THE CHICAGO COMMUNITY TRUST®

DONOR PORTAL USER GUIDE

December 2025

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 on-demand access to manage their funds. Donors can use the Portal to:

- View account balances
- Make grant recommendations
- Set up recurring grants
- View giving history
- Access Fund Statements
- 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:

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.
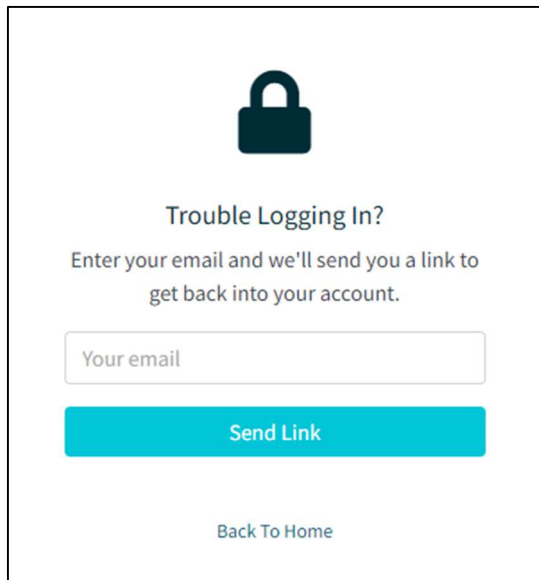
First Time Users

If you are a first-time user, our admin team must establish your access before you receive instructions to create your password. For questions or to enable your account, please contact your Philanthropic Advisor or DonorServices@cct.org.

STEP 1. Our admin team will send you a system-generated email from DonorServices@ct.org 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 or DonorServices@cct.org.

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

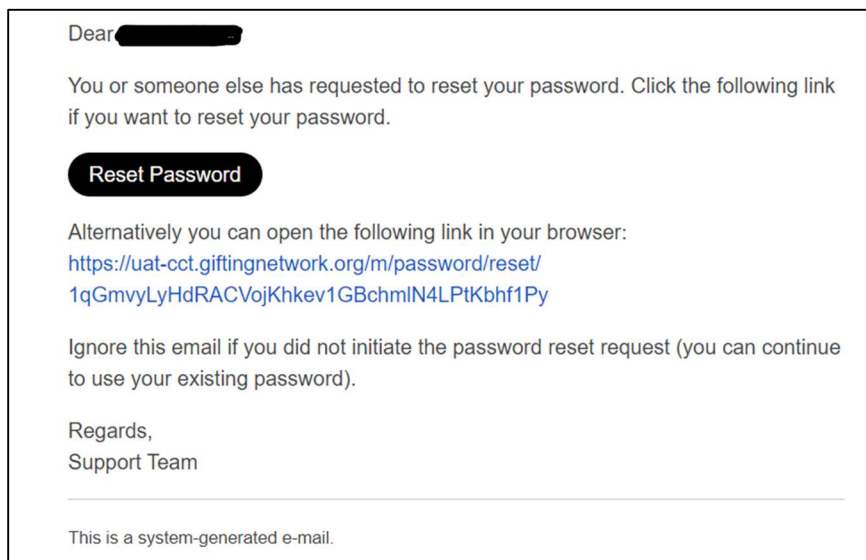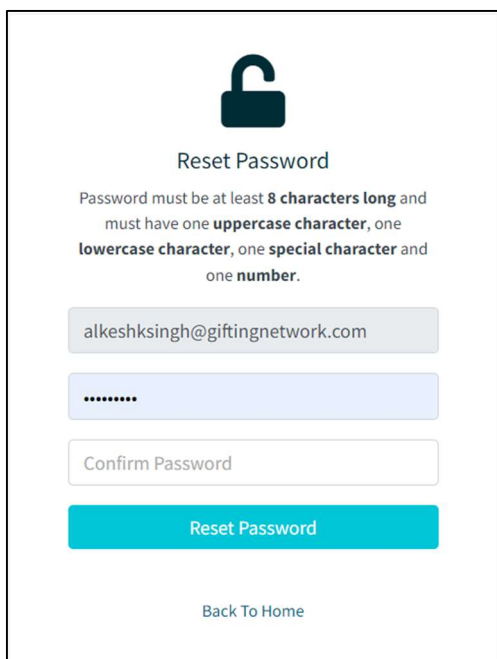**STEP 3:** Within the field provided, enter your email address and click on "Submit/Send Link" button.

