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.

To see a video walkthrough of navigating our Donor Portal, please view our brief **Donor Portal Instructional Video** here.

Setting Your Login

1. You will receive an email with a unique link to set your login for Donor Portal. The first time you visit, you will be taken to a webpage with **this form**, allowing you to create your own password.

   Your Login Username will always be the email address we have on file for your fund. If you need to update your email, please contact us.

   Setup Access

   Please setup a password to access your account.

Name	Day, Josiah
Login	josiah.day@cfnova.org
Password	
Confirm Password	

   Save

2. Once you have set your password and clicked "**Save**," you will be brought directly into the Donor Portal system. Should you ever need to reset your password, you can select the "**Forgot Password?**" option on the login page.

   Giving & Investing   Grants & Scholarships   Community Leadership

   Username
   Password
   Forgot Password?
   Login

3. When your login is set, please bookmark **https://www.cfnova.org/donor-portal** to ensure you are always one click away from managing your fund.

The Homepage

The homepage (pictured below) offers you an overview of the options available to you as a fund advisor. 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 **Available Cash** amount shows how much is available for grantmaking at the moment, whether that is due to pending grants, endowment spending limits, etc.

View **GIFTS** to your fund here	View **GRANTS** from your fund here	**RECOMMEND A GRANT** here	View your **FUND STATEMENTS** here

Test Charitable Fund of Northern Virginia

Home   Gifts   Grants   Recommend A Grant   Fund Statements   Files   Logout

See **RECENT CONTRIBUTIONS** to your fund below here	Current Balance: $40,365.48	See **RECENT GRANTS** from your fund below here

Available Cash: $35,365.48

Fund Advisors are: Day, Mr. Josiah

Recent Contributions

Date	ID	Contributor	Amount
12/22/2020	19711	Anonymous	37,865.48
10/22/2020	19713	Anonymous	10,000.00

Recent Grants
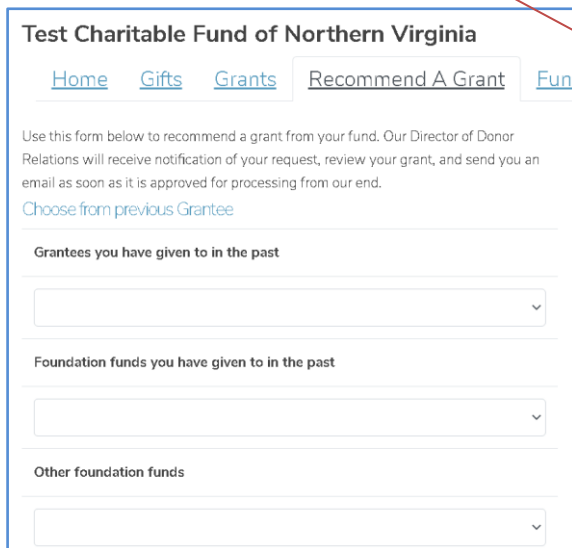
Date	ID	Status	Recipient	Amount
12/22/2020	6445	Paid	COVID-19 Response Fund for Northern Virginia :: D:Designated	5,000.00
12/22/2020	6446	Paid	ACTS of Prince William County	2,500.00

Recommend a Grant

Using Donor Portal, you can easily recommend a grant to a new or existing charitable organization in our database, or to another fund held at the Community Foundation, directly from your fund.

1. From any page, select the "Recommend a Grant" button in the top toolbar. 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**

2. If you continue to scroll down, you can also **Search for other Grantees** in the Community Foundation's database that you have not recommended a grant to in the past. And if you are recommending a grant to an entirely new organization, you can scroll further down to **Enter Grantee Information Manually**

