



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.

The Portal is a secure web page where you can:

- View Fund Activity
- View Fund Balances
- Make Grant Requests
- View and Print Fund Statements
- Access the Giving Hub to Make Online Donations

Highlighted Features

- Quarterly Statements will be posted directly to the Fund Advisor Portal.
- 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 "Donations" to review all historic gifts received into the fund 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 as well use the "Grant Request" section to recommend a new charitable payment to an eligible recipient.

Accessing the Portal

Use this link to access the online portal: <https://wyomingcf.fcsuite.com/erp/portal>

A screenshot of the login page for the Fund Advisor Portal. The page is titled 'Login' and features two input fields: 'Username' and 'Password'. Below the password field is a red 'LOGIN' button. At the bottom of the form, there is a link that says 'Forgot your password?'.

Your email is your username. If you have forgotten and need to reset your password, use the "Forgot your password?" link below the login. If you are a new user and have not had your account set up please reach out to Database Specialist Chelsea Kucera, chelsea@wycf.org 307-721-8300.

Using the Donor Portal

Once you have logged in you can select the tabs at the left 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 **'Fund Summary'** page for that Fund. If you serve as an advisor for multiple funds, you will be able to select which fund you wish to view and interact with. You can then select from the drop-down menu to switch viewing to other funds.

The **'Fund Summary'** tab shows the Fund's Current Balance plus the Spendable balance (if applicable). This area also lists recent contributions and recent grants for the Fund.

The screenshot shows the Wyoming Community Foundation Portal. The main header includes the logo and navigation links: FUND MANAGEMENT, CS/ITE, PROFILE, and LOGOUT. Below the header is a banner image of a field of purple flowers with the text "WYOMING COMMUNITY FOUNDATION PORTAL". A welcome message reads "Welcome to the Fund Advisor Portal for the Wyoming Community Foundation".

The left sidebar contains navigation tabs: FUND SUMMARY (highlighted with an orange arrow), DONATIONS, GRANTS, GRANT REQUEST, FUND STATEMENTS, and DONATE. The main content area is for the "Wyoming Tumbleweeds Fund" and includes a "CREATE GRANT REQUEST" button.

The "Recent Contributions" section shows a table with the following data:

ID	Date	Contributor	Amount
68250	03/20/2025	Kucera, Chelsea	5,000.00

The "Recent Grants" section shows a table with the following data:

ID	Date	Status	Grantee	Amount
46127	03/20/2025	paid	Tumbleweeds for Wyoming	1,000.00

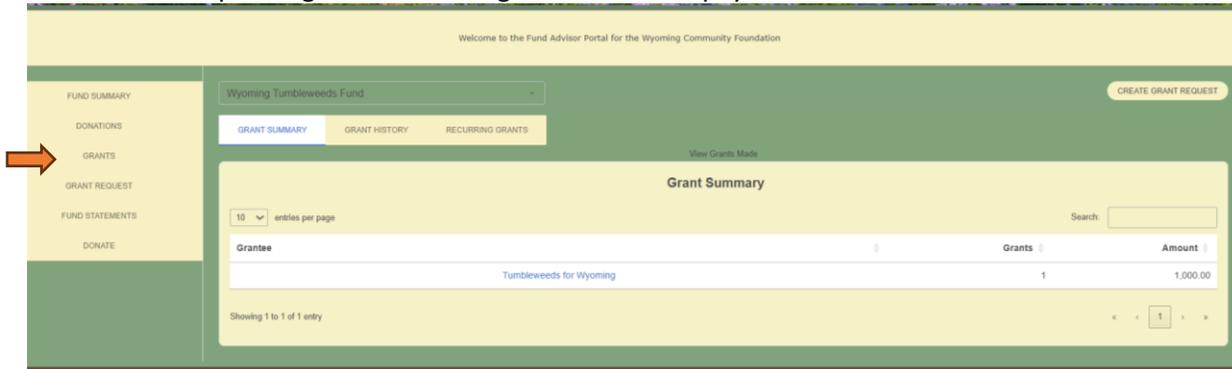
The **'Donations'** tab shows all contributions or donations to the fund. Clicking on a Contributor's name will bring up their history of contributions.

