



Advisor Portal Guide

THE ADVISOR PORTAL GUIDE

Advisor Portal

As a fund advisor at the Ashland County Community Foundation, you have the ability to access your fund information online through the Advisor Portal. Within the portal, you can easily check your fund balance, view and download fund statements, review historic donation and grant information and add to your fund. The Advisor Portal makes it easy to manage your fund from anywhere at any time.

Information about navigating the portal can be found as follows within this guide:

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Logging In

To access the Advisor Portal, visit ACCF's website at www.ashlandforgood.org and click the 'Advisor Portal' link at top of the homepage.



Use one of the two options below to log in:

OPTION 1: Log in with your email address.

Step 1: Enter your email address and click 'LOGIN'.

The image shows a login form with a light gray background. At the top is the title 'Login'. Below it is an input field labeled 'Email Address' containing the text 'brittaney@ashlandforgood.org'. Under the input field is a dark blue button with the word 'LOGIN' in white capital letters. At the bottom of the form is a link that says 'Login with username/password' in blue text.

Step 2: A PIN will be sent to the email address entered. Enter the PIN, and click 'LOGIN'.

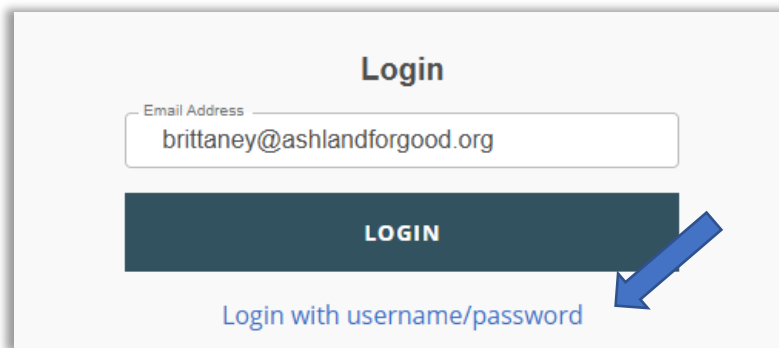
The image shows a verification form with a light gray background. At the top is the title 'Verify your pin'. Below it is a light blue message box with the text: 'An email has been sent to the email provided. It contains a PIN which will be valid for up to 3 minutes. Check your spam or junk folders if you do not receive the email.' Below the message box is an input field labeled 'Pin'. Under the input field is a dark blue button with the word 'LOGIN' in white capital letters. At the bottom of the form is a link that says 'Login with email' in blue text.

Step 3 (OPTIONAL): If you would like to create a username and password to use for future access, the following steps should be followed:

- Once logged in, select 'PROFILE' from the top right menu.
- Select 'SECURITY' from the left menu.
- Select the 'ADD USERNAME/PASSWORD' box.
- Enter your username and password of choice and select the 'SET USERNAME AND PASSWORD' box to save.

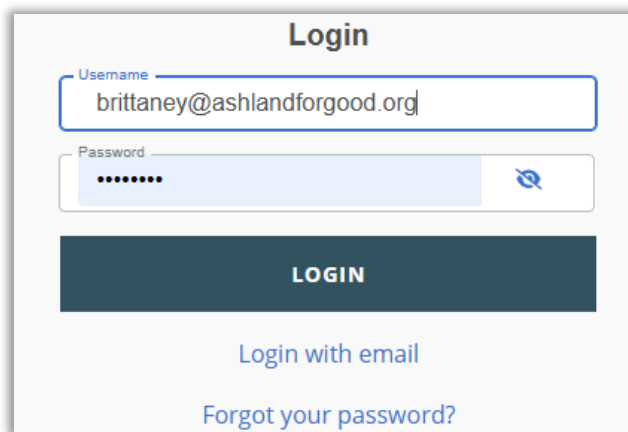
OPTION 2: Log in with a username and password.

Step 1: Select the 'Login with username/password' link on the main page.



The screenshot shows a login interface with the title "Login". Below the title is a text input field labeled "Email Address" containing the email "brittaney@ashlandforgood.org". Below the input field is a dark blue button with the text "LOGIN" in white. Below the button is a blue link that says "Login with username/password". A blue arrow points from the right side of the "LOGIN" button down to the "Login with username/password" link.

Step 2: Enter the username and password associated with your account and select 'LOGIN'.



