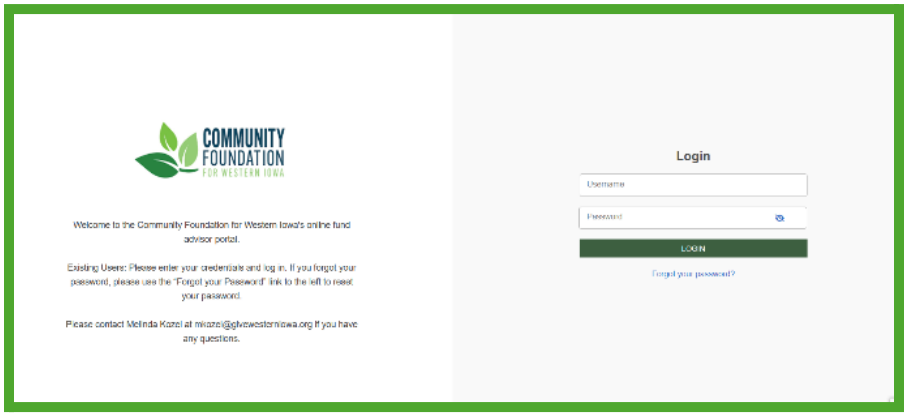
CFWI Donor Portal User Guide

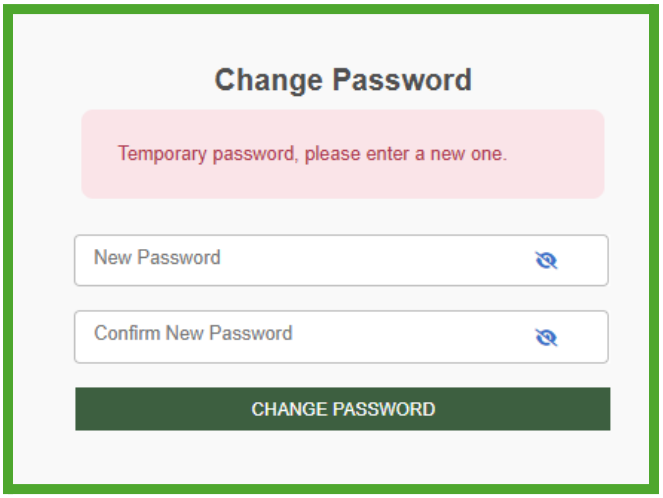
This guide provides a brief overview of how to navigate the donor portal. For additional resources in using the tool, visit our other guides.

LOGIN & DASHBOARD

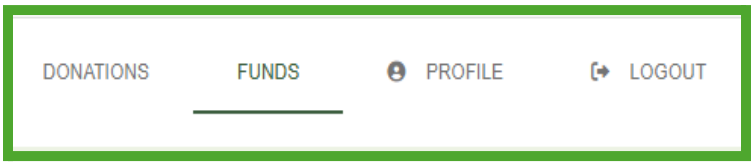
1. You will receive an email from CFWI with a link to the portal, username (email used for your account), and a temporary password.
    a. Click on the link to access the portal.



2. Enter the credentials emailed to you from CWFI.
    a. The portal will ask you to come up with a new password. Once you have entered it, it will have you log in with your new password.