The screenshot shows the Wyoming Community Foundation Portal with the "Donations" tab selected (highlighted with an orange arrow). The main content area is for the "Wyoming Tumbleweeds Fund" and includes a "CREATE GRANT REQUEST" button.

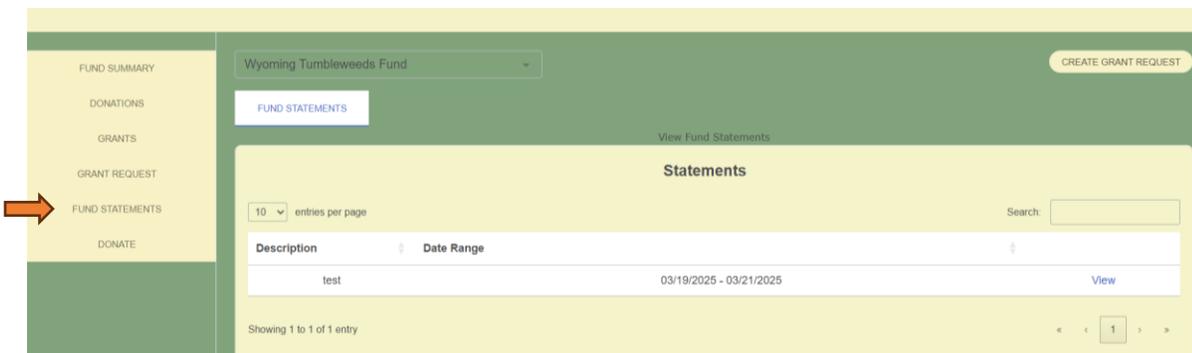
The "Donations" section shows a table with the following data:

ID	Date	Contributor	Type	Description	Amount
68250	03/20/2025	Kucera, Chelsea	Cash	to support fund	5,000.00

The 'Grants' tab will show the history of Grants made from the fund. Select a grantee to see all grants made. Select a specific grant ID to view grant details and payment schedule.



