

## C-Suite Portal Guidelines for Fundholders

The Community Foundation of New Jersey (CFNJ) will debut a redesigned fundholder portal system on April 1, 2025, so we've provided guidelines in the following pages to help smooth your transition to using the refreshed platform.

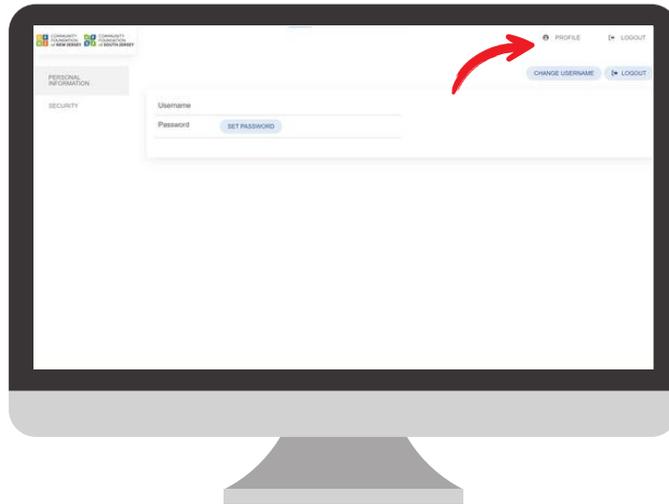
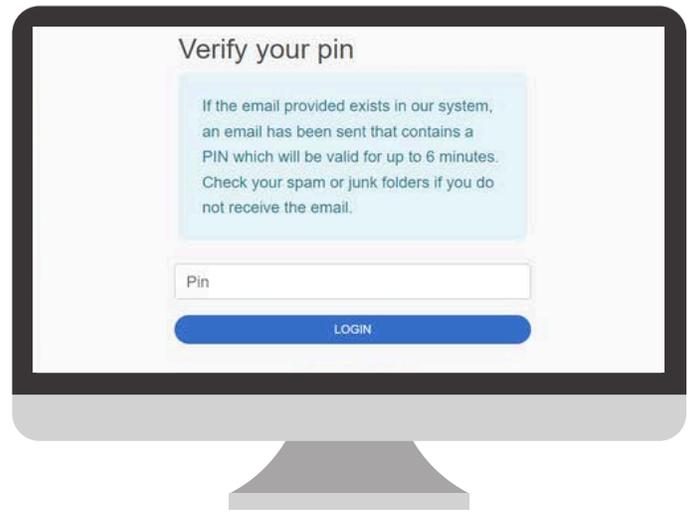
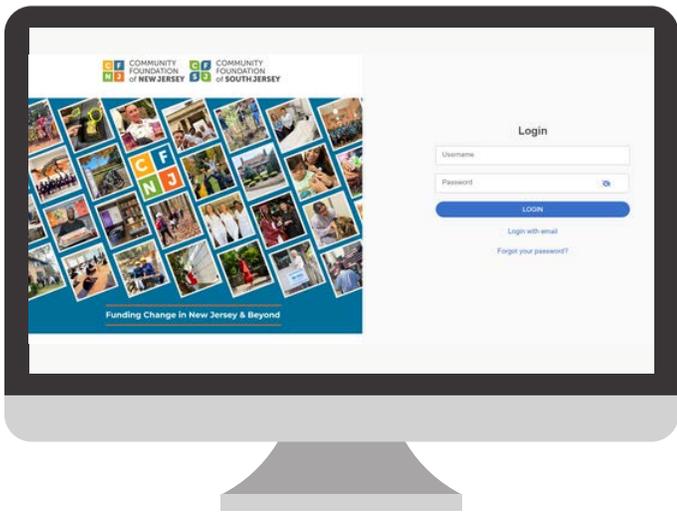
Although the user experience and appearance will be different in the portal, fundholders can still manage their fund online, see their fund balance, view past grants, etc.

The portal is available 24 hours a day and can be accessed through CFNJ's website at [cfnj.org](https://cfnj.org). If you have questions, contact Lydia Gracey at [lgracey@cfnj.org](mailto:lgracey@cfnj.org) or 973-267-5533. A section on troubleshooting issues is also included on page 8.