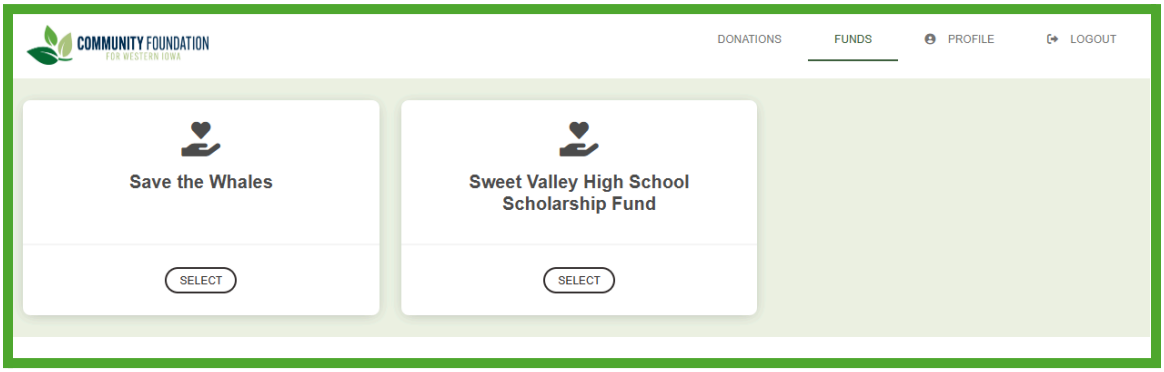


3. After successfully logging in, you will start on your dashboard. In your dashboard, in the top right corner, you will see tabs for different areas of your portal. Each dashboard is customized to the specific fund(s) you have with CFWI and the donation history for your fund(s).
    a. The menu options listed below may be different than this screenshot based on your type of funds

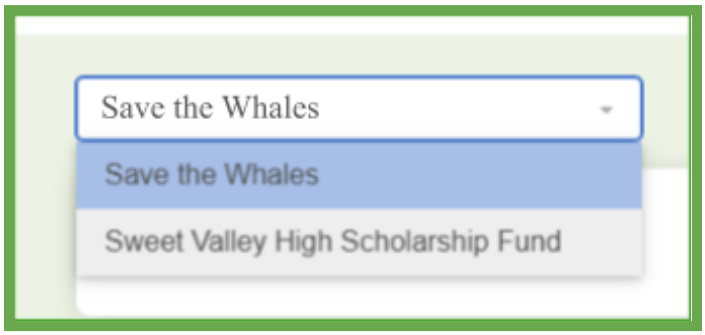


FUNDS TAB

4. If you have funds set up, your dashboard will default to the funds tab. Here, your funds are displayed as cards that you can click on to view more information.



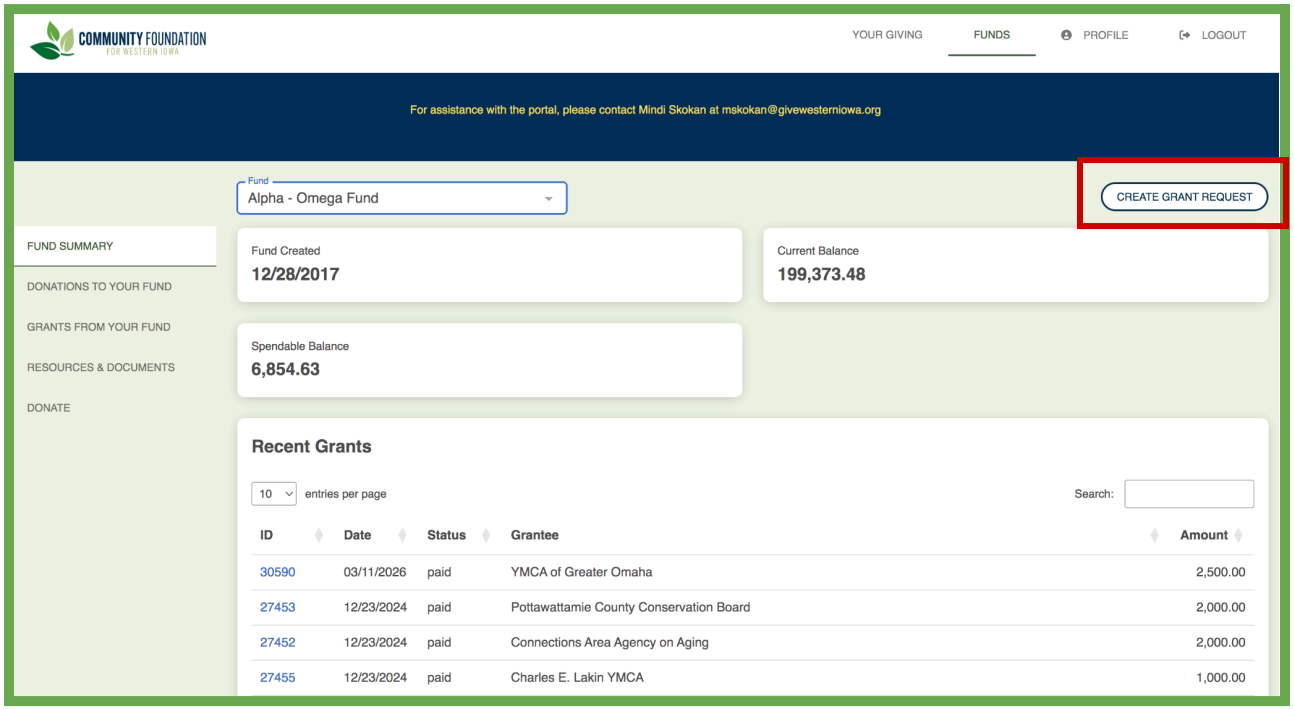
5. Once you choose a fund, you can toggle to other funds through this drop down option.



