

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.

Wyoming Community Foundation Fund Advisor Online Access Info 🔉 🔤
Wyoming Community Foundation <no-reply@fcsuite.com≻ to me ←</no-reply@fcsuite.com≻
Dear Allison, Use the link below to setup your Wyoming Community Foundation online account info. You will create a password; please put it somewhere you will remember. Contact me if you have any questions or problems.
https://wyomingcf.fcsuite.com/erp/fundmanager?invite=6ce74d4901531889dadba71ff73c13f9
Thanks
Misty Gehle

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.**

WYOMING COMMUNITY	« RETURN TO THE MAIN WEBSITE
FOUNDATION	
	allison@wvcf.org
	Forgot Password?
	Login
	If you have trouble resetting your password please contact Vickery Hall vickery@wycf.org 307-250-6808

Once you have successfully completed the registration process, visit <u>https://wyomingcf.fcsuite.com/erp/fundmanager</u> 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.

Home Chi	oose Fund Co	ontributions Grants	Grant Request Statem	ents Donate	Logou	it		
			Current Balar	nce: \$15,00	0.00			
	Re	cent Contributions	Fund Advisors are	e Renton, Ms. Alliso	ri -	R	ecent 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	5,000.00
							Foundation	

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	d			
Home Ch	oose Fund Contributions	Grants Grant Request	Statements Donate Logout	Export	
Contribution	S				
+ 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.

	ose Fund C	Contributions	Grants	Grant Request	Statements	Donate	Logout	Export	
irantee Sumn	nary								
+ Grantee								+ Grants	+ Amount
Wyoming Con	nmunity Four	ndation						1	5,000.0
irants									
+ Date	+ ID	+ Statu	IS	+ Recipient				Description	+ Amount

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.

Wyoming Com	munities Fund	ł								
Home Choose Fu	nd Contributions	Grants	Grant Request	Statement	s Donate	Logout				
The Wyoming Community	Foundation (WYCF) is pl	eased to offe	er you the opportuni	ty to	Grants					
make grant recommendat understand that my recor	ions from your Donor Ad	ivised Fund.	As donor advisor, I It binding on the WYC	CF; that I	+ Date	+ Status	+ Recipient	+ Description	+ Amount	¢
can receive no goods or se funding of grants out of m	ervices as a result of gran	ts from my c es not const	loor advised fund; ar	nd that a pledge	09/10/2020	Approved	Wyoming	Operating	5,000.00	
on my behalf, or that of m	y spouse, family membe	rs, employer	and/or other donors	5,			Community Foundation	Support		
advisors, or entities contr	olled by any of these per	sons.								
Choose from previo	ous Grantee									
Grantees you have give	en to in the past									
				~						
Other foundation fund	s									
				~						
	or									
Search for other Gr	antees									
Name		Sear	ch							
	or									

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.

Wyoming Communities Fund		
Home Choose Fund Contributions Grants Grant	t Request Statements	Donate Logout
Statements		
Statement Date Range Status		

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.

Home	Donate To A Fund	Logout	
	Y	'ou may select any of the funds below to donate online. Should /ickery@wycf.org	ou have any questions or need additional information please contact Vickery Hall by er
	A	After utilizing the Search option on the bottom of the page, if Community Foundation Annual Fund, and then list that fund	ou are unable to find the fund you would like to donate to - Click on Wyoming 1 the Additional Notes section on the payment page.
	ſ	Donate To A Fund	
		Fund Name	Description
		Wyoming Community Foundation Fund	
		Wyoming Community Foundation Annual Fund	Donate Supports the operations of the Wyoming Community Foundation.
		Field of Interest	
		Wyoming Women's Foundation Fund	Donate Supports the operations of the Wyoming Women's Foundation.
		Wyoming Wildlife Foundation	Supports the operations of the Wyoming Wildlife Foundation
		Wyoming After School Alliance	Supports the operations of the Wyoming After School

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.

	cilicities boliate	Logout			
e Wyoming Community Foundation (WYCF) is pleased to offer you the opportunity to	Grants				
ke grant recommendations from your Donor Advised Fund. As donor advisor, I derstand that my recommendation is solely advisory and not binding on the WYCF; that	+ Date	+ Status	* Recipient	Description	+ Amount
n receive no goods or services as a result of grants from my door advised fund; and that iding of grants out of my donor advised fund does not constitute satisfaction of a pledge my behalf, or that of my spouse, family members, employer and/or other donors, visors, or entities controlled by any of these persons.	09/10/2020	Approved	Wyoming Community Foundation	Operating Support	5,000.00
Grantees you have given to in the past					
~					
Other foundation funds					

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 <u>GuideStar</u> 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.

lama		an and the	
Name		 Search	

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.

Address *		
City		
State		
Zipcode *		
Phone *		
Email		
* required inform	ation	

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.

Town of Bed	lrock Fund	I									
Home Choos	se Fund Con	tributions	Grants	Grant Request	Statements	Files	Donate	Receipts	Logout	Export	
Grantee Summa	ry										
Grantee								Grants			• Amount
Town of Bedroc	k							1			500.00
Grants											
+ Date	+ ID	+ Statu	s	* Recipient	٠	Description	I.		• A	mount	
04/19/2022	29033	Pendin	g	Town of Bedrock	C	ommunity S	Support			500.00	Сору

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 autogenerated email should only be used to establish your password. Take note of your username and the password you select and then visit <u>https://wyomingcf.fcsuite.com/erp/fundmanager</u> 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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