



Fund Advisor Portal User Guide

As a Fund Advisor, you have an online Fund Advisor Portal where you can access information about the funds you manage.

Getting started:

Your password will need to be updated.

All Fund Advisors should have received an invitation and instructions to create a new password to the Fund Advisor Portal. (If you don't see our email in the inbox associated with your account, please check your spam or junk folder.) From that email, click the link, and you will be prompted to create your password to the Fund Advisor Portal. Once your password is created, navigate to the Login page, enter your credentials, and log in. Your Username is your email address associated with your account.

If you did not receive these instructions, email portalsupport@oshkoshareacf.org.

After You Log In

If you serve as a Fund Advisor for multiple funds, you will see the "Choose Fund" menu:

Choose Fund

Lake Poygan Scholarship Fund
Winnebago Dreams Fund

Choose the fund with which you wish to interact.

If you are listed as a Fund Advisor for only one fund, you will go directly to the home page for the fund. Your screen will look similar to this:



Foundation Contact: Kate Bahr Fuller
kate@oshkoshareacf.org

Home Choose Fund Gifts Grant History Grant Request Statements Files Paid Expenses Logout

Current Balance: \$4,500.00

Fund Advisors are: Sturgeon, Jack S.

Recent Contributions				Recent Grants				
Date	ID	Contributor	Amount	Date	ID	Status	Recipient	Amount
02/01/2023	110659	Sturgeon, Jack S.	5,000.00	02/01/2023	35155	Paid	Injured Fin Rescue	500.00

Easy Navigation

From the home page, you can select the tabs at the top of the page to review each area. Below is a summary of information for each tab. Some tabs will not appear for every fund type.

Winnebago Dreams Fund



Home – This tab shows a summary of your fund's current balance. It also shows a list of your contributions and grants as well as Fund Advisors.

Gifts – This tab shows a list of gifts and/or donations to your fund. Clicking on a donor's name will bring up the gift detail. You can export this information into an Excel spreadsheet by clicking on the Export tab. Donor contact details including address, phone, email, etc. will not be displayed.

Grant History – This tab shows a list of grants made from your fund. Clicking on the grantee name will display the history. You can export this information into an Excel spreadsheet by clicking on the Export tab.

Grant Request – This tab shows a list of grants you've made in the past, along with an easy way to make a new grant to an organization or to another fund held at the Community Foundation. You can recommend a grant using one of four methods:

1. Choose from Previous Grantee – Select a grantee you've given to in the past from the dropdown menu and fill in the amount.
2. Other Foundation Funds – Search for another grantee from the other foundation funds dropdown menu.
3. Search for Other Grantees – Search for other organizations you want to support by using the search box. Enter keywords such as the organization name then click the search button. The system will search other foundation funds as well as GuideStar, the world's largest database of nonprofit organizations. Once you find the organization you want to support, click Create Request.

The screenshot shows a form with three main sections, each with a circled number:

- 1 Choose from previous Grantee**: A dropdown menu labeled "Grantees you have given to in the past".
- 2 Other foundation funds**: A dropdown menu.
- 3 Search for other Grantees**: A search form with fields for "Name", "City", and "State", and a blue "Search" button.

Horizontal lines separate the sections, and the word "or" is centered between the first two and the last two sections.

4. Enter Grantee Information Manually – If you are unable to find the organization using the search feature, you can manually enter the name of the organization, including the mailing address and phone number, and submit your request for approval.

4 Enter Grantee information manually

Name *

Address *

City*

State*

Zipcode *

Phone *

Email

* required information

Once you submit your request, the Community Foundation will process your grant and notify you. When the grant has been completed, it will also appear in this tab.

Statements – This tab allows you to view or download a current or past fund statement(s) since January 2023.

Files – This tab shows you important documents related to the fund. Initially, not all documents will be available in the Fund Advisor Portal.

Paid Expenses – This tab shows you a list of expenses paid by the fund. You can export this information into an Excel spreadsheet by clicking on the Export tab.

Export – This tab allows you to download reports including the fund’s gifts, grant history, and paid expenses using this tab.

Logout – This tab allows you to end your current online session.

Manage Your Profile Information

Click the profile link in the upper-right area of your Fund Advisor Portal to change your password or to update your mailing address or phone number. Click the Save button to keep the changes.

Locked out?

Click **Forgot Password** on the login page. Enter your username (the email address associated with your account) and click the Reset Password button. If an account with that username is found, instructions will be sent to the email address we have on file.

If you’re still having trouble, email portalsupport@oshkoshareacf.org.