

FundConnect, the Jewish Federation of Cleveland's Donor Advised Fund (DAF) Portal

Quick Start Guide

The screenshot shows the FundConnect website interface. At the top left is the logo for FundConnect, Jewish Federation of Cleveland. Below the logo is a navigation bar with links for Home, Log Out, Profile, and Contact Us. The main content area features a large blue banner with the text "STAY CONNECTED" and "Unique online programming for Jewish Cleveland designed to connect, inform, and entertain." Below the banner is a button that says "Learn about events and resources". On the left side, there is a "MAIN MENU" with links for Home, Statements, Recommend A Grant, Grant History, My Charities, Forms and Documents, and Recurring & Future Grants. Below the main menu is a "YOUR FUNDS" section showing a fund named "Nancy Kaleal Donor Adv..." with a balance of "\$180.00". Below that is a "SEARCH FOR A GRANTEE" section with a search box and a "Search" button. At the bottom left, there is a "Links" section with the Jewish Federation of Cleveland logo and a link to the "Quick Start Guide". On the right side, there are two sections: "RECENT GRANTEES" which says "You have not made any grants yet" and "RECENT ACTIVITY" which lists "Grants in Process", "Grants Paid", "Rejected Grants", and "Contributions Made". Three red callout boxes are overlaid on the screenshot: one pointing to the Main Menu, one pointing to the Your Funds section, and one pointing to the Profile link in the navigation bar.

Most actions can be executed from the main menu, such as recommending a grant, viewing statements, and grant history.

All of your funds will appear in this window. Hover over a fund and a pop up will appear to give you quick access to that fund's activity or statements.

Update your contact info, change your password, and select your charitable interests from the profile menu.

Recommend A Grant

FUNDCONNECT Jewish Federation of Cleveland

Welcome JCF Test Donor [Home](#) | [Log Out](#) | [Profile](#) | [Contact Us](#)

MAIN MENU

- Home
- Statements
- Recommend A Grant
- Grant History
- My Charities
- Forms and Documents
- Recurring & Future Grants

» Search for a Grantee » Choose a Grantee » Enter Grant Details » Review and Submit Grant

Use the search screen below to find a grantee or use your [My Charities](#) listing if you have added the grantee to your list of favorite grantees.

[Search](#)

[Advanced Search](#)

Can't Find Your Grantee?

If you want to make a grant to a new organization and cannot find it in our database, [click here to enter your grantee](#).

Search for organizations already approved and in our database here.

If you would like to make a grant recommendation to an organization that is not in our database, a request for a new organization to be added (and a related grant to that organization) can be added here.

FUNDCONNECT Jewish Federation of Cleveland

Welcome JCF Test Donor [Home](#) | [Log Out](#) | [Profile](#) | [Contact Us](#)

MAIN MENU

- Home
- Statements
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» Search for a Grantee » Choose a Grantee » Enter Grant Details » Review and Submit Grant

Records per page: 10|20|30|40|50 Your search returned more than a 1000 results.

JEWISH FEDERATION OF CLEVELAND

25701 SCIENCE PARK DR
CLEVELAND, OH 44122-7302

Click [here](#) to view charity details...

EIN: 34-0714445
[Donate Now](#)
[Add to My Charities](#)
[GuideStar Charity Check™](#)

From the search results, you can select to create the grant recommendation with [Donate Now](#). You can also add this organization to your [My Charities](#) list or get additional information about the organization's charitable status through [GuideStar](#).

» Search for a Grantee » Choose a Grantee » **Enter Grant Details** » Review and Submit Grant

Grantee Information

JEWISH FEDERATION OF CLEVELAND

(Business) Mandel Building 25701 Science Park Drive, Cleveland, OH 44122 (Primary) ▼

Grant Information

Fund **5.09953 - Nancy Kaleal Donor Advised Fund**

Current Balance: (\$180.00)

Available for Disbursement: (\$180.00)

Amount \$ (The minimum grant is \$100)

If you are an advisor for multiple funds, a drop down will appear here to select the fund that you would like the recommendation to be disbursed from.

Grant Purpose (Optional)

You may use this space to enter a purpose for your grant. **This text will appear** on the grant check letter that will be received by the grantee.

Example: For general operating support

Enter the amount of the grant here. Above the box displays the current balance of your fund and the amount available for disbursement.

Grant Description / Notes (Optional)

You may use this space to enter notes to describe the grant or to provide special instructions relating to the grant. **This text will appear** on the grant check letter.

Donor Recognition

Make this grant anonymous:

Please provide my details to the grant recipient using the following designation: (Choose Designation) ▼

Make this my default designation:

Details provided to Grantee: Show Name and Address ▼

Grant Timing

This is a **one-time** grant to be processed **immediately**.

This is a **one-time** grant to be issued on a **future** date.

This is a **recurring** grant to be issued on the **specified** frequency.

Select the appropriate toggle if you would like the grant to be established as a recurring grant or be paid at a future point in time.

Click submit when you're done.