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 or DonorServices@cct.org.

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."

Reset Password

Password must be at least **8 characters long** and must have one **uppercase character**, one **lowercase character**, one **special character** and one **number**.

alkeshksingh@giftingnetwork.com

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Confirm Password

Reset Password

Back To Home

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

Powered by GiftingNetwork

THE CHICAGO COMMUNITY TRUST®

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.

If you need to update your phone number to use for two-factor authentication, please contact your philanthropic advisor. A mobile number is required to use for two-factor authentication.

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

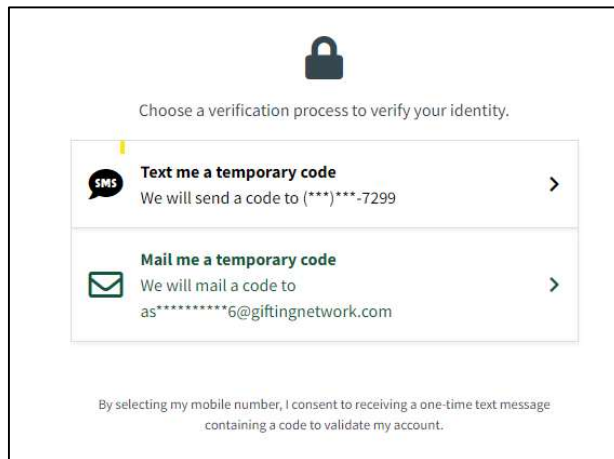*Use the latest version of Chrome for the best donor portal experience. Download Chrome here.*
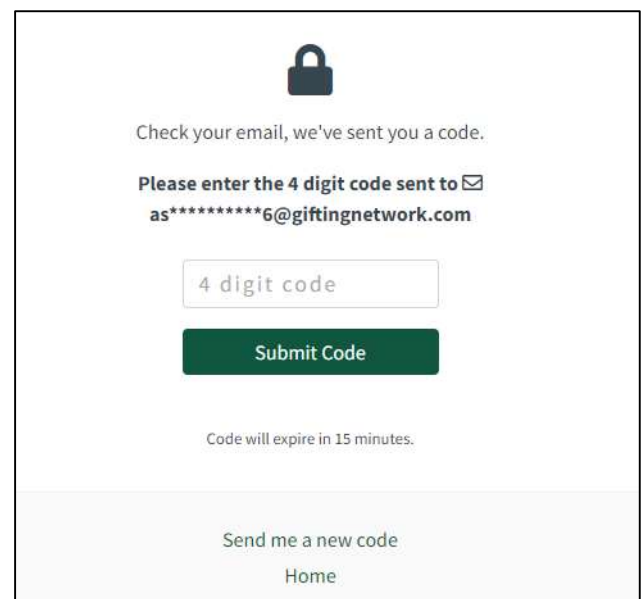
Login

Username

Password

Log In

Forgot Password?

Download:
DAF Application Form
Donor Advised Fund FAQ's
Donor Portal User Guide

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. You may need to ask your Philanthropic Advisor or email DonorServices@cct.org to update your mobile phone number to receive the 4-digit code via text message. This code cannot be retrieved through a landline.

