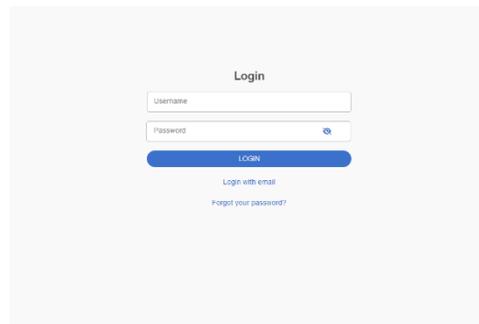


Donor Portal Navigation Manual

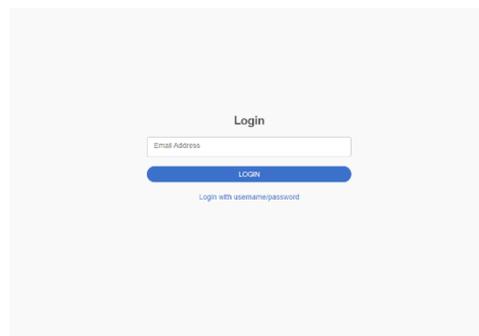
Donor Portal is the Community Foundation for Northern Virginia's online platform to manage your donor-established fund. From here you can conveniently view your latest fund balances, download fund statements, make grant recommendations, review your giving history, and more.

Setting Your Login

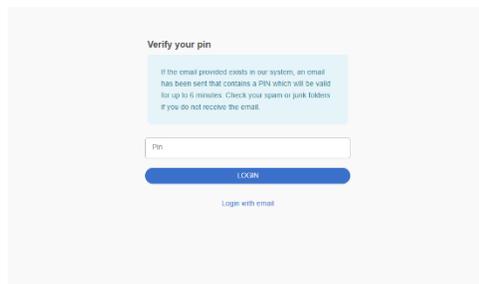
1. **Navigate to the Portal login page.**
2. **Use one of the two options below to log in.**
 - **Option 1:** Login with username/password. Enter the username and password, and then click **Login**.



- **Option 2:** Login with email address. Enter the email address, and then click **Login**.



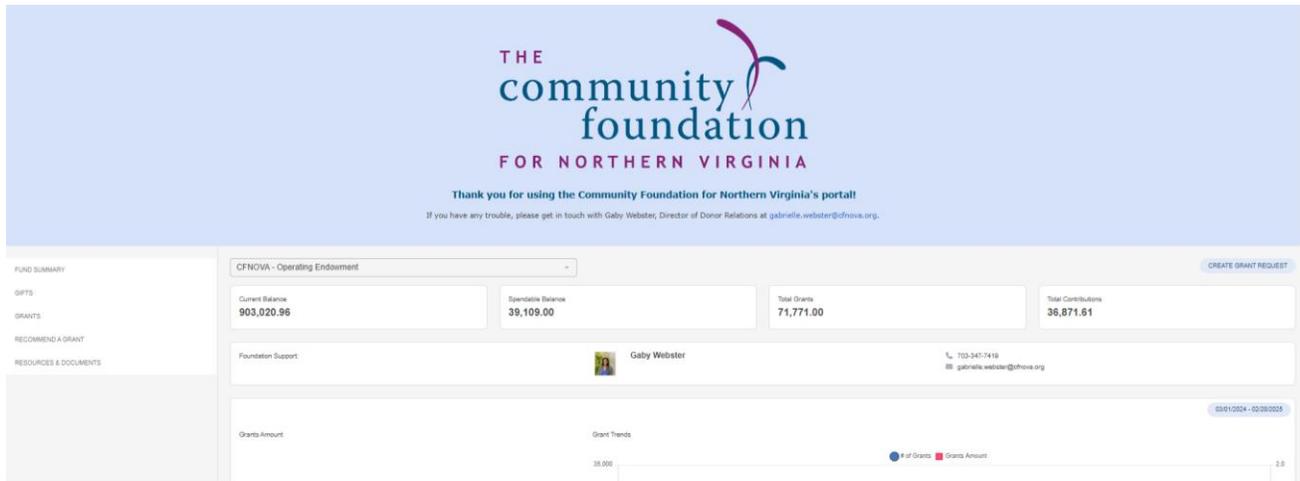
- A PIN will be sent to the email address entered. Enter the PIN, and then click **Login**.



