# Fund Advisor Portal Overview

As a Fund Advisor, you have access to an online portal where you can view information about the funds you manage. As always, thank you for letting the Wyoming Community Foundation assist in your charitable efforts. We are excited to launch the new Donor Portal system to better serve your needs.

The Donor Portal is a secure web page where you can:

- View Fund Activity
- View Fund Balances
- Make Grant Requests
- View Administrative Fees and Distributions
- View Uploaded Documents
- View and Print Fund Statements
- Access the Donation Portal

# Highlighted Features

Here are a few highlights of the new Fund Advisor Portal.

- Quarterly Statements will be posted directly to the Fund Advisor Portal instead of landing in your email inbox as in the past. Look for the "Statements" option in the menu bar (just under the account name) to access these statements going forward.
- Account balances are updated in real-time inside the Fund Advisor Portal. For those accounts that receive high volumes of donations each week, you will see the most recent transactions on the account's main page when you log in. Use the section labeled "Contributions" in the menu bar (just under the account name) to review all historic gifts received into the account since 2015. Please ask staff if you have any questions about grants or contributions prior to 2015.
- Donor Advised Funds will be able to review all pending and completed grants paid from the account using the "Grants" option in the menu bar.
- You can use the "Grant Request" section to recommend a new charitable payment to an eligible recipient.

# Accessing Your Donor Portal

Look for an email to arrive from sender ""no-reply@fcsuite.com." You will see "Wyoming Community Foundation" referenced in the email's subject line. Some email programs might flag this message as spam so please check your quarantine folder if it does not make its way to your inbox.
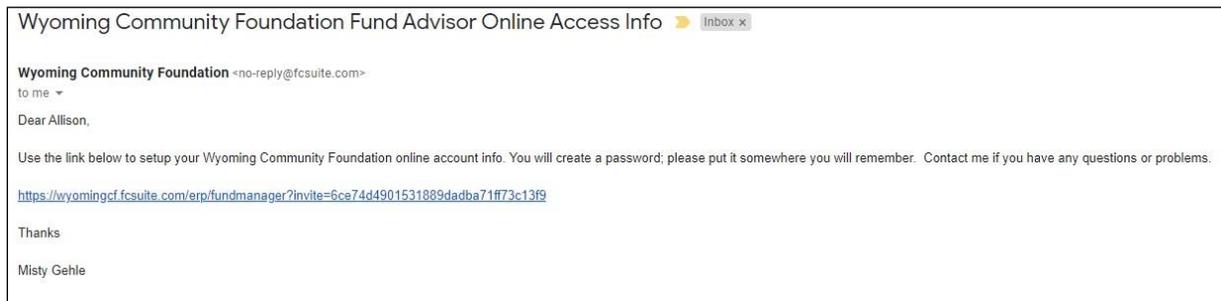


The email will provide you with a custom link to establish your unique password. Click the link to start the simple set-up process. **Be sure to take note of the username and password as you work through this process.**
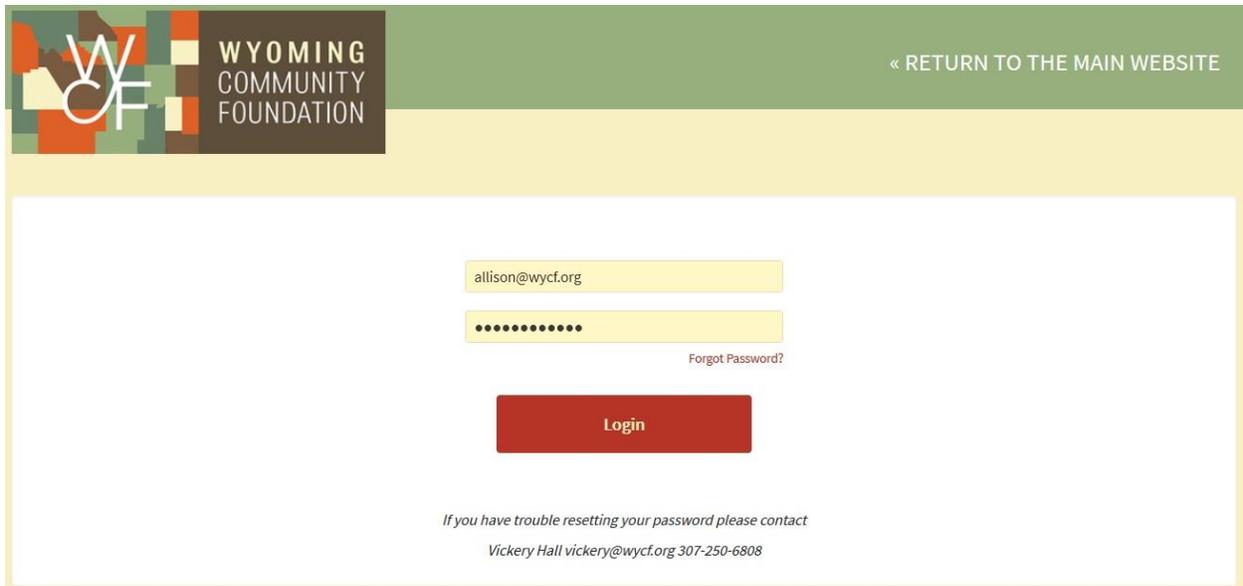


Once you have successfully completed the registration process, visit
https://wyomingcf.fcsuite.com/erp/fundmanager to access the system at any time.

