



Getting Started in CFWNC's Fund Portal

General Questions

How do I set up my login and password?

We will send you an email with a link to get started. The link will enable you to create your password and follow clear steps to log in. Your username is your email address, in all lowercase letters.

I haven't received my login email yet.

Check your spam or junk folder for an email from CFWNC with the email "noreply@fcsuite.com". It includes a link that is essential for setting up your password and entering the site. If you cannot locate the email, contact Eliana Rodriguez, Donor Relations Associate at rodriguez@cfwnc.org

Where can I access my online fund portal?

Visit our website at www.cfwnc.org and look for the "Fund Access" button at the top right. This will lead you to the [Online Fund Access page](#), where you click on the blue "Online Fund Access" button.

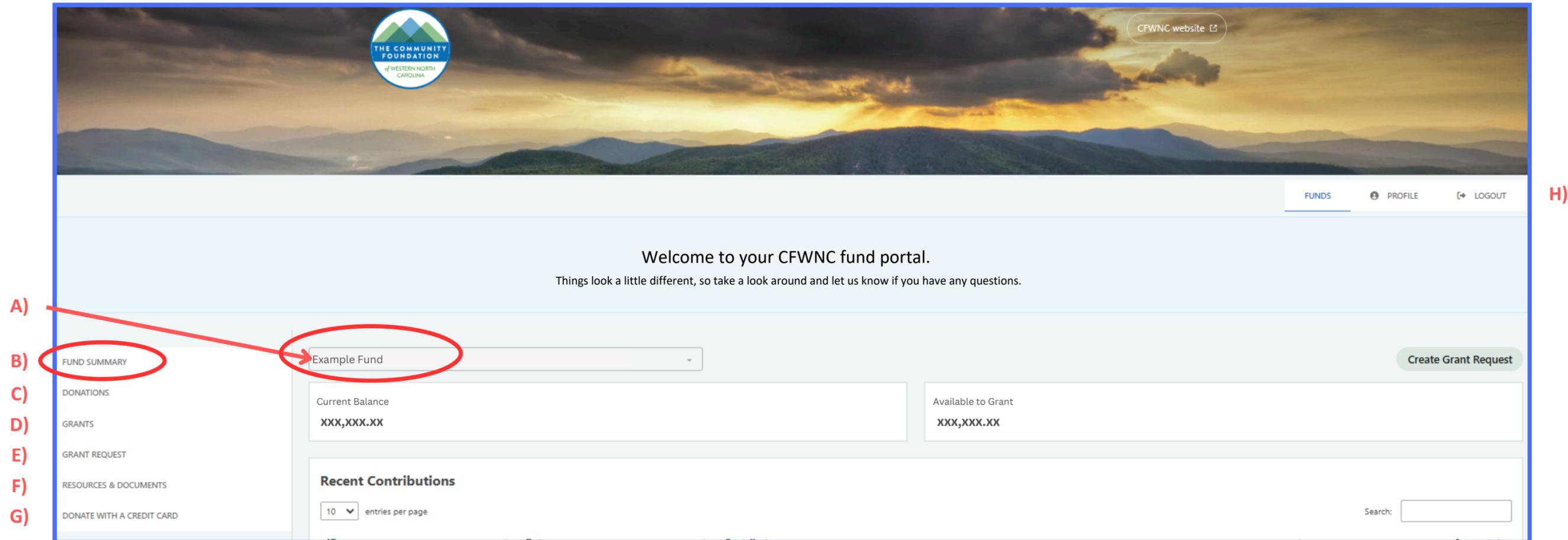
I've lost my password/locked myself out.

If you forgot your password, you can reset it at any time through the [Forgot Password](#) link. Your username is your email address, all lower case letters. Instructions to reset your password will be sent via email from noreply@fsuite.com. (It may go to your junk or spam folder, so please check there.)

The system will lock you out after five unsuccessful login attempts.

CFWNC Fund Portal

Depending on your type of fund, your fund portal may have some differences.



A) Choose Fund

If you have access to multiple funds, conveniently switch back and forth between funds using the drop-down bar.