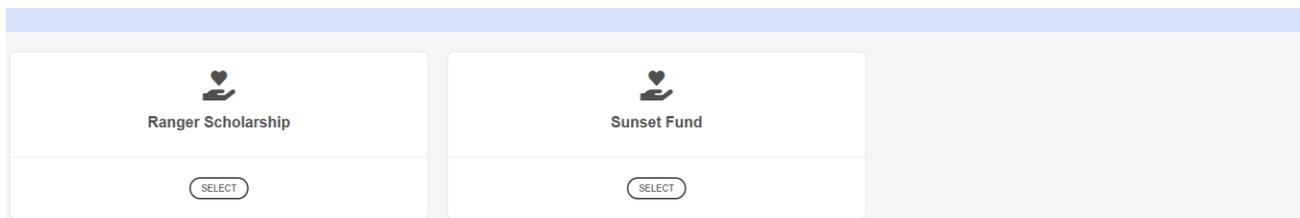
- When your login is set, please bookmark <https://cfnova.fcsuite.com/erp/portal> to ensure you are always one click away from managing your fund.

The Homepage

The Fund Management landing page (pictured below) varies depending on whether the fund advisor has one or more funds. If the fund advisor has multiple funds, then the fund names appear on the initial landing page and the fund advisor selects which fund to display. It will include charts and graphs, the fund's current and spendable/available cash balance, fund steward information, and total grants, contributions, and scholarships. The fund advisor's cart is also accessible.



From here, you can view gifts to your fund, recommend grants, see your historical fund statements, and more, using the navigation bar across the top of the page. On the homepage, you will also see a snapshot of recent contributions and grants associated with your fund.



The **Current Balance** shows how much is in your fund, while the **Spendable Balance** amount shows how much is available for grantmaking at the moment, whether that is due to pending grants, endowment spending limits, etc.

FUND MANAGEMENT



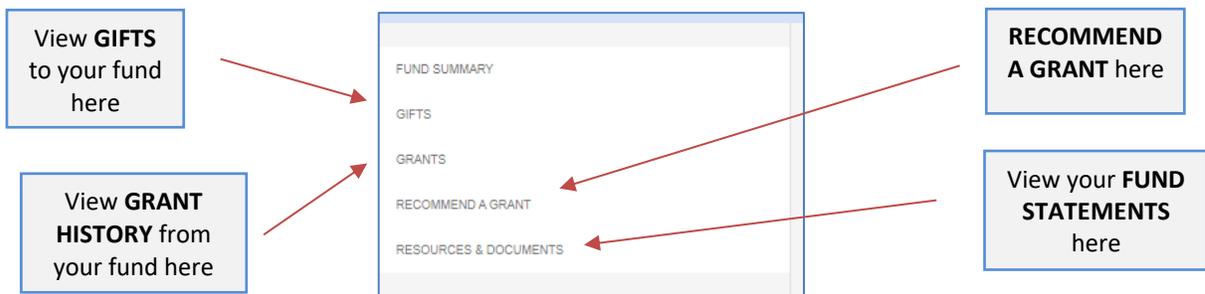
THE community foundation FOR NORTHERN VIRGINIA

Thank you for using the Community Foundation for Northern Virginia's portal!
If you have any trouble, please get in touch with Gaby Webster, Director of Donor Relations at gabrielle.webster@cfnova.org.