The screenshot shows a login interface with the title "Login". Below the title are two input fields. The first is labeled "Username" and contains "brittaney@ashlandforgood.org". The second is labeled "Password" and contains masked characters (dots). Below the input fields is a dark blue button with the text "LOGIN" in white. Below the button are two blue links: "Login with email" and "Forgot your password?".

**Haven't created a username a password yet? Follow the instructions in Option 1 above to set up these credentials.*

Forgotten Password

For security reasons, the ACCF team does not have the ability to access your password. If you need help remembering the password, click the 'Forgot your Password?' link on the sign-in page. If you still need assistance, please contact Brittaney Reep at 419-281-4733 or brittaney@ashlandforgood.org and the password can be manually reset so a new one can be created.

Navigating the Portal

All pages within the Advisor Portal offer several navigation options.

The top menu *will be customized* based on the type of information available for you or your organization.



By selecting the individual tabs, additional navigation menus will appear on the left side of the page. These tabs, located at the top of the page, will show additional information summarized as follows:

DONATIONS: Historic donation and pledge information for you or your organization.

GRANTS: Historic information on grants received by you or your organization.

FUND MANGEMENT: Current and historic activity within your fund(s) as well as fund statements.

PROFILE: Contains your personal contact information and ability to change your login preferences.

DONATIONS

The DONATIONS tab allows users to view historic donation information associated with themselves or their organization.

The four left navigation options are available as follows:

- DONATION SUMMARY
- DONATIONS
- PLEDGES
- RECURRING DONATIONS

Users can click the MAKE A DONATION button from any screen within the DONATIONS area to make an online gift to any fund held by ACCF.

Donation Summary: This tab provides a historic giving snapshot for you or the organization you represent.

ASHLAND COUNTY
COMMUNITY FOUNDATION

DONATION SUMMARY

DONATIONS

PLEDGES

RECURRING DONATIONS

DONATIONS

GRANTS

FUND MANAGEMENT

PROFILE

LOGOUT

MAKE A DONATION

Total Donations
408,045.50

Total Donations This Year
0.00

Total Donations Last Year
0.00

Donation Summary (Primary Org and Children)

Fund	2021	2020	2019	2014	2013	2012	2011	2002	1996	Total
				150.00	675.00		74,364.16		205,000.00	280,189.16
						25,000.00				25,000.00
	100.00	325.00						500.00		925.00
						0.00				0.00
						1,931.34				1,931.34
			100,000.00							100,000.00
Total	100.00	325.00	100,000.00	150.00	675.00	26,931.34	74,364.16	500.00	205,000.00	408,045.50

Donations: This tab provides a full detail of historic donations. The search function can be used to search for detailed information about a specific gift. The export button can be used to produce an excel document of the information presented.

My Donations

MAKE A DONATION

Donations

10 entries per page

RESET

EXPORT

Search:

ID	Date	Fund	Recurring	Anonymous	Type	Description	Amount
19040	04/07/2021					Public Security	462,693.49
18181	10/07/2020						500.00
17194	12/27/2019						5,849.06
17178	12/23/2019						494,405.92

Pledges: This tab displays historic pledge information. By selecting the Pledge ID, additional detailed information about each pledge can be viewed, including payment history and remaining balance.

Pledges > Pledge 3013

Promise		Payment Schedule			
ID	3013	Date	Amount	Donation	Donation Date
Type	promise	07/31/2025	8,334.00		PAY
Date	02/27/2023				
Status	open				
Fund	Women's Fund Childcare Initiative				
Anonymous	No				
Description	\$25,000 DAF recommendation to the Women's Fund Childcare Initiative. To be paid \$8,333 in July 2023 and 2024 and \$8,334 in July 2025				
Amount	25,000.00				
Canceled	0.00				
Balance	8,334.00				

Recurring Donations: If you have established a recurring donation, detail of that gift and payments made can be viewed in this area. Edits to the donation can also be made including adjustments to the end date, altering the timing, and cancellation of future payments.

Recurring Donations > Recurring Donation 1231

EDIT DONATIONCANCEL DONATION

Recurring Donation		Donations		
ID	1231	ID	Donation Date	Amount
Closed	No	46541	01/03/2025	3.09
Start Date	07/03/2023	46540	01/03/2025	100.00
Interval	every quarter	44396	10/03/2024	3.09
Next Date	04/03/2025	44395	10/03/2024	100.00
End Date	01/03/2026	42217	07/03/2024	100.00
Amount	103.09	42218	07/03/2024	3.09

GRANTS

The GRANTS tab will populate if you or your organization have been the recipient of a grant from ACCF.

