COMMUNITY FOUNDATION of NEW JERSEY

C-Suite Portal Guidelines for Fundholders

The Community Foundation of New Jersey (CFNJ) fundholder portal system is available 24 hours a day and can be accessed through our website at cfnj.org.

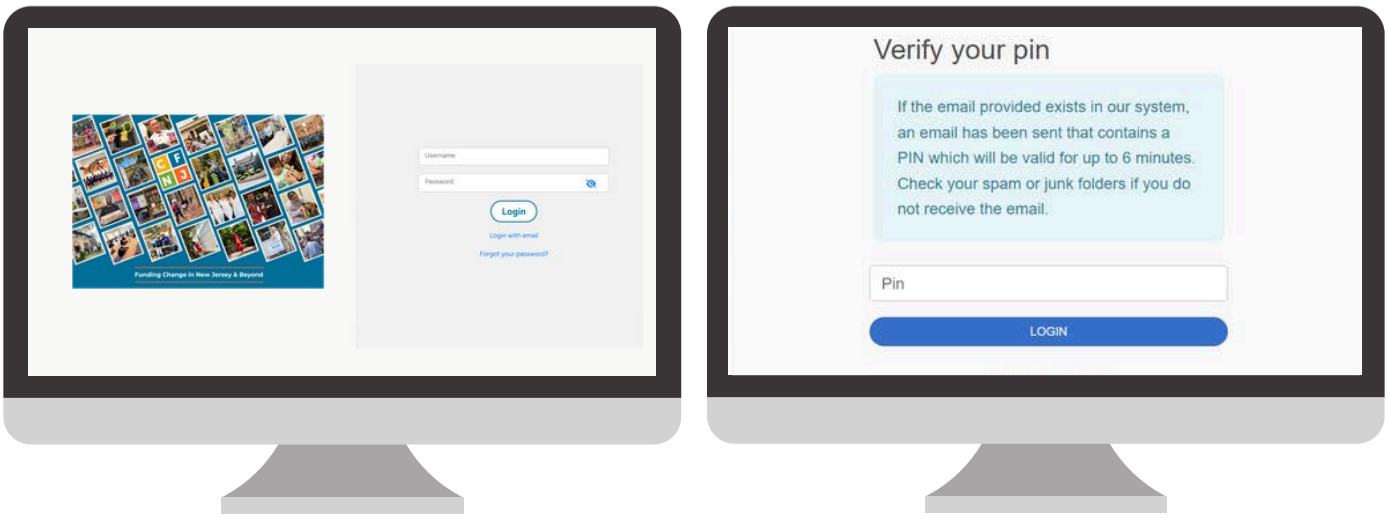
If you have questions, contact Lydia Gracey at lgracey@cfnj.org or 973-267-5533. A section on troubleshooting issues is also included on page 9.

Here's the direct link to the portal: https://cfnj.fcsuite.com/erp/portal/list

Portal Features

Fundholders:

- Can review monthly statements in the "Resources & Statements" section
- See the most recent transactions when they view the "Your Fund Summary" page
- Review all pending and completed grants paid from the account in the "Your Grant History" section
- Submit grant requests