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.
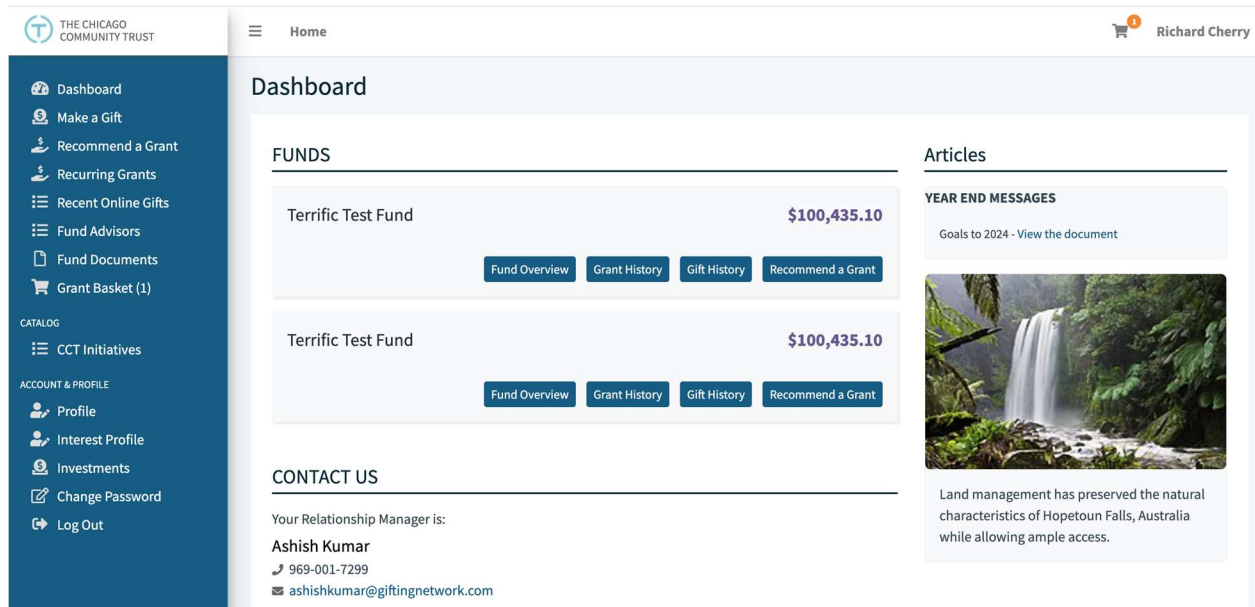
From the navigation tool bar on the left, you will be able to manage your personal information, make grant recommendations, and more by clicking the associated menu option. The navigation bar is visible on every page of the Donor Portal.
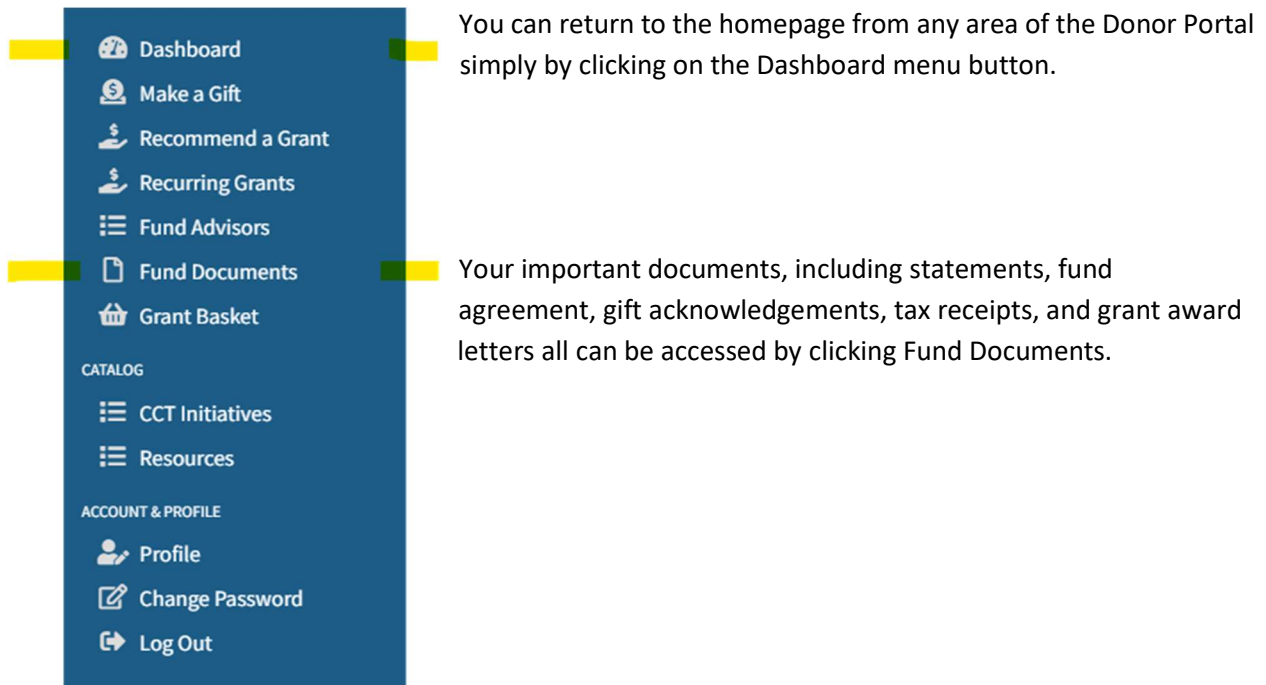
You can return to the homepage from any area of the Donor Portal simply by clicking on the Dashboard menu button.

