

Donor Portal Guide



As a Greater Milwaukee Foundation donor or fund adviser, you can access your financial information online through our donor portal. Within the portal, you can easily check your fund balance and donation history, view and download fund statements, request and track grants (or scholarships), add to your fund, and more. The donor portal makes it easy to manage your giving and is available 24/7 from anywhere, on any device. Need help? Contact us at csuite@greatermilwaukeefoundation.org or 414-272-5805.

PORTAL LINK: <https://gmf.fcsuite.com/erp/portal>

NEW USERS

If you have not logged in to the portal before, click Login with Email and enter the email address associated with your fund or profile. You will receive a temporary PIN in your inbox. Enter the PIN and you will log into your account.

To create a username and password, go to your profile settings and click Security on the left side of the page. Create a username (we strongly recommend using your email address as your username) and enter your desired password twice. Please use a mix of capital letters, numbers and/or special characters to keep your account secure.

Please write down your password and put it somewhere you will remember!

If logging in with email does not work, your email address may not be currently associated with an account. Please email your philanthropic adviser or contact csuite@greatermilwaukeefoundation.org for assistance.

The screenshot shows a 'Login' form with two input fields: 'Username' and 'Password'. Below the fields is a blue 'LOGIN' button. Underneath the button, there is a link that says 'Login with email' with a yellow arrow pointing to it. At the bottom, there is a link that says 'Forgot your password?'.

New user? If the Username field is visible, click Login with Email.

The screenshot shows a 'Login' form with one input field: 'Email Address'. Below the field is a blue 'LOGIN' button. At the bottom, there is a link that says 'Login with username/password'.

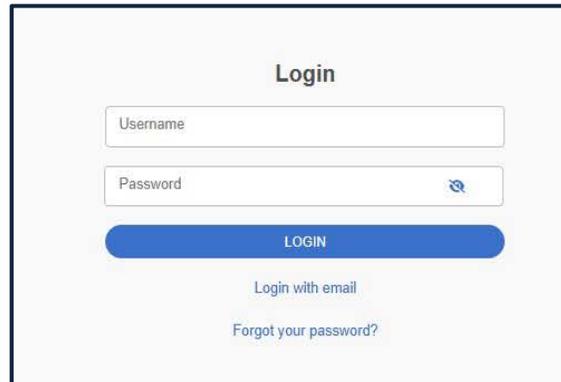
Next, enter your email address and click Login.

The screenshot shows a 'Verify your pin' page. At the top, there is a message box that says: 'An email has been sent to the email provided. It contains a PIN which will be valid for up to 3 minutes. Check your spam or junk folders if you do not receive the email.' Below the message box is a 'Pin' input field. Below the field is a blue 'LOGIN' button. At the bottom, there is a link that says 'Login with email'.

Enter the PIN from your email. It will be valid for up to 3 minutes. Click Login.

RETURNING USERS

Returning users can access the donor portal at any time by visiting <https://gmf.fcsuite.com/erp/portal>. You can also visit the Greater Milwaukee Foundation home page, click the user icon in the top right, and then click on Donor Login Portal.

A screenshot of a web login form. At the top center is the word "Login". Below it are two input fields: "Username" and "Password". The "Password" field has a small eye icon to its right. Below the input fields is a blue button with the text "LOGIN". Underneath the button are two links: "Login with email" and "Forgot your password?".

This will take you to the login screen where you will enter your username and password. If you don't have a username and password yet, click Login with Email and follow the instructions for new users.

