

## Fundholder Portal Quick Start Guide

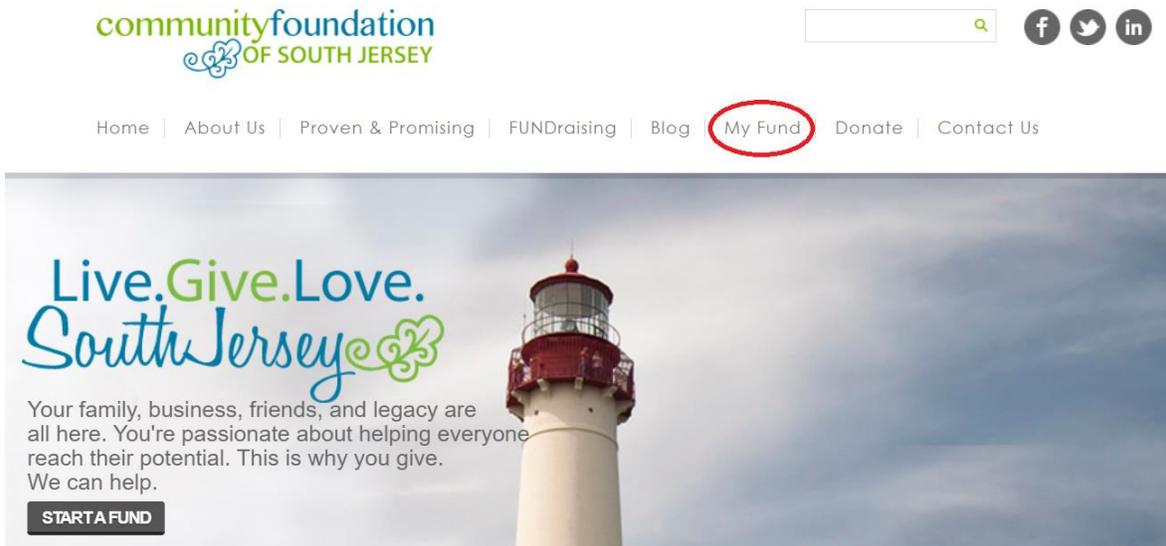
The Community Foundations of New Jersey and South Jersey have introduced a new online fundholder portal provides to access your charitable fund(s). Once logged in, you can review your fund balance, retrieve fund statements, make grant recommendations, make contributions to your fund with a credit card or direct debit from your bank account and view the gift and grant history for your fund(s).

### Get Started

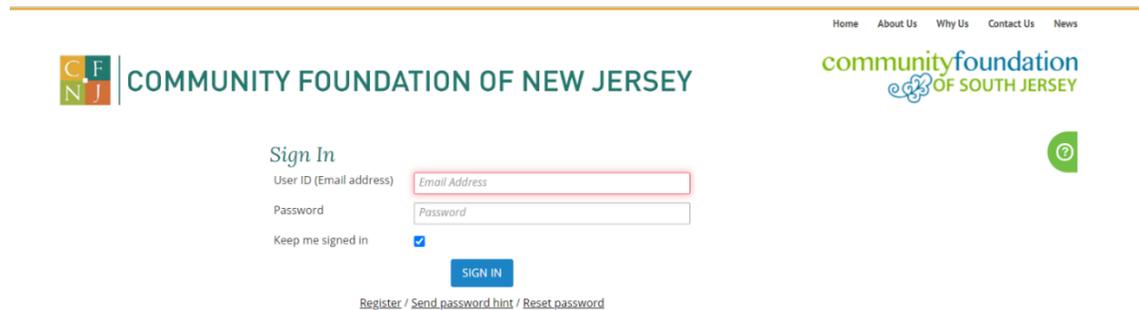
- **Navigate to the log in page** for the portal: <https://cfnj.spectrumportal.net/#/accounts/signin>. You can bookmark this site on your computer for easy access in the future.
- You can access the portal any time from [cfnj.org](http://cfnj.org):



- You can access the portal any time from [communityfoundationsj.org](http://communityfoundationsj.org):



- **Register for an account.** Even if you previously had an account, you will need to register in the updated portal.
- **Create a password.** Passwords must be at least 6 characters and include a number or symbol.



