

Donor Advisor User Guide

Contents

Login	3
Home Page	4
Fund Summary	5
My Contributions	5
New Grant Request	6
Granting to a 501(c)3	7
Grant from Fund History	8
Granting to a Fund of the Foundation	9
Contact Information	10

Login

To login to the Donor Portal:

- Go to www.cfoscc.org and click LOGIN (top right corner)
- Or, go to www.giving.cfoscc.org



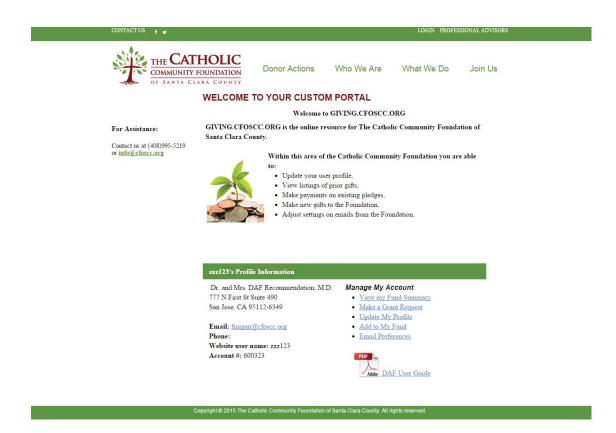
Enter your User Name and Password in the appropriate box, and click Login.



Home Page

On the Home Page you will find:

- Quick links to common donor actions under Manage My Account



- The full list of actions can be found by hovering over Donor Actions at the top to reveal the dropdown menu shown below.



Fund Summary

Access your Fund Summary from either the Donor Actions menu or the Manage My Account links.

- If you have multiple funds with the Foundation, you can select which to view from the dropdown menu.
- Click the links in the Year to Date column to see detailed information.



My Contributions

Click on the linked field of Contributions from the Fund Summary to:

- Add money to your fund.
- View past contributions.



New Grant Request

Begin a new grant request from either the Donor Actions menu or the Manage My Account links.

- Select the appropriate fund from the dropdown menu, if necessary.
- To grant to:
 - Any 501(c)3, please see page 7
 - An existing fund of the Foundation, see page 9
- Enter an amount and purpose for the grant.
- Review the information you have entered, and then check I Agree under Legal Statement.
- Click Submit Request when ready, or Cancel Request if necessary.

Donor Name	DAF Recommendation	
Confirmation Email	info@cfoscc.org	
	6XXX - Donor Advised Fund	*
Funds Currently Available for Grants:	\$1,429,746.91	
Grant Type ® Gran	t To A Recipient Grant To A Fund	
RECIPIENT INFORMA	TION	
To Select Recipient Or	ganization: Select From Your Grant History Search Our Database (or Add New Organization)	
Recipient O	rganization	
Recipie	nt Address	
Recipie	ent Contact	
C	ontact Title	
Cor	ntact Phone	
Con	ntact Email	
GRANT INFORMATIO	N	
Grant Amount S		
	Recommended minimum amount \$250	
Grant Purpose		*
Special Request for Catholic		
Community Foundation		
Staff		
	Make my grant anonymous	
LEGAL STATEMENT		
	ncluded in the terms and conditions of my advised fund agr recommendation is subject to review and approval by the	
	nmendation does not represent the payment of any persona Nor do I expect or will accept any personal benefit, goods or	
□ I Agree	This grant, if made, is for the public benefit of the non-profit it i intended for, and not for any one individual, including but not li myself.	
		Print
	ations may not appear immediately on your fund summary, been entered into our database.	but will
Submit Request Cancel Reque	est	

Granting to a 501(c)3

To grant to a 501(c)3 click Search Our Database (or Add New Organization) from the Recipient Information section.

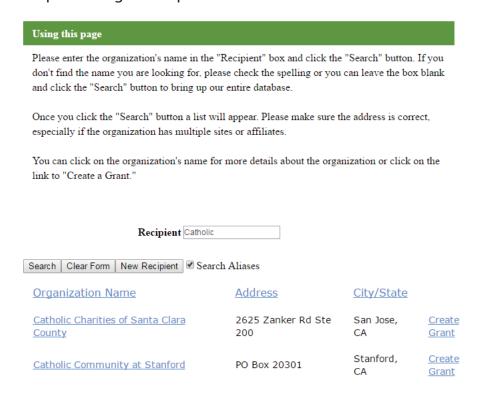
(If you would like to duplicate one of your previous grants, please see page 8.)

RECIPIENT INFORMATION

To Select Recipient Organization:	Select From Your Grant History
	Search Our Database (or Add New Organization)
Recipient Organization	
Recipient Address	
Recipient Contact	
Contact Title	
Contact Phone	
Contact Email	

Enter the organization's name you wish to grant to, click the Search Aliases box, and click Search. If the correct organization appears, click the Create Grant link at the end of the row.

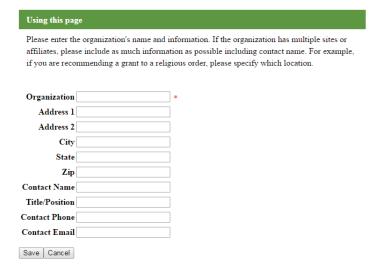
After selecting the correct organization you will be taken back to screen shown on Page 6 to complete the grant request.



Granting to a 501(c)3

If the organization you wish to grant to is not in our database:

- Click New Recipient.
- Enter the Organization's name, and any other information you may have.
- Click Save.



You will be taken back to screen shown on Page 6 to complete the grant request.

Granting from Fund History

To grant from your Fund History:

- Select the date range if necessary.
- Click Create Grant at the end of the correct row.



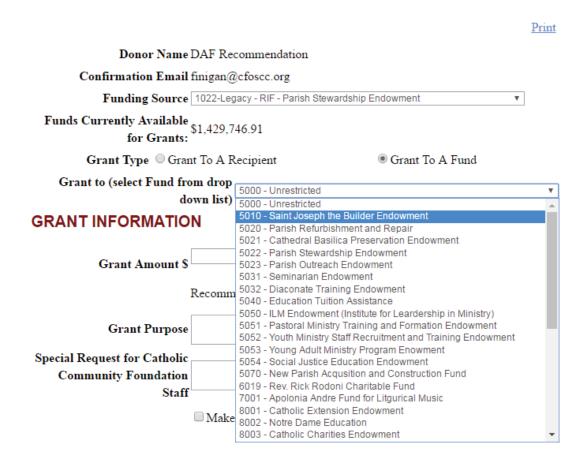
You will be taken back to screen shown on Page 6 to complete the grant request.

Granting to a Fund of the Foundation

To grant to one of the many funds the Foundation holds:

- Select the Grant to a Fund button.
- Pick the fund you would like to grant to from the drop down menu.

DONOR INFORMATION



You will be taken back to screen shown on Page 6 to complete the grant request.

Questions?

If you have any questions about the Online Portal, please contact:

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