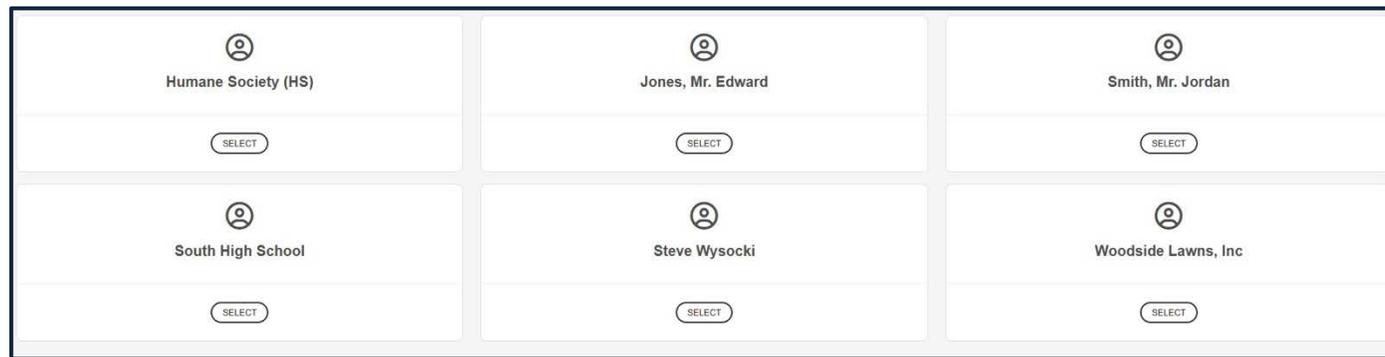
The Foundation team does not have the ability to access your password. If you forget your password, click Forgot Your Password to receive a password reset link. If you still need assistance, please contact your philanthropic adviser or our team at csuite@greatermilwaukeefoundation.org or 414-272-5805.

Note: The donor portal will lock you out after five unsuccessful login attempts. If you are locked out, please contact our team at csuite@greatermilwaukeefoundation.org or 414-272-5805.

IMPORTANT: If you access the donor portal from a shared computer or device, we strongly encourage you to use the Logout option in the top right of your screen after completing each session. This ensures no one other than you has access to the system.

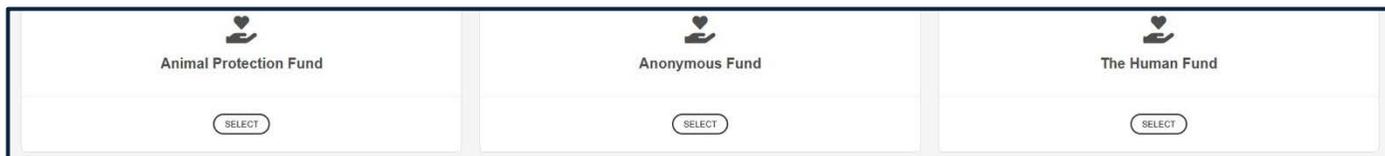
DONOR PORTAL NAVIGATION

Once you are logged in, if you have multiple profiles associated with your account, your profiles will appear. If applicable, choose the profile you wish to review.



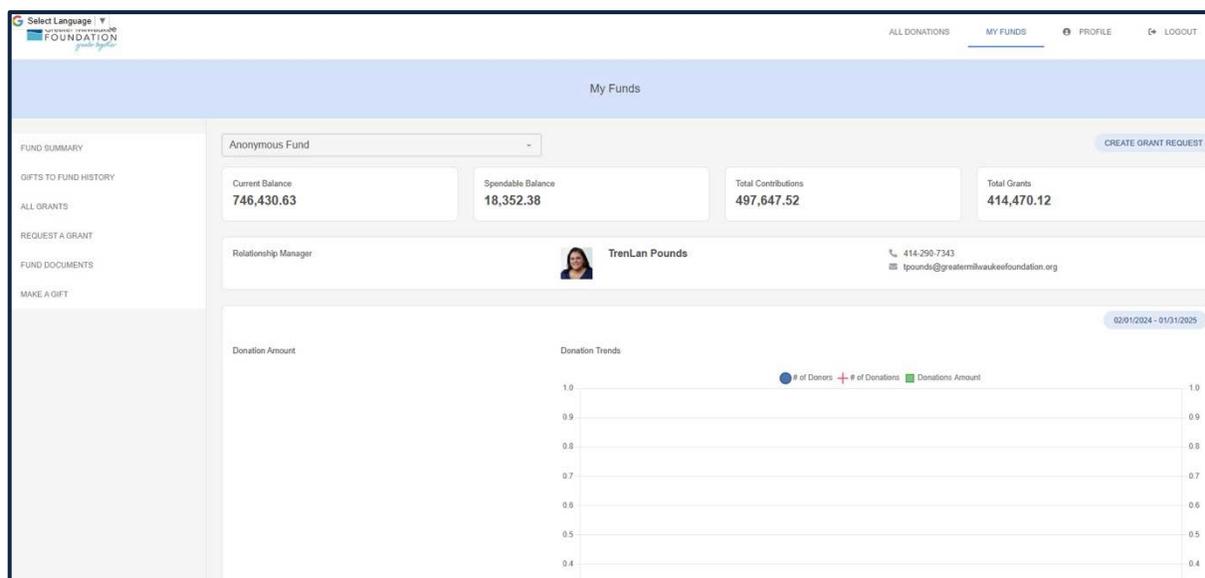
This login includes multiple profiles.

