



Donor Designated Fund Online Portal

Welcome to the Catholic Foundation of Michigan's Donor Portal system. We have assembled this quick-reference guide to introduce the basics of the donor portal. As always, please know the friendly team stands ready to answer any questions you might have.

- **Establishing your password:** Catholic Foundation staff will initiate your Fund online using the information provided in the Exhibit A document connected to each the chartable account. If updates are needed, please have any of the named account individuals reach out to the Catholic Foundation team for assistance.
 - Once the process has been initiated, you will receive an automated email from sender "no-reply@fcsuite.com." You will notice "Catholic Foundation of Michigan" referenced in the email's subject line.
 - The automated email will instruct you on the steps to create a custom password specific to your Catholic Foundation Fund account.
 - Take note of your username and password as you complete this process.
 - Please delete this automated email once you have successfully completed this process. The link contained in the email is only to be used for establishing your initial password.
- **Accessing the system:** To access the portal at any time, simply visit <https://cfmi.fcsuite.com/erp/fundmanager> and enter your username and password established in the step outlined above. Once inside the system, select the particular account you wish to review and then use the menu items in the screenshots below to navigate through the Advisor Portal.

Catholic Foundation
of Michigan

Community Donor

Username

Password

Login

[If you need to reset your password please contact us](#)

Access <https://cfmi.fcsuite.com/erp/fundmanager> by any web browser (including most smartphones and tablets) to access the Advisor Portal system. Sign in using your username and password established in the step outlined above.

For easy access, there is a link directly on our website: <http://catholicfoundationmichigan.org>



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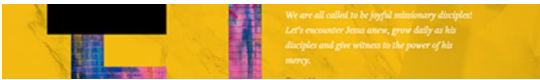
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Catholic Foundation of Michigan

1145 W. Long Lake Road, Suite 201
Bloomfield Hills, MI 48302
Phone: 248.204.0332



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Current Fund Holders



If you serve as an advisor for multiple charitable accounts, you will see the “Choose Fund” menu once you have successfully signed in to the Advisor Portal System. Choose the particular account with which you wish to interact. If you are listed as an advisor for only one account, you will not see this screen.



Community Donor

Choose Fund

[My Favorite Parish Endowment Fund](#)

[Sample Donor Advised Fund](#)

If you manage one fund with the Catholic Foundation of Michigan, you will see the following main screen when you log into your account:



Community Donor

Sample Donor Advised Fund

[Home](#) [Contributions](#) [Grants](#) [Grant Request](#) [Statements](#) [Files](#) [Donate](#) [Logout](#)

Current Balance: \$
Fund Advisors are: **Sample, Sam**

Recent Contributions

ID	Contributor	Amount

The main screen provides an at-a-glance list of **contributions received** into the account and **grants paid** out of the account. You will also see the Current Balance, updated monthly, and the current Fund Advisors will be indicated just below the balance. Note that each person listed will have similar access to the Advisor Portal.

The menu bar along the top of the window provides the following additional options:

- **Choose Fund** - allows you to select a different account for which you serve as an advisor
- **Contributions** - provides in-depth information regarding each contribution received into the charitable account. Provided the donor has not requested to remain anonymous, you will be able to learn more detail about each donor by clicking his/her name.
 - You will note that an “Export” option appears on the far right side of the menu bar. This feature will export information about each donation into a Microsoft Excel spreadsheet.
- **Grants** - provides more detail about all grants paid from this charitable account. The top section provides a summary of grants by recipient (aka, grantee). Scroll down past the summary section to see an itemized list of grants paid in descending order (most recent first).
 - Look for the word “Complete” in the Status column to know the grant has been paid.



- Other status indicators will appear as the grant moves along our internal processes. Only the status “Complete” confirms that a grant has been successfully paid. Contact the helpful Catholic Foundation team for questions about grant status indicators.

- **Grant Requests** – (see image below) use this tab to recommend a grant payment from your Donor Advised Fund or Sponsorship Account. You will find the Grant Requests window divided into four sections.
 - The Grants Listing appears in the right half of the window. Here you will find each grant recommended/paid from this charitable account listed in descending date order. Look for the word “Complete” in the Status column to confirm a grant has been successfully made.

Sample Donor Advised Fund

Home Contributions **Grants** Grant Request Statements Files Donate Logout

Use this form to request a new grant or contribution from your fund. Select a grantee from the drop-down menu or enter a new nonprofit. [Catholic Foundation of Michigan] will receive notification of your request and process your grant. We will notify you once the grant has been completed. Grants already processed from your fund are listed.

Choose from previous Grantee

Other Foundation Funds

Search for other Grantees

Name

Enter Grantee information manually

Grants					
Date	Status	Recipient	Description	Amount	
8/20/2018	Request	Loyola High School	Support for School	\$10,000.00	
8/20/2018	Request	Operations	Support for Catholic Foundation	\$ 5,000.00	

- **Selecting the Benefiting Charity:**
 - The first portion on the left side of the screen provides three ways to designate a charity:
 - 1. Choose your beneficiary.**
 - 2. Enter Grantee Information Manually** – the last section allows you to manually enter the information we will need to process your grant recommendations. The fields marked with red asterisk are required; providing all the required information allows us to ensure your grant recommendation is processed as accurately and efficiently as possible. A foundation staff member may need to reach out to you for more information if this is selected. +
- **Statements** - Statements related to this charitable account will appear under the Statements tab. This ensures each quarterly statement is archived in one convenient location that can be accessed at any time by any of the fund advisors. Statements are updated monthly.



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- **Files** - important documents related to this charitable account will be archived here.
- **Log Out** - If you access the Advisor Portal from a shared computer or device, we strongly encourage you to use the Logout option after completing each session. This ensures no one other than you has access to the system.

Please reach out the staff at the Catholic Foundation of Michigan if you need any help. 248-204-0332 or email Info@CatholicFoundationMichigan.org