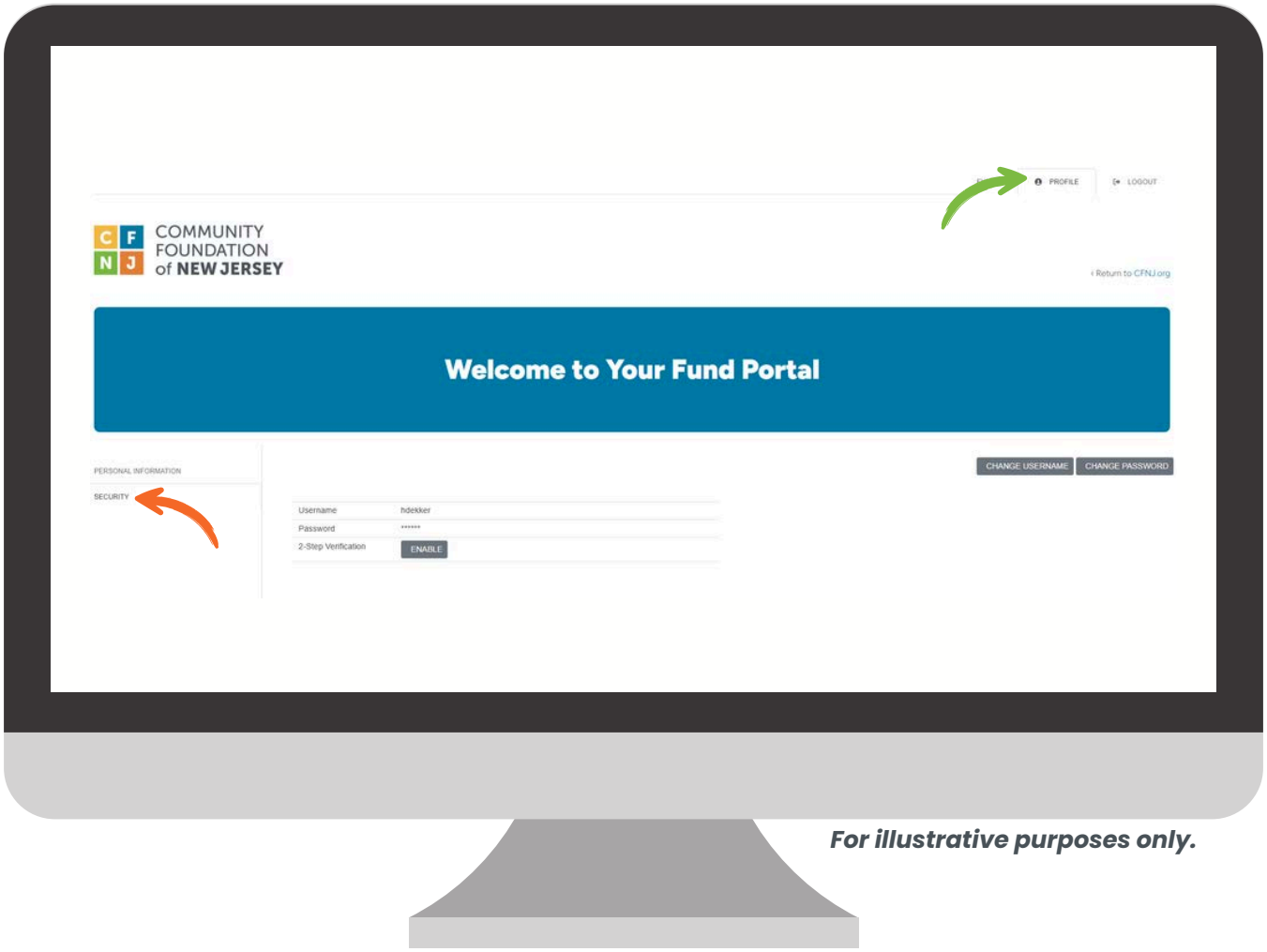


Portal Log-in Page

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>**.

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.



