Donor Services Online
Instructions
Navigating Your Fund Online

This password-protected access allows you to see your fund information.

To become a registered user of the Donor and Volunteer Login:
2. Click on “Donor Services and Volunteer Information” on the upper-right menu of the website:

3. On the Donor Services Online page, use the orange button to register as a new user:

You will be directed to this page:

Our system requires a strong password for security:

Your new password must contain:
- A minimum of 12 characters
- Both letters and numbers (no patterns)
- At least 1 special character (like # / $ % & @)

The password cannot contain:
- Your name, username or organization name.
- Any patterned numbers (such as 123 or 321)

New login accounts: The links to your fund accounts may take up to 48 hours to activate.

Questions or login issues? Contact our Donor Services Online Help team at DSOhelp@cffoxvalley.org
We will assist you during business hours (8 - 4 M-F).
If you need to reset your password, click on the link in the login box:

Once your are logged in, you can click on these links to manage your fund:

Welcome!
Welcome to Donor Services Online. Use this portal at any time, seven days a week, to check your fund balance, see how much you have available to grant, recommend a grant or get other information about your charitable fund.

For Optimal Results:
- Use a browser other than Internet Explorer -- such as Chrome, Firefox or Safari. They will give you the best results on the donor pages of our website.
- Use the full year 2022 in your searches, rather than MM/DD/22

Online Services
Your Giving
- **View your Fund Statement** - Get a balance sheet and revenue statement updated through the most recent month (unaudited), for a date range you determine.
- **See how much you can grant** - Fund Summary gives you a snapshot of past and pending grants, gifts and grant dollars available.
- **Review your past grants** - Look up grants you have recommended in recent years. Or search for a nonprofit among all Community Foundation grants.
- **Review your past gifts** - Look up past gifts you made to any Community Foundation fund.
- **Recommend a grant** - Make a paperless request for a grant; look up past grant recipients.
- **Check gifts to a fund** - Review the history of all gifts made to your fund. Or, you can go outside of your personal fund portal to give online now.

Your Giving Profile
- **Explore your giving preferences** - Complete our survey to help us know your charitable preferences.
- **Update your profile** - Keep us up to date with changes in your life.
- **Change your password** - It is a good practice to change your password from time to time.

Here To Help!
- Your **donor services representative** is always happy to assist you in finding any information you need.

Questions about your fund? Your **donor services representative** is always happy to assist you in finding any information you need.

Email info@cffoxvalley.org or call 920.830.1290.

Revised 1/18/2022