The three left navigation options are available as follows:

- SUMMARY
- GRANTS
- SCHOLARSHIPS

SUMMARY: This tab provides a historic summary of grants received by you or the organization you represent.

Total Distributions

14,750.00

Total Distributions This Year

1,000.00

Total Distributions Last Year

1,000.00

Grant Award Summary						
Fund	2025	2024	2020	2003	2000	Total
ACCF Grantmaking Fund				5,000.00	4,000.00	9,000.00
ACCF Strategic Grantmaking Program			3,750.00			3,750.00
Pass Through Fund		1,000.00				1,000.00
	1,000.00					1,000.00
Total	1,000.00	1,000.00	3,750.00	5,000.00	4,000.00	14,750.00

GRANTS and SCHOLARSHIPS: These tabs provide full details of historic grants or scholarships received by you or the organization. The search function can be used to quickly search for information about these grants. The export button can be used to produce an excel document of the information presented.

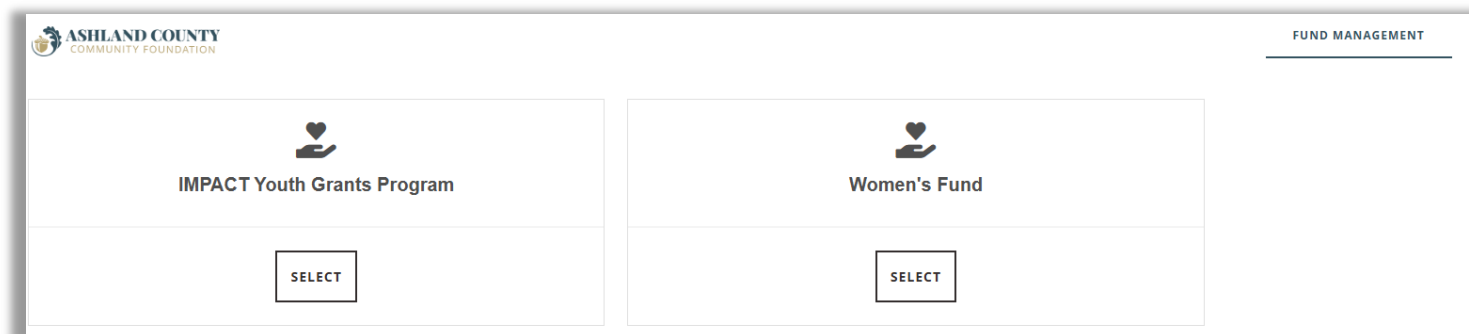
You can click on individual grants or scholarships to view additional information as follows:

Grants > Grant 29386					
Grant		Payments			
ID	29386	Check Date	Check Number	Amount	Reconciled
Date	01/13/2025	01/15/2025	3822	1,000.00	Yes
Status	paid				
Fund					
Description	DAF 2024-2025				
Amount	1,000.00				

FUND MANAGEMENT

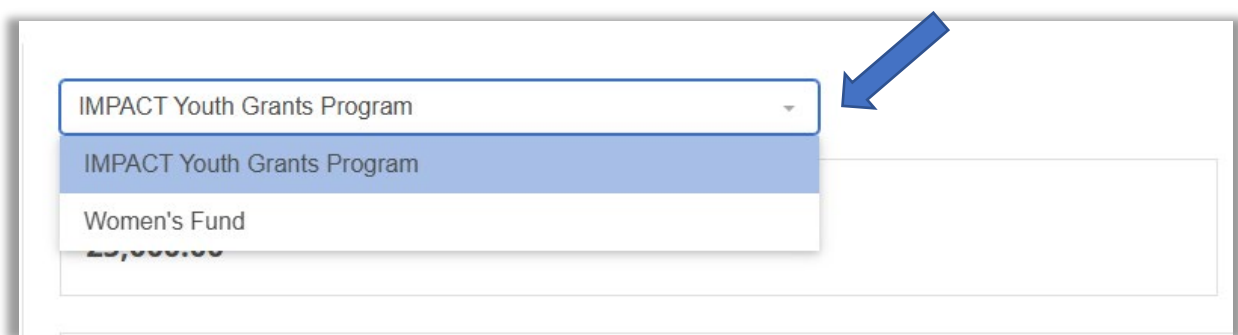
The FUND MANAGEMENT tab will populate if you are a named advisor on one or more funds.

