



# Fundholder Portal Guide

## Updated March 9, 2025

The Community Foundation for the Ohio Valley (CFOV) is committed to providing our fundholders with the best tools and resources to make critical grants where they are needed most. The CFOV uses an online Portal to provide you with a secure and easy way to access fund information, such as the fund balance, donation history, or prior grants.

This guide is designed to walk you through how to use the Portal. If you need additional assistance or have any questions, please contact us at 304-242-3144.

### Technology Recommendations

The new Portal is compatible with most devices that can access the internet through a browser. Please note that there is no mobile app for the Portal at this time.

The recommended browsers are Google Chrome and Microsoft Edge.

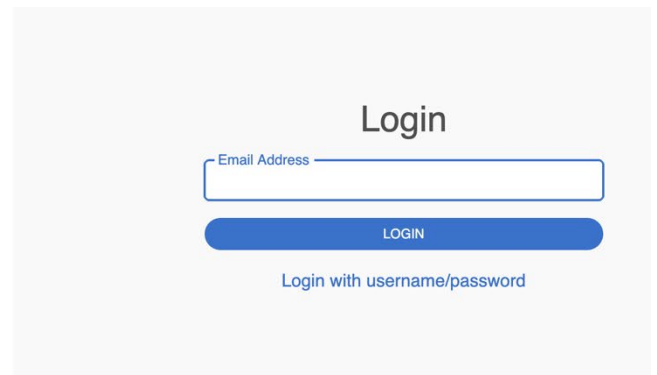
### Logging In

Go to <https://cfov.fcsuite.com/erp/portal>. You should see the following screen:



Welcome to the login page for the CFOV's fund advisor portal. Login with your email or with your username/password. Click "Forgot your password" to reset your password.

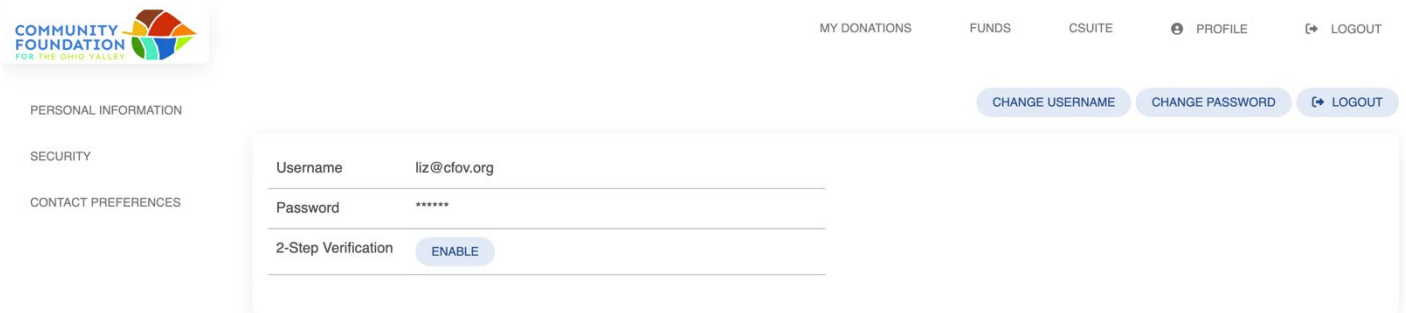
*If you have trouble logging in, please contact us at 304-242-3144.*



Fundholders who already have a username and password for the legacy portal can select "Login with username/password" to log in with their current credentials. You may be prompted to create a new password depending on how strong your current password is. **If you forget your password, click "Forgot your password?" to reset.**

If you are new to the Portal, you can simply enter your primary email address and click "Login". You will be sent a PIN to verify your email. This code is only active for 3 minutes. Once you enter the PIN, you will be logged into the system. **Note:** the email entered must match what CFOV has on file. If you do not receive a PIN, call us at 304-242-3144 to see what email we have in your record.