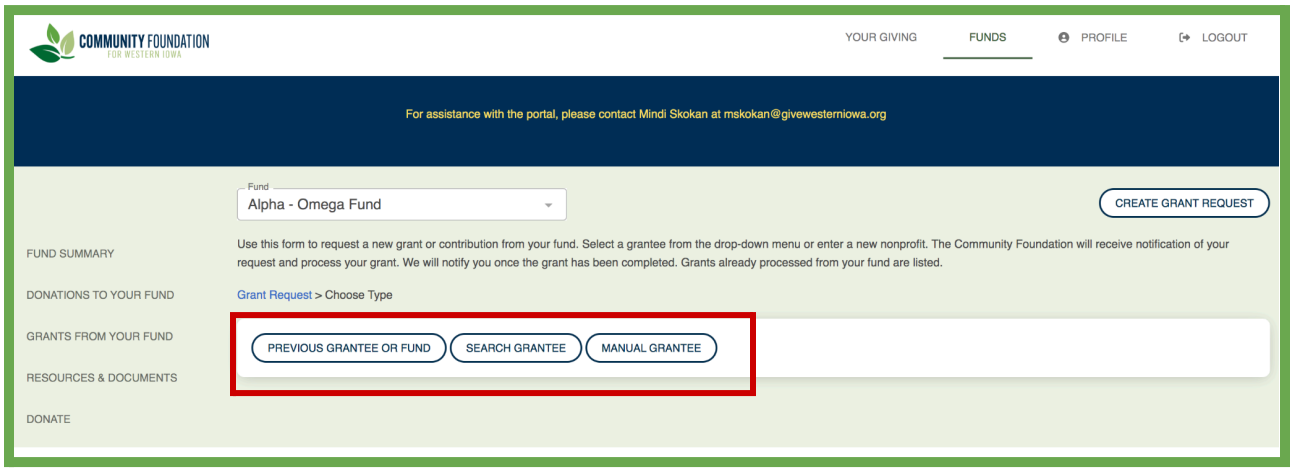
GRANT REQUEST TAB

6. Once you select your fund, you have the information provided below regarding the fund.
    a. You can view when the fund was created, the current balance, spendable balance of the fund, as well as recent grants.

