



Accessing Your Community Foundation Fund Online

The Community Foundation of Greater Memphis is pleased to present DonorView, an online service for donors that provides secure access to information about your charitable fund(s).

If at any time you need assistance using DonorView, please call Donor Grants Officer Susan Cooley at (901) 722-0012 or scooley@cfgm.org.

We recommend using the latest version of Internet Explorer. Some functionality may be limited in other browsers.

To Login to DonorView

Please use the username and temporary password we provided for your initial login. Once you are logged in for the first time, the program will prompt you to establish a new personal password. Thereafter, to ensure the protection and confidentiality of your fund information, you will be required to use your username and the new password you created to gain access to DonorView.

Initial Login Process

STEP 1: Gaining Access to DonorView

- Go to the Community Foundation of Greater Memphis website at www.cfgm.org.
- Select “Donor Login” from the upper right corner of the home page

STEP 2: Enter username and temporary password in the appropriate fields. Click the Login button.

STEP 3: After you are logged in, you will be prompted to enter important information for your personal profile to maintain secure access to all your fund information:

- Establish a personalized security question
- Confirm or provide an email address
- Provide date of birth – to ensure another level of security.

STEP 4: You will also be prompted to change your personal password for all future logins to ensure that only you will know the password

IMPORTANT NOTE: Please record your username & newly selected password for all subsequent logins. If you forget your user name, please call Susan Cooley at (901) 722-0012. If you forget your password, use the *Forgot Password* link below the login module.

Once you complete the login process, you will be brought to the Donor Dashboard – which will display basic information concerning your fund.

To Access Fund Information

Confirm the name of your fund. If you are connected to more than one charitable fund at the Community Foundation of Greater Memphis, please use the dropdown arrow to the right of your fund name to select another fund.

Next, use the navigation menu on the dashboard to navigate to other pages in DonorView:

- Fund Summary
- Gift History
- Recommend Grants
- Grant History
- Recurring Grants
- Inter-Account Grants
- Add to Your Fund
- My Profile

Explore the different areas to see your gift and grant history, as well as access online statements for your fund(s).

Recommend Grants

STEP 1:

User the following steps to recommend a grant from your fund:

- Go to the Recommend Grants page in the left-hand menu.
- Confirm you have chosen the correct donor-advised fund from the dropdown menu.
- To recommend a grant, either search for the organization you wish to support under Search by Keyword or use the Grantee List table. A grant can be either a one-time payment or a recurring payment.
- When searching for an organization, click on Details/Recommend a Grant on the results page to make a grant recommendation.
- If the organization you are searching for does not appear, you may click on Suggest a Grantee, and submit that organization to the Community Foundation.
- Use the Grantee List table in the lower right-hand corner of the page to keep track of your favorite grantees, or to repeat a previous grant.
- To recommend a grant from your Grantee List, click the New Grant button beside the grantee name. If you would like to recommend grants to multiple organizations at once, click Add to Cart to enter grant recommendations as a group, rather than individually.
 - Once you have added the grantee payments to your cart, select Save Changes and Go to Cart.
 - Review your cart, confirm payment details and select Check Out.
 - On the Confirmation page you will see a list of Transaction IDs to be used to track your payments.

STEP 2: Complete the Grant Recommendation form.

STEP 3: Click the Grant Recommendation button at the bottom of the page.

STEP 4: Final confirmation. You will also receive a confirmation email for each recommendation, which will include a special transaction ID for future tracking.

Recurring Grants

On the Grant Recommendation form, you may select a single payment (default) or recurring payments to setup a schedule of payments to the same grantee.

- Select payment amount and frequency (monthly, annually, etc.), including start and end dates.

Grant Cart: If you would like to recommend grants to multiple organizations at once, click "Add to Cart" to enter grant recommendations as a group, rather than individually.

- Once you have added the grantee payments to your cart, select Save Changes and Go to Cart.
- Review your cart, confirm payment details and select Check Out.
- On the Confirmation page you will see a list of Transaction IDs to be used to track your payments.

Inter-Account Grants

This page allows you to make a grant from your fund directly to another fund at the Community Foundation.

STEP 1:

- To recommend a grant in support of another fund of the Community Foundation, enter the keywords for the fund you wish to support. If the fund does not appear in the search results, please contact Susan Cooley at (901) 722-0012 or scooley@cfgm.org.

STEP 2: Click Submit.

STEP 3: Find the fund that you wish to support and click Recommend a Grant.

STEP 4: Click the Recommend an Inter-Account Grant button

STEP 5: Complete the Grant Recommendation form.

STEP 6: Click Submit

STEP 7: Final confirmation. You will also receive a confirmation email for each recommendation, which will include a special transaction ID for future tracking.

My Profile

Use this page to maintain personal information (name, addresses, phone numbers, email, etc.) to ensure that the Community Foundation's records are accurate and up-to-date. You may also change your password information and/or secret question.

FREQUENTLY ASKED QUESTIONS

Accessing Your Fund Information

Forgot your User Name?

If at any time you need assistance using DonorView, please call Donor Grants Officer Susan Cooley at (901) 722-0012 or scooley@cfgm.org.

Forgot your Password?

Click on the link that says Forgot Password. You will be prompted to enter your email address, which must match the email address we have on file. A token to change your password will then be emailed to you. If you have any difficulties, call Susan at (901) 722-0012 and request assistance.

If I have multiple funds, will I be able to see the details for each fund separately?

Yes! For donors with access to multiple funds, you will see a drop down menu which allows you to select each fund to view.

Fund Activity

How will I know when my fund statement has been posted online?

You will receive an email notification when the quarterly fund statements are posted in DonorView.

What does “Available” mean on the Donor Dashboard?

The “Available” calculation is the total grant dollars that can be distributed from a fund. For most funds this is the total market value minus any outstanding payments such as grants or fees.

What does “party name” mean when I download contribution activity to Excel?

Party name is the legal contributor which is the entity that signed the check, made the credit card gift, or electronic transfer. Sometimes this differs from how the donor wants to be recognized. Please contact us if you are unable to determine the contributor from the “party name.”

What does the “Approved” status mean?

The “Approved” status signifies that the transaction has been made and approved in the system, but not yet paid.

What does the “Posted” status mean?

The “Posted” status signifies that the transaction has been posted on the account and is ready to or has been paid.

What is an “Issued” Date?

The “Issued” date captures when payment is (check has been created.) sent to the recipient.