

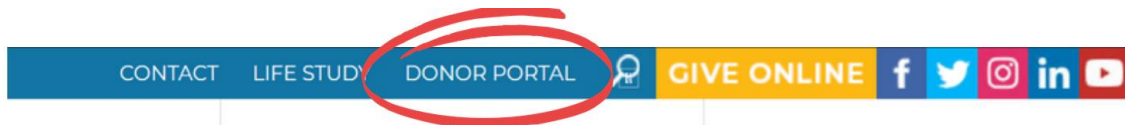
# Donor Services Online Instructions

## Navigating Your Fund Online

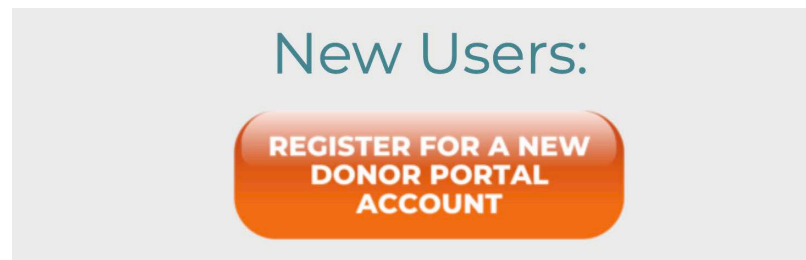
This password-protected access allows you to see your fund information.

### To become a registered user of the Donor and Volunteer Login:

1. Go to [www.cffoxvalley.org](http://www.cffoxvalley.org).
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:

A registration form titled 'Signup for Donor Services Online'. It contains the following fields: First Name, Last Name, Preferred Email, Country (dropdown menu showing 'United States'), Address lines, City, State (dropdown menu showing '<Please Select>'), ZIP, Sex (dropdown menu), Username, Password (with a note '12 characters or more'), and Confirm Password. A blue 'SUBMIT' button is at the bottom.

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 # / \$ % & @)

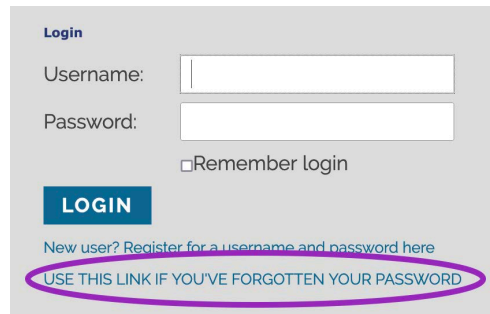
The password cannot contain:

- 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](mailto: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:



The image shows a login form with the following elements:

- Login** header
- Username: [input field]
- Password: [input field]
- Remember login
- LOGIN** button
- Link: [New user? Register for a username and password here](#)
- Link: [USE THIS LINK IF YOU'VE FORGOTTEN YOUR PASSWORD](#) (circled in purple)

Once you 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](mailto:info@cffoxvalley.org) or call 920.830.1290.