

Fund Advisor Portal User Guide





Welcome to the Fund Advisor Portal!

The Fund Advisor Portal is an online fund management tool for Wichita Falls Area Community Foundation Fund Advisors. The Portal provides fast, efficient, and convenient service as a value add-on to the support already provided to you by WFACF. The Portal enables you to:

- Review and manage fund activity and balances- just like you would when you bank online.
- Recommend grants.
- Review, print, and save Fund Statements.
- Review, print, and save donation acknowledgement letters and other documents associated with your fund.

This quick-reference guide was created to introduce the basics of the new Fund Advisor Portal. And, as always, WFACF is available to answer any questions you may have!

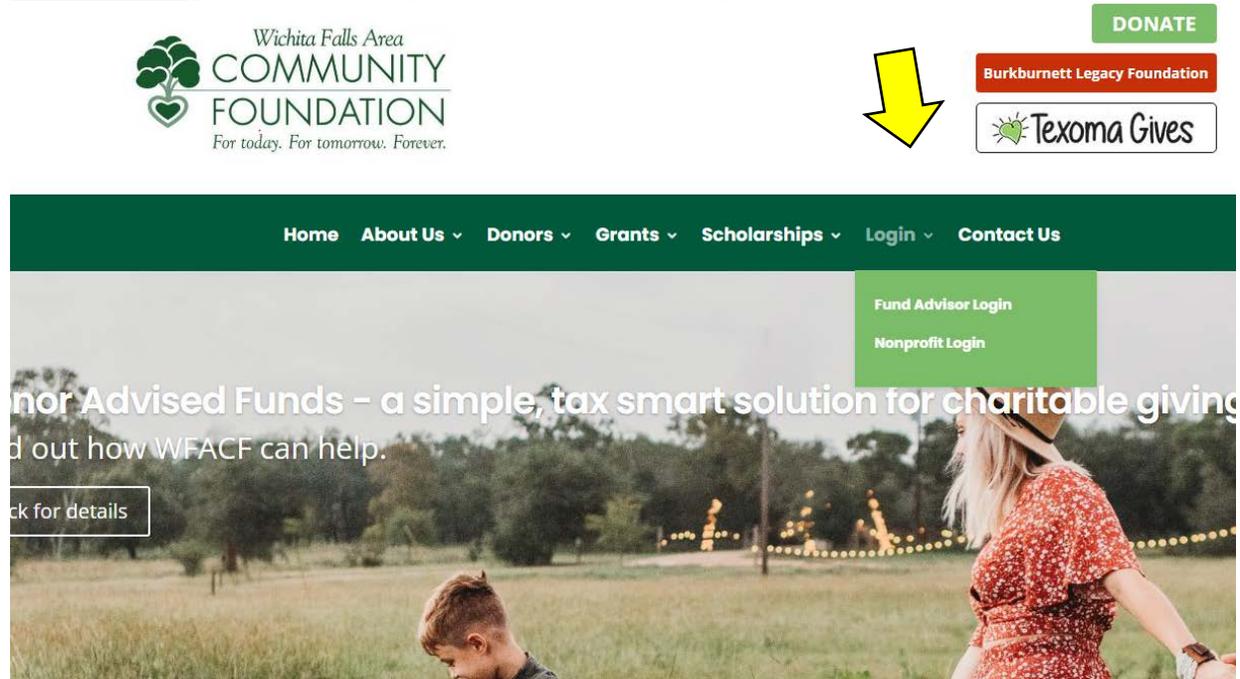
Initial Login Process and Creating Your Account

You will receive an email from WFACF (no-reply@fcsuite.com) with a custom invitation link to create your account on the Fund Advisor portal. Note your username (your email address) and password during this process. **DO NOT** use the link in that email to access the portal after you have completed the initial setup.

Note: If you did not receive an email to access the portal, but would like access, please contact WFACF.

Returning Users

Access the portal anytime here: <https://wichitacf.fcsuite.com/erp/fundmanager> or go to www.wfacf.org and click on Login and Fund Advisor Login.



