

DONOR ADVISED FUND ADVISOR PORTAL INSTRUCTIONS GUIDE

SETUP YOUR PASSWORD

- You will receive an email from no-reply@fcsuite.com to set up your account and create a password.
- If you did not receive an email or the link has expired then contact Ashley at ashley@kearneyfoundation.org for assistance.
- The email address where you received the email is your username. Username and password fields are case-sensitive. Please note 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. DO NOT use the link in the original email to access the system after you have completed the setup. See below for the link to bookmark to log in moving forward.

NAVIGATE TO THE PORTAL AND LOG IN

- Once you have set up your password you can log in. Bookmark this address as the login page for future use:
 - <https://kearneyfoundation.fcsuite.com/erp/fundmanager>

NAVIGATING THE PORTAL

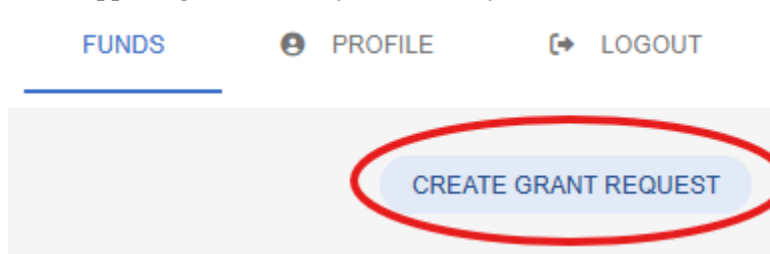
Once you have logged in and are on a fund's home page, you can select the tabs on the left side of the page to review informational areas that are available to you as the Fund Advisor.

Note: If you are a fund adviser for multiple funds, you can toggle between them using the drop-down menu on the top of the Fund Summary page.

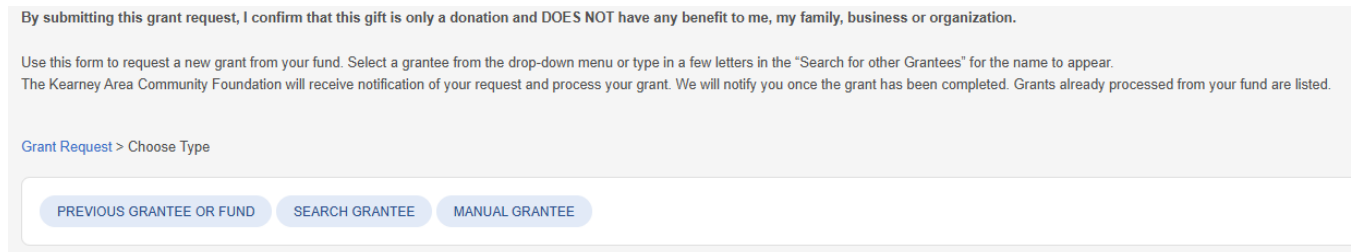
FUND SUMMARY	Fund Summary - Shows the date the fund was created, the current balance, any spendable balance (if applicable) and a list of recent grants.
DONATIONS	Donations - Shows all recent donations/money coming into the fund. You can also click the Export option on the far-right side of the page to export the details into an Excel spreadsheet.
GRANTS	Grants - Shows all grants going out from the fund. The page defaults to Grant Summary, but you can use the tabs at the top to see “Grant History” or “Recurring Grants”. Under Grant History you have the option to export the details into an Excel spreadsheet.
GRANT REQUEST	Grant Request – This page shows the most recent grants you’ve requested. You’ll see the date of the request, its status, the Recipient/Grantee, a description (if included) and the amount.
PROGRAM INCOME	Program Income – This can be ignored, it does not apply to Donor Advised Funds.
RESOURCES & DOCUMENTS	Resources & Documents – View and download all current fund statements. <u>To find historic financial statements for activity before July 1, 2022, look under the “Files” tab.</u>

CREATING A GRANT REQUEST

In the upper-right corner of your screen, you will see the “Create Grant Request” button.

