

CFSGA's Donor Portal

We are pleased to announce CFSGA's new [Donor Portal](#). A convenient place to manage your charitable fund online. You can check your fund balance, make grant requests, and see your grant history and past contributions.

Activating Your Account

Before signing into the online donor portal for the first time, you will need to activate your account. An activation email will come from no-reply@fcsuite.com. If you have not received your activation email, please be sure to check your junk or spam folder first. If you are unable find it, please email Claire Bowen, Director of Donor Services, at cbowen@cfsga.net.

Logging In to Your Account

In order to log in to your account, click the link in your activation email. This link will expire 30 days after you receive it. After clicking the link, you will be taken to the login page where you will create and confirm your password. Then, you will be able to access the portal.

Navigating the Portal

Once you log into the online donor portal, you will be able to navigate through a menu located on the left side of your screen. Depending on the type of fund you advise, all options may not be visible to you.

Fund Summary

The Fund Summary page displays information about the funds you advise. If you advise more than one fund, then each fund can be selected from the drop-down menu located at the top of the Fund Summary page. Default information displayed on this page includes the fund created date, current balance of the fund, total grants, and total contributions. Charts and graphs for top grantees by amount, grant trends, top donors by amount, and donation trends display in Fund Summary as well.

Donations

A list of the selected fund's donations is displayed on this page. The donation ID, date, contributor, type, description, and amount are included. Click the donation ID to view

donation information, click the contributor name to view contact information and a list of contributions for the contributor. You can apply a date range to the table by clicking Filter. Export the list of donations by clicking Export.

Grants

The Grant page contains additional tabs at the top including: Grant Summary, Grant History, and Recurring Grants. Grant Summary displays the grantee, the number of grants per grantee, and the total amount granted to the grantee. Grant History displays grant details of grants paid from the selected fund. Grant ID, date, status, grantee, fund, description, advisor, and amount are displayed along with the ability to copy the grant. The list of grants can also be exported. Recurring Grants displays any recurring grants that may be scheduled for the fund. Recurring grants may be edited or canceled here. If you do not have any recurring grants, none will be displayed on this page.

Grant Request

In order to recommend that a grant be sent from a fund you manage to a nonprofit organization, you may do so on this page by clicking Create Grant Request located at the top right-side of your screen and then selecting one of the following three options.

- Choose from Previous Grantee or Fund: You may choose your grantee from a drop-down list of organizations you have previously supported or you may choose to make a transfer from one fund to another fund at CFSGA you have previously supported. If the fund you want to support is not listed, please email Claire Bowen at cbowen@cfsga.net.
- Search Grantee: You may search for other nonprofit organizations in the CFSGA database by typing the organization's name into the box.
- Manual Grantee: You may enter the grantee information manually by completing the required form fields and clicking submit.

Once you have selected the grantee and filled out the required information, click Add to Cart. To request another grant to another organization, simply click the Create Grant Request button again and follow the steps listed above. Once all requests have been added to your cart, click Review Grant Requests. Check that all information is correct and then click Submit Grant Requests.

Once submitted, a confirmation message will display along with the option to continue. You will also receive an email confirming that you have submitted grant requests. If you would like to cancel a recently submitted grant request, click Cancel next to the grant listing on the Grant Request page.

Resources & Documents

Quarterly statements for your fund will appear here and will be listed in chronological order by year and quarter. Click View to open a copy of a fund statement. This will typically open in a new browser where it can be downloaded, printed, or saved. Only fund statements generated after our system conversion to CSuite are available to be viewed here. If you are looking for a fund statement prior to 2nd quarter 2024, please email Claire Bowen at cbowen@cfsga.net.