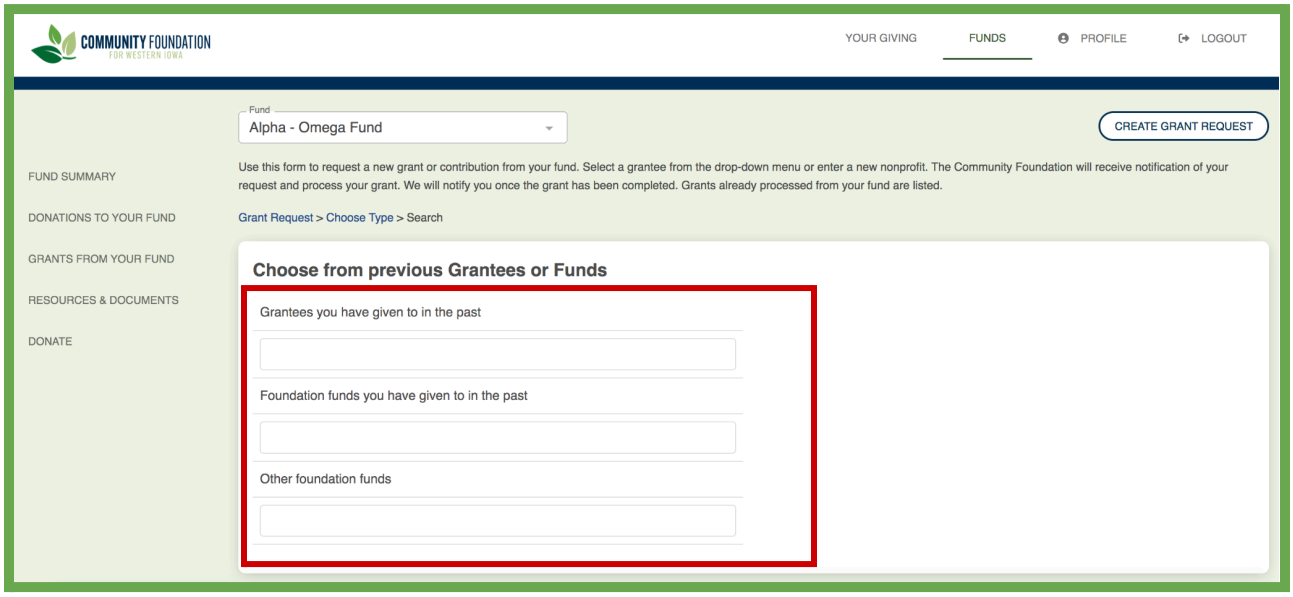
b. In the right hand corner of the screen, you have the option to ‘Create Grant Request’



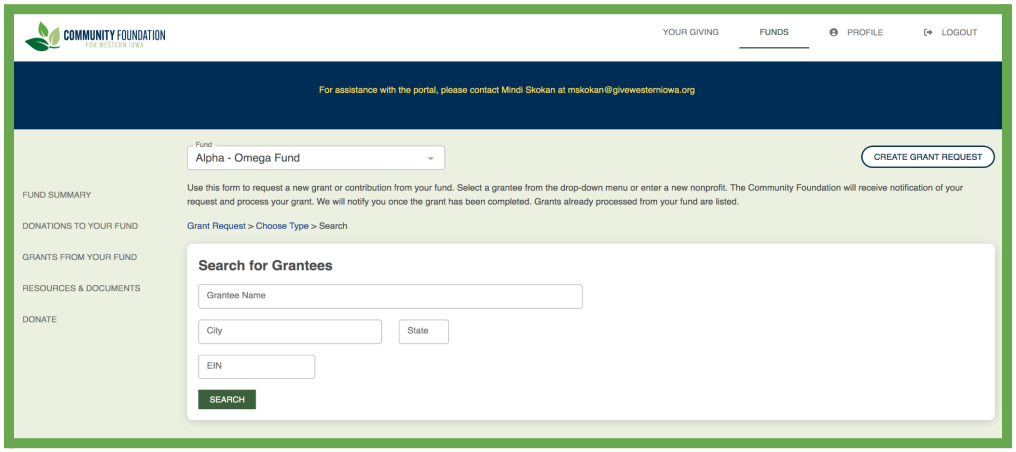
7. When you click ‘Create Grant Request”, you have the option to choose the following to create the request by:
    a. Previous Grantee or Fund
    b. Search Grantee
    c. Manual Grantee Creation



