

DONOR PORTAL FAQ



At the Community Foundation of Greater Fort Wayne, we are dedicated to equipping our fundholders with the tools and resources they need to make a meaningful impact through their giving. Our secure online Portal offers a convenient way to access fund details, manage grant recommendations, and review past contributions. Depending on your fund type, you may also be able to view current balances and track your fund's activity. This FAQ is designed to help you confidently navigate the Portal, ensuring you have the information you need to manage your philanthropic efforts effectively.

Accessing the Donor Portal

Q: How do I access the donor portal from the website?

A: To access the portal, go to cfgfw.org's home page and click on Donor Login at the top.

Logging In

Q: How do I log in for the first time?

A: Check your email for a portal link and a temporary password. Enter your email, follow the login process, and complete the PIN verification for security. Update your password under the Profile > Security section.

Q: How do I log in as a returning user?

A: Simply enter your credentials. Two-step verification is not required if you've already set up a password.

Q: How can I change my password?

A: To change your password after logging in, navigate to Profile > Security > Change Password. To change your password from the login screen, click *Forgot your password?* and enter your username (which should be your email address).

Q: What if I need to update my contact information?

A: Review your details under the Profile tab. If updates are needed, contact our team for assistance.

Managing Your Fund

Q: Where can I view my fund details?

A: On the portal dashboard, click on Fund Management. If you manage multiple funds, select the one you want to review.

Q: What information is available on the Fund Summary page?

A: You can view your **current balance, recent contributions, and recent grants.**

Contributions

Q: How can I view my fund contributions?

A: The **Your Contributions** section lists all contributions, including the date, donor, type, and amount. You can filter, sort, and export records for easy tracking.

Q: How can I make contributions to my fund?

A: Go to **Search Community Foundation Funds**, find your fund, and contribute using your credit card. For additional options, visit our [website](#) or contact us for assistance.

Grant Requests

Q: How do I submit a grant request?

A: Click **Create Grant Request**, then choose a grantee:

- **Previous Grantee:** Select an organization you've previously supported.
- **Search Grantee:** Find a nonprofit by name, EIN, city, or state. This search method allows you to search for an organization you've previously granted to or a new organization. When searching for a previously granted organization, two options may be listed on the screen: one for the organization's agency endowment and another that allows grants to go directly to the organization. Be sure you are selecting the right one.
- **Manual Grantee:** Enter the organization's details manually. If additional details are needed, a member of our team will contact you to confirm.

Please complete the description, amount, anonymity preferences, and optional recurring settings. Then click **Add to Cart**, review, and submit.

Q: How do I request a recurring grant?

A: Check the **Recurring** box and specify a start date and interval (monthly, quarterly, etc.). If left blank, the grant will continue indefinitely.

Q: Can I attach additional information to my grant request?

A: You can add attachments and notes for specific instructions, such as event details or alternate mailing addresses.

Q: Can I copy a previous grant request?

A: Use the **Copy** button in **Full Grant History** to create a new request with past details, making necessary updates before submitting.

Grant History & Management

Q: How can I review past grants?

A: Click **Your Grant History** to see an overview of the grantee. To view the full history, click **Full Grant History** to filter and sort records.

Q: Where do I manage recurring grants?

A: Click **Recurring Grants** to view and update scheduled grants.

Fund Documents & Resources

Q: Where can I find fund statements and agreements?

A: Click **Fund Documents & Resources** to access:

- **Fund Statements**
- **Fund Agreements**
- **Other resources, including fund modification information, Donor Advised Fund Guidelines, or Agency Endowment Guidelines.**

Q: Can I generate a custom statement?

A: Yes, select **Manual Statement** from the fund statements page, choose a statement type and date range, then click **Create** to generate a report.

Making Contributions

Q: What are alternate ways that can I donate to a fund?

A: Use the **Search Community Foundation Funds** button to visit our website and contribute via credit card. Note: This does not grant money from your fund.

Coming Soon!

Your Fund Summary page will list the name and contact info of the donor engagement specialist assigned to your account.

Your fund summary page can be configured to show information in chart and graph form instead of as a list. If you want to use this feature, please get in touch with the Community Foundation for more information.

Need More Help?

If you have any additional questions, our team is happy to assist you. You can also watch our **Instructional Video** for a guided portal walkthrough. Thank you for being part of the Community Foundation of Greater Fort Wayne.

Portal Contact

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