



## Getting Started

As a Fund Advisor or an authorized representative to review financial information for one or more charitable accounts, you have an online portal where you can access information about the funds you manage. The Community Foundation will send you a login name and a link to access the portal via email. Select the link and you will be prompted to create your own password to the donor portal site. Once your password is created go to the Login page, enter your credentials and log in.

## Accessing and Viewing the Site

Once you have successfully completed the registration process, visit <https://cfmv.fcsuite.com/erp/fundmanager> to access the system at any time.

If you serve as an advisor for multiple funds, you will see the “Choose Fund” menu when you sign in to the portal. Choose the particular account with which you wish to interact.

- If you are listed as an advisor for only one Fund, you will go directly to the Home page for that Fund.

Once you have logged in you can select the tabs at the top of the page to review the different areas available to you.

- The “Home” tab shows a variety of information about the fund, including the Date Created, Current Balance, Spendable Balance (if applicable) and more. This area also lists all fund advisors, shows charts of top contributors as well as top grantees.
- The “Choose Fund” tab is visible if there are other funds to select and view.
- The “Contributions” tab shows all contributions or donations to the fund.
  - ⇒ Clicking on a Contributor’s name will bring up their contact information and a history of contributions.
- The “Grants” tab will show the history of Grants made from the fund.
- You may be able to make a distribution request from the fund depending on the type of fund or your level of authorization. If available, you will see a “Distribution Request” tab.
  - ⇒ This tab will show a list of distributions requested to be paid out on the right with the current status.
  - ⇒ Requests still in the “request” status can be canceled from this screen.
  - ⇒ The left side of the screen is where requests are created.
  - ⇒ Previous grantees and other foundation funds to support can be selected from drop down

lists.

- \* In the middle of the left side of your screen is 'Search for other Grantees'. This is helpful because you can type in some keywords and click the "Search" button. The system will search *GuideStar* for organizations containing the keywords. *GuideStar* is an information service specializing in reporting on U.S. nonprofit companies. The more keywords used, the better the search results will be.
- \* The bottom section is where a new Nonprofit or Grantee can be entered manually. You will need to enter the name of the new Grantee, an address, zip code and a phone number to move the grant request to the Community Foundation for approval.
- \* Once the grantee information has been added, you can complete the request by clicking the "submit" button at the bottom of the page to provide details of the distribution and submit the request to the Foundation.

⇒ *Please note, if you would like to respond to a competitive grant application that we have shared from our quarterly grant cycles, please contact Casey Krell directly at [ckrell@cfmv.org](mailto:ckrell@cfmv.org) rather than submitting a distribution request on the portal.*

- The "Statements" tab will show fund statements if they are setup for the fund. Fund Advisors will be able to view newly created fund statements immediately after they are created as well as past fund statements.
  - ⇒ Printing Statements - The system will generate a PDF in a new window in your web browser that you may save or print.
- Funds with a fiscal sponsorship can view project-related expense payments under the "Vouchers" tab.
- Remember to use the "Logout" tab to close your portal. You will be automatically logged out each night even if you do not logout.

### Locked Out of your Donor Portal?

If you are locked out of your account, click Forgot Password on the login page. Enter your username and click the Reset Password button. If an account with the provided username is found, instructions to reset your password will be sent to the email address for that account. If you're still having trouble, please contact us at 330-743-5555 or [info@cfmv.org](mailto:info@cfmv.org). Usernames are case sensitive.

### Alerts

The foundation will send you an email alert every time a Donation is made or a Grant is paid out from your Fund. These alerts can be cancelled at any point, but the alerts are not retroactive, so you will not be notified of past grants or donations.

If you wish to have alerts stopped for each donation and/or grant requested and paid, please contact us at 330-743-5555 or [info@cfmv.org](mailto:info@cfmv.org).