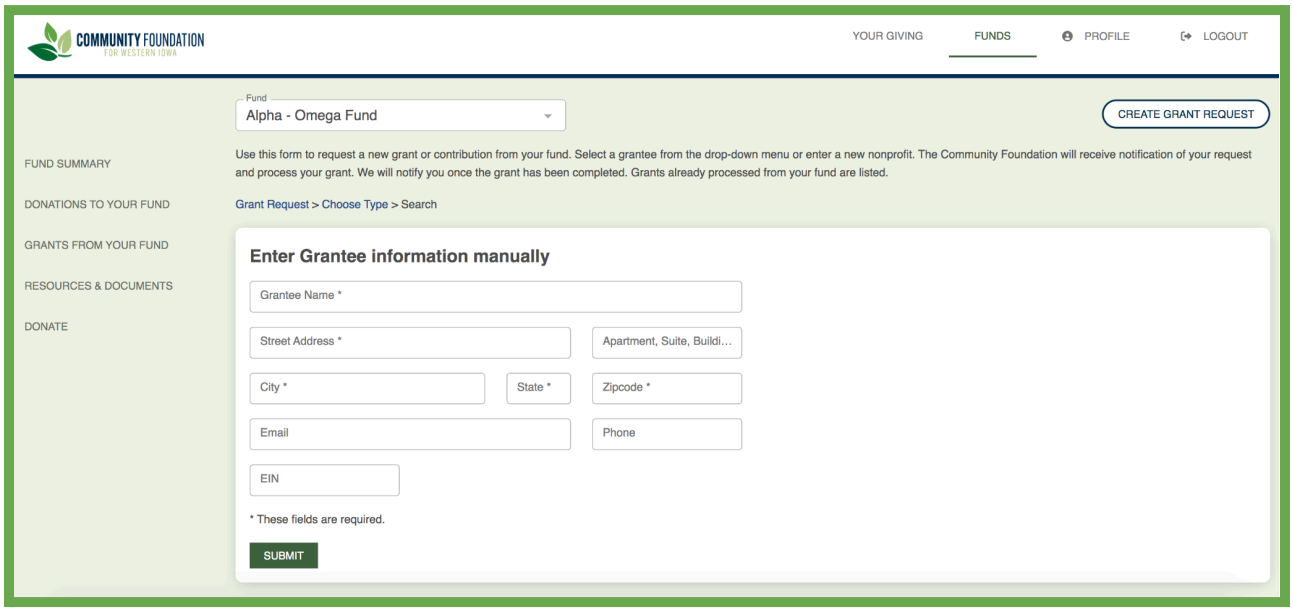
8. When clicking on the ‘Previous Grantee or Fund’ option, there are three options to choose from when creating the request:
    a. Grantees you have given to in the past
    b. Foundation funds you have given to in the past
    c. Manual Grantee creation
        i. All of these options will populate a drop-down from past records/entries made.



9. When selecting ‘Search by Grantee’, you are able to search for an existing grantee by the following:
    a. Name
    b. City
    c. State
    d. EIN

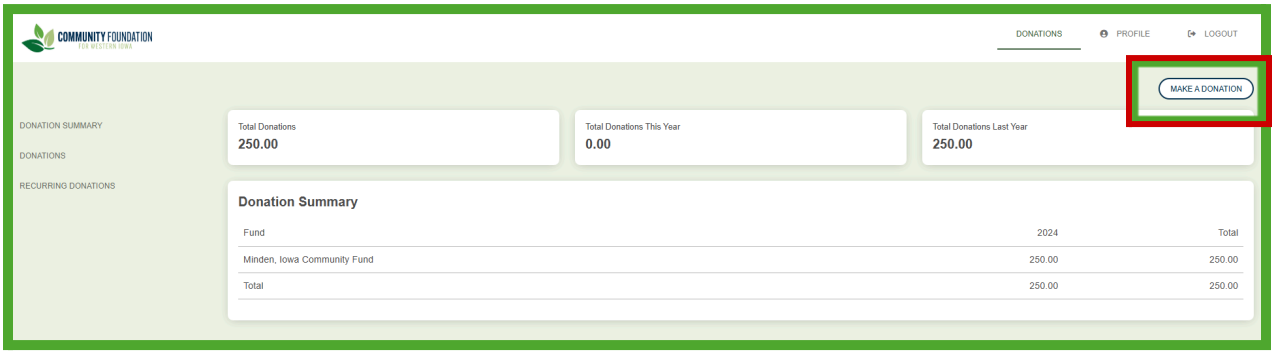


10. When selecting ‘Manual Grantee’ - select a grantee from the dropdown that you want to request a new grant or contribution from.
    a. all information listed below is required except for email, phone number & EIN.
    b. Once necessary information is entered, click ‘submit’ & this will send a notification to the Community Foundation and will proceed in processing your grant.