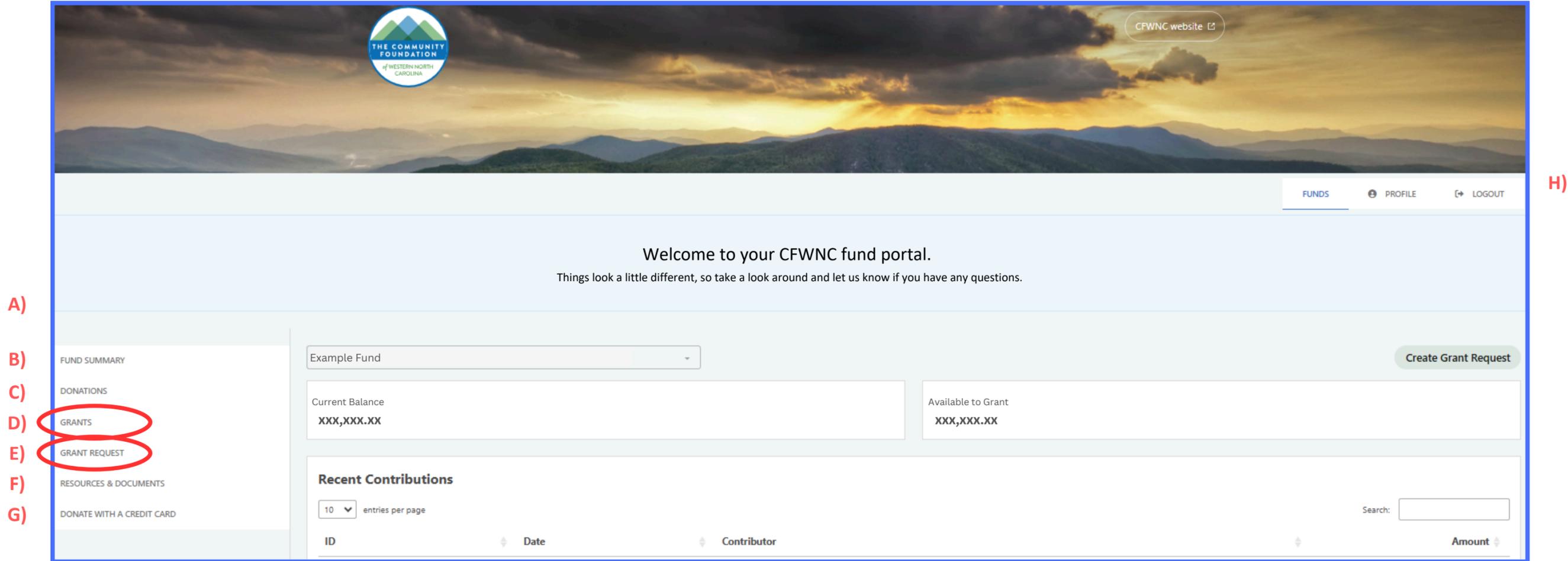
B) Fund Summary

Online fund portal main page which displays an overview of your fund including your current balance, available to grant, and recent donations.

C) Donations

Shows gifts/donations made to your fund. Clicking on a donor's name will show their history of donations to the fund. You can export this data by clicking on the green "Export" button found on the Donations page.

CFWNC Fund Portal



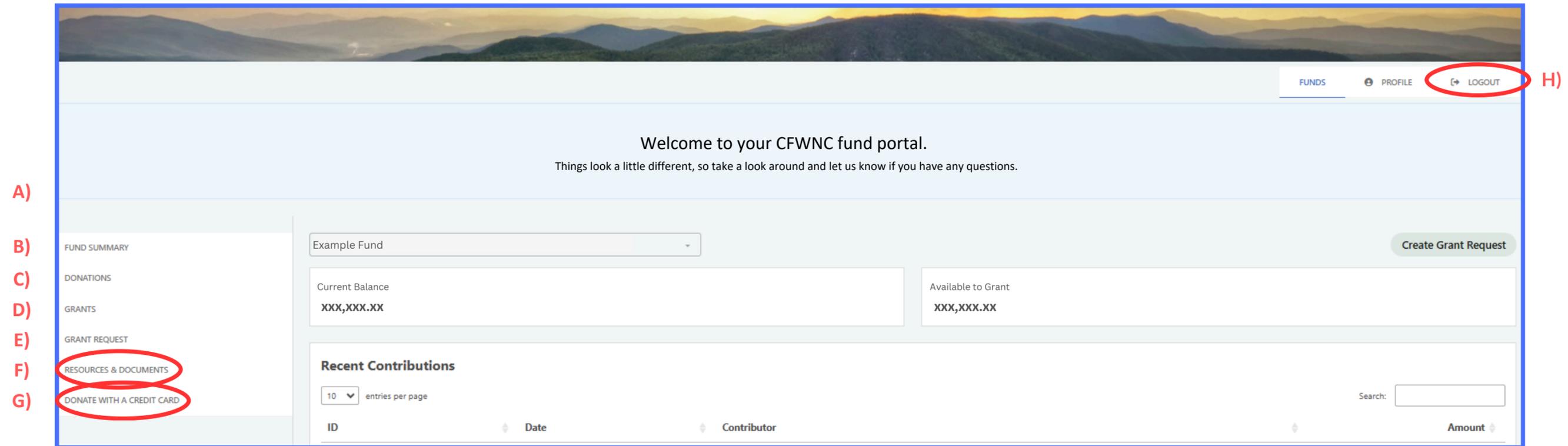
D) Grants

Shows grants made from your fund. Clicking on a grantee’s name will show the history of grants made to that organization. You can export this data by clicking on the green “Export” button found on the Grants page.

E) Grant Requests

You can make grant recommendations from the fund’s available to grant balance. There is a \$250 grant minimum. See ‘Making Grant Recommendations in your Fund Portal’ for instructions on making a grant recommendation.

CFWNC Fund Portal



F) Resources & Documents

- Fund Statements

Quarterly fund statements generated since January 2021 will be listed here. (Statements prior to January 2021 are available upon request.)

- Files

Access your fund agreement, fundholder handbook and online grant recommendation process here.

G) Donate with a Credit Card

Make a gift to your fund or one of CFWNC's funds.

H) Log Out

Exit and return to the login page.