the bottom of the page. You will be directed to a password confirmation page, click **Continue**.

If you serve as an advisor for multiple funds, you will see the **Choose Fund** menu (see right, bottom image) appear once you click **Continue**. Click the name of the fund with which you wish to interact.

If you are an advisor for only one fund, you will go directly to the home dashboard.

Setup Access

Please setup a password to access your account.

Name Client, Any

Login client@cfgb.org

Password

**Confirm
Password**

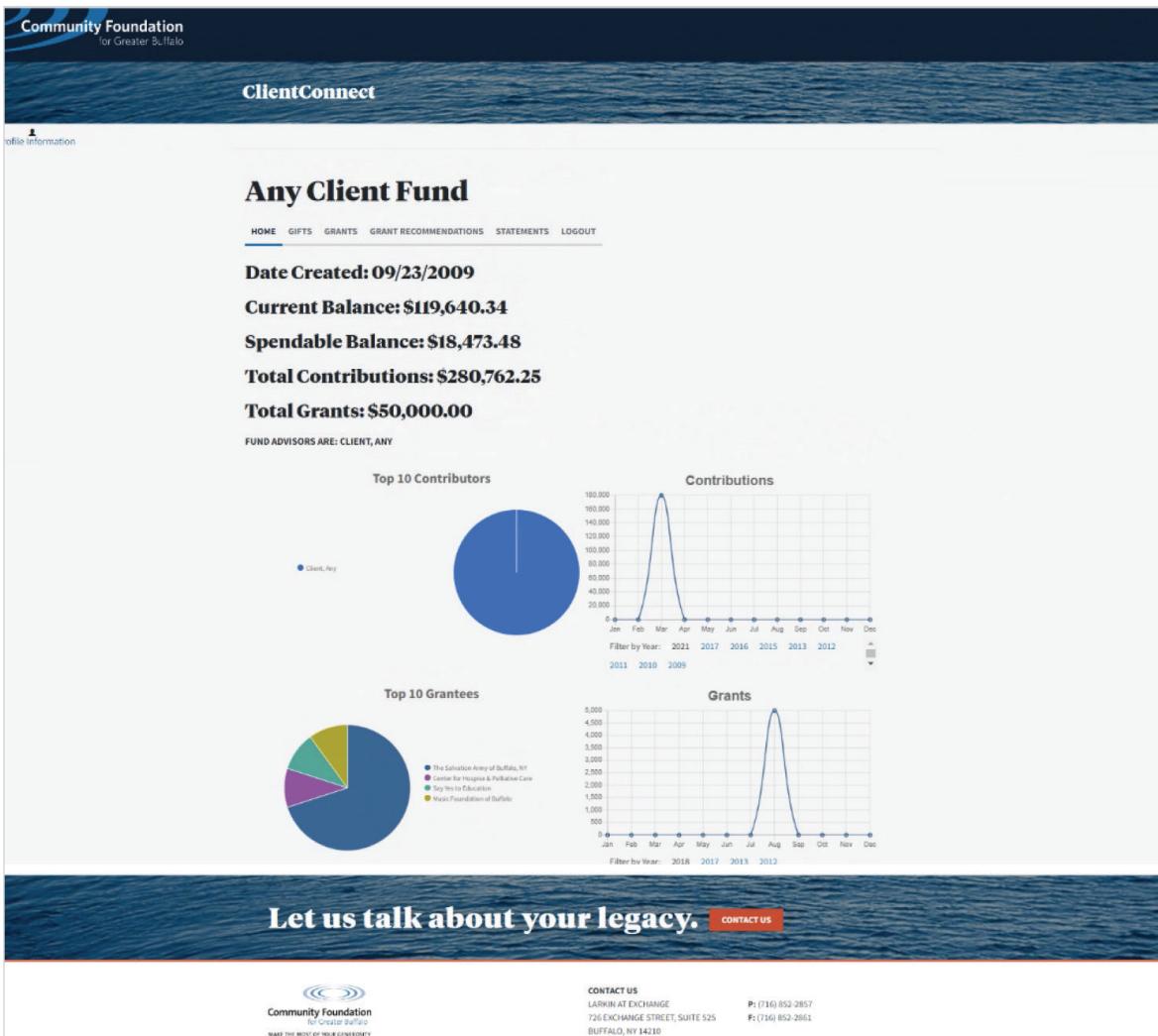
Choose Fund

Any Client Fund

Any Client Scholarship Fund

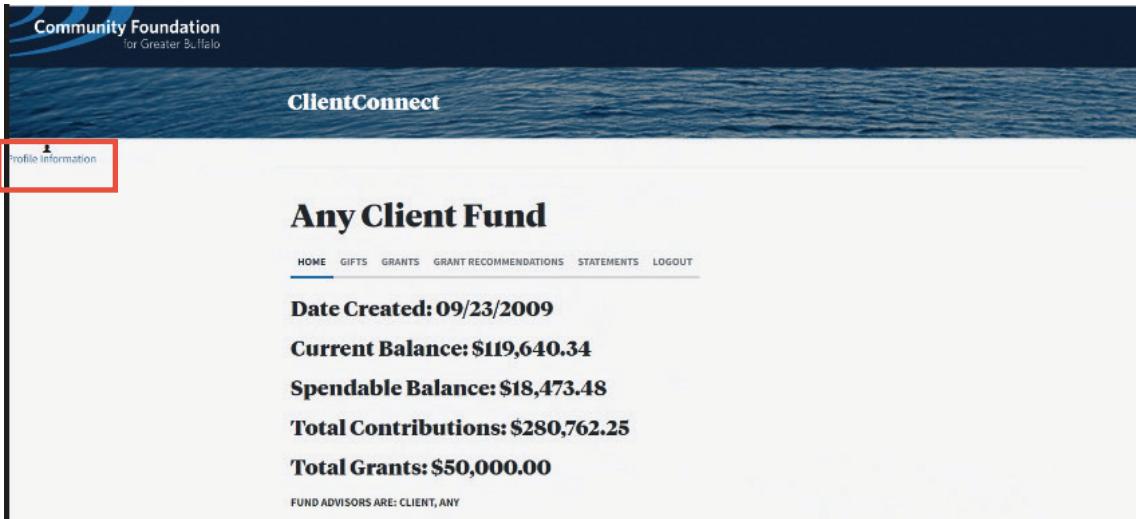
The Dashboard

The dashboard (see image below) offers a snapshot of your fund and your grantmaking. From here you can view your fund's spendable **balance**, review your grant **history**, view **contributions** to