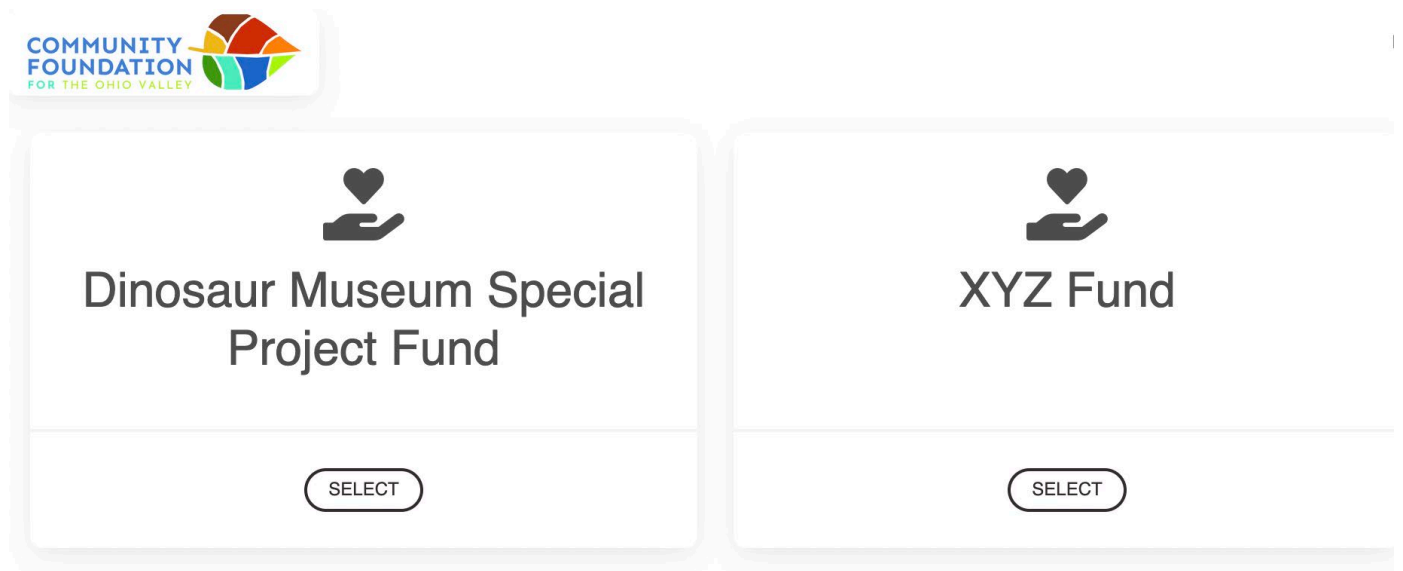
To change your username and password at any time, navigate to the profile icon at the top. Click “Profile” and then select “Security” in the left navigation bar. You can enter a new username and/or password here.



The screenshot shows the user profile page for the Community Foundation for the Ohio Valley. The top navigation bar includes links for MY DONATIONS, FUNDS, CSUITE, PROFILE, and LOGOUT. On the left, there is a navigation menu with options for PERSONAL INFORMATION, SECURITY, and CONTACT PREFERENCES. The main content area is titled 'SECURITY' and contains three sections: 'Username' with the value 'liz@cfov.org', 'Password' with masked characters '\*\*\*\*\*', and '2-Step Verification' with an 'ENABLE' button. At the top right of the main content area, there are buttons for 'CHANGE USERNAME', 'CHANGE PASSWORD', and 'LOGOUT'.

## Accessing Your Home Page

If you are a fundholder for multiple funds, you will see the funds listed in a “card view” like the example below. Select the fund you wish to view.



The screenshot displays the fund selection interface. At the top left is the Community Foundation for the Ohio Valley logo. Below it, two fund cards are shown in a grid. Each card features a heart icon above a hand icon, representing a donation. The first card is titled 'Dinosaur Museum Special Project Fund' and has a 'SELECT' button at the bottom. The second card is titled 'XYZ Fund' and also has a 'SELECT' button at the bottom.

Once you select a fund or if you are a fundholder for only one fund, you will see the fund's home page, which will look similar to the screenshot below. The home page provides you with a fund summary of the current fund balance, as well as recent contributions and/or grants. Other tabs that appear depend on the type of fund.

The screenshot shows the 'FUND SUMMARY' page for 'XYZ Fund'. The current balance is \$100,000.00. The 'Recent Contributions' section shows one entry: ID 42481, Date 03/01/2025, Contributor Doe, John, Amount 100,000.00. The 'Recent Grants' section is currently empty.

Fundholders with multiple funds can move between funds by clicking on the current fund's name to access a dropdown menu of the other funds.

## Navigating the Portal

From the home page, you can select the tabs in the left navigation bar to view the different areas available to you as a fundholder. As a reminder, you will only see the tabs that pertain to the specific fund type.

- **Fund Summary**

This tab, which serves as the home page for the fund, provides the current fund balance as well as recent grants and/or contributions.

- **Donations**

This tab shows each gift donated to the fund. Unless the donor has requested to remain anonymous, you will be able to view more details about each donor by clicking their name. You can also click "export" on the right side of the screen to export the details into an Excel spreadsheet for your records.

o **Grants**

This tab provides details on all grants distributed from the fund. When you click this tab, you will see three sub-tabs across the top: Grant Summary, Grant History, and Recurring Grants.