- **Receive confirmation.** Once you have registered, the Community Foundation staff will verify your information and approve your account. This helps ensure your information is kept secure. You will receive a confirmation email when you are granted access to your fund information. **Please allow up to one business day for approval.**
- **Log in** to the portal with the email and password you used to set up your account.

## Find Help

- Each page in the portal has help topics to answer some questions you may have about information on the page and to guide you on how to use the system. Click the green half circle on each page for help.



## Navigate the site

- **The Fundholder Home Page** provides your fund balance, grant summary information, a grant history chart, a gift history chart, the Community Foundation's Twitter feed and more. Peruse the page for a quick view of activity associated with your fund. Link to other parts of the site from here.
- **The Fundholder Dropdown Menu** also gives you quick access all areas of the portal.



## Recommend a Grant

Recommending a grant is easy. You can copy previous grants you have made, search for organizations in our database, or add a new organization to recommend a grant. **All organizations are vetted by Community Foundation staff to ensure they are eligible to receive a grant.**

- Select **RECOMMEND GRANT** from the **FUNDHOLDER** menu at the top of the screen. You will need to **complete information on each of 4 tabs** on the bottom half of the screen.
1. **Fund Details Tab:** You will see your fund name and basic information here. If you have more than one fund or family foundation, click the Edit button to select the fund from which you want to recommend a grant and click 'Save.'

Please select each tab to view/edit your Grant Request details.



The screenshot shows the 'Fund Details' tab selected in a navigation bar. Below the navigation bar, there is an 'EDIT' button with a pencil icon. The main content area displays 'Source Fund \*' and 'Current Available Balance \$0.00' with a note 'As of 7/25/2020 12:00 AM'. A 'NEXT TAB' button is located at the bottom left of the form area.

2. **Recipient Tab:** Click the '+Add' button to select or add a recipient. You will see options for searching for a recipient. Be sure to 'Save' after you have made your selection.

Please select each tab to view/edit your Grant Request details.



The screenshot shows the 'Recipient' tab selected in a navigation bar. Below the navigation bar, there is a '+ ADD' button. The main content area contains a form for adding a recipient with fields for 'Organization \*', 'Address Block', 'City', 'State', 'Zip', 'Contact', 'Title', 'Phone', 'Email', and 'EIN (SSN or Tax ID)'. 'PREVIOUS TAB' and 'NEXT TAB' buttons are located at the bottom left of the form area.

- To recommend a grant to an organization you have supported in the past, you may choose **Search for recipients in past grant requests**. This takes you to your Grant History page. Click the ellipsis (...) button next to the organization you want to make a grant to and choose **Add to grant recommendation**.

Find in this list	
Status	Recipient
...	HISTORY First Day of School Foundation, Inc.
...	HISTORY First Day of School Foundation, Inc.
...	HISTORY First Day of School Foundation, Inc.

- To recommend a grant to an organization you have not supported in the past, select **Search all recipients in the database**. If you do not find it listed, select **Enter a new recipient** and enter information about the organization.

- Grant Information Tab:** Click the 'Edit' button to enter details about the grant including amount, payment frequency, purpose, special instructions (if needed), and whether the donor or fund should be anonymous. Click the 'Save' button.

- Submission tab:** Acknowledge the grant recommendation requirements by checking the 'I Agree' box and click the 'Submit' button. You will receive a confirmation email.

[Fund Details](#)
[Recipient](#)
[Grant Information](#)
[Acknowledgement](#)
[Submission](#)

**Legal Statement**

This grant, if made, will not satisfy any pledge, dues, memberships or other contractual obligations already committed, and will not provide me with any substantial benefit.

