

FUND MANAGEMENT PORTAL USER GUIDE

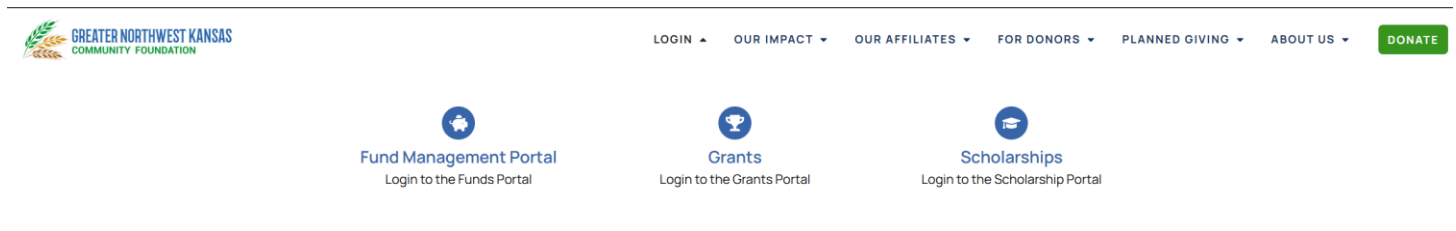


Donor Portal

As a fundholder of Greater Northwest Kansas Community Foundation (GNWKCF), you can access your fund information online through our Fund Management Portal. Within the portal, you can easily check your fund balance, view and download fund statements, request and track grants, add to your fund, and more. Available options vary by fund type and the advisory role; all options listed within are available for donor-advised funds.

The Fund Management Portal makes it easy to manage your fund(s) and is available 24/7 from anywhere on any device.

Accessing the Portal



Navigate to our website at **www.gnwkcf.org** and hover over the 'Login' dropdown along the top menu of the website; select the 'Fund Management Portal' option. You may also access the portal login from the 'For Donors' dropdown options.

First-Time Users*

You will receive a system-generated email upon activation of your online access. Follow the instructions within the email. If you are unable to locate the email, but have confirmation that you have access, see the Login Instructions / Forgot Password section (page 4).

**Only authorized users will be eligible for access. This includes named individuals identified within the donor-advised fund establishing document, as well as identified fund advisors and committee representatives authorized by organization fund-holders.*



Login Instructions



Welcome to Greater Northwest Kansas Community Foundation Fund Management Portal.

- If you are a returning user of the portal, enter your user name (primary email on file with GNWKCF) and password and click 'Login'.
- If you are a returning user, you can continue to use the password and username from the Legacy Donor Portal.
- If you are a new fund advisor and have not received an email with login information, please **contact our office** at 785-734-2406 for assistance.

A screenshot of the login page for the Fund Management Portal. It features a white background with the title "Login" at the top. Below the title are two input fields: "Username" and "Password". The "Password" field has a small eye icon to its right. Below the input fields is a green button labeled "LOGIN". At the bottom of the form, there is a blue link that says "Forgot your password?".

When logging in, you will be directed to this site. You will use your primary assigned email address as your username. Enter your personalized password and click 'Login'.

Forgot Password?

The GNWKCF team cannot access your password. If you forget your password, you can reset it within the Fund Management Portal login page by clicking on the 'Forgot your password?' link.

Use your primary assigned email address and a reset email will be shared if you have an active account tied to that email.

If you have issues, please reach out to our GNWKCF accounting office at 785-734-2406 or email accounting@gnwkcf.org for further inquiry.

Individuals Who Advise Multiple Funds

If you advise multiple funds, you will see all the funds you advise listed on the home page of the portal. **Select the fund you wish to view.**



Portal Features by Fund View

The tabs at the left side of the page display features that may be available to you as a fund advisor:

Fund Summary – This page provides a snapshot of the fund.

FUND SUMMARY
DONATIONS
GRANTS
GRANT REQUEST
STATEMENTS, FINANCIALS AND FILES
DONATE

Donations (*limited by fund type*) – Unless the donor has requested to remain anonymous, this tab shows all contributions/ donations made into the fund. You will note that an 'Export' option appears on the far-right side of the page. This feature will export information about each donation into a Microsoft Excel spreadsheet. Clicking on a contributor's name will bring up the person's contribution history, including date of gift, type and amount, as well as contact information.