<p>FUND SUMMARY</p> <p>GIFTS</p> <p>GRANTS</p> <p>RECOMMEND A GRANT</p> <p>RESOURCES & DOCUMENTS</p>	<p>CFNOVA - Operating Endowment</p> <table border="1"> <tr> <td>Current Balance 903,020.96</td> <td>Spendable Balance 39,109.00</td> <td>Total Grants 71,771.00</td> <td>Total Contributions 36,871.61</td> </tr> </table> <p>Foundation Support:</p> <p style="text-align: right;">  Gaby Webster <small>703-347-7410 gabrielle.webster@cfnova.org</small> </p> <p>Grants Amount</p> <p style="text-align: right;">Grant Trends</p>	Current Balance 903,020.96	Spendable Balance 39,109.00	Total Grants 71,771.00	Total Contributions 36,871.61
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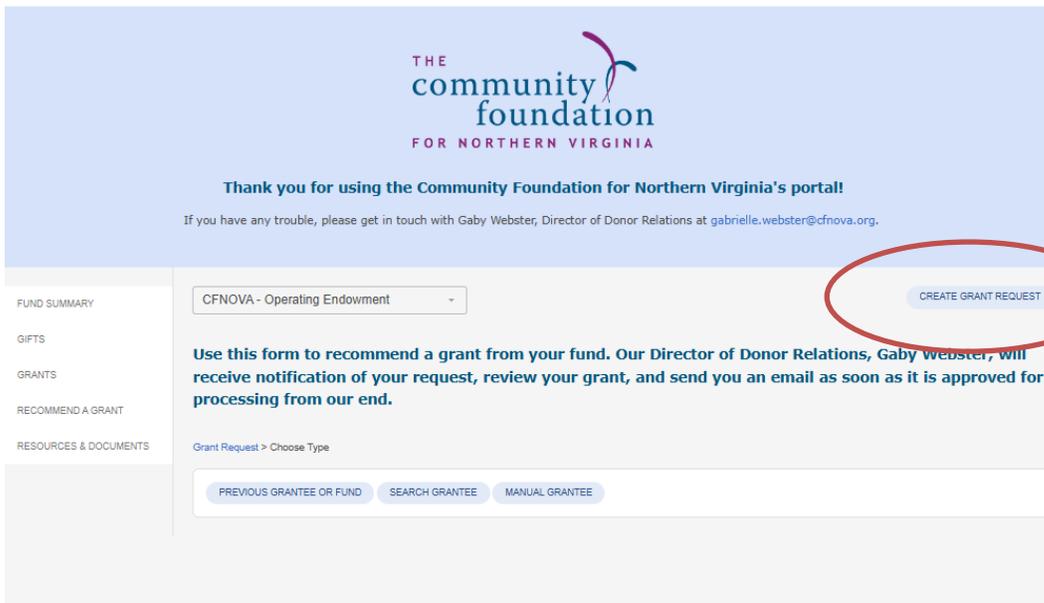
Homepage Navigation

Use the navigation menu on the left to view **gifts** to your fund, **grants** from your fund, to **request grants**, and view **fund statements** and other relevant documents.



Recommend a Grant

Creating a grant request can be initiated from any location in the Fund Management tab providing that ability has been enabled for the fund advisor. Fund advisors can choose from a previous grantee, search for a grantee, or manually create a new grantee when they begin a grant request.



THE community foundation FOR NORTHERN VIRGINIA

Thank you for using the Community Foundation for Northern Virginia's portal!

If you have any trouble, please get in touch with Gaby Webster, Director of Donor Relations at gabrielle.webster@cfnova.org.

FUND SUMMARY

GIFTS

GRANTS

RECOMMEND A GRANT

RESOURCES & DOCUMENTS

CFNOVA - Operating Endowment

CREATE GRANT REQUEST

Use this form to recommend a grant from your fund. Our Director of Donor Relations, Gaby Webster, will receive notification of your request, review your grant, and send you an email as soon as it is approved for processing from our end.

Grant Request > Choose Type

PREVIOUS GRANTEE OR FUND SEARCH GRANTEE MANUAL GRANTEE

From here, you can select from a list of existing (1) **Grantees you have given to in the past**, (2) **Foundation funds you have given to in the past**, or (3) **Other Foundation funds**.

After selecting a grantee, you have the option to designate a **Description** and **Amount** for your grant and can decide whether you'd like this grant to be **Anonymous** or **Recurring**.