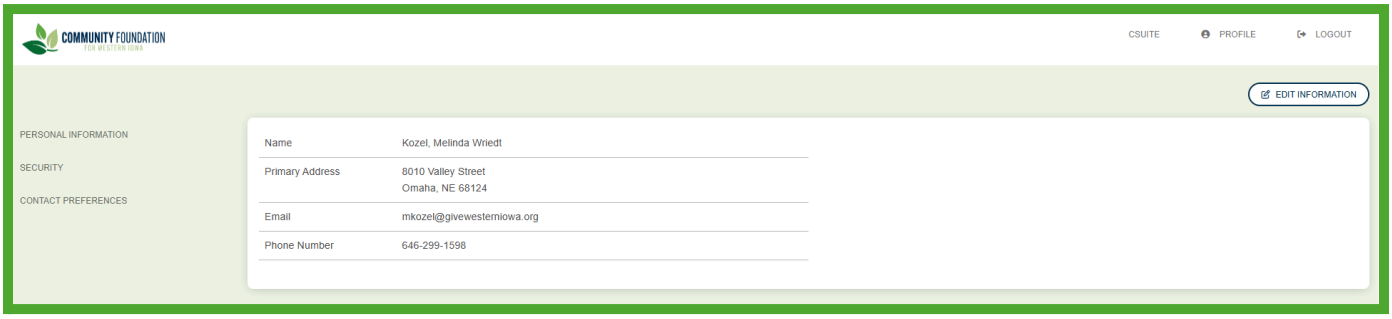
DONATIONS TAB

11. If you do not have a fund(s) with CFWI, the dashboard will default to the ‘Donations’ tab at login.
    a. This tab allows you access to your donations. You are also able to access the ‘Giving’ option with the highlighted button above.
    b. The Giving Hub takes you to the website to make a donation, as well.

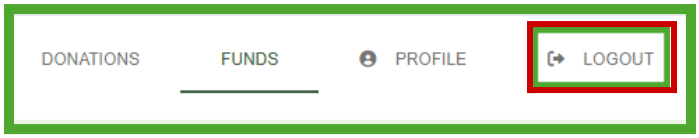


PROFILE TAB

12. The profile tab lists your contact information. You can update your password and contact preferences by choosing the 'Edit Information' button at the top right.
    a. If you are only using the portal as an administrative user, your dashboard will default to the profile tab.

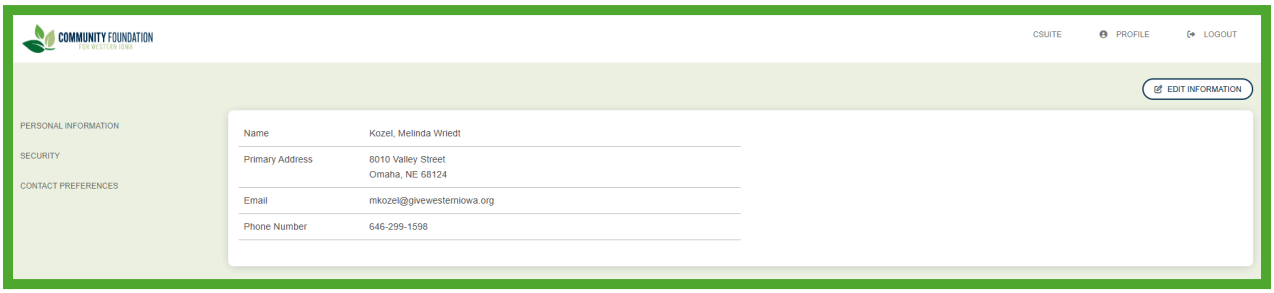


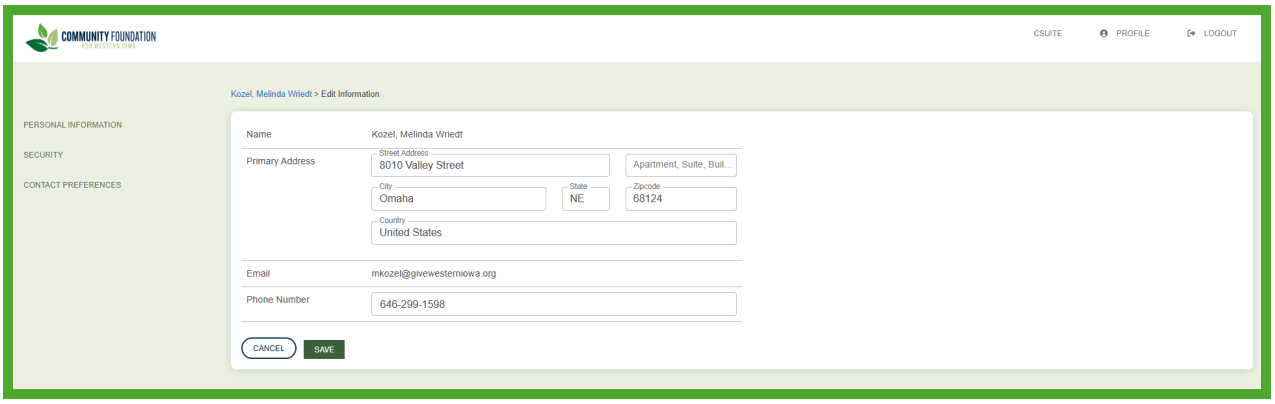
13. The system logout button is located at the top right of your dashboard screen.