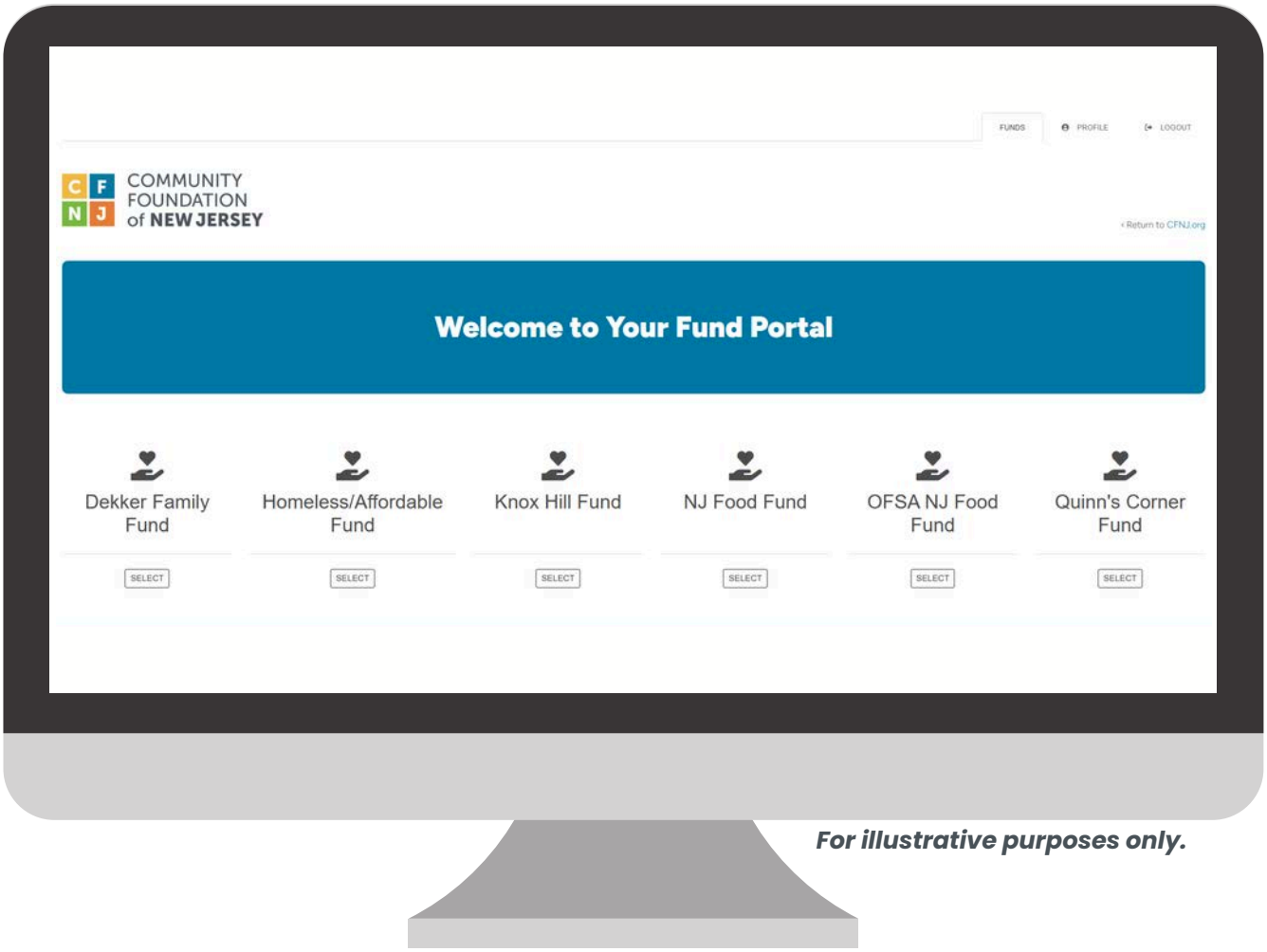
For illustrative purposes only.

Portal Log-in Page

You can access your profile page by selecting the "Profile" tab in the top right-hand corner of the screen (see green arrow above) and clicking "Security" on the left side of the screen (see orange arrow above) to set up your password. **Take note of your new password**.