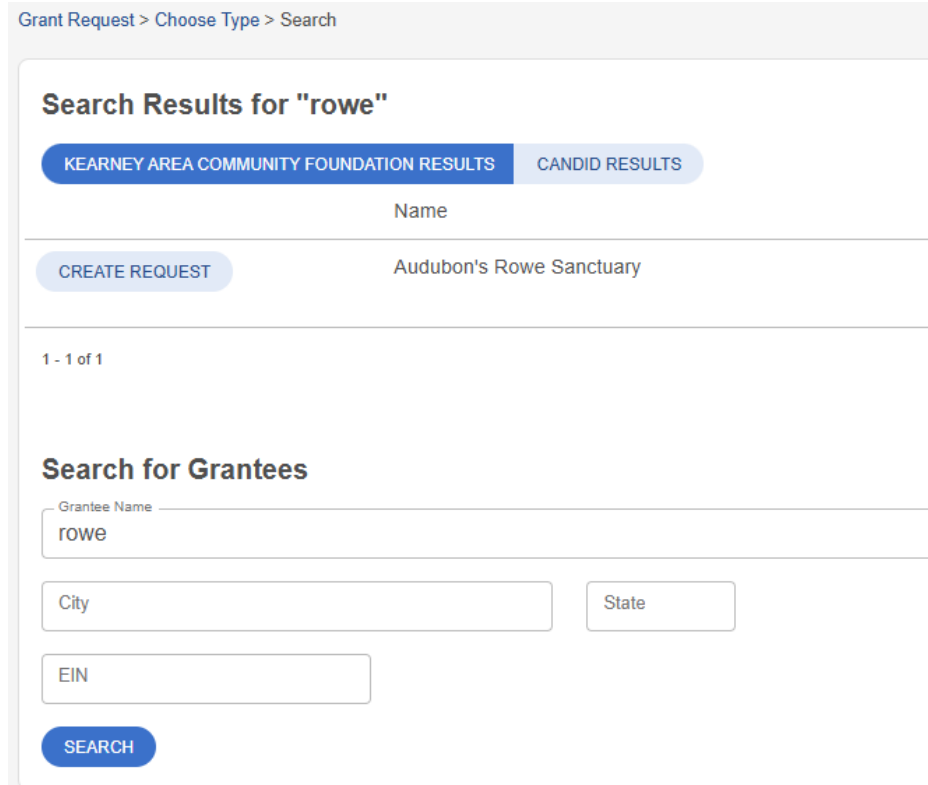


Once you click the button, you will be taken to a new screen that will show you three options: “Previous Grantee or Fund”, “Search Grantee” or “Manual Grantee”.



Previous Grantee or Fund: When selected, you will be given three options: “Grantees you have given to in the past”, “Foundation funds you have given to in the past, and “Other foundation funds”. (Foundation funds are the projects and organizations that use KACF as their fiscal agent.) Under each of these you will see a see a blank box, when clicked on, it will show you the corresponding list.

Search Grantee: When selected, you can search via Grantee Name, City, State, and/or EIN number. You will then be given an option to search the results already entered into the Kearney Area Community Foundation’s database. If none appear, you can toggle to “Candid Results”, this will search the comprehensive non-profit database to help you ensure you are finding the correct organization.



In this example, the user has chosen the “Search Grantee” option, then typed in “Rowe” for the Grantee Name. As Audubon’s Rowe Sanctuary is already in KACF’s database, the user can click the blue “Create Request” button to proceed. If it is a different organization, they can toggle to “Candid Results” at the top and continue their search. More information may be needed when using this feature to narrow down search results.

Manual Grantee: In this option, you will need to provide more information. It is recommended to use “Search Grantee” when you would like to grant to a new organization. Only use this option when you are unable to find your organization using the “Search Grantee” option. If you have questions about eligible organizations, please contact Ashley at ashley@kearneyfoundation.org.

Once the organization you wish to grant to has been selected and the “Create Request” button has been clicked, you will be taken to the Grant Request page.

Grant Request

Grantee	Audubon's Rowe Sanctuary
Primary Contact	Marcos Stoltzfus
Address	44450 Elm Island Road Gibbon, NE 68840
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"/>

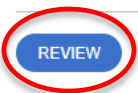
Description: Optional. Use if you'd like your grant directed in a specific way. This information is included in the letter sent to the grantee with the check.

Amount: Required.

Anonymous: Check only if you'd like this grant to be anonymous.

Recurring: Check only if you'd like to establish a recurring grant to this organization. More options will appear once this box is checked.

Review: When complete, click the blue “Review” button to proceed.



Review New Grant Request

Grantee	Audubon's Rowe Sanctuary
Description	to assist with crane blind repair
Amount	\$ 50
Anonymous	No
Special Instructions	

We will process your request and follow up with you if we have questions. Thank you for making our community a better place! Warm regards, Kearney Area Community Foundation 308-237-3114 kacf@kearneyfoundation.org

[EDIT REQUEST](#)

[SUBMIT REQUEST](#)

You will then be shown a confirmation screen where you can either edit the request to make changes, or submit.

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 or 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 ashley@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 recent fund activity won't reflect in the Fund Advisor Portal until our staff has entered 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 financial 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 “Fund Summary” tab?

A: The Fund Summary” tab shows a recent summary of donations and grants. To see a full history, click on the “Donations” or “Grants” tab respectively. There you will see a full list of donations 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 following month. If you require a statement at a different time (or for a different time frame), please contact us.

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. 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.

