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**How to Move Between Funds**

**STEP 1**
You can move between funds on the "Home," "Fund Summary" and "Recommend a Grant" pages. See examples for each page below.

**STEP 2**
On the "Home" page, click "Select Fund" on the left-hand side, and select the fund you would like to view.
STEP 3
On the "Fund Summary" page, click your fund's name at the top of the page, and select the fund you would like to view.

STEP 4
On the "Recommend a Grant" page, select the dropdown located on the left-hand side, and pick the fund you would like to view.
How to View Your Grant History

**STEP 1**

Click "Grant History."

**STEP 2**

Your grant history is a summary of all grants made from all of your funds. You can choose to view the history for as many of the funds as you want. In the fund name field, choose the one(s) you would like to view. Click the box to view all of your funds and click the "x" to remove them.
STEP 3
Click "Apply Filter."

STEP 4
To view grants made to a specific recipient, click the dropdown list under "Grant Recipient" and select one.
STEP 5
Click "Apply Filter."

STEP 6
To view grants made within a specific timeframe, select the start and end dates.
STEP 7
Click "Apply Filter."

STEP 8
If you would like to grant to the same recipient, select "Repeat Grant" in the right-hand column. You will have the option of granting the same amount or changing the amount.
How to View Your Gift History

STEP 1

Click "Gift History."

STEP 2

This page shows all of the gifts made to your fund(s), including donors and their addresses.

If someone makes a gift anonymously, their information will not appear alongside the gift.
STEP 3

"Gift History" shows gifts made to all of the funds that you are connected with. To filter by fund, click the dropdown list under "Fund Name," and chose from the list provided.

STEP 4

Click "Apply Filter."
STEP 5
You can view gifts to multiple funds by selecting them in the "Fund Name" dropdown. The "Formal Fund Name" column in the table below indicates which fund the gift was made to.

<table>
<thead>
<tr>
<th>Formal Acknowledgement</th>
<th>Formal Fund Name</th>
<th>Gift Type</th>
<th>In Memory or Honor of</th>
<th>Posting Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jeremy Tree</td>
<td>Community Needs Endowment Fund</td>
<td>GRP</td>
<td></td>
<td>6/5/2023</td>
</tr>
<tr>
<td>Monica Moser and Steven Train</td>
<td>Community Needs Endowment Fund</td>
<td>GRP</td>
<td></td>
<td>6/22/2023</td>
</tr>
<tr>
<td>Willow Jeffreys</td>
<td>Community Needs Endowment Fund</td>
<td>GRP</td>
<td></td>
<td>6/14/2023</td>
</tr>
<tr>
<td>Kathryn Konnawaros</td>
<td>Community Needs Endowment Fund</td>
<td>GRP</td>
<td></td>
<td>6/14/2023</td>
</tr>
<tr>
<td>Nonprofit Network</td>
<td>Community Needs Endowment Fund</td>
<td>GRP</td>
<td></td>
<td>6/10/2023</td>
</tr>
<tr>
<td>Charles and Pamela Schultz</td>
<td>Community Needs Endowment Fund</td>
<td>GRP</td>
<td></td>
<td>6/5/2023</td>
</tr>
<tr>
<td>Jeremy Tree</td>
<td>Community Needs Endowment Fund</td>
<td>GRP</td>
<td></td>
<td>6/5/2023</td>
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</table>

STEP 6
Click "Apply Filter."
STEP 7
"Gift History's" default view shows gifts made throughout the current year. To filter by date and view more gifts, type the start and end dates or click the calendar icon.

STEP 8
Click "Apply Filter."
How to View Your Fund Statement

STEP 1
Click "Fund Statement."

STEP 2
Your fund statement preview will show year to date by default. To change the date range, type the start and end dates. If you would like to see your fund's year-to-date details, select January 1 for the start date.
STEP 3
Click "Apply Date Filter."

STEP 4
To print your fund statement according to the date range chosen, click the printer icon in the top right corner of the PDF preview.
STEP 5

To download a PDF according to the date range chosen, click the downward-facing arrow in the top right corner of the PDF preview.
How to Recommend A Grant

STEP 1

Click "Recommend a Grant."

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STEP 2

Ensure the fund listed on the left is the one you would like to recommend a grant from. You have the option to grant to a fund or an organization. Choose one from the dropdown.
STEP 3
Select the dropdown and search for the organization or fund you would like to grant to.

STEP 4
If you don't see the organization or fund after typing it in, click "Create new organization/fund."
STEP 5

Fill in the fields to the best of your knowledge.

We will verify all information submitted.

STEP 6

Type the amount you would like to grant to the organization or fund.

The minimum amount is $250.
STEP 7

If you would like your grant issued on a specific date, click "Issue this grant on the following specific date" under "Timing of grant."

Please note that we require up to one week for processing grant recommendations.

STEP 8

Select the date you would like the grant issued.
STEP 9
If you would like your grant issued as soon as possible, click "Issue this grant upon Foundation approval" under "Timing of grant."
Please note that we require up to one week for processing grant recommendations.

STEP 10
Select the grant type.
You can choose between general operating/unrestricted and restricted.
**STEP 11**

If you select "restricted," please provide a short description of the grant's purpose.

<table>
<thead>
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</tr>
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<tbody>
<tr>
<td>Organization</td>
</tr>
</tbody>
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**Organization Name**

Jackson Community Foundation

**Amount**

$ 250

Distributions must be a minimum of $250.00.

**Timing of grant**

Issue this grant upon Foundation Approval

**Grant Type**

Restricted

**Purpose of grant**

(e.g. general support, capital campaign, specific program, endowment, etc.)

<table>
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<th>Please issue this grant anonymously</th>
</tr>
</thead>
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<tr>
<th>Recommendation(s) suggested above are advisory only and in accordance with IRS regulations:</th>
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<td>1. Do not represent satisfaction or discharge of any pledge or previous commitment.</td>
</tr>
<tr>
<td>2. Will not be used for tickets to an event, for membership fees or any activity that serves to benefit the fund holder or fund holder’s family and that</td>
</tr>
<tr>
<td>3. No goods or services were received by the donor or fund holder in exchange for the payment to the organization.</td>
</tr>
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</table>

**STEP 12**

You can chose to issue your grant anonymously. Click the check box if you chose to do so.

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STEP 13

Before submitting your request, you must confirm that you are not making this grant for personal gain. To do so, check the box next to "Recommendation(s) suggested".

STEP 14

Click "Submit."

STEP 15

Once your recommendation has been submitted, you will be redirected to a "thank you" page. Here, you can choose to recommend another grant or navigate to a different page.

STEP 16

You now have the option to recommend another grant or navigate to a different page.