your fund, access your quarterly fund **statements** and recommend **grants**. Use the navigation bar across the top of the page to view your fund details.



Profile Information

Clicking on the **Profile Information** icon will allow you to review and update your profile information and password. Any updates to your contact information will automatically be updated in our database. If you would like to add two-factor authentication to your ClientConnect site, you may elect to do so in this area.



The screenshot shows the "Your Information" page under the "PROFILE INFORMATION" tab. It lists several profile details with edit buttons:

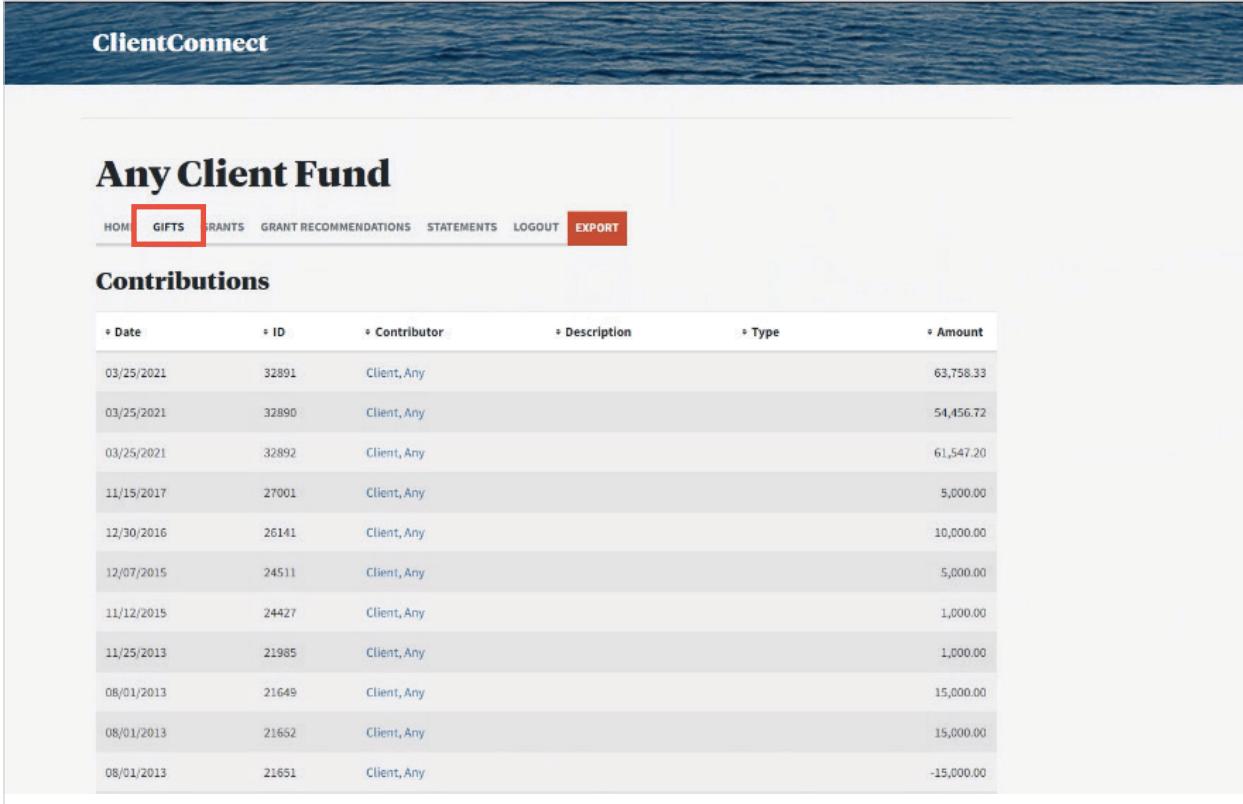
Name	Client, Any
Login	client@cfgb.org
Password	CHANGE PASSWORD
Two Factor Login	ENABLE
Primary Email	client@cfgb.org
Primary Phone	716-123-4567
Primary Address	123 Any Street Buffalo, NY 14210