14. This tab defaults first to the Personal Information window. This shows the primary address and phone number associated with your CFWI accounts.
    a. To update your information, click on the 'Edit Information' in the top right.
    b. You are unable to edit the email address listed here. Contact CFWI to change email address.

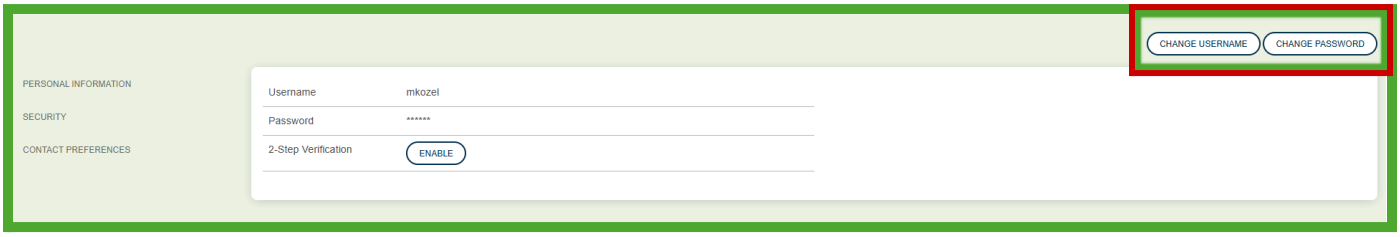
15. Make any updates and click 'save' to update your record. Click 'cancel' to exit without saving your updates.