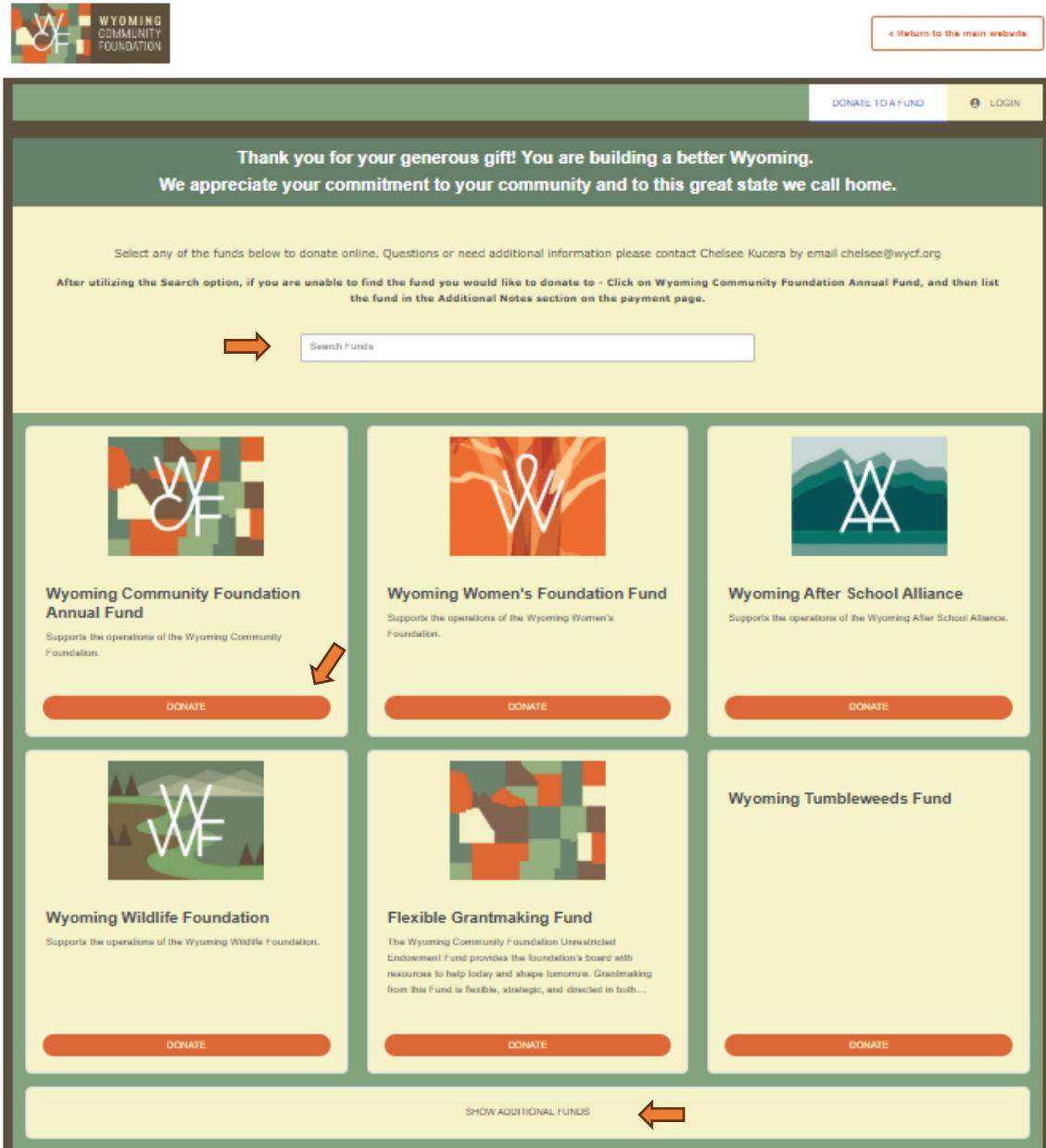
The 'Statements' tab will show fund statements if they are set up for the fund. You will be able to view newly created fund statements immediately after they are created as well as past fund statements. The system will generate a PDF in a new window in your web browser that you may save or print.



See the fund statement example below, find the print or download buttons in the upper right corner.

Fund Activity	Quarter to Date through March 21, 2025	Year to Date through March 21, 2025
Beginning Balance	\$0.00	\$0.00
Receipts		
Gifts & Bequests	5,000.00	5,000.00
Total Receipts	<u>5,000.00</u>	<u>5,000.00</u>
Distributions		
Grants Voted	1,000.00	1,000.00
Total Distributions	<u>1,000.00</u>	<u>1,000.00</u>
Ending Balance	<u>\$4,000.00</u>	<u>\$4,000.00</u>
Available for Grantmaking:	4,000.00	
Grant Detail:		
Tumbleweeds for Wyoming	1,000.00	
Total Grants		<u>\$1,000.00</u>