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

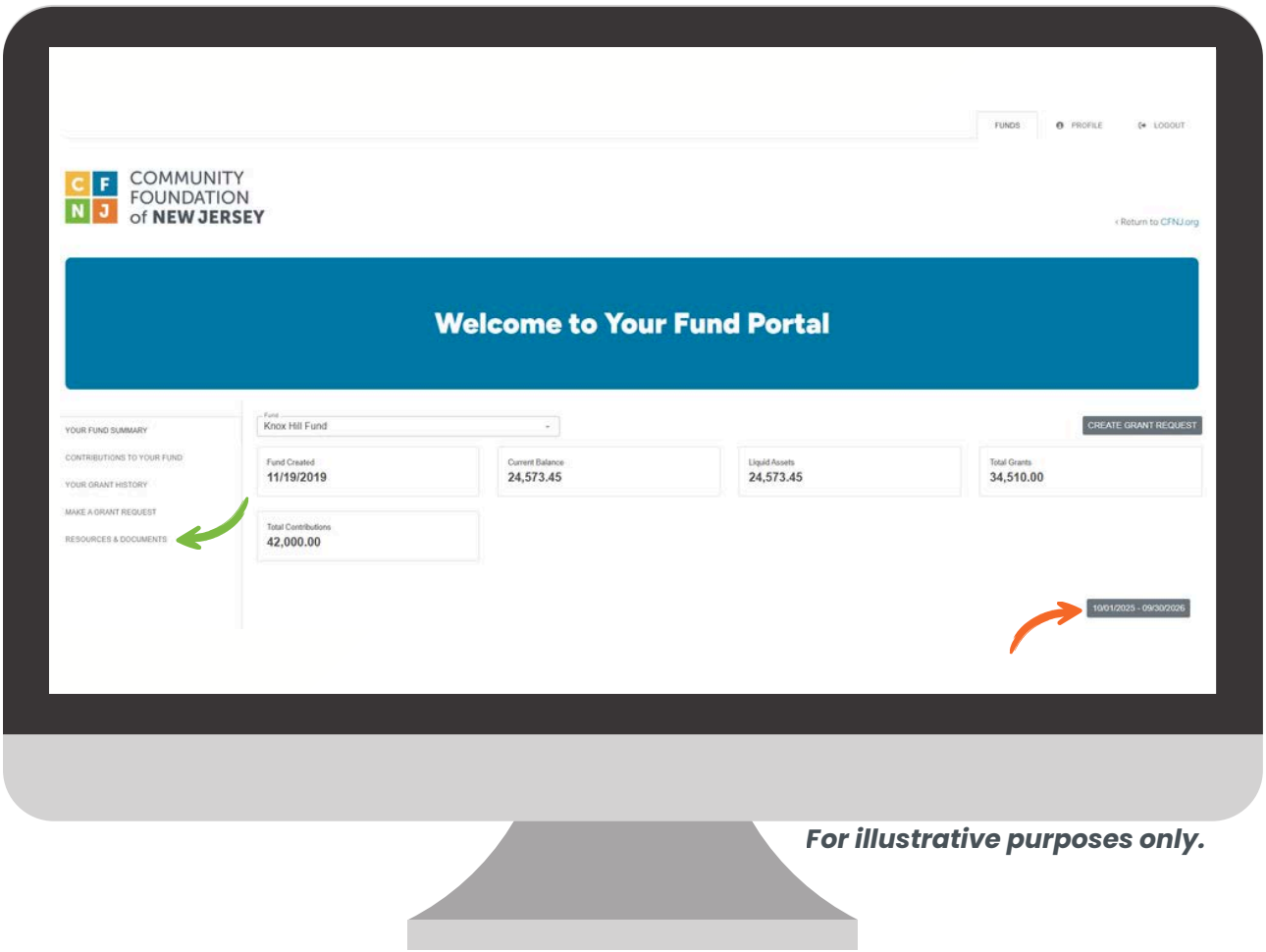
To access the portal at any time, visit CFNJ's website at cfnj.org and select "Fund Login" in the right-hand corner of the homepage.



For illustrative purposes only.

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.