An "EDIT" button is located at the bottom of the list.

View Gift History

To view your gift history (see image below), select the **Gifts** tab from the uppermost navigation bar. Here you can view all of the gifts that have been made to your fund. By clicking on the contributor's name, you will be able to see their history of giving to your fund as well as their name, address and email address.

Your gift history can be exported to Microsoft Excel by clicking the **Export** tab on the far right side.



The screenshot shows the ClientConnect interface for managing a client fund. At the top, there is a banner with the text "ClientConnect". Below the banner, the title "Any Client Fund" is displayed. The top navigation bar includes links for "HOME", "GIFTS" (which is highlighted with a red box and a red arrow pointing to it), "GRANTS", "GRANT RECOMMENDATIONS", "STATEMENTS", "LOGOUT", and "EXPORT". The main content area is titled "Contributions" and displays a table of gift records. The table has columns for Date, ID, Contributor, Description, Type, and Amount. The data in the table is as follows:

Date	ID	Contributor	Description	Type	Amount
03/25/2021	32891	Client, Any			63,758.33
03/25/2021	32890	Client, Any			54,456.72
03/25/2021	32892	Client, Any			61,547.20
11/15/2017	27001	Client, Any			5,000.00
12/30/2016	26141	Client, Any			10,000.00
12/07/2015	24511	Client, Any			5,000.00
11/12/2015	24427	Client, Any			1,000.00
11/25/2013	21985	Client, Any			1,000.00
08/01/2013	21649	Client, Any			15,000.00
08/01/2013	21652	Client, Any			15,000.00
08/01/2013	21651	Client, Any			-15,000.00

View Grant History

The **Grants** tab shows a summary of grants made from your fund, along with a full history of grant recommendations.

By clicking on the organization name in the “Grantee Summary” section, you can see a full history of grants made to that organization.

Clicking on the **Copy** button on this page will allow you to recommend another grant to the same organization. While the amount of the grant you have selected to copy will auto-populate the grant recommendation form, you can choose to select a new grant amount or purpose for that grant.

Your grant history can be exported to Microsoft Excel by clicking the **Export** tab on the far right side.

A screenshot of the ClientConnect software interface. At the top, there's a blue header bar with the "ClientConnect" logo. Below it, the main title is "Any Client Fund". A red arrow points to the "GRANTS" tab in the navigation menu, which is highlighted in blue. The "Grantee Summary" section lists several organizations with their grant counts and amounts:

* Grantee	+ Grants	+ Amount
Buffalo Music Foundation	1	5,000.00
Center for Hospice & Palliative Care	1	5,000.00
Say Yes to Education	1	5,000.00
The Salvation Army of Buffalo, NY	3	35,000.00

The "Grants" section below shows a list of past grants with columns for Date, ID, Status, Recipient, Description, and Amount. Each grant row has a "COPY" button to its right. The grants listed are:

* Date	* ID	* Status	* Recipient	* Description	* Amount
08/14/2018	32433	Complete	Center for Hospice & Palliative Care	For Patient Care	5,000.00
12/06/2017	30874	Complete	The Salvation Army of Buffalo, NY	summer music camp, repair of instruments	5,000.00
12/06/2017	30875	Complete	Buffalo Music Foundation	unrestricted use	5,000.00
12/06/2017	30876	Complete	Say Yes to Education	Buffalo State Summer Success Academy	5,000.00
08/20/2013	21575	Complete	The Salvation Army of Buffalo, NY	Donation	15,000.00
08/27/2012	19738	Complete	The Salvation Army of Buffalo, NY	Undesignated use	15,000.00

At the bottom of the page, there's a banner with the text "Let us talk about your legacy." and a "CONTACT US" button.

