



## 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
- 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](mailto:info@cfnorthstate.org) or 530-244-1219.

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## GETTING STARTED

Foundation staff will initiate your account setup if you have a brand new fund or haven't logged into the new portal yet.

Please contact CFNS staff to get started at 530-244-1219 or [info@cfnorthstate.org](mailto:info@cfnorthstate.org)

Already setup your online account?

Skip this step & continue on!

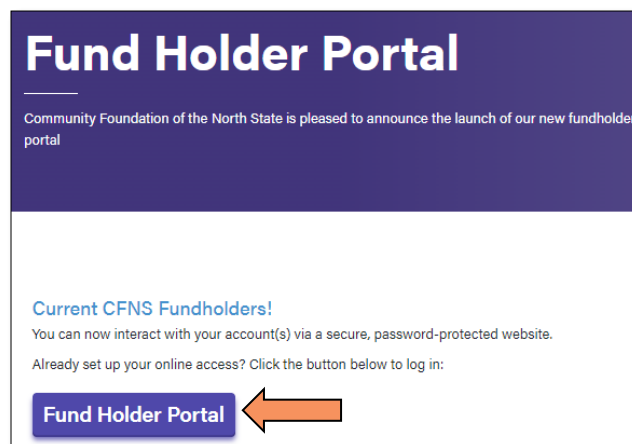
## LOGGING IN TO THE PORTAL

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

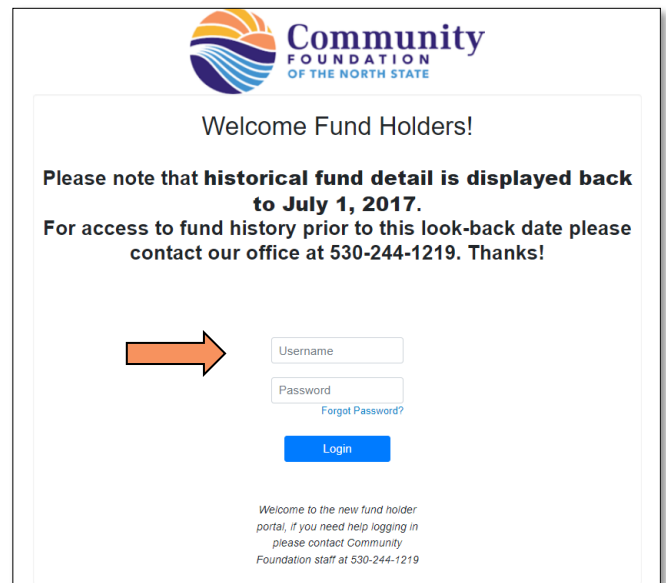
Click the icon on the Community Foundation [homepage](#)



Or simply type the portal URL directly into your internet browser ([www.cfnorthstate.org/portal](http://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.



**Community FOUNDATION OF THE NORTH STATE**

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!

Username

Password

[Forgot Password?](#)

Login

Welcome to the new fund holder portal, if you need help logging in please contact Community Foundation staff at 530-244-1219

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.