### Portal Features

Fundholders:

- Can review monthly statements in the "Resources & Statements" section
- See the most recent transactions when they log into the Portal Fund Summary Page
- Review all pending and completed grants paid from the account in the "Grant History" section
- Submit grant requests and make a contribution to their fund



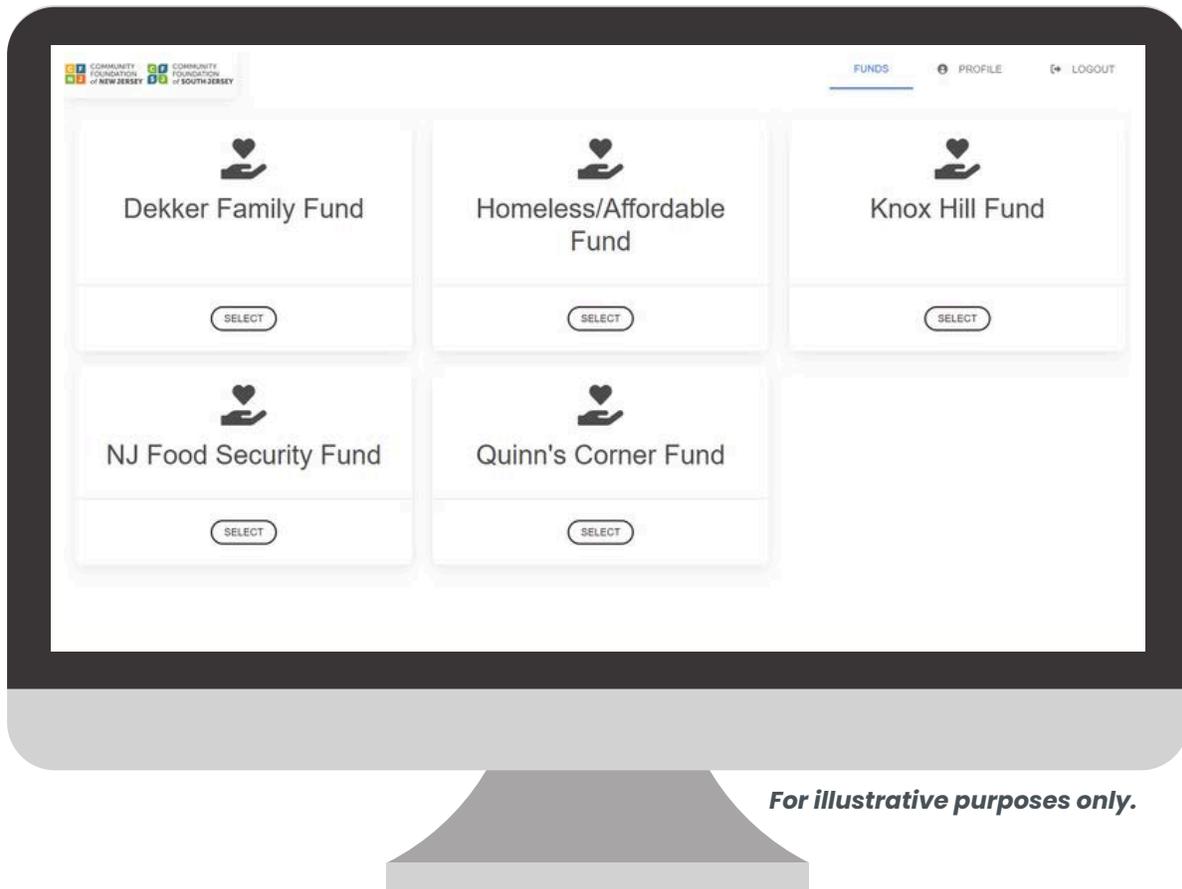
## Portal Log-in Page

If you're accessing the portal for the first time, you should've received an email with a temporary pin code from **Community Foundation of New Jersey** <[no-reply@fcsuite.com](mailto:no-reply@fcsuite.com)>. Note that this code will expire after six minutes.