# Using the Donor Portal

Once you have logged in you can select the tabs at the top of the page to review the different areas available to you as a Fund Advisor. If you are listed as an advisor for only one Fund, you will go directly to the **"Home"** page for that Fund. If you serve as an advisor for multiple funds, you will see the **"Choose" Fund"** menu once you have successfully signed into the Donor Portal System.  Choose the fund account with which you wish to interact.

The "**Home**" tab shows the Fund's Current Balance plus the Spendable balance (if applicable). This area also lists all fund advisors, shows recent contributions and recent grants given for the Fund.

## Wyoming Communities Fund

| Home | Choose Fund | Contributions | Grants | Grant Request | Statements | Donate | Logout |

### Current Balance: $15,000.00

Fund Advisors are: Renton, Ms. Allison

| **Recent Contributions** | | | | | **Recent Grants** | | | | |
| ⇕ Date | ⇕ ID | ⇕ Contributor | ⇕ Amount | ⇕ Date | ⇕ ID | ⇕ Status | ⇕ Recipient | ⇕ Amount |
| 09/15/2020 | 32660 | Jones, Ms. Mary | 10,000.00 | 09/10/2020 | 22500 | Approved | Wyoming Community Foundation | 5,000.00 |
| 09/01/2020 | 32659 | Smith, Mr. Bob | 10,000.00 | | | | | |

The **"Contributions"** tab shows all contributions or donations to the fund. Clicking on a Contributor's name will bring up their history of contributions.

## Wyoming Communities Fund

| Home | Choose Fund | Contributions | Grants | Grant Request | Statements | Donate | Logout | Export |

### Contributions

| ⇕ Date | ⇕ ID | ⇕ Contributor | ⇕ Description | ⇕ Type | ⇕ Amount |
|---|---|---|---|---|---|
| 09/15/2020 | 32660 | Jones, Ms. Mary | | Cash | 10,000.00 |
| 09/01/2020 | 32659 | Smith, Mr. Bob | | Cash | 10,000.00 |

The **"Grants"** tab will show the history of Grants made from the fund.



As a Fund Advisor you can make "**Grant Requests**" from the fund's assets. This tab will show a list of grants requested to be paid out on the right with the current status. The left side of the screen is where requests are created. Further instructions for using this feature are below.

The "**Statements**" tab will show fund statements if they are set up for the fund. You will be able to view newly created fund statements immediately after they are created as well as past fund statements. The system will generate a PDF in a new window in your web browser that you may save or print.