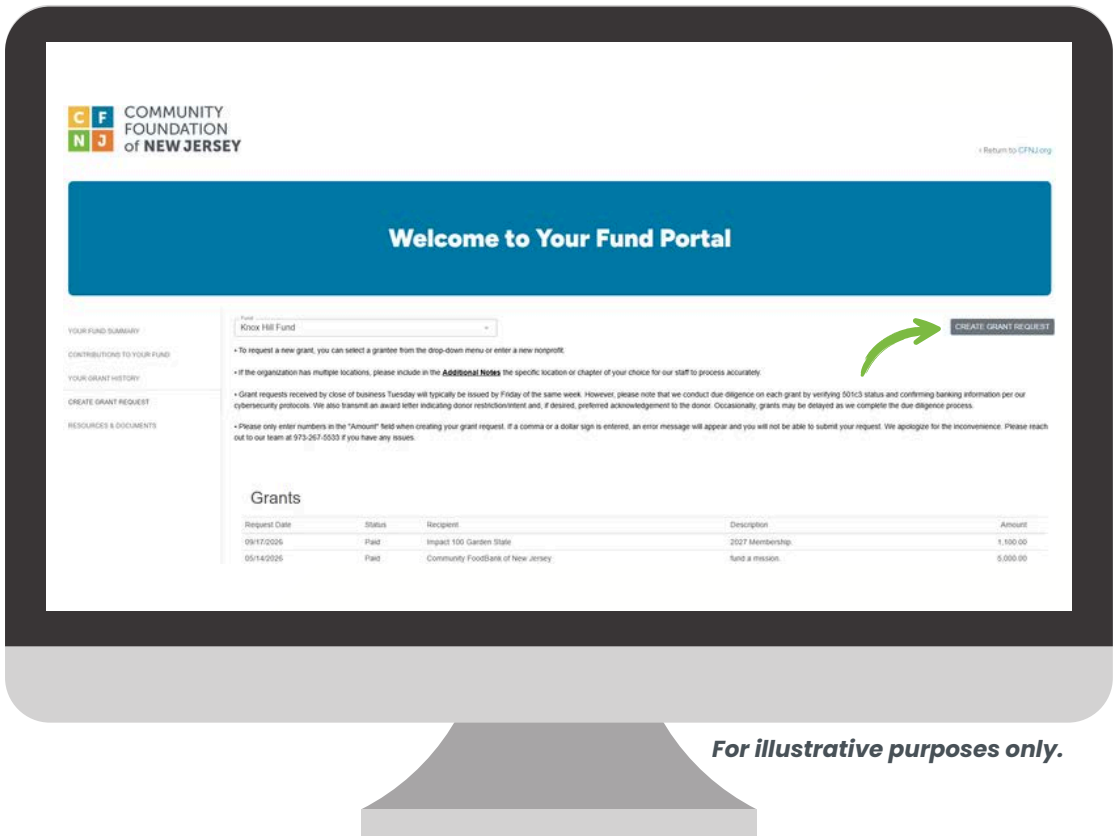
For illustrative purposes only.

Your Fund Summary Page

Once you select a fund to view, you will see your balance, assets, contributions, and more on the “Your Fund Summary” page. Statements, receipts, and financials are located in the “Resources & Documents” section (see green 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 (see orange arrow above). To see more details about your contributions or grants, click on the "Contributions to Your Fund" or "Your Grant History" buttons on the left side of the screen.



For illustrative purposes only.