Once you log in with your email address on the Portal Log-in Page, you will be prompted to enter your pin code. You should then access your profile page by selecting "Profile" in the top right-hand corner of the screen (see red arrow above) and clicking "Security" on the left side of the screen to set up your password. **Take note of your new password.**

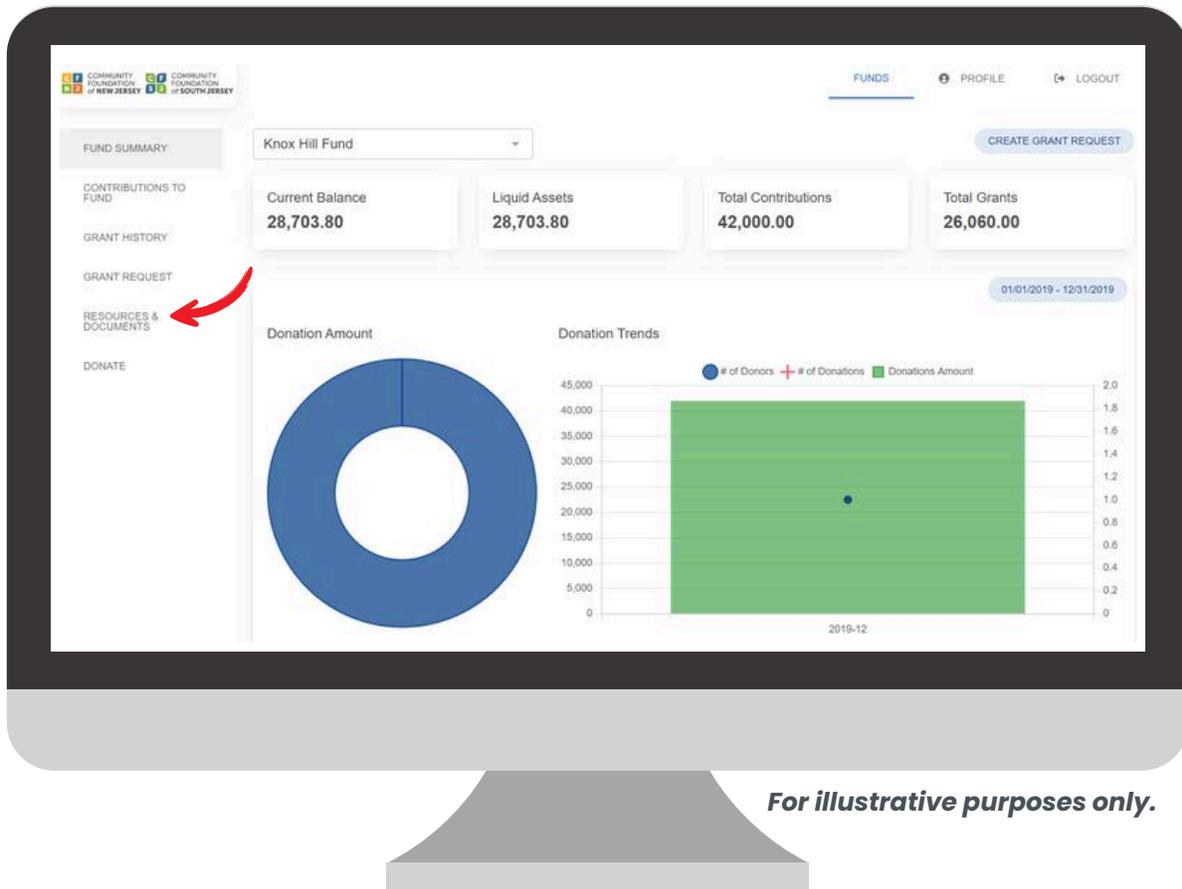
If you already have an account, continue to use your current password.

To access the portal at any time, visit CFNJ's website at [cfnj.org](http://cfnj.org) and select "Fund Login" in the right-hand corner of the homepage.



## Portal Landing Page

Once you log into the Portal Landing Page, you can select the fund you wish to view. Some fundholders will have multiple funds listed on this page, while others will have one.