Once the fields are completed, click **Review**. If all the information is correct, select **"Submit Request."** If additional changes need to be made, select **"Edit Request"** before submitting your grant.

Make sure to push the "Submit Request" button once you have reviewed for accuracy.



Grant Request > Choose Type > Create Request

Grant Request

Grantee CFNOVA - General Support

Description 0/255 characters

Amount

Anonymous

Recurring

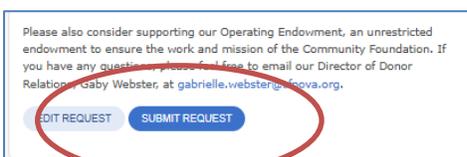
Attachment No file chosen (or drag and drop anywhere on the page)

Attachment Description

Notes for CFNOVA Staff

By checking this box, I confirm that this grant request complies with all fund guidelines and restrictions. The CFNOVA team will review all requests, and you will receive a confirmation once processed.

REVIEW



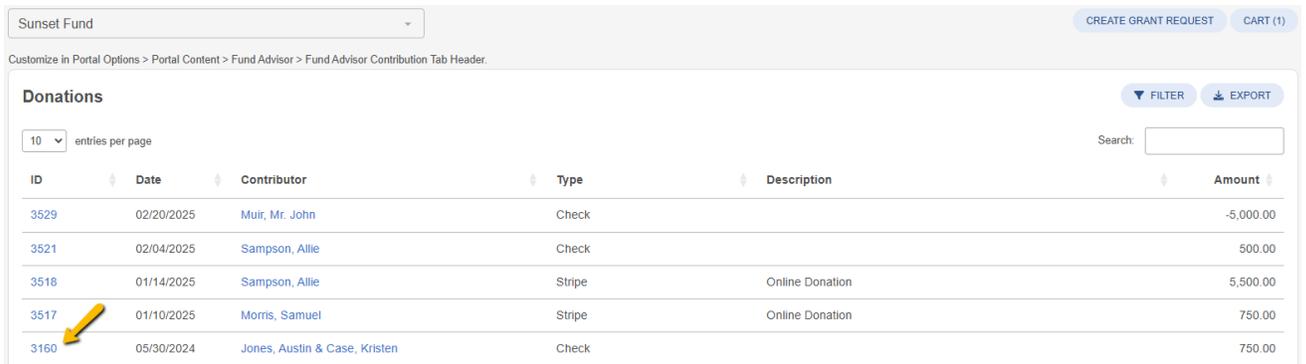
Please also consider supporting our Operating Endowment, an unrestricted endowment to ensure the work and mission of the Community Foundation. If you have any questions, please feel free to email our Director of Donor Relations, Gaby Webster, at gabrielle.webster@cfnova.org.

EDIT REQUEST **SUBMIT REQUEST**

Viewing Gifts to Your Fund

After clicking **“Gifts”** in the left navigation, a list of the selected fund's donations is displayed. The donation ID, date, contributor, type, description, and amount are included.

- Click the donation id to view donation information.



Sunset Fund CREATE GRANT REQUEST CART (1)

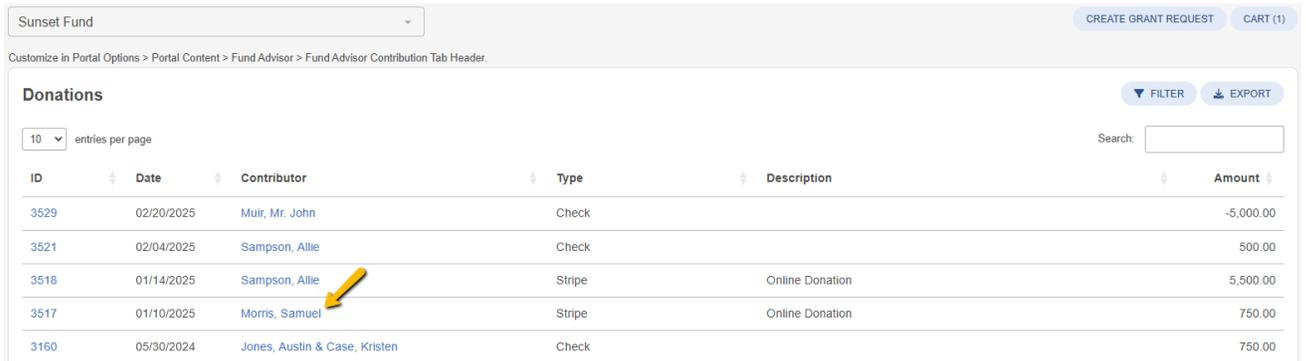
Customize in Portal Options > Portal Content > Fund Advisor > Fund Advisor Contribution Tab Header.

