Checklist for Portal Setup

Considerations		
Action	**Resource / Information**	**Priority**
☐ Determine which designations will have Portal access (profile, donor, grantee, student, vendor, customer, nonprofit, fund advisor) • It is easier to be restrictive at the beginning and release additional functionality/expand audiences at a later date.	Fund Portal Access Guide	High
☐ Establish communications and roll-out plan, both internally and externally; develop fund advisor educational materials.	Fund Portal Access Guide	High
☐ Define the timeline of transitioning portals. What does the blackout period look like if you are implementing CommunitySuite? Consider what processing grant recommendations, timing for available fund statements, etc. may look like for your team.		High
☐ Determine when and how you will redirect from your website to the Portal from your website.		High
☐ Determine site styling.	If you are implementing CommunitySuite and working with a web designer, it is common to have copy of coding saved outside of the system to avoid accidental data loss at system switch.	High
☐ Determine if you are going to beta test.	Receiving feedback from board members or fund advisors prior to portal launch can highlight areas that need further clarification in an FAQ.	High
☐ If implementing CommunitySuite, identify your fund advisors via profile fund category and determine permissions each fund category will have.	Profile Fund Categories will be used to bulk add the fund advisor designation, providing access to the Portal and receive a fund statement. Ensure accuracy with profiles being linked to the correct fund (consideration of deceased and organizational profiles, if showing closed funds). Fund Portal Access Guide	High

☐ Determine Portal access that involve organizations.	Organizational profile set up and who needs to access the portal (one staff vs multiple staff) can vary.	High
☐ Determine plan for profiles that do not have a primary email address.	Can bulk set logins to be primary email or another format such as first initial last name. Important to note that the logins are case sensitive.	Medium
☐ Document set up and maintenance of fund advisors.	This will guide staff to set the profile appropriately if there are changes to fund advisors and when creation of new Funds/advisors is necessary.	Medium
☐ Decide procedure on email management.	Lean into Undeliverable Emails from CommunitySuite Default Report and MailChimp.	Medium
☐ Anticipate higher volume of advisor inquiries when portal is launched. Plan communications and staff calendars accordingly.	Consideration: Increase Fund Advisor Setting: Max Failed Attempts to 10 when first launching Portal.	Medium
☐ Identify profiles you do not want showing in Grant Request search results as 'Inactive' from the grantee record.	Organizational profiles with grantee designations are visible on Grant Request.	Medium
☐ Determine process for managing abandoned fund advisor carts.		Low
☐ Determine use of affiliate functionality and how it appears on the Portal.		Low
Test It		
Action	**Resource / Information**	**Priority**
☐ Review Profile Fund Categories. Test linking profiles and any profile fund category clean up.		High
☐ Review Profile Details (i.e. primary phone, addresses and email addresses, interest type, contact preferences) and identify clean up that may be needed.	Profiles can have the ability to edit their address, phone number, update contact preferences, and interest areas. Reviewing this data will give you an idea of volume and what bulk edits may need to occur as this can impact your communications.	High
☐ If implementing CommunitySuite, determine and test order of operations with setting up fund advisor permissions.		High
☐ Review primary emails of the profiles that are receiving portal access and clean up as necessary.	Each profile that has the same primary email address will appear after login.	High

	If profile has inactive email, that profile will not appear on the Portal. If profile is inactive but has an active email, it can still access the Portal.	
☐ Set Settings for the following areas: Portal Options, Styles, Funds, Scholarships, and Fund Advisors.	Settings you choose to enable may require additional setup and/or clean up. For example, bulk update Steward Mailing Label, Title, Phone, and Email if enabling Show Steward Info for a fund advisor.	High
☐ Test profile edits, voucher request and grant request, and processing workflow from Portal.		Medium
☐ Test fund advisor experience, sending login email, and login/access process in Sandbox.		Medium
☐ Test supporting fund advisors.	Get comfortable with password reset and unlocking advisors.	Medium
☐ Test and determine workflow, possible reports, and/or communications needed of recurring donation, pledge/promise payments, cancellations, etc.		Medium
Actions		
Action	**Resource / Information**	**Priority**
☐ Review Fund Portal Access Guide and establish communications and roll-out plan, both internally and externally; develop fund advisor educational materials.	Communicate the new Portal in advance; invitation email to log into the Portal will come from noreply@fcsuite.com. Share a portal launch date range, not a specific date to plan ahead for possible delays	High
☐ Review settings for the following: Portal Options, Styles, Funds, Scholarships, and Fund Advisors.	Settings you choose to enable may require additional set up and/or clean up. For example, bulk update Steward Mailing Label, Title, Phone and email if enabling Show Steward Info for a fund advisor.	High
☐ Customize content areas for the following: Portal Options, Styles, Fund Advisor, Grant, Donation, and Funds.	Emails From CommunitySuite	High
☐ Set profile permissions for Manage Login/Login As.	**Manage Login Info/Login As**: Permits the user to log in to the Portal as a fund advisor or other profile designation. This permission is helpful to support individuals navigating the Portal.	High

	Login As Another User: Permits the user to manage login information such as setting or updating passwords and allows the user to log in as another user. Must have Manage Login Info/Login As permission also. A consideration for users who are also fund advisors and managing security.	
☐ Publish final version of styled Portal in CommunitySuite (Do not yet publish the URL on your website.)	You may require a web developer for customizations.	High
☐ Set the users who will receive notifications for edits and requests (found in Profile Options > Portal Notifications)	Users=staff who will receive these communications.	Medium
Post System Switch Actions Only		
Action	**Resource / Information**	**Priority**
☐ Assign Fund Advisors in bulk using Profile Fund Categories.	When creating advisors, the system defaults to giving access to all tabs. Recommendation is to bulk create advisors with the most restrictive access first.	High
☐ Set Tab Permissions. If being restrictive with access, Tab Permissions will be set in batches after creating fund advisor.	Review Tabs in Support Hub.	High
☐ Set statement type preferences.	Online, paper, and email will all be available online.	High
☐ Set grant and donation notification preferences.	Reminder: When turned on, the grant and donation notifications are triggered by the posting or un-posting from a fund.	High
☐ Set profiles you do not want showing in Grant Request search results as 'Inactive' from the grantee record.		High
☐ Set up Affiliates/Supporting Orgs (groups of funds) that will have own affiliate portal or group view within the fund advisor portal.		Medium
☐ Review primary emails of profiles and clean up duplicates.	Clean up of duplicate profiles may be postponed if there is a document migration apart of your implementation.	Medium
☐ If showing stewards, set photo, mailing label, email, phone, and title.		Low

☐ Add Portal URL link to your website.	URL is located left-side menu of Home > System URLs.	Low
☐ Create campaign category for Portal communications/mailing list.	Lean into reporting to deliver communications via campaign.	Low
☐ Add fund advisors to a campaign. Use this list to send the portal URL when ready to launch Portal. *Note: This is the last step.	Do not use "Send Login Emails" from within Fund Advisor Area. This directs them to a legacy fund advisor URL.	Low