I Agree

Signature *Your Name* \*

Upon submission, you will receive an email notifying you of the submission. If you do not receive the notification, please contact the foundation.

[PREVIOUS TAB](#)
[SUBMIT](#)

**NOTE:** If you are unable to complete a grant recommendation in one sitting, you can access it later by selecting **SAVED RECOMMENDATIONS** from the **FUNDHOLDER** menu. Information that was saved on each tab will still be there.

### View Your Fund Information

Select **FUND SUMMARY** from the **FUNDHOLDER** menu to access fund information. If you have multiple funds, you can select which fund you would like to view, or you can select all. You will see aggregated information about contributions, grants, net investment earnings, and more. You can view more detail about each item by clicking the blue hyperlink for the item you are interested in. Click the back button on your browser to return to the Fund Summary page.

<b>Fund Statement</b>		
<b>Description</b>	<b>Last Year</b>	<b>This Year</b>
Beginning Balance	\$0.00	\$0.00
<a href="#">Contributions in</a>	\$200.00	\$0.00
<a href="#">Interest and Dividends</a>	\$0.00	\$0.00
<a href="#">Other Income</a>	\$0.00	\$0.00
<a href="#">Realized G/L in MV</a>	\$0.00	\$0.00
<a href="#">Unrealized G/L in MV</a>	\$0.00	\$0.00
<a href="#">Grants</a>	-\$200.00	\$0.00
<a href="#">Program Related Expense</a>	\$0.00	\$0.00
<a href="#">Additional Expenses</a>	\$0.00	\$0.00
<a href="#">Management Fees</a>	\$0.00	\$0.00

### View Your Fund Statements

Select **REPORTS** from the **FUNDHOLDER** menu, then **DONOR FUND STATEMENT**.

Select the fund you would like to see a statement for in the dropdown Fund Name menu, select the start date and end date of the period you would like to view. Click 'View Report.'

## View Grant History

Select **GRANT HISTORY** from the **FUNDHOLDER** menu. A list of your prior grants will display. You can search for specific grants using the search box and change the number of grants that will display on the page.

<input type="text" value="Find in this list"/>	<input type="button" value="Q"/>	<input type="button" value="□"/>	<input type="button" value="▼"/>	<input type="button" value="📄"/>	Rec Count: 11	Rec Limit <input type="text" value="1000"/>	Items Per Page <input type="text" value="10"/>
<hr/>							
	Status	Recipient	Address	City/State	Date ▼	Amount	Des

Click the ellipsis button (...) next to the grant and click **Open Recipient** to view organization information. You may make a grant recommendation to an organization on this list by clicking the ellipsis button and selecting **Create grant recommendation**.

## View Gift History

Select **GIFT HISTORY** from the **FUNDHOLDER** menu. A list of contributions will display. Select **Mine** to see your personal gifts. Select **All** to see every contribution to the fund by you and others. You can search for specific contributions using the search box. You also can set the number of contributions to display per page.

Gift Source      Mine  All

<input type="text" value="Find in this list"/>	<input type="button" value="Q"/>	<input type="button" value="□"/>	<input type="button" value="▼"/>	<input type="button" value="📄"/>	Rec Count: 0	Rec Limit <input type="text" value="1000"/>	Items Per Page <input type="text" value="10"/>
Open	Date ▼	Type	Amount	Reference			

**Page Total**                      \$0.00

**Grand Total**                    \$0.00

## Manage Your Account Information

You may edit your contact information, request an additional role (generally used if you are changing from a Fund Viewer to a Fund Advisor), request to be added to an organization, and change your password on your My Account page. Select **MY ACCOUNT** from the navigation menu to access these functions.



You will see this screen and can make your edits/additions here.

### My Account

#### Account Info

Name

Nickname

Email Address

Address

 EDIT

 CHANGE PASSWORD

**Need help or have questions about your fundholder portal? We are here to help!**



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