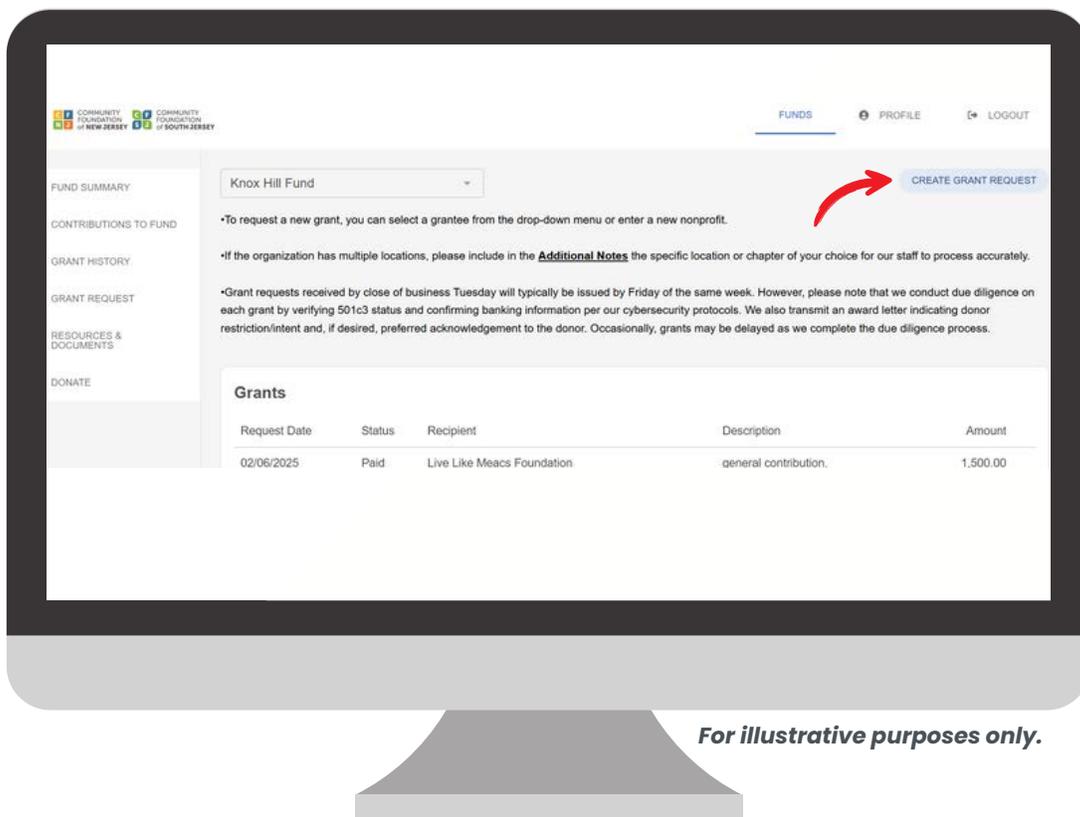


*For illustrative purposes only.*

## Portal Fund Summary Page

Once you select a fund to view, you will see your balance, assets, contributions, and more on the Portal Fund Summary Page. Note that the menu items that appeared at the top in the old portal design on this page have been moved to the left side of the screen. Your statements, receipts, and financials have also been moved to the "Resources & Documents" section (see red arrow above).

In addition, this page provides a summary of recent donations you have made to your fund, as well as recent grants you have made to nonprofits. You can click on the date on the right side of the screen to select additional date ranges. To see more details about your contributions or grants, click on the "Contributions to Fund" or "Grant History" buttons on the left side of the screen.