If you manage multiple funds, you will see a box for each of your funds. If applicable, choose the fund you wish to review.

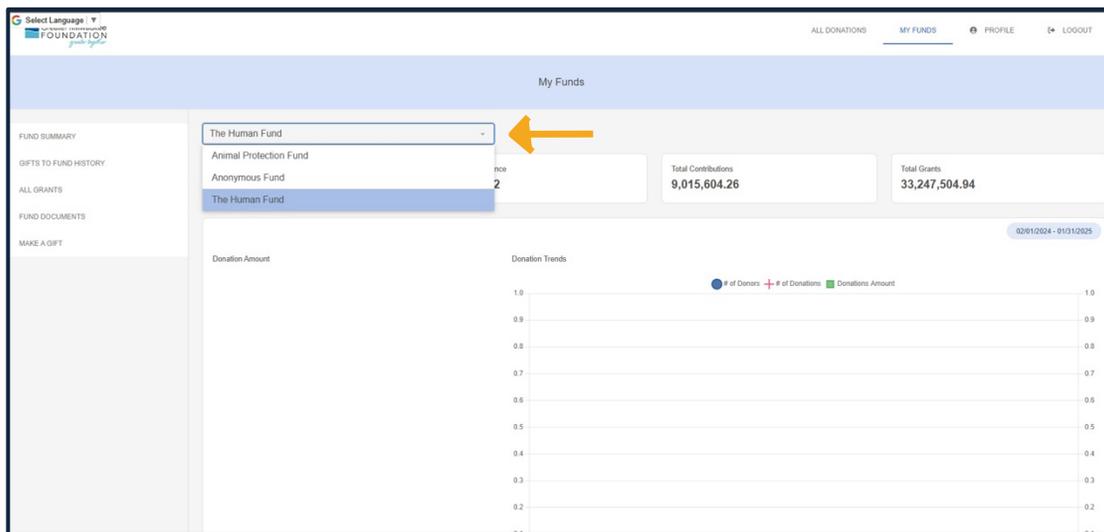


This profile includes multiple funds.

If you are listed as an adviser for only one account, you will not have the Choose Fund menu but instead will see only your account information. If you do not manage any funds, you will only see donation information.



If you manage a fund, the My Funds tab is your homepage. Visible features vary depending on fund and profile details.



If you manage multiple funds, you can switch between them with this dropdown menu.

DONOR PORTAL FEATURES

There are four tabs on the top of the page for fund advisers: **All Donations**, **My Funds**, **Profile**, and **Logout**.

MY FUNDS TAB

If you are a fund adviser, the My Funds tab is your homepage — a quick snapshot of your basic fund information, including current balance, spendable balance, total contributions and total grants.

There are multiple submenu options on the left side of the page:

Fund Summary – Shows historical data and charts about your fund, including contributions and grants. This is also the default page of the My Funds tab.