XYZ Fund CREATE GRANT REQUEST

GRANT SUMMARY   GRANT HISTORY   RECURRING GRANTS

### Grant Summary

10 entries per page   Search:

Grantee	Grants	Amount
123 Food 4 All	1	250.00

Showing 1 to 1 of 1 entry   « < 1 > »

- **Grant Summary:** Lists total cumulative grants by grantee.
- **Grant History:** Lists each individual grant from the fund, starting with the most recent.
  - a. Fundholders can make copies of previous grants by clicking “Copy”. This will create a new grant request with the same details as the prior grant recommendation.
  - b. The grant status reflects where the grant is in the Foundation’s process. “Request” means that the recommendation has been submitted. “Complete” means the grant has been approved and mailed to the grantee.
- **Recurring Grants:** Lists any recurring grants associated with the fund.

- **Grant Requests (for donor advised funds)**

Donor advisors can make grant requests by clicking on this tab. To request a grant, click “Create Grant Request” and select from the three options to proceed.

XYZ Fund ▾

CREATE GRANT REQUEST

To request a grant from this fund, click "Create Grant Request".

Once you have chosen the grantee or entered its information manually, simply click on "Create Request" to enter the details of your request, including the amount and a description of the grant's purpose. The minimum grant request is \$100. CFOV staff will receive notification of your request and process the grant if it follows the Foundation's policies and the requirements of the Pension Protection Act of 2006.

Please note that the grant may not:

- fulfill an obligation of an existing legally-binding pledge agreement;
- pay for dues, membership fees, tuition, goods from charitable auctions, or other goods or services (including dinners, tickets, etc.) that provide more than an incidental benefit to you or any other individual;
- go to an individual; or
- be used for political contributions or to support political campaigns.

**Please allow at least 3 weeks for grant processing.**

You can view the status of grants from the fund under the "Grant Request" tab in the left navigation bar.

[Grant Request](#) > Choose Type

PREVIOUS GRANTEE SEARCH GRANTEE MANUAL GRANTEE

- **Previous Grantee**

- a. This gives you the option to select a grantee you have given to in the past, a CFOV fund you have given to in the past, or other CFOV funds you might want to support.

- **Search Grantee**

- a. This selection allows you to search for a grantee based on name, city/state, or EIN. The system will first search the Foundation's database for a match. If none is found, the system will prompt you to “check Candid results above.”

Candid's results will include all matches that fit the information you provide. Once you find the correct nonprofit, choose “create request.”

- **Manual Grantee**

- a. This selection allows you to enter grantee details manually. You will need to enter the grantee's name and address to move the grant request to the CFOV's staff for due diligence.

Once the grantee’s information has been added, you can complete the request by filling out the remaining details of the grant request and clicking “Add to Cart” at the bottom of the page. **Note:** the description field for grant requests is required. Please provide the grant purpose, such as general support.

## Grant Request

Grantee	123 Food 4 All
Address	987 Oxford Way Triadelphia, WV 26059
Description	<input type="text"/> <span style="float: right;">0/255 characters</span>
Amount	<input type="text"/>
Anonymous	<input type="checkbox"/>
Recurring	<input type="checkbox"/>
Attachment	<input type="button" value="Browse..."/> No files selected. (or drag and drop anywhere on the page)
Attachment Description	<input type="text"/>
Enter Grantee EIN here:	<input type="text"/>

Through submission of this request, I certify that all advisors of the fund agree to this distribution. No individual will benefit from any goods or services as a result of this distribution.

After you have added all grant requests to your cart, simply click “Cart” in the top right corner of your screen to view the list of grant requests and make any final edits. Once you have confirmed your requests, click “Review Grant Requests” to move to the final stage. Click “Submit Grant Requests” to submit your requests to CFOV staff for due diligence.

Grant Request Cart			<input type="button" value="REVIEW GRANT REQUESTS"/>
	Recipient	Description	Amount
<input type="button" value="DELETE"/>	123 Food 4 All 987 Oxford Way Triadelphia, WV 26059	General operating support	500.00 <input type="button" value="EDIT"/>
Grant Request Total			500.00

- **Payment Request (for special project funds)**

Special project fund representatives can submit invoices to the CFOV's Finance staff through the Portal. To upload an invoice, click "Create Voucher Request" and choose from the three options to proceed.

Dinosaur Museum Special Project Fund ▾

To submit an invoice for your Special Project fund, click "Create Voucher Request" below. You will then see three options below: "Previous Vendors", "Search Vendors", and "Manual Vendor".

If you are entering a vendor that the fund has made a payment to in the past, choose "Previous Vendors". If your request is for a new vendor, we recommend that you use the "Search Vendors" function to locate the organization using its name and city. If you have the full address of the vendor already, you can always enter them manually under "Manual Vendor".