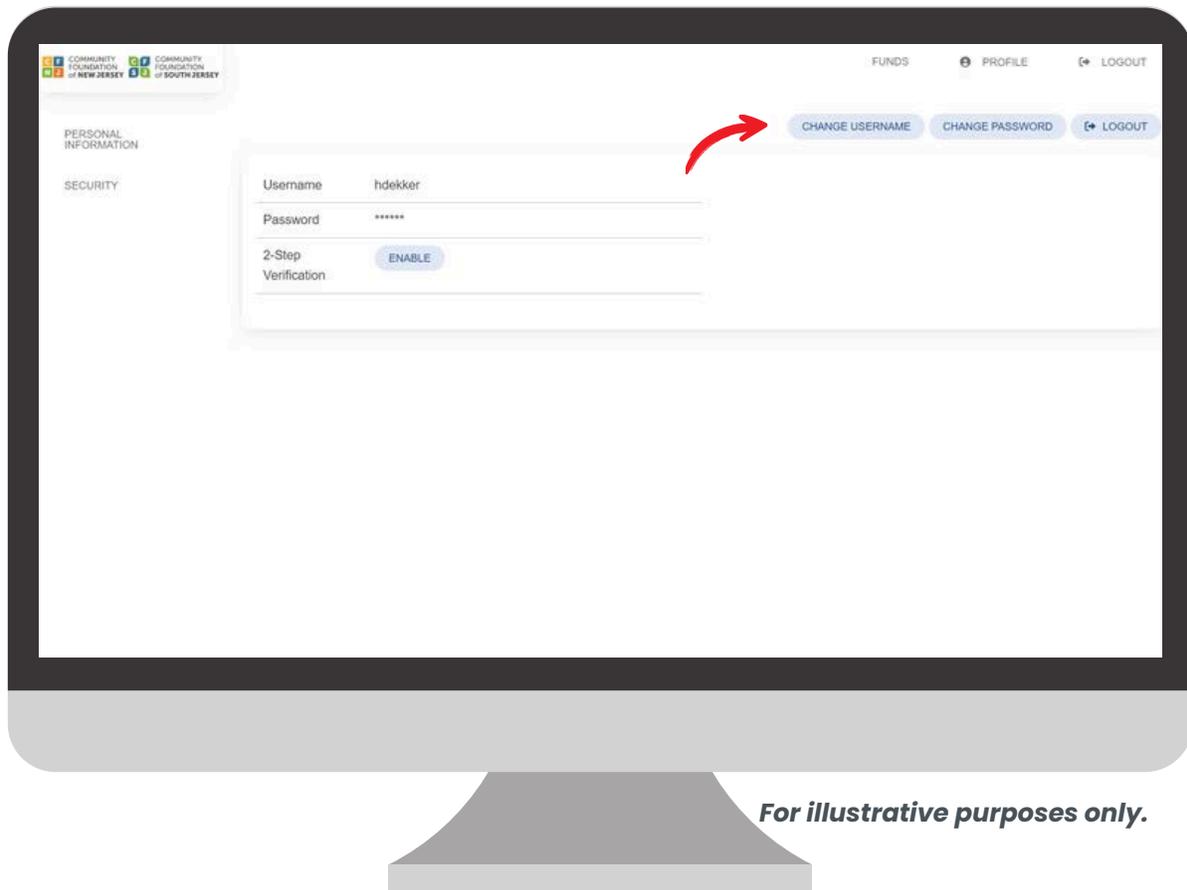
*For illustrative purposes only.*

## Portal Grant Request Page

The way you navigate through the “Contributions to Fund” and “Grant History” menu items is the same, but they have been moved to the left side of the screen as mentioned on page 4. The process for creating a grant request is also slightly different.

To get started, fundholders will need to click the “Create Grant Request” button in the top right-hand corner of the screen (see red arrow above).

- The process of searching for a grantee, viewing previous grantees, and manually typing in the name of a grantee remains the same.
- To copy a grant request you made previously, click on "Grant History." Then, select the name of the organization you would like to make a grant to and click the "copy" button on the right side of the screen.
- Once you select the grantee you would like to make a grant to, please include details about the amount of the grant. If you would like to provide the nonprofit with information on what the grant is for, you can include those details in the "Description" section. Once everything is complete, select "Review" and then "Submit Request."