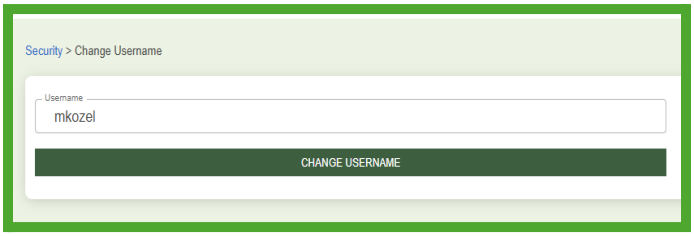


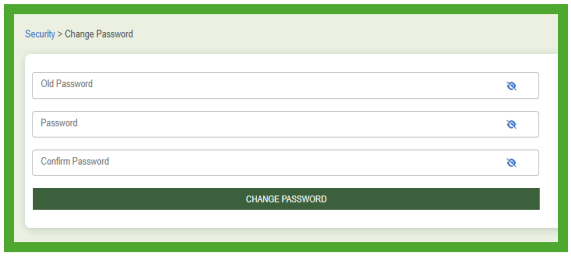


SECURITY TAB

16. At the top right of the screen, you can choose ‘change username’ or ‘change password’.





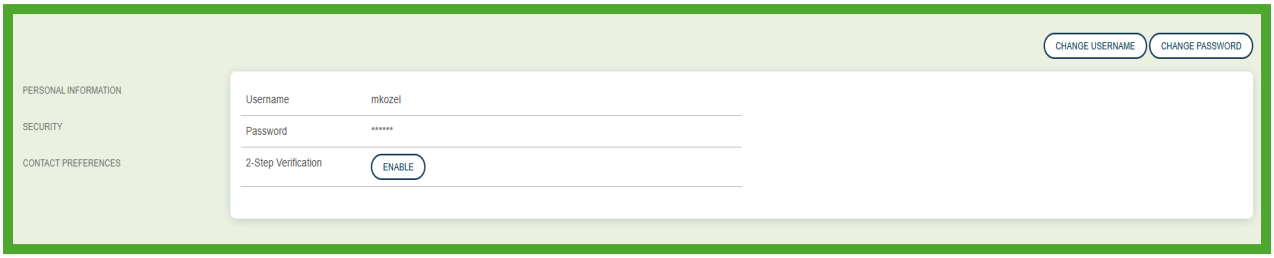


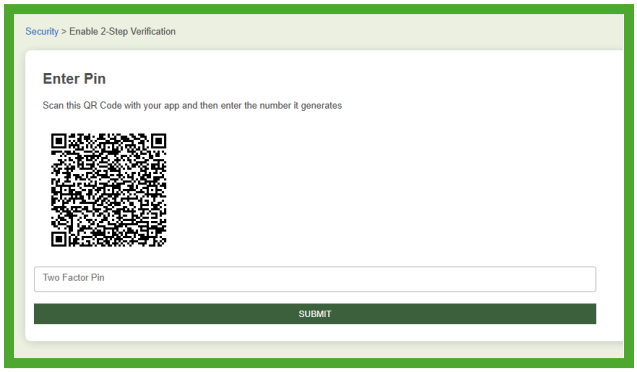
17. To cancel your changes without saving, click on the Security link again, use the back button on your browser or click any tab on the screen.

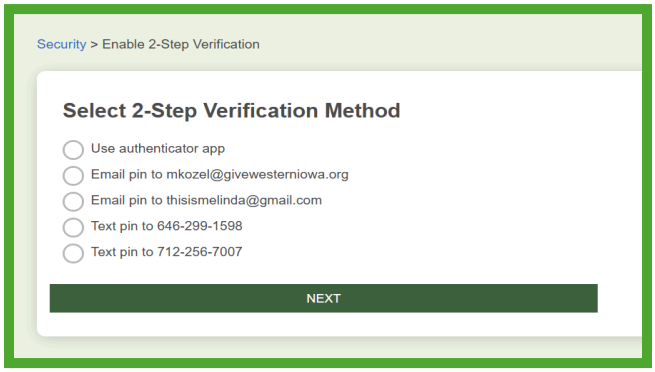
    a. Optional - you can add 2-step verification to your login by clicking the ‘enable’ button.

    b. After clicking enable, you will have choices for how to receive that 2-step verification information.

    c. The Authenticator App works with any 3rd party app of your choice.

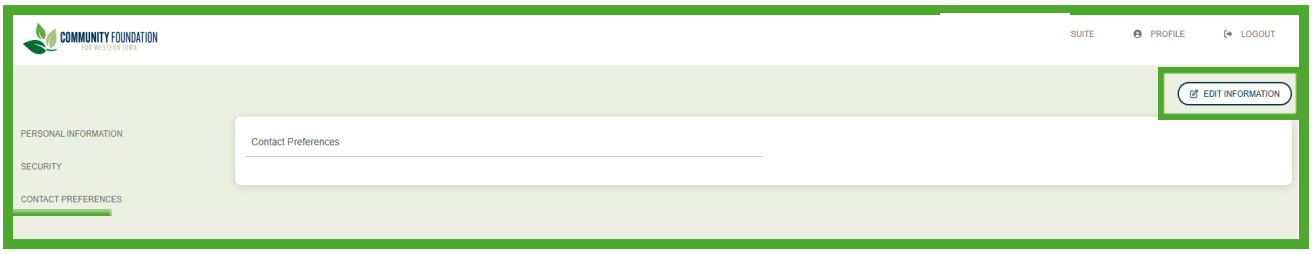


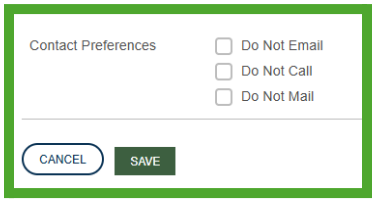




CONTACT PREFERENCES TAB

18. You can edit these to exclude emails, phone calls or mail from the ways we contact you.




Contact Preferences
Do Not Email
Do Not Call
Do Not Mail
CANCEL
SAVE