Once you have chosen the vendor or entered its information, click "Create Request" to enter the details of your request, including the amount, a description of the invoice, and copy of the invoice.

**Since the CFOV is a tax-exempt organization, please ensure that sales tax has been removed from the invoice. If not, please contact the vendor for a new invoice without sales tax and submit that.**

The CFOV will receive notification of your request and process your voucher if it meets the policies of the Foundation and the requirements of the Pension Protection Act of 2006. **Please allow at least 3 weeks for processing.** Letters outlining the distribution, along with the check and invoice, will be mailed directly to the vendor.

You can view past vouchers from your fund under the "Payments" tab on the left hand side of the screen.

[Voucher Request](#) > Choose Type

PREVIOUS VENDORS SEARCH VENDORS MANUAL VENDOR

- **Previous Vendors**

- a. You can select a vendor that the fund has made a payment to in the past.

- **Search Vendors**

- a. You can search for a vendor based on name, city/state, or EIN. The system will search the CFOV's database for a match. If no match is found, you will need to enter the information manually.

- **Manual Vendor**

- a. You can enter vendor details manually. Make sure to include the vendor's name and address.

Once you have chosen the vendor or entered its information manually, click "Create Request" to enter the details of your request, including the amount, a description of the invoice, and a copy of the invoice. Click "Review" and then "Submit Request" to send your voucher request to CFOV staff for due diligence.

- **Payments (for special project funds)**

This tab shows each voucher paid from the fund.

- **Statements and Files**

When you click this tab, you will see two sub-tabs across the top: Fund Statements and Fund Agreement & Other Documents.

- **Fund Statements:** Shows quarterly fund statements dating back to January 2021.
- **Fund Agreement & Other Documents:** Shows documents and resources for the fund that we have made viewable to you.

○ **Make a Donation**

This tab redirects you to our Giving Hub where you can donate to any listed funds at the CFOV. The fund(s) for which you are a fundholder will appear on the home page of the Giving Hub while you are signed into the Portal.

Online donations can be made with a credit card, Link, Apple Pay, Google Pay, Amazon Pay, Cash App Pay, and bank account.

## My Donations

If you are a donor as well as a fundholder, you will see My Donations at the top of your screen.

MY DONATIONS

FUNDS

 PROFILE

 LOGOUT

Clicking this will bring you to a summary page of all donations you have made to any fund.

MAKE A DONATION

DONATION SUMMARY

DONATIONS

RECURRING DONATIONS

Total Donations

**146,500.00**

Total Donations This Year

**145,500.00**

Total Donations Last Year

**1,000.00**

### Donation Summary

Fund	2025	2024	Total
CFOV Unrestricted / Community Impact Fund		1,000.00	1,000.00
Dinosaur Museum Special Project Fund	45,500.00		45,500.00
XYZ Fund	100,000.00		100,000.00
<b>Total</b>	<b>145,500.00</b>	<b>1,000.00</b>	<b>146,500.00</b>

To view details of a past donation you have made to the CFOV, select "Donations" in the left navigation bar and click the ID number next to the donation.

## Grants Received (for agency fundholders)

Agency fundholders will see Grants Received at the top of the screen.

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MY DONATIONS

GRANTS RECEIVED

FUNDS

 PROFILE

 LOGOUT

Clicking this will bring you to a summary page of all grants your organization has received from the CFOV. To view details of a past grant, select "Grants" in the left navigation bar and click the ID number next to the grant.

### Logging Out

Remember to log out of the Portal when finished by clicking "Logout" in the upper righthand corner.

### Having Trouble Logging In?

CFOV does not save passwords, so if you lose yours, you will need to reset it before logging back into the Portal. On the login page, select "Login with username/password" and then click "Forgot your password?" to reset. An email with password reset instructions will be sent to the email address if it is in our system.

If you still cannot access the Portal, please call us at 304-242-3144.

## FAQ

### **1. I want to update my information. Can I do that in the Portal?**

- a. You can update your personal information by clicking “Profile” in the upper righthand corner. You can edit your contact information, change your username and password, and contact preferences. Any changes made in the Portal will automatically be reflected in the CFOV’s internal records. Your password, however, is never visible to CFOV staff.

### **2. How will I know if I submitted a grant successfully?**

- a. You can check the status of the grant under the Grant Requests tab.

### **3. How long does it take to process a grant recommendation?**

- a. Please allow at least 3 weeks for grants to be processed before contacting the CFOV regarding the status of grant requests.

### **4. If I have a donor advised fund with the CFOV, how much of the fund balance can I grant?**

- a. The Fund Summary tab on the Portal lists the current balance in the fund. If the fund is non-endowed, the entire fund balance is spendable. If the fund is endowed, you will see the spendable balance next to the current balance. You can make grants up to that amount.