Wichita Falls Area
COMMUNITY
FOUNDATION
For today. For tomorrow. Forever.

Username

Password

[Forgot Password?](#)

*To reset your password automatically, use the link above.
Your username is typically your full email address. The
username is case sensitive and is all lowercase. If you need
assistance with your account, please contact the WFACF
office at 940-766-0829 or email lpetersen@wfacf.org.*

For individuals who advise multiple funds:

If you are an advisor for multiple funds, you will see the “Choose Fund” menu once you have successfully signed in. Select the fund that you wish to view. If you are an advisor for only one fund, you will not see this screen.

For Funds with multiple advisors:

Each advisor will have their own login with their unique email address.

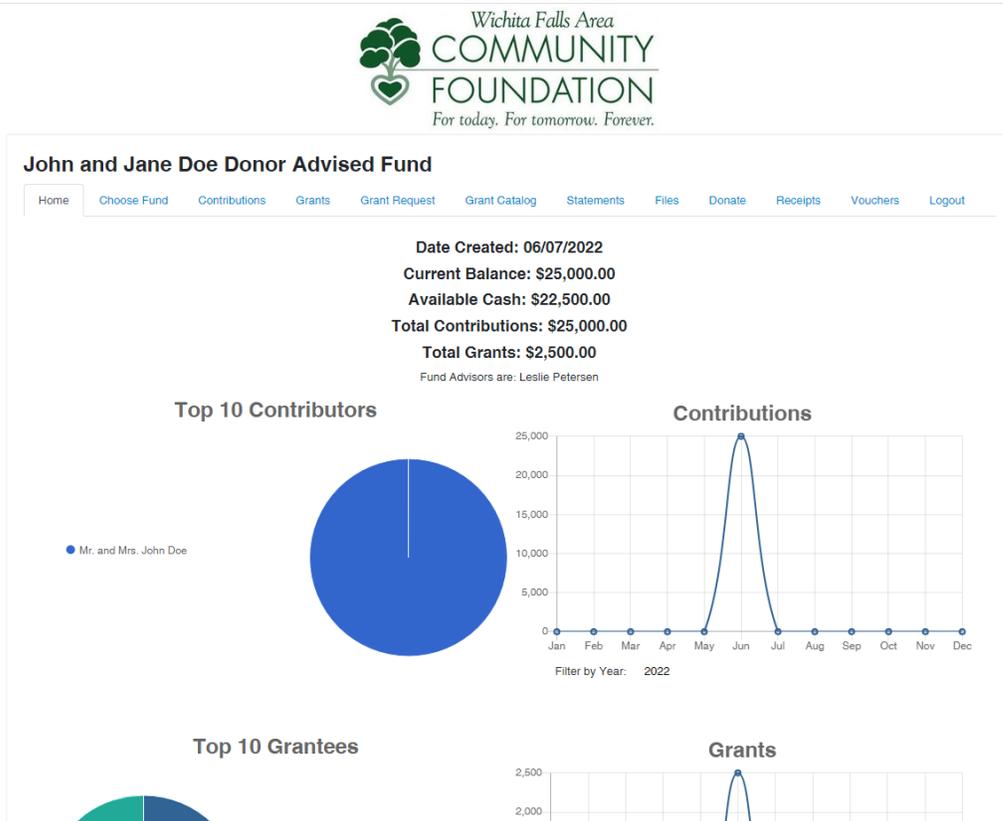
Navigating the Portal

Homepage:

The homepage provides an at-a-glance list of recent gifts and grants paid out of the fund. You will also see the current balance, updated in real-time and the current advisors associated with the fund.

Keep in mind that investment returns are only posted monthly and administrative fees are posted quarterly. Your fund statement is still the most accurate picture of your fund’s status.

The tabs at the top of the page display the different features available to you.



Contributions:

This tab shows all donations made to your fund. You can click the “export” option on the far right side of the menu bar to export the details in an excel spreadsheet.