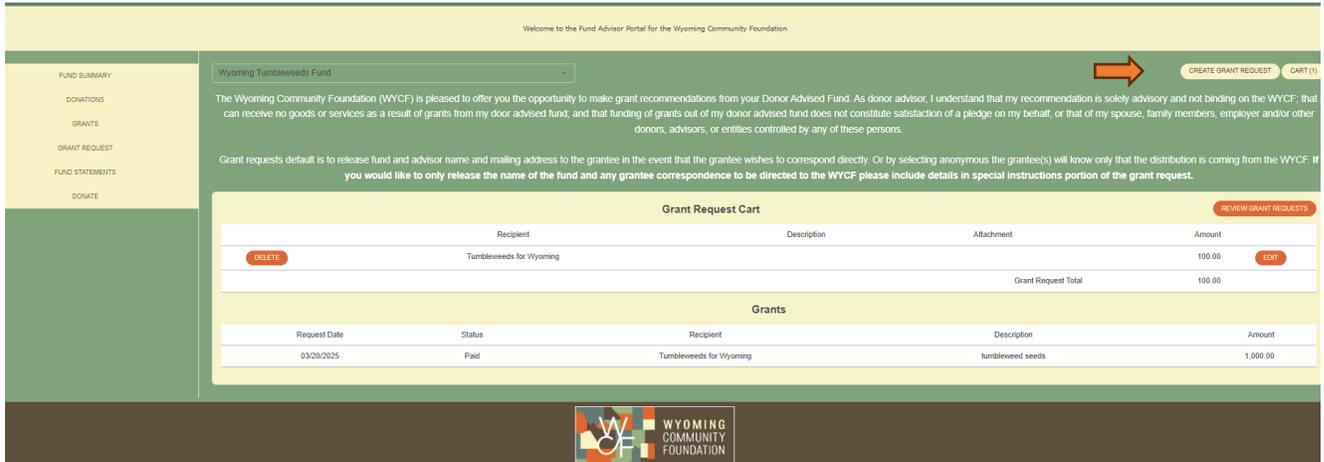
The **'Donate'** tab will take you to the Giving Hub, where you will be able to donate to your own fund or to one of WYCF's public funds. You can search for additional funds at the top of the page, or at the bottom select **'Show Additional Funds'** to view a list of all public funds available for online donation.



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

As a fund advisor of a Donor Advised Fund, you can use this portal to make Grant Requests. This tab will show a list of grants requested to be paid out in the **Grant Request Cart**. Grant Requests can still be canceled or edited from here. Past grants made are listed below in the **Grants** area.

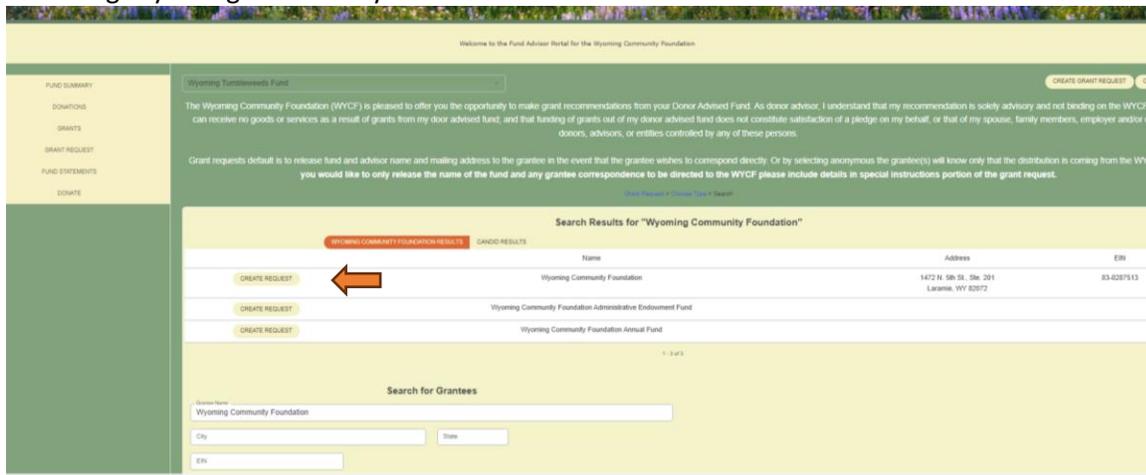


In the upper right side of your screen is the **'Create Grant Request'** and **'Cart'** buttons where you can create a new grant request or review your grant requests in the cart.