Your important documents, including statements, fund agreement, gift acknowledgements, tax receipts, and grant award letters all can be accessed by clicking Fund Documents.

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 to complete the recommendation form and submit for payment.

STEP 1: From the left navigation menu or the main Dashboard page, click **Recommend a Grant**.
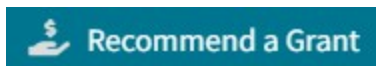
STEP 2: A form will appear to provide the grant details.

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 Grant Basket.**

Please note: only advisors with grantmaking privileges will be able to add grant recommendations to the Portal grant basket to be submitted.

Recommend a Grant

Please provide the grant information in the form below. Fields marked with an * are required.

*Fund Name   Test Friday's Terrific Test Fund
Spendable balance: $65,565.00

*Organization Name

[Select from the past grantees](#)

If you would like to add an alternate address, please enter the address in the special instructions.

Enter the recipient organization contact person information below, leave blank if you do not know the primary contact for the organization.

Contact Person   **Contact Title**

Contact Email   contact@example.com   **Contact Phone**   333-333-4444

*Amount ($)   250 or more

☐ Make this a Fund Closing Grant

*Granting Frequency   One Time

*Requested Payout Date   11-18-2025

Grant Purpose   Special grant purpose

Instructions   Instructions to our staff (this does not appear on the award letter)

Grant Dedication   None

Award Letter Options

You will be able to review your selections in the Grant Basket and on the submission confirmation screen.

Donor Identity   ☐ I wish to remain completely anonymous

The Fund Name will automatically be shared with the grantee unless "I wish to remain completely anonymous" is selected.

☐ **Share Fund name with grantee, but do not allow grantee to recognize publicly**

☐ **Share advisor name(s) with grantee**

[Add to Grant Basket]   [Cancel]

STEP 4: On the Grant Basket page, accessed through the grant recommendation process or by clicking the basket icon in the upper right corner, you may review information for the grant and either submit your grants for payment, 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.**

Grant Basket (2)

Newly created grant recommendations will stay in the grant basket for up to 48 hours. Grant recommendations not submitted from the grant basket within 48 hours will be deleted from grant basket. We highly recommend submitting the grant recommendations immediately after adding them to the grant basket.

To submit your grant recommendations, scroll down and select 'Proceed to Checkout' once you are done reviewing your grant recommendation(s).

Make Another Grant

$255.00
Fund Test Friday's Terrific Test Fund
Granting Frequency One Time
Expected Payout Date 11-18-2025

The Chicago Community Trust/Community Desk Chicago - Admin
33 S State Street, Suite 750,
Chicago, IL 80603

⊙ DETAILS   ☑ EDIT   🗑 REMOVE

$257.00
Fund Test Friday's Terrific Test Fund
Granting Frequency One Time
Expected Payout Date 11-18-2025

Nevada Discovery Museum
400 S. Center Street,
Reno, NV 89501

⊙ DETAILS   ☑ EDIT   🗑 REMOVE

Total Recommended: $512.00   Proceed to Checkout

Note: The total recommended amount does not include the amount of fund closing grants as fees are deducted from the granted amount. To find out the granted amount for your fund closing grant, please contact your Philanthropic Advisor.

If you choose not to process the grants at this time, they will stay in your grant basket for 48 hours. You can view unprocessed grant recommendation(s) any time by clicking the Grant Basket menu option, or the basket icon in the upper right-hand corner of the Portal.

Please note: you will only be able to see the grant recommendations <u>you</u> have added to your grant basket. You will not be able to see grant recommendations added by other grant advisors on the account until they have been submitted. Grant recommendations remaining unsubmitted in your Donor Portal grant basket for more than 48 hours will be automatically canceled. If you have questions or need assistance, please contact your Philanthropic Advisor or DonorServices@cct.org.