FUND ADVISOR PORTAL INSTRUCTIONS GUIDE

STEP 1: SETUP YOUR PASSWORD

- You will receive an email from no-reply@fcsuite.com to set up your account and create a password.
- The email address where you received the email is your username. Username and password fields are case-sensitive. <u>Please note</u> that iPhone and iPad users may experience an automatic capitalization when entering information that may prevent successful login.
- **Note:** the link in the email will expire after 30 days. The link also expires when the fund advisor logs in and creates a password. <u>DO NOT</u> use the link in the email to access the system after you have completed the setup.
- If you did not receive an email or the link has expired then contact Laurel at laurel@kearneyfoundation.org for assistance!

STEP 2: NAVIGATE THE PORTAL

- Once you completed Step 1, then you can log in. Bookmark this address as the login page for future use:
  - **https://kearneyfoundation.fcsuite.com/erp/fundmanager**

Note: If you are a fund adviser for multiple funds, then you will see a Choose Fund screen to choose which fund you want to review. Once you have clicked on a fund name, you can switch to another fund by clicking the Choose Fund tab. If you only have one fund, then you will not see this screen.

STEP 3: NAVIGATING THE TABS

- Once you are on a fund's home page, you can select the tabs at the top of the page to review informational areas that are available to you as the Fund Advisor. Here are the possible tabs you may see when you log in. (Please note that you may not see all of these tabs depending on how your fund is set up.)
  - **Home** - Shows a summary of the fund's balance, including spendable balance if applicable; advisors; recent grants and recent contributions.
  - **Choose Fund** - Lists funds that you, the fund advisor, have access to.
  - **Contributions** - Shows all recent donations/money coming into the fund. You can also click the Export option on the far right side of the menu bar to export the details in an Excel spreadsheet.
  - **Grants** - Shows all grants going out from the fund.
  - **Grant Request** – This feature is only for Donor Advised Funds. This contains a form that allows the fund advisor to make a grant request to a non-profit, a grantee, or a fund.
    -Historical grants can be copied in Grants to make a grant request by using the Copy button in the grant list.
  - **Scholarships** – This will show up on Scholarship funds. 2022 scholarship payments will show up under grants. In 2023, scholarships will show up under this tab.
  - **Statements** - View and download all current fund statements. <u>To find historic financial statements for activity before July 1, 2022, look under "Files".</u>
  - **Files** - View and download any files uploaded to the fund record.
  - **Program Expenses** - Lists the vouchers paid by the fund.
  - **Logout** - Closes the current login session on the Fund Advisor Portal. We encourage you to log out when you are done reviewing your fund.

FREQUENTLY ASKED QUESTIONS (FAQ):

PROFILE INFORMATION

Q: I want to change my profile information (login, address, email, phone), so how can I update it?

A: Click on Profile in the upper right area of your fund advisor portal. You can click the Edit button to edit your login, address, email, and phone and add a note about the changes you are making. Additionally, you can change your fund advisor portal password and enable two-factor authentication when logging in. Click the Save button to keep the changes.

GETTING LOCKED OUT

Q: What do I do if I'm locked out of my account?

A: 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're still having trouble, please contact us at laurel@kearneyfoundation.org or (308) 237-3114.

MY FUND BALANCE DOESN'T MATCH MY RECORDS

Q: What if my fund balance is not what I think it should be?

A: Please note that fund activity won't reflect in the Fund Advisor Portal until our staff can enter it. Depending on what kind of activity it is (donations, grants, expenses, etc.) it may take a few days for our staff to be able to confirm everything and log it into your account. If you have any questions, contact our office at angie@kearneyfoundation.org or (308) 237-3114.

OTHER FAQs

Q: What if I can't see all of our donations and grants on the home tab?

A: The home tab shows a recent summary of donations and grants. To see a full history, click on the Contributions or Grants tab respectively. There you will see a full list of contributions and grants.

Q: How often can I expect to see our fund statements on the portal?

A: You can expect to see statements posted to the portal monthly, usually by the 15th of the month. If you require a statement at a different time (or for a different time frame), please contact us.

Q: What if I am an advisor for more than one fund?

A: 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.

Q: I just entered a grant to be issued, but it doesn't look like it happened. Do I need to do something else?

A: Submitting a grant request through the online system does not complete the transaction. It sends a message to our grants team that you would like the grant to be processed—and we'll get going on it! If you'd like to confirm the request was sent, scroll down the Grants Request page to see a list of recently requested grants, where your latest grant will be listed with "Pending" status. Remember, requests need to be sent by Tuesday for checks to be written on Wednesday.

Q: The URL only worked the first time. How do I return to the portal?

A: 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 our donor portal to access the system at any time.

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