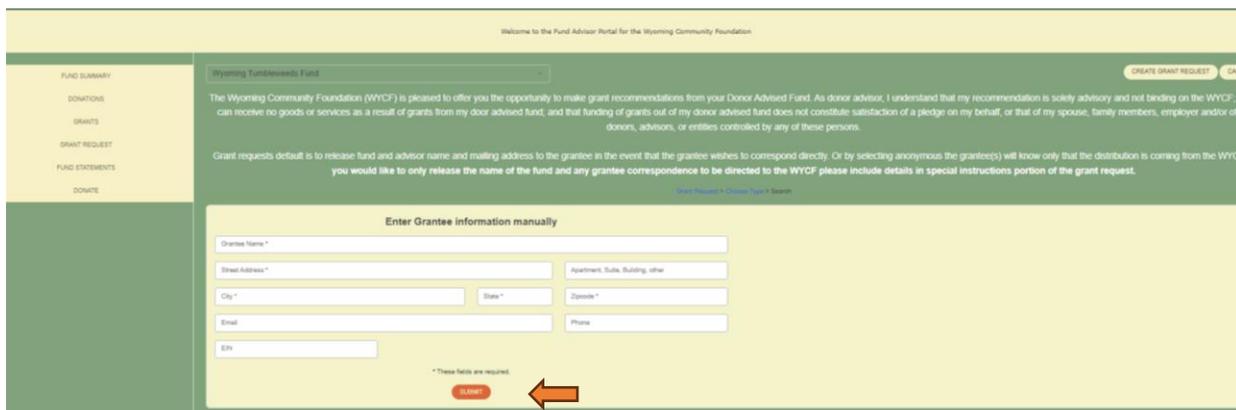
Select **'Create Grant Request'** to take you to the screen below where you can select **'Previous Grantee or Fund'** you have granted to in the past, **'Search Grantees'** to use the system and search [GuideStar](#) for organizations, or **'Manual Grantee'** to manually enter name of grantee.



GuideStar is an information service specializing in reporting on U.S. nonprofit companies. If searching GuideStar the more keywords used, the better the search results will be. See the example below when searching Wyoming Community Foundation.



If entering a grantee manually, you will need to enter the name of the new grantee, an address, and zip code to move the grant request to the 'Cart' for approval. Once completed select 'Submit'.



Once the grantee information has been added, you can move the request to your grant cart by -clicking the 'Add to Cart' button at the bottom of the page.

The Wyoming Community Foundation (WYCF) is pleased to offer you the opportunity to make grant recommendations from your Donor Advised Fund. As donor advisor, I understand that my recommendation is solely advisory and not binding on the WYCF; that I can receive no goods or services as a result of grants from my donor advised fund, and that funding of grants out of my donor advised fund does not constitute satisfaction of a pledge on my behalf, or that of my spouse, family members, employer and/or other donors, advisors, or entities controlled by any of these persons.

Grant requests default is to release fund and advisor name and mailing address to the grantee in the event that the grantee wishes to correspond directly. Or by selecting anonymous the grantee(s) will know only that the distribution is coming from the WYCF. If you would like to only release the name of the fund and any grantee correspondence to be directed to the WYCF please include details in special instructions portion of the grant request.

Grant Request > Choose Type > Create Request

Grant Request

Grantee	Wyoming Community Foundation
Primary Contact	Ms. Samin Dadelahi
Address	1472 N. 5th St., Ste. 201 Laramie, WY 82072
Description	<input type="text"/>
	0/255 characters
Amount	<input type="text"/>
Anonymous	<input type="checkbox"/>
Recurring	<input type="checkbox"/>
Attachment	<input type="button" value="Choose Files"/> No file chosen (or drag and drop anywhere on the page)
Attachment Description	<input type="text"/>
Special Instructions	<input type="text"/>

ADD TO CART

Once added to your grant **Cart** it will take you back to the main **Grant Requests** page, you will then need to select '**Review Grant Requests**' to submit grant requests.