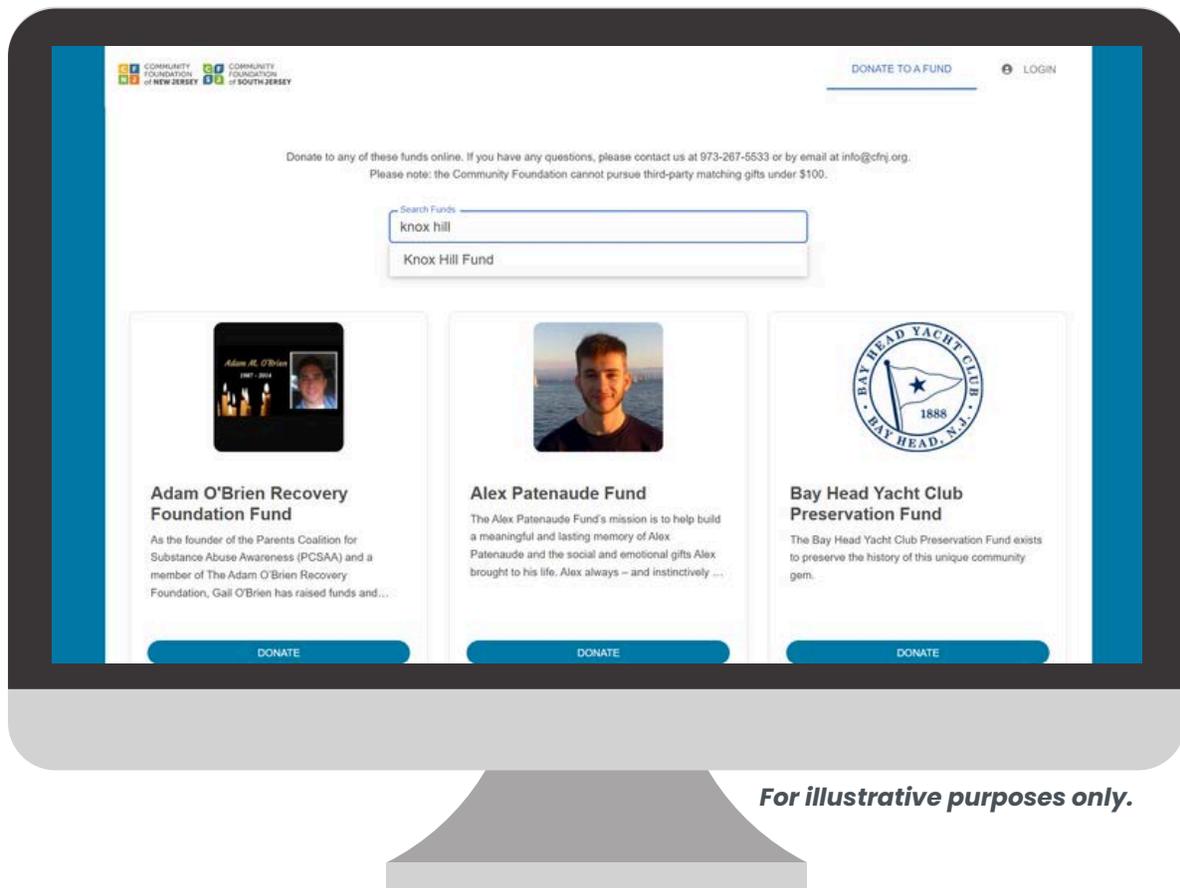


## Portal Profile Page

The Portal Profile Page is a new feature available for fundholders. You can change your password and username on this page (see red arrow above). A “Personal Information” and “Security” section appears on the left side of the screen.

The “Personal Information” section allows you to view the name, address, email, and phone number we have on file.

The “Security” section allows you to change your username or password and enable two-step verification.



*For illustrative purposes only.*

## Giving Hub Page

Although you can access the Giving Hub Page the same way by clicking on "Give Online," which appears in the top right-hand corner of CFNJ's website at [cfnj.org](http://cfnj.org), the layout of the page is slightly different if you access it by clicking on the "Donate" button through the portal.

# Troubleshooting Issues

## **I haven't received the auto-generated email with a temporary pin yet. What should I do?**

Check your Spam or Junk folder for an email from **no-reply@fcsuite.com**. If it hasn't arrived within an hour, email Lydia Gracey at [lgracey@cfnj.org](mailto:lgracey@cfnj.org) so that we can resend the information you will need to get started.

## **I don't understand how to navigate the portal. Where can I get help?**

You can email Lydia Gracey or call us at 973-267-5533.

## **I've lost my password. What should I do?**

For security reasons, the Community Foundation does not have the ability to access your password. To regain access to your account:

- Return to the Portal Log-in Page
- Click on the "Forgot Your Password?" link
- Type in your email address
- Request a new password

A link to reset your password will be sent to your email address.