Donations ▼ FILTER EXPORT

10 entries per page Search:

ID	Date	Contributor	Type	Description	Amount
3529	02/20/2025	Muir, Mr. John	Check		-5,000.00
3521	02/04/2025	Sampson, Allie	Check		500.00
3518	01/14/2025	Sampson, Allie	Stripe	Online Donation	5,500.00
3517	01/10/2025	Morris, Samuel	Stripe	Online Donation	750.00
3160	05/30/2024	Jones, Austin & Case, Kristen	Check		750.00

- Click the contributor name to view contact information and a list of contributions for the contributor.



Sunset Fund CREATE GRANT REQUEST CART (1)

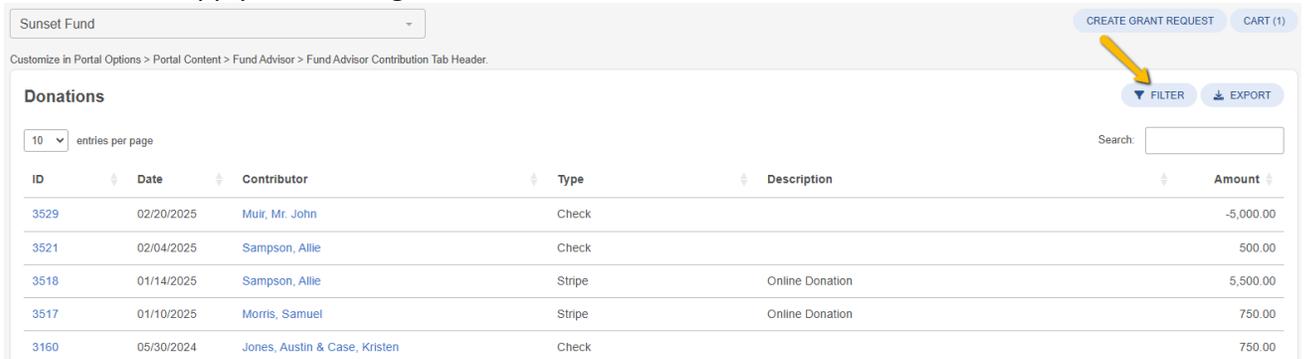
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3160	05/30/2024	Jones, Austin & Case, Kristen	Check		750.00

- Click **Filter** to apply a date range to the table.



Sunset Fund CREATE GRANT REQUEST CART (1)

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- Click **Export** to export the donations list.

Sunset Fund CREATE GRANT REQUEST CART (1)

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Donations ▼ FILTER EXPORT

10 entries per page Search:

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3160	05/30/2024	Jones, Austin & Case, Kristen	Check		750.00

Viewing Grant History

The “Grants” contains additional secondary navigation: Grant Summary, Grant History, and Recurring Grants. Historical and recurring grant information is available in addition to the ability to edit and cancel grants.

Forgot Your Password?

If you forget your password or would like to reset your password, go to the Donor Portal login page and click **Forgot Password?** Enter your username and 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 have tried to reset your password and your login attempts fail, or if you cannot remember your username, contact staff using the information below.

Your Donor Services Team

If you have any questions or require assistance granting from your fund, contact the CFNOVA team at Gabrielle.Webster@cfnova.org or **703-347-7419**.

Gabrielle Webster

Director of Donor Relations

Gabrielle.Webster@cfnova.org

Moses Ulom

Gifts and Grants Administrator

Moses.Ulom@cfnova.org