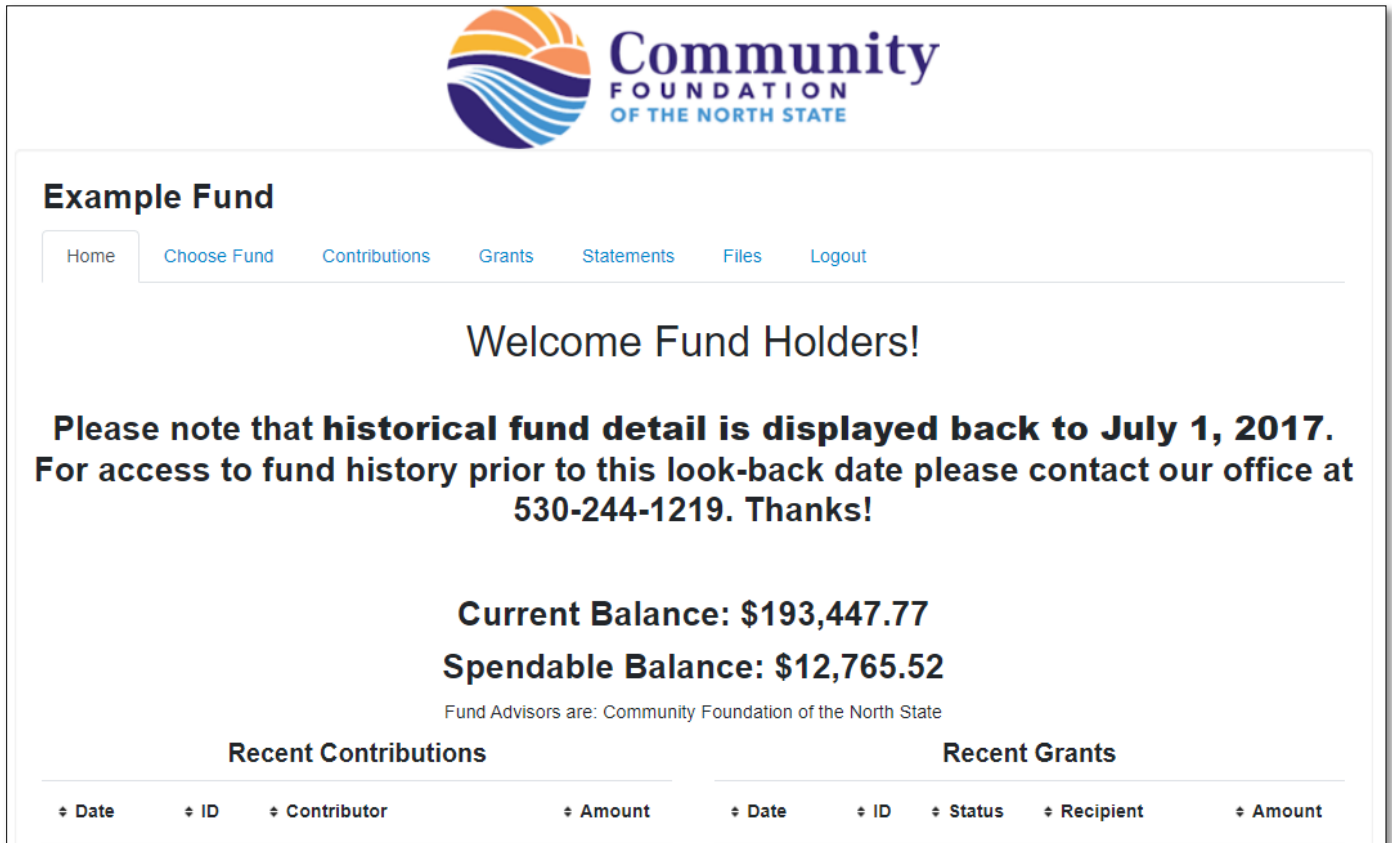


### Choose Fund

- 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.



The screenshot shows the portal interface for the Community Foundation of the North State. At the top is the organization's logo, which consists of a stylized sun and waves. Below the logo is the text "Community FOUNDATION OF THE NORTH STATE". The main content area is titled "Example Fund" and features a navigation menu with options: Home, Choose Fund, Contributions, Grants, Statements, Files, and Logout. The "Home" option is currently selected. The page displays a welcome message: "Welcome Fund Holders!". Below this is a notice: "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!". The current financial status is shown as "Current Balance: \$193,447.77" and "Spendable Balance: \$12,765.52". Below the balances, it lists "Fund Advisors are: Community Foundation of the North State". At the bottom, there are two sections: "Recent Contributions" and "Recent Grants". Each section has a table header with columns for Date, ID, Contributor, Amount, Date, ID, Status, Recipient, and Amount.

**Community FOUNDATION OF THE NORTH STATE**

### Example Fund

Home Choose Fund Contributions Grants Statements Files Logout

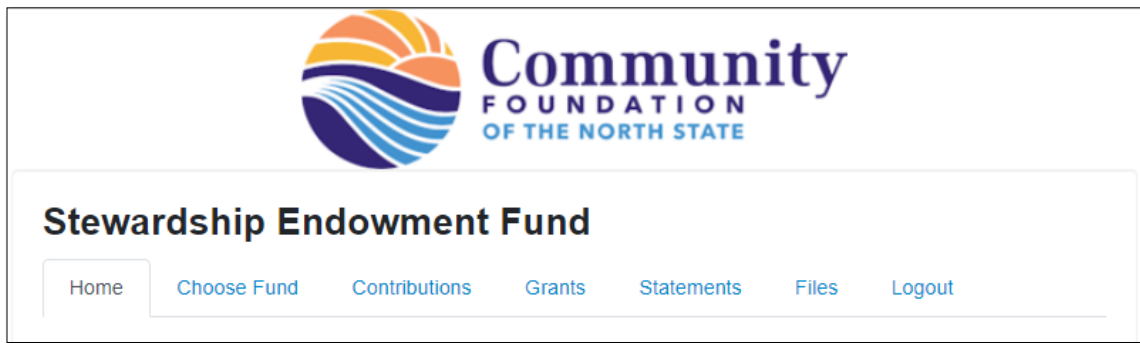
Welcome Fund Holders!

**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 | Amount |

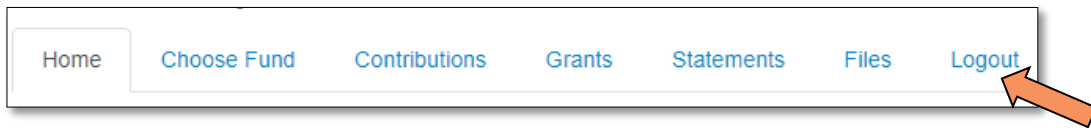


Use the menu bar along the top of the window to manage your fund. Depending on your level of access to the fund you're viewing, you will have several menu options to select from:

- **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 in 2023.*
- **Statements:** Semi-annual statements related to the fund will be archived under this tab.
- **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](mailto:info@cfnorthstate.org)  
530-244-1219