Test Charitable Fund of Northern Virginia

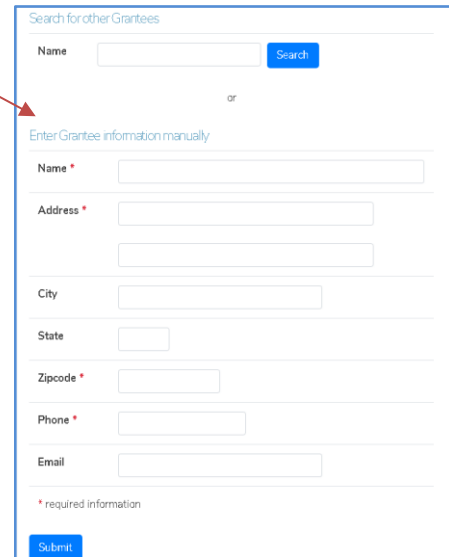Home   Gifts   Grants   Recommend A Grant   Fund

Use this form below to recommend a grant from your fund. Our Director of Donor Relations 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.

Choose from previous Grantee

Grantees you have given to in the past

Foundation funds you have given to in the past

Other foundation funds

Search for other Grantees

Name _____ [Search]

or

Enter Grantee information manually

Name * _____
Address * _____
          _____
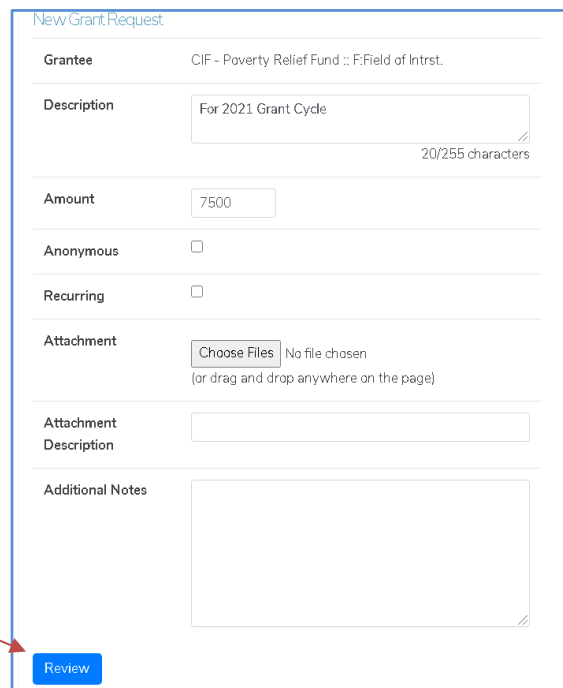City _____
State _____
Zipcode * _____
Phone * _____
Email _____

* required information

[Submit]

3. 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**

4. Once the fields are completed, click **Review**

New Grant Request

Grantee   CIF - Poverty Relief Fund :: F:Field of Intrst.
Description   For 2021 Grant Cycle
                                          20/255 characters
Amount   7500
Anonymous   ☐
Recurring   ☐
Attachment   [Choose Files] No file chosen
               (or drag and drop anywhere on the page)
Attachment
Description   _____
Additional Notes

[Review]

3

5. If all the information is correct, select **"Submit Request."** If additional changes need to be made, select **"Edit Request"**

6. Once you have submitted the request, if you return to the "Recommend a Grant" tab, you should see your grant listed with a status of **"Request"**

Once your grant has been submitted, Josiah will follow-up with you via email to confirm that the grant has been approved for processing. From there, he will send you another email when the grant check has been paid and mailed out.

Viewing Gifts to Your Fund

To view gifts to your fund, select the **"Gifts"** tab from the top toolbar.

You can also export a spreadsheet of contributions to your fund by selecting the **"Export"** option from the top toolbar.

Viewing Grant History

To view your grant making history, select the **"Grants"** tab from the top navigation bar. Here, charts detail your grant totals by recipient and over time. By clicking on any of the headers in the "Grants" table, you can sort your grant history by column.

You can also export a spreadsheet of grants made by your fund by selecting the **"Export"** option from the top toolbar.

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?*** Foundant will send an automated email to the address on file with CFNOVA to walk you through resetting your password.

If you have tried to reset your password and your login attempts fail, or if you cannot remember your username, contact Josiah Day, our Director of Development, 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 **Josiah.Day@cfnova.org** or **703-879-7636.**

Josiah Day
Director of Development
Josiah.Day@cfnova.org

Moses Ulom
Gifts and Grants Administrator
Moses.Ulom@cfnova.org