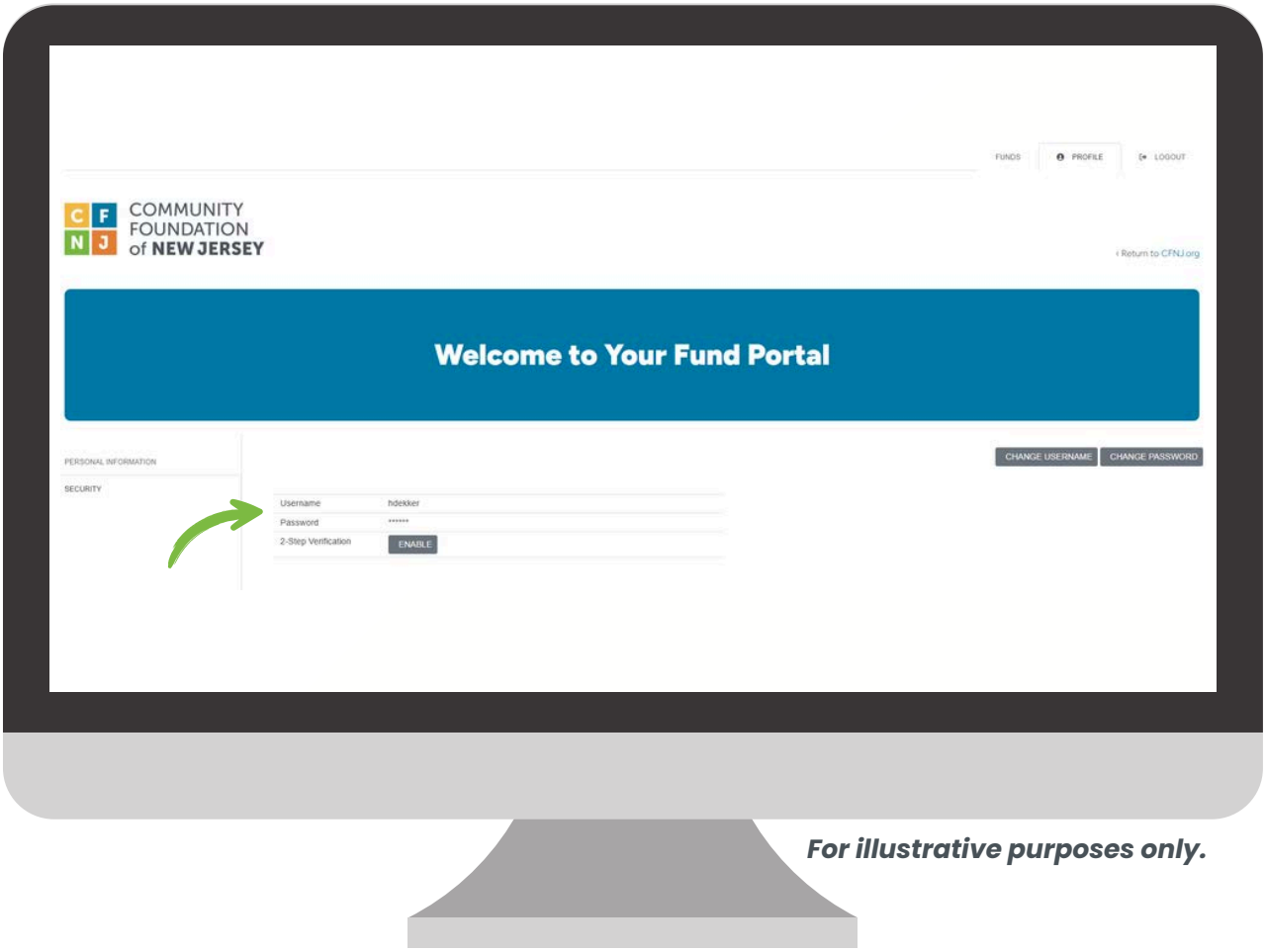
Portal Grant Request Page

- To create a grant request, fundholders can click the “Create Grant Request” button in the top right-hand corner of the screen (see green arrow above).

- You can search for a grantee or view previous grantees by manually typing in the name of the nonprofit organization.

- To copy a grant request you made previously, click on "Your 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."