If you are an advisor on more than one fund, the first screen will ask you to select which fund you would like to interact with:



The screenshot shows the 'FUND MANAGEMENT' tab in the top right corner. Below the header, there are two large white boxes. The left box is titled 'IMPACT Youth Grants Program' and features a heart icon above the title and a 'SELECT' button below. The right box is titled 'Women's Fund' and also features a heart icon above the title and a 'SELECT' button below.

If you are the advisor of more than one fund, you may toggle to a different fund at anytime using the drop down menu that appears at the top of the page.



The screenshot shows a dropdown menu with three options: 'IMPACT Youth Grants Program', 'IMPACT Youth Grants Program', and 'Women's Fund'. A blue arrow points to the dropdown menu, indicating it is the toggle for switching funds.

After selecting a fund, the following left menu options will become available:

- FUND SUMMARY
- DONATIONS
- PLEDGES
- GRANTS
- GRANT CATALOG (donor advised fund holders only)
- GRANT RECOMMENDATION (donor advised fund holders only)
- STATEMENTS & DOCUMENTS
- DONATE

FUND SUMMARY: This page displays the funds current balance, the spendable or available cash balance of the fund, recent contributions and recent grants.

DONATIONS: This tab provides a full detail of donations made to the fund. The individual gift ID can be selected for any donation to review full details of the gift. The contributor can also be selected to view a full giving history of that donor to the fund.

The export button can be used to produce an Excel document of the information presented.

Women's Fund

Donations

10 entries per page

RESETEXPORT

Search:

ID	Date	Contributor	Type	Description	Amount
46573	12/30/2024		Internal Grant	Mother's Day Initiative	250.00
46049	12/18/2024		Check		50.00
45620	11/25/2024		Check		100.00

PLEDGES: This tab displays historic pledge information to the selected fund. By selecting the Pledge ID, additional detailed information about each pledge can be viewed, including payment history and remaining balance.

GRANTS: This tab provides detailed information on grants paid from the fund. Several new tabs appear at the top of this area:

- GRANT SUMMARY – Details total number and amount of grants issued to each grantee.
- GRANT HISTORY – Details all grants made, organized by grant date. This information can be exported to Excel.
- RECURRING GRANTS – If any recurring grants exist within the fund, a detail of these grants will be shown here.

GRANT CATALOG: This tab will appear only for those who are fund advisors for one or more donor advised funds. The Grant Catalog allows ACCF to share current grant requests from local nonprofits with you and give you the opportunity to fund these requests directly from your DAF.

A separate guide for using the Grant Catalog has been created and can be viewed [HERE](#).

GRANT RECOMMENDATION: This tab will appear only for those who are fund advisors for one or more donor advised funds. This area allows you to make online grant recommendations to the nonprofits you care most about.

A separate guide for using the Grant Recommendation feature has been created and can be viewed [HERE](#).

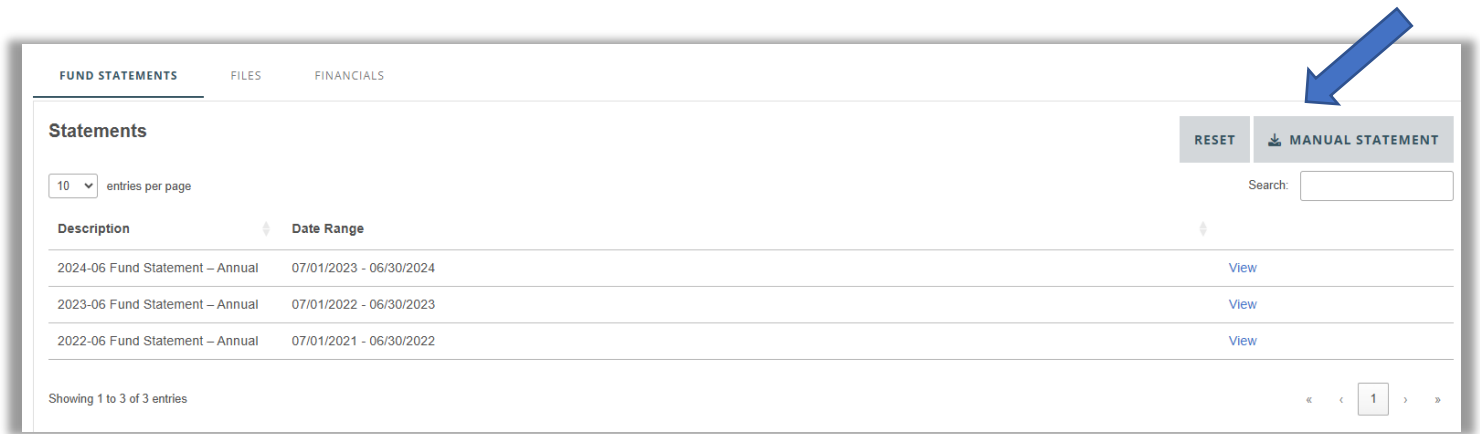
STATEMENTS & DOCUMENTS: This tab includes historic fund statements, displays any files ACCF staff have shared, as well as allows you to run manual statements for the fund.