Welcome to the Fund Advisor Portal for the Wyoming Community Foundation

Wyoming Tumbleweeds Fund CREATE GRANT REQUEST CART (2)

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Grant Request Cart

Recipient	Description	Attachment	Amount	
Tumbleweeds for Wyoming			100.00	<input type="button" value="EDIT"/>
Wyoming Community Foundation Ms. Samin Dadelahi 1472 N. 5th St., Ste. 201 Laramie, WY 82072			100.00	<input type="button" value="EDIT"/>
Grant Request Total			200.00	

REVIEW GRANT REQUESTS

Grants

Request Date	Status	Recipient	Description	Amount
03/26/2025	Paid	Tumbleweeds for Wyoming	tumbleweed seeds	1,000.00

This will allow you to submit all the grants in your **Cart** at one time, if you have more than one.

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Grantee	Description	Attachment	Amount	Anonymous
Tumbleweeds for Wyoming			\$ 100.00	No
Wyoming Community Foundation Ms. Samin Dababla 1472 N. 58 St. Ste. 201 Laramie, WY 82072			\$ 100.00	No
Total			\$ 200.00	

I understand that my recommendation is solely advisory and not binding on the WYCF; that I can receive no goods or services as a result of grants from my donor advised fund; and that funding of grants out of my donor advised fund does not constitute satisfaction of a pledge on my behalf, or that of my spouse, family members, employer and/or other donors, advisors, or entities controlled by any of these persons.

By submitting this grant request I accept the terms listed above regarding distribution from my donor-advised fund.

SUBMIT GRANT REQUEST 

Once submitted you can now view the grants in the Grants area. They will show the status of the **Grants** from your fund. First, they will show as requested, and once processed by WYCF staff they will update to paid status.

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Wyoming Tumbleweeds Fund CREATE GRANT REQUEST

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Request Date	Status	Recipient	Description	Amount	
03/21/2025	Request	Wyoming Community Foundation		100.00	CANCEL
03/21/2025	Request	Tumbleweeds for Wyoming		100.00	CANCEL
03/26/2025	Paid	Tumbleweeds for Wyoming	tumbleweed seeds	1,000.00	

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.

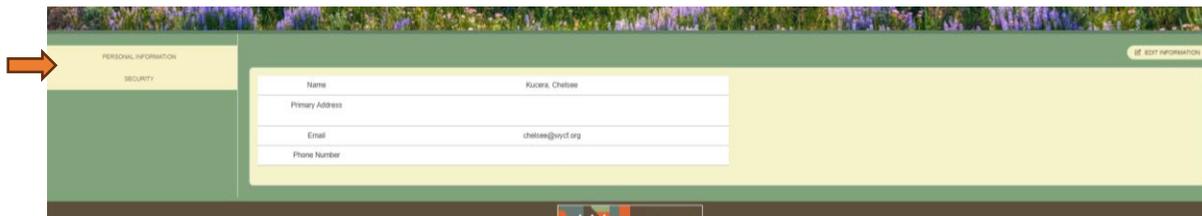
I do not understand how to navigate the portal. Where can I get help? Chelsee Kucera (chelsee@wycf.org or 307-721-8300) for assistance.

I want to update the fund’s information. Can I do that in the Portal? If you want to update details for the fund, please reach out to Misty Gehle (misty@wycf.org or 307-721-8300)

If you would like to update your contact information or password, you can navigate to the **‘Profile’** area in the upper right corner of the page:



This will allow you to update **‘Personal Information’** which will directly update our database for name, address, email or phone number. Or **‘Security’** to update your username and/or password.



How do I return to the portal? Use the link anytime <https://wyomingcf.fcsuite.com/erp/portal>

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 Chelsee Kucera (chelsee@wycf.org or 307-721-8300) 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 portal. Choose the account with which you wish to interact.

How will I know if I submitted a grant successfully. You will receive an email when the grants have been submitted. You can also check the status of the grant in the 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

Misty Gehle – Chief Financial Officer – misty@wycf.org

Chelsee Kucera – Database Specialist – chelsee@wycf.org