Grant Recommendations

ClientConnect makes it easy for you to recommend a grant from your fund. You can replicate previous grants you made or search for new organizations to support with a grant.

The first step in recommending a grant is to identify the grantee (the organization that will receive the grant) using one of three methods available on this screen:

- Choose from previous grantee
- Search for other grantees
- Enter grantee information manually

1

Use this form to request a new grant from your fund. Select a grantee from the drop-down menu or search for a new nonprofit. The Community Foundation for Greater Buffalo will receive notification of your request and process your grant. We will notify you once the grant has been completed.

Choose from previous Grantee

Grantees you have given to in the past

or

Search for other Grantees

Name

City

State **SEARCH**

or

Enter Grantee information manually

Name *

Address *

City*

State*

Zipcode *

Phone *

Email

* required information

2

Use **Choose from previous Grantee (1)** to quickly find nonprofits that you have given to in the past using the drop-down lists.

To recommend an interfund grant to another fund held at the Community Foundation for Greater Buffalo, please select the fund from the drop-down list under “Other foundation funds.”

Use **Search for other Grantees (2)** to search for nonprofit organizations that are already in the Community Foundation’s database. If the organization is in the Community Foundation database, you can click **Create Request** to advance to the next page.

If the organization is not listed in the Community Foundation database, you can click the tab for **GuideStar Results** to view nonprofit organizations listed in the national GuideStar database.*

Use **Enter Grantee information manually (3)** if you cannot find the organization after using the search feature. You will need to enter the name of the grantee, an address, a zip code and a phone number to submit the recommendation for approval.

*GuideStar is an information service specializing in reporting on US nonprofit organizations.

Grant Recommendations (continued)

Once you have selected your grantee, you will advance to this page to complete entry of your grant information.

4
5
6
7
8

9

10

New Grant Request

Grantee	Zoological Society of Buffalo
Additional Grantee Contact	<input type="checkbox"/>
Description	<input type="text"/> 0/255 characters
Amount	<input type="text"/>
Anonymous	<input type="checkbox"/>
Recurring	<input type="checkbox"/>
Attachment	<input type="button" value="Choose Files"/> No file chosen (or drag and drop anywhere on the page)
Attachment Description	<input type="text"/>
Additional Notes	<input type="text"/>
REVIEW	

Additional Grantee Contact (4) – If you would like anyone else to be notified of this grant, please select this box and enter their name and contact information so we can send them a copy of the grant letter.

Description (5) – Use this box to enter any special purpose for which the grant is to be used. The default purpose, if none is entered, is for the organization's unrestricted use.

Amount (6) – The minimum grant amount is \$100.

Anonymous (7) – Please select this box if you would like your grant to be made anonymously.

Recurring (8) – Please select this box and enter a recurrence start date, the interval and number of recurring grants you wish to make. If you leave “Number of Recurring” blank, the recurring grant will not have an end date.

Attachment and Attachment Description (9) – If you have any documents you would like to submit with information about your grant recommendation, please upload the files and provide a description. (Note: this is not a required field.)

Additional Notes (10) – Use the “Additional Notes” field to enter any additional information you would like to share with the nonprofit grantee, including memorial or tribute details.

Grant Recommendations (continued)

Once you review and submit the grant recommendation, it will appear in the “Grants” queue in the **Grant Recommendations** tab. Grant recommendations with “request” status can be canceled by clicking the Cancel button.

Grants

Date	Status	Recipient	Description	Amount	*
06/23/2022	Request	Any Town Educational Foundation	Unrestricted Use	250.00	Cancel

Statements

The screenshot shows the ClientConnect interface for "Any Client Fund". At the top, there is a navigation bar with links for HOME, GIFTS, GRANTS, GRANT RECOMMENDATIONS, **STATEMENTS** (which is highlighted with a red box and arrow), and LOGOUT. Below the navigation bar, the title "Statements" is displayed. Underneath, there is a table with two columns: "Description" and "Date Range". The first row shows "Q4 2021 Statement" and "10/01/2021 - 12/31/2021". To the right of the table is a "View" button.

The **Statements** tab lists the quarterly statements for your fund. You will be able to view fund statements immediately after they are created.

To download your statement to be viewed, saved or printed, please click the **View** button next to the statement you would like to see. This will open your statement in a new window.

Forgot Your Password

If you forget your password or would like to reset your password, go to the ClientConnect login page and click **Forgot Password**. You can also reset your password by clicking on the Profile Information icon. Enter your login email address, and an email will be sent to you with instructions on creating a new password.

If you have tried to reset your password and your login attempts fail, or if you cannot remember your username, please contact Nora Kennon by phone at (716) 852-2857, ext. 254, or email at norak@cfgb.org.