Gifts to Fund History – Shows all contributions to your fund.

All Grants – Shows grant information via Grant Summary (grantees sorted alphabetically, organization clickable for details), Grant History (grants sorted by date, ID clickable for details), and Recurring Grants (grants scheduled on a cadence)

Fund Documents – Shows your fund statements sorted by most recent. You can also generate a manual fund statement, but please note that manual statements may not include the most recent financial performance of your investments.

Make a Gift - Opens a window for you to add to your fund or contribute to other funds managed at the Foundation.

SUBMITTING A GRANT REQUEST

To recommend a grant from your fund, click Create Grant Request in the sidebar or top right of any page (if your profile allows this ability).

Recommending a grant is a three-step process:

STEP ONE — CHOOSE A GRANTEE

Choose a grantee in one of three ways:

- A. Previous Grantee**

Choose the organization you want to grant to from a drop-down list of organizations you have previously supported. This includes Greater Milwaukee Foundation strategic priority funds and other Foundation funds, found in the lower two fields.
- B. Search Grantee**

Search for the organization you want to support by name, city and state, or EIN, supported by GuideStar. Once you find the organization you want to support, click Create Request.
- C. Manual Grantee**

If you can't find the organization you wish to support, you will need to enter the organization's information manually: organization name, address and phone number. The fields marked with an asterisk are required; providing all the requested information allows us to ensure your grant recommendation is processed as accurately and efficiently as possible. Once you enter this information, click Submit.

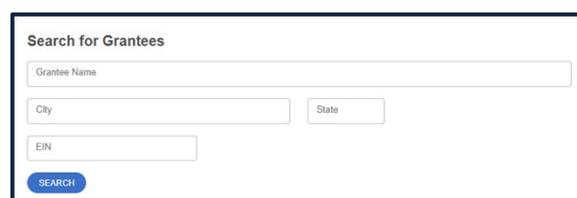


Choose from previous Grantees or Funds

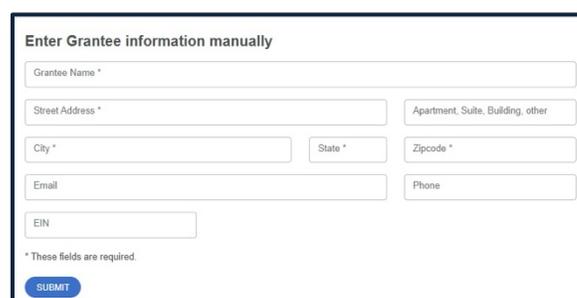
Grantees you have given to in the past

Foundation funds you have given to in the past

Other foundation funds



Search for Grantees



Enter Grantee information manually

* These fields are required.

Once the organization has been selected, you will be redirected to a new page to provide pertinent grant details including the grant description and amount.

Note: All grants are approved by the Greater Milwaukee Foundation's Board of Directors. A \$250 minimum is required for each grant request. Grants up to and including \$250,000 are typically paid within one to two weeks and approved during the Foundation's quarterly board meetings. Foundation policy requires all grants over \$250,000 to be approved by the Board prior to payment. This may be done via electronic board ballot to help expedite the payment process.

STEP TWO — GRANT DETAILS

Additional Grantee Contact – Add name, email, and other information for an additional grantee contact.

Description (required) – Provide a short (up to 255 characters) description of the grant purpose and any special handling. For general support, write either “sustaining support” or “unrestricted support” as the description. If the grant is for a specific purpose, please name it (e.g. “For the support of X campaign.”)

Amount (required) – Enter the donation amount.

Anonymous – If checked, the fund name will not be included on the check or grantee notification.

Recurring – If checked, select recurrence start date, recurrence interval, and number of recurring donations.

Attachment – Enter any supporting documentation (typically none).

Attachment Description – Enter details about the attached documentation.