The "**Donate**" tab will take you to the Donation portal, where you will be able to donate to your own fund or to one of WYCF's public funds.
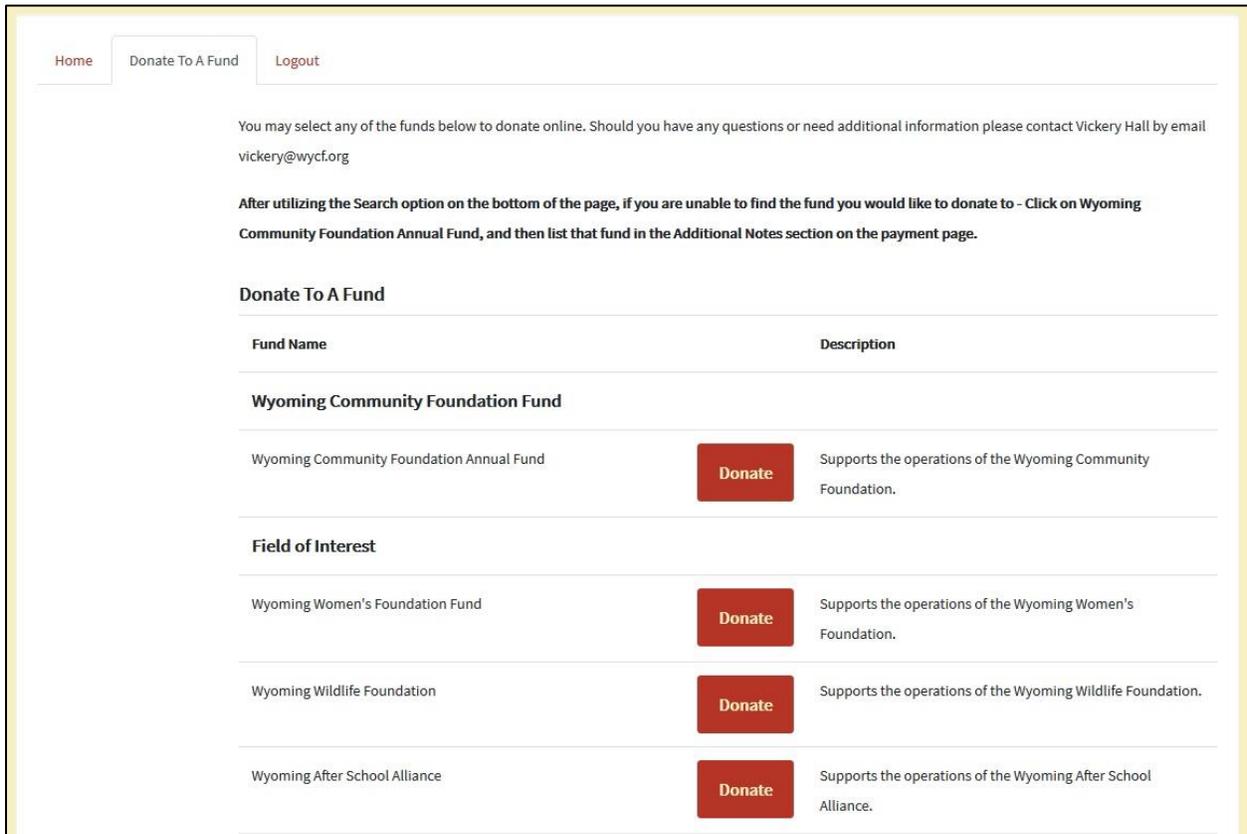


Remember to use the **"Logout"** tab to close your Donor Portal. You will be automatically logged out each night even if you do not logout.

# How to Use Grant Requests

You can use this portal to make Grant Requests using the tab of the same name. The top of this tab will show a list of grants requested to be paid out on the right with the current status. Grant Requests still in the "Request" status can be canceled from this screen.

The left side of the screen is where requests are created. Near the top of the page, you can find previous grantees and funds that you have given to can be selected from drop down lists.



In the middle of the left side of your screen is 'Search for other Grantees.' You can type in some keywords and click the "Search" button. The system will search GuideStar for organizations containing the keywords. GuideStar is an information service specializing in reporting on U.S. nonprofit companies. The more keywords used, the better the search results will be.



The bottom section is where a new nonprofit or grantee can be entered manually. You will need to enter the name of the new grantee, an address, zip code and a phone number to move the grant request to the Community Foundation for approval.

Once the grantee information has been added, you can complete the request by clicking the "**Submit**" button at the bottom of the page.

You can copy an existing grant to be resubmitted by going to the **"Grants"** Tab and selecting the **"Copy"** button next to the grant you would like to use.

# FAQs

**Do the Available Cash Balance and Spendable Balance reflect pending Grants?** No. Pending Grants will show up in the "Home" tab and Grants tab but will not reduce the Available Cash Balance and Spendable Balance.

**I have not received the auto-generated email yet. What should I do?** Check your Spam or Junk folder for an email from no-reply@fcsuite.com If it has not arrived within 24 hours, please contact Misty Gehle (misty@wycf.org) so she can manually send a new link.

**I do not understand how to navigate the portal. Where can I get help?** Please contact Vickery Hall (vickery@wycf.org or 307-250-6808) or Chelsee Kucera (chelsee@wycf.org or 307-721-8300) for assistance.

**I want to update the fund's information. Can I do that in the Donor Portal**? If you want to update details for the fund (including the email address, you use to login to the portal) please contact Vickery Hall. (vickery@wycf.org or 307-250-6808)

**The URL only worked the first time. How do I return to the portal?** The custom URL inside the auto-generated email should only be used to establish your password. Take note of your username and the password you select and then visit https://wyomingcf.fcsuite.com/erp/fundmanager to access the system at any time.

**I have lost my password. What should I do?** For security reasons, the WYCF team does not have the ability to access your password. If you are locked out of your account, click **Forgot Password** on the login page. Enter your username and click the **Reset Password** button. If an account with the provided username is found, instructions to reset your password will be sent to the email address for that account. If you are still having trouble, please contact Vickery Hall (vickery@wycf.org) for assistance.

**What if I am an advisor for more than one fund?** If you serve as an advisor for multiple funds, you will see the "Choose Fund" menu once you have successfully signed into the Donor Portal System. Choose the account with which you wish to interact.

**How will I know if I submitted a grant successfully.** You can check the status of the grant in the donor portal on the "Grants" tab.


If you have any questions or concerns, feel free to reach out to staff at any time. PH: 307-721-8300

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