Several new tabs appear at the top within this area:

- **FUND STATEMENTS**

This area shows all the statements generated by ACCF staff for your fund. By selecting 'View' on the right side, a new tab should open in your web browser with a PDF of the statement. This can be saved, downloaded or printed as you wish.

You can also generate your own fund statements at any time by selecting the MANUAL STATEMENT button in the top right corner.



On the next page, indicate the statement type (monthly, quarterly, yearly, custom), enter the start date of the period, and select 'CREATE'.

The screenshot shows the 'Manual Fund Statement' form. It has a 'Statement Type' section with radio buttons for 'Monthly' (selected), 'Quarterly', 'Yearly', and 'Custom Date Range'. Below this is a 'Start Date' field with a calendar icon, showing '01/01/2025'. A blue arrow points to the 'CREATE' button at the bottom left.

A new tab will appear in your internet browser with a PDF of the statement. This can be saved, downloaded or printed as you wish.

- FILES

If the ACCF Staff has uploaded any files to your fund, they will appear here. The file name can be clicked on, and a PDF should open in a new tab of your internet browser. This document can then be saved, downloaded, or printed as you wish.

DONATE: This tab takes you to the ACCF online donation page. Your funds will be listed but all ACCF funds can be accessed through the 'Search Funds' box at the top of the page.

Donate To A Fund

To donate to an existing fund, type the fund name in the search box below, or choose from one of our featured funds. For a list of all our funds, click the "show additional funds" link next to the search box. If you have questions or would like to speak with staff that can help guide your donation, please call ACCF at 419-281-4733 or email accf@ashlandforgood.org.

Search Funds

Women

Ashland County Women of Achievement

Ashland County Women of Achievement's 'Young Woman to Watch' Award Ag

Julia A. Wright Fund, for the benefit of Women in Ashland County

Women's Fund

Women's Fund Childcare Initiative

IMPACT Youth Grants Program

FOUNDATION
Affiliate of Ashland County Community Foundation



Community Grants

Ashland City Schools Foundation Non-Endowed Operating Fund

Ashland City Schools Foundation exists to generate and endow funds to promote excellence in academics, the arts and athletics, and to provide educational opportunities for ...

Community Grants Fund

Donations to this fund support our largest annual grant program—the Community Grants program. Nonprofit agencies can apply for Community Grants to fund programs and...

DONATE

DONATE

DONATE

FREQUENTLY ASKED QUESTIONS

I've lost my password. What should I do?

For security reasons, the ACCF team does not have the ability to access your password. If you need help remembering the password, click the 'Forgot your password?' link on the Advisor Portal login page. If you still need assistance, please contact Brittany Reep at 419-281-4733 or brittaney@ashlandforgood.org and she can manually reset your password so a new one can be created.

How often are fund statements posted?

Fund statements are posted by the 15th day following the end of the month, quarter or year (dependent on the schedule your fund is on). You will be notified via e-mail when a new fund statement has been added and is ready to be viewed in the Advisor Portal. A manual fund statement can be generated at any time by selecting Fund Management from the top navigation menu, Statements & Documents from the left menu, and then hitting the 'Manual Statement' button on the right side of the page.

Who do I contact if I'm having issues with the Advisor Portal?

If you have any questions or are experiencing issues with the Advisor Portal, please contact Brittany Reep at 419-281-4733 or brittaney@ashlandforgood.org.