Additional Notes to GMF Staff – Add any optional directions about grant execution, such as specific recipient information to include with payment, “in honor of” or “in memory of” notation, or Foundation staff communication requests.

Once you are finished entering this information, click Add to Cart.

Your grant is not yet submitted! See next step.

STEP THREE — REVIEW AND SUBMIT REQUEST

Repeat steps one and two for any additional grant requests. Once finished, click Review Grant Requests to view grant request details and then click Submit Grant Requests. Once you submit the request, our team can begin processing the grant request. You will receive a confirmation email upon submission. If you submit multiple grants at once, you will receive one combined confirmation email.

Grant Request

Requested By: Jones, Mr. Edward

Grantee: College Possible Milwaukee

Additional Grantee Contact:

Description: 0/255 characters

Amount:

Anonymous:

Recurring:

Attachment: Choose Files No file chosen
(or drag and drop anywhere on the page)

Attachment Description:

Additional Notes to GMF Staff:

ADD TO CART

Grant Request Cart			
Grantee	Description	Amount	Anonymous
[Redacted]	scholarships Additional Notes to GMF Staff:	\$ 5,000.00	No
Total		\$ 5,000.00	

SUBMIT GRANT REQUESTS
←

VIEWING GRANT HISTORY

To review your most recent grant history, click the All Grants tab followed by the Grant History tab. Under the Status column (see arrow), 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 blue Cancel button.

Cancelled means your grant request has been cancelled.

Pending or **New** mean that our team is currently processing your grant request.

Approval means your grant request has been processed and is awaiting approval.

Voucher means your grant request has been approved and is awaiting payment.

Paid or **Complete** mean that a check has been paid out to the organization and your grant is complete.

Click Export to save your grant history to your files.

Click the blue Copy button to start a new grant request with the same details.

Grants								RESET	EXPORT
ID	Date	Status	Grantee	Description	Advisor	Amount		Search:	
	01/28/2025	new	Guest House of Milwaukee	sustaining support.		5,000.00	COPY		
	01/28/2025	new	Hope House of Milwaukee, Inc.	sustaining support.		10,000.00	COPY		
	12/08/2023	paid	Greater Together Campaign: ThriveOn Arts Fund			5,000.00			
	12/08/2023	paid	Food Pantry of Waukesha County Inc			5,000.00	COPY		
	12/08/2023	paid	Greater Together Campaign: Housing Fund			5,000.00			
	12/08/2023	paid	Wisconsin Marine Historical Society, Inc.			2,000.00	COPY		
	12/08/2023	paid	Malaika Early Learning Center	the ThriveOn King Campaign		5,000.00	COPY		
	12/08/2023	paid	Basic Needs Fund			5,000.00			
	12/08/2023	paid	Greater Together Campaign: Early Childhood Education Fund			5,000.00			
	11/25/2022	complete	Food Pantry of Waukesha County Inc	sustaining support		5,000.00	COPY		
	11/25/2022	complete	Malaika Early Learning Center	sustaining support		5,000.00	COPY		

DONATION HISTORY TAB

If you are not a fund adviser, the Donation History tab is your homepage — a summary of your total donations by fund and year. If you are a fund adviser, you can click Donation History at the top of the page to view the funds you have supported.

Total Donations		Total Donations This Year		Total Donations Last Year																	
373,316.42		0.00		0.00																	
Donation Summary																					
Fund	2023	2022	2012	2011	2010	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000	1998	1997	1996	1995	1994	Total
Anonymous Fund					5,000.00	12,000.00	10,000.00	24,958.00	10,000.00	250,000.00											311,958.00
Bonnie R. and Carl A. Weigell Fund											200.00						100.00				300.00
Camps for Kids Fund															100.00	100.00	100.00	100.00			400.00
Early Childhood Education Fund	10,047.05																				10,047.05
General Charitable Fund																				200.00	200.00
Maquon Nature Preserve Program Fund		250.00	500.00	500.00	500.00	500.00	1,000.00	25,205.25		500.00		200.00	1,000.00								29,655.25
ThriveOn Arts & Culture Fund	10,109.07																				10,109.07
ThriveOn Collaboration Fund	10,047.05																				10,047.05
Women's Fund Endowment														100.00		100.00	100.00	100.00	100.00		500.00
Women's Fund Gift to Grants															100.00						100.00
Total	10,109.07	20,094.10	250.00	500.00	5,500.00	12,500.00	11,000.00	50,163.25	10,000.00	250,500.00	200.00	200.00	1,000.00	100.00	200.00	200.00	300.00	200.00	100.00	200.00	373,316.42