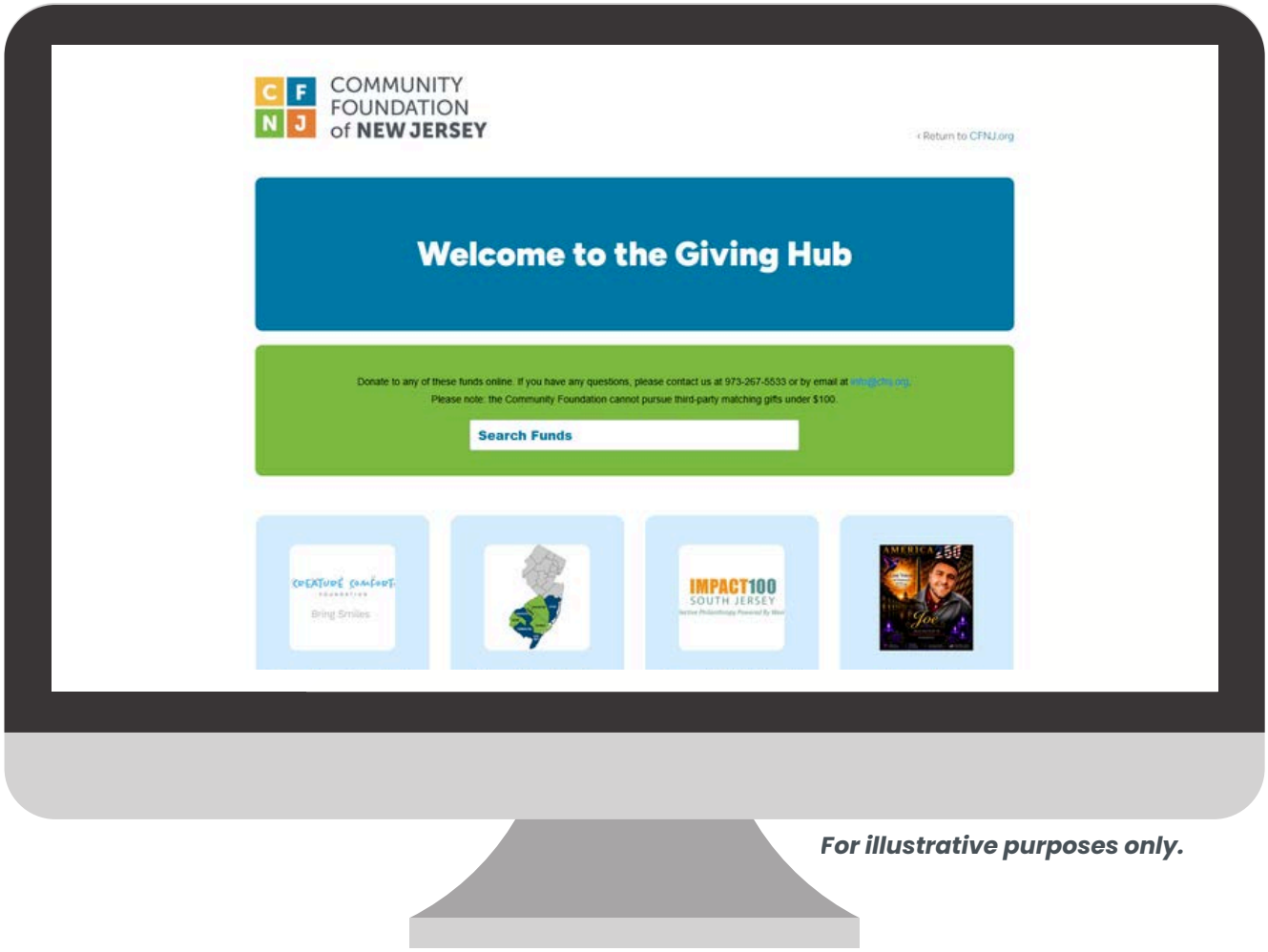
For illustrative purposes only.

Portal Profile Page

On the Portal Profile page, fundholders can change their password and username (see green 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

Many of our funds solicit contributions for important causes in the community, and you're welcome to review the list and give online.

You can access the page by clicking on the "Donate to Fund" link that appears at the top of CFNJ's website at cfnj.org. You can also click on this link: https://cfnj.fcsuite.com/erp/donate/list.

Troubleshooting Issues

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

  Check for an email from **no-reply@fcsuite.com** in your Spam or Junk folder. If it hasn't arrived within an hour, email Lydia Gracey at 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.