Grants:

This tab shows a summary of all grants awarded from your fund. The top section provides a summary of grants by recipient (grantee). Scroll past the summary section to see grants, reoccurring grants and grants listed from most recent to oldest.

Grant Requests:

This tab is used to submit grant requests. A listing of the most recent grants appears on the right side of the page along with their status. If a grant is still in the “request” status, it can be changed or cancelled. The left side of the page is used to submit your grant request. Please read the guidelines and then choose your grantee. You can choose from those that have been granted to in the past, internal WFACF funds, search for a grantee, or enter the information manually.

Once the grantee information is entered, click submit. On the next screen, you will enter any description, the amount of the grant, anonymous information, etc and then click review. Once you have reviewed the request, click submit, and you are finished! The WFACF team will receive a notification of your request and will review and process the grant.

Grants are processed twice a month. If you have questions about the status of a submitted grant, please email wfacf@wfacf.org.

Grant Catalog:

This tab will be available when WFACF has an active Grant Catalog. The catalog, formerly known as Donor Difference, is a tool you may use to browse funding requests from nonprofits that have applied for a grant through WFACF. As a fund holder, you may assist organizations on the list through additional grants directed from your fund.

Statements:

Fund Statements will appear under this tab for you to view and print. All statements that have been generated from the current WFACF software system (July 2021 forward) will be here. Past statements will be located in the Files tab. You will receive an email each time a quarterly statement is posted in this tab.

Files:

Documents related to the fund will be located in this tab (Fund Agreements and Amendments, Contribution Acknowledgement Letters, previous Fund Statements, etc.).

Donate:

You can donate to your fund via credit card on this tab. Locate the fund and click Donate. Your donation will appear in your fund portal once WFACF has processed the donation. Please remember wire transfers, stock donations, and check donations are processed through the WFACF office. For questions about these transactions, please email lpetersen@wfacf.org.

Receipts:

Contribution acknowledgement letters generated from the current WFACF software system (July 2021 forward) will be in this tab. Previous letters will be located in the Files tab.

Vouchers:

This tab provides details on any expenses paid from the fund.

Logout:

Remember to use this tab to close your Fund Advisor Portal. You will be automatically logged out each night if you do not log out.

FAQ's

I haven't received the auto-generated email yet. What should I do?

Check your spam/junk folder for an email from WFACF with the address of: no-reply@fcsuite.com. If it hasn't arrived within an hour, please email lpetersen@wfacf.org so we can re-send the information.

The URL in the email only worked the first time. How do I return to the portal?

The custom URL inside the auto-generated email should only be used to establish your password the first time you login. Please note your username and password. To return to the portal you can go here: <https://wichitacf.fcsuite.com/erp/fundmanager>, or you can go to www.wfacf.org. Click on Login and Fund Advisor Login.

I'm locked out (or lost my password)? How can I login?

The portal will lock after five unsuccessful login attempts. If you are locked out of your account, click on the **Forgot Password** link on the login page. Enter your username (usually your email address) and click the **Reset Password** button.

Instructions to reset your password will be sent to the email address for the account. If you still have trouble, please contact WFACF. *Note: Usernames and Passwords are case sensitive.*

Why did WFACF choose to offer the Fund Advisor Portal?

The Fund Advisor Portal was created when WFACF adopted a new software solution. This new software fully integrates WFACF's internal fund and grant management functions to give a complete picture for Fund Advisors. In using this software and the portal, WFACF is more efficient for Fund Advisors. The software partner, Foundant Technologies, specializes in Community Foundations and is the software of choice for many other Community Foundations.

What if I do not want to access my funds online?

You can opt-out of the Fund Advisor Portal at any time by emailing lpetersen@wfacf.org.

How is my information protected on the Fund Advisor Portal?

The site and your private information are fully secured with the latest technologies and practices. Any activity and documents are visible only to you and the WFACF staff. In addition, anonymity is protected if requested.

For Further Information or Help:

Call us at 940-766-0829 or email wfacf@wfacf.org or stop by the office at 2405 Kell, Suite 100!