Grants – Shows the history of grants awarded from the fund, including date, organization name, purpose and amount. The top menu provides three options to learn more about the grants from the fund:

(Tab 1) Grant Summary – Lists total cumulative grants by grantee.

(Tab 2) Grant History – Lists each grant made from the fund, from most recent to oldest.

- **Copying a grant** – Fundholders may have the option to make copies of previous grants by selecting the green 'Copy' button (right of the Amount Column). This will create a new grant request with the same details as the previous grant recommendation.
- **Status** – Under the Status column, you will see one of six statuses for each grant:
 - **Request** means that your grant request has been sent to our team. If you would like to cancel a pending grant request before it is processed, click the yellow "Cancel" button.



- **Canceled** means your grant request has been canceled.
- **Pending** means our team is currently processing your grant request.
- **Approved** means your grant request has been approved but not yet paid.
- **Paid** means the grant request has been approved and a check has been paid out to the organization.
- **Completed** means the grant request has been successfully fulfilled.

(Tab 3) Recurring Grants – Lists any recurring grants associated with the fund. By selecting the individual recurring grant, the option to edit the recurring grant will appear on the right side.

Grant Request – Allows you to make a grant request from your fund and see recent grant statuses, if applicable. Certain restrictions apply to allow access.

Statements, Files & Financials:

(Tab 1) Fund Statements – Shows your monthly fund statements from August 2023 to current. All financials are deemed preliminary until audited.

(Tab 2) Files – Shows viewable files regarding the fund, if applicable. This may include the signed establishing documents, investment forms, succession documents, as well as this user guide.

(Tab 3) Financials – This tab allows you to run Statement of Financial Position and Statement of Activities reports based on various date options.

Donate – Opens a new window to the donation portal to make an online credit card donation to any funds managed at the Community Foundation.



Creating a Grant Request

To recommend a grant from your fund, click the green “Create Grant Request” button located on the upper right side of any page within your portal.

Select from the following three options to make your request:

Previous Grantee or Fund – Choose the organization you want to support from this drop-down list of organizations or funds you have previously supported.

Search Grantee – Search for a grantee based on name, address or EIN. The system will search the foundation’s database and Candid for organizations containing the keywords you enter. Candid is a service that provides information about U.S. nonprofit organizations. The more keywords used, the better the search results. Results will be displayed from the foundation’s database and Candid. **Note:** The use of Candid does not automatically guarantee an organization will pass the foundation’s due diligence. That procedure will take place during processing.

Manual Grantee – If you can’t find the organization you wish to support, you may enter the organization’s information manually: organization name, address, and phone number. Providing all the requested information allows us to ensure your grant recommendation is processed as accurately and efficiently as possible.

Grant Details

Once you have selected a grantee, complete the form, being sure to fill in the description field with the grant purpose and any special handling. Keep in mind that if you don’t designate a specific grant purpose, your grant will be designated for *unrestricted use*.

➡ If you choose to remain **anonymous**, select the “Anonymous” checkbox.

➡ Selecting the **recurring** option will allow you to set up the same grant to disburse automatically on an identified timeline. For example, you may set up a \$100 monthly recurring grant to your church. This recurrence may be identified with a specific number of payments, or it may be canceled by going back into the request and shutting off the recurrence interval. You may also contact grants@gnwkcf.org to visit further with foundation staff.

➡ Upload an **attachment** if the process deems necessary for your fund type or fund instructions.

Upon reviewing the information, you must click the "Submit Request" button to complete the request. A confirmation will immediately display on the screen stating, "Grant Request Submitted".

Email Notifications

Your account may be set up to receive an alert via email every time a contribution is made to your fund or a grant has been awarded from your fund. These alerts may be canceled at any time by contacting accounting@gnwkcf.org.

Frequently Asked Questions

How often are fund statements posted?

Fund statements are posted monthly. If you would like to receive auto-generated email notifications when they've been posted, please email your request to accounting@gnwkcf.org.

I've lost my password. What should I do?

You can reset your password on the Fund Management Portal login page by clicking on the "Forgot your password?" link and a system generated email will be sent to you if you have an active account.

Questions?

You may reach out to your local Community Foundation staff or contact GNWKCF directly at 785-734-2406 or email accounting@gnwkcf.org.