

QUICK REFERENCE

Fundholder Portal User Guide

The fundholder portal is your online platform for managing your charitable fund at the Community Foundation of the North State. Depending on your fund type and level of access, you can use the portal to:

- View your fund's activity
- View fund balances
- View statements (*starting August 2022*)
- Make grant requests (*coming soon!*)

As always, our staff is ready to answer any questions you might have. If you'd like assistance with the portal, please contact us: info@cfnorthstate.org or 530-244-1219.

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GETTING STARTED

Foundation staff will initiate your account setup. Once the process has been initiated, you will receive an automated email from sender "no-reply@fcsuite.com" with "CFNS Fund Holder Online Account Setup" in the subject line. The automated email will instruct you on the simple steps to activate your account. Your username will be your email address (written in lowercase letters). **Save your username and the password you create in a secure location for future use!**

Example
Email



From: Community Foundation of the North State-TEST <no-reply@fcsuite.com>
Sent: Wednesday, June 8, 2022 3:03 PM
To: Community Foundation of the North State <info@cfnorthstate.org>
Subject: CFNS Fund Holder Online Account Setup

Dear Test Leal,

We are so excited to launch the brand-new Fund Holder Portal for our CFNS fund holders! To get started, see below.

If you do not receive the email, please check your junk or spam folder. If you still do not find the email contact [CFNS staff](#)

Already setup your online account?

Skip this step & start on page 3!

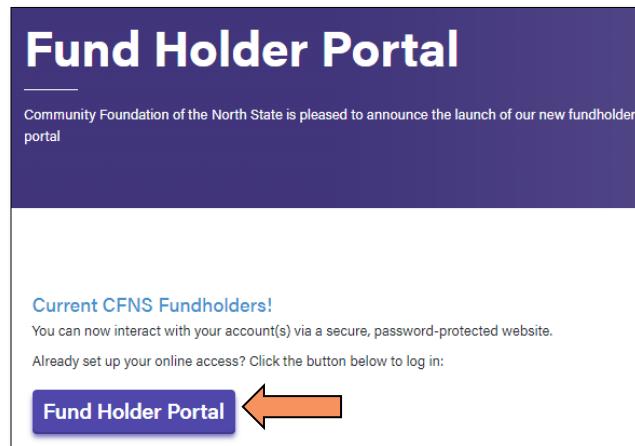
LOGGING IN TO THE PORTAL

Once you create your account using the step above you can access the portal at any time.

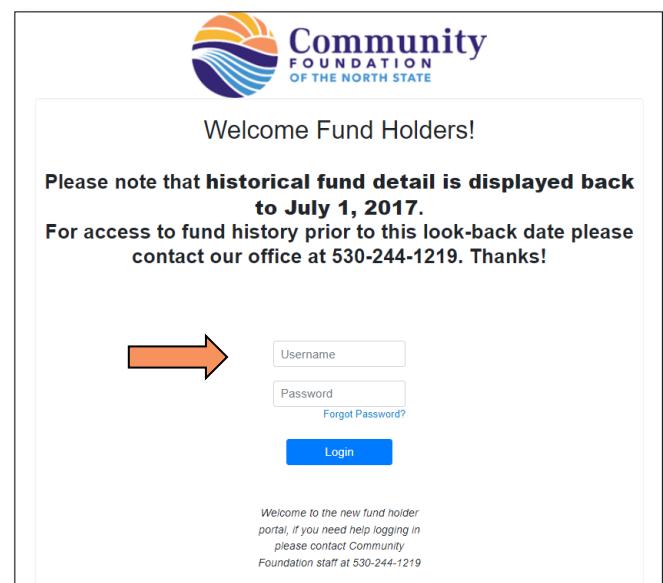
Click the icon on the Community Foundation [homepage](#)



Or simply type the portal URL directly into your internet browser (www.cfnorthstate.org/portal), then click on the **Fund Holder Portal** button.



This will take you to the login screen where you will enter your username (the email address associated with your fund, written in lowercase letters) and your password.



If you serve as an advisor for multiple charitable funds at CFNS, you will see the “Choose Fund” menu once you have successfully signed into the portal. Select the fund name you’d like to view.

Choose Fund

Community Scholarship Endowment
North State Wildfire Recovery Fund
Stewardship Endowment Fund

NAVIGATING THE PORTAL

The Home screen provides an at-a-glance list of recent contributions to the fund and grants recently paid out of the fund. You will also see the live, updated balance and the fund’s advisors.



Example Fund

Home Choose Fund Contributions Grants Statements Files Logout

Welcome Fund Holders!

Please note that historical fund detail is displayed back to July 1, 2017. For access to fund history prior to this look-back date please contact our office at 530-244-1219. Thanks!

Current Balance: \$193,447.77
Spendable Balance: \$12,765.52

Fund Advisors are: Community Foundation of the North State

Recent Contributions				Recent Grants			
± Date	± ID	± Contributor	± Amount	± Date	± ID	± Status	± Recipient



Community
FOUNDATION
OF THE NORTH STATE

Stewardship Endowment Fund

[Home](#)

[Choose Fund](#)

[Contributions](#)

[Grants](#)

[Statements](#)

[Files](#)

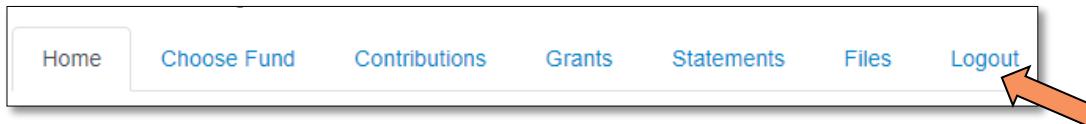
[Logout](#)

Use the menu bar along the top of the window to manage your fund. Depending on your level of access to the fund you're viewing, you will have several menu options to select from:

- **Choose Fund** (for donors who serve as advisors to multiple funds only): Allows you to select and interact with your various funds
- **Contributions:** Provides in-depth information regarding each contribution received into the fund **as of July 1, 2017**. You may use the "Export" option (which appears on the far right of the navigation menu) to export donation information into a Microsoft Excel spreadsheet.
Clicking on a Contributor's name will bring up their history of contributions.
- **Grants:** Offers more detail about all grants distributed from this fund. The top section provides a summary of grantees. Scroll down past the summary section to see an itemized list of grants paid in descending order.
- **Grant Requests:** *Coming Soon - Donor Advised Fund Holders will see the Grant Request tab later this summer!*
- **Statements:** Semi-annual statements related to the fund will be archived under this tab. Check back in *August 2022* for the very first digital statement!
- **Files:** Important documents related to the fund will be archived here, conveniently accessible to you and other fundholders with access to the fund.

SIGNING OUT OF THE PORTAL

We encourage you to use the LOGOUT option after completing each session. This ensures no one other than you can access the system.



We are ready to help you navigate the new portal should you need assistance!
Send us an email or give us a call:

info@cfnorthstate.org
530-244-1219