The Donation History page shows funds you have supported.

There are three submenu options on the left side of the page:

Donation Summary – Shows funds you have supported, organized alphabetically with gifts by year.

Donations – Shows all donations to funds, sorted by date. Click ID number for details, including tax acknowledgements if applicable. Note that donations prior to mid-2023 will not have a tax letter attached.

Recurring Donations – Shows any recurring donations you have set up, including start date of donations, next donation date, end date of donations and additional details.

CONTRIBUTE TO YOUR FUND OR MAKE A DONATION

In the top right of any donation page, click Make a Donation to open our giving portal. You have the option to contribute to your fund, make a gift to a Foundation fund, or support numerous other funds available for donations. Your fund is listed first, followed by featured funds, and a Show Additional Funds link at the bottom opens the complete list. Click the blue Donate button next to a fund to start the donation process.

DONATE TO A FUND

To search for a fund, please use the box below or scroll down, clicking on "Show Additional Funds" to view all funds available for a donation.

Please contact Development and Philanthropic Services at philanthropicservices@greatermilwaukeefoundation.org with any questions, or to make a gift through another payment method.

Ellen Gilligan Leadership in Racial Equity and Social Justice Award DONATE

Greater Together Campaign: Community Grant Fund
This flexible fund allows the Foundation to leverage knowledge, community insights, research and partnerships to respond to challenges, fund important initiatives and build collaborative solutions. DONATE

PROFILE TAB

The profile tab includes the personal information on file for you, including name, primary address, email address, and phone number. Click Edit Information to modify your address or phone number. Your name and email address are tied to your profile and cannot be changed.

There are three submenu options on the left side of the page:

Personal Information – Shows the personal information on file for you.

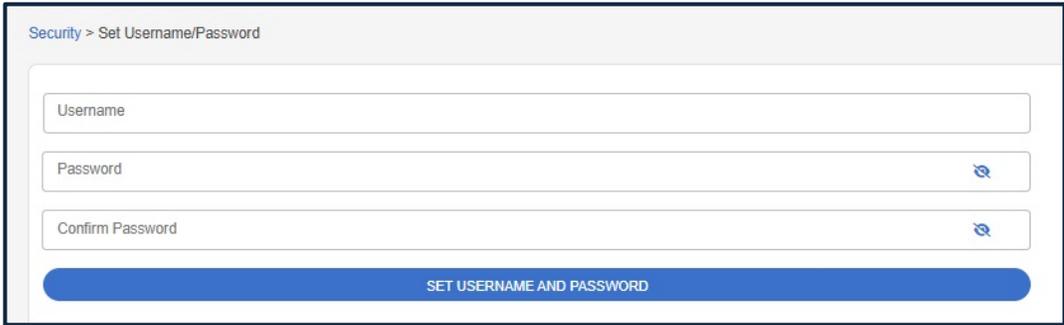
Security – Allows you to create or edit your username and password.

Contact Preferences – Allows you to mark your profile as Do Not Email, Do Not Call, or Do Not Mail for Greater Milwaukee Foundation communications. Note that your philanthropic adviser may still contact you for fund management and personal outreach.

CREATE OR EDIT USERNAME AND PASSWORD

If you are a new portal user, you forgot your login information, or you would like to change your login information, click Security on the left side of the Profile page to set a new username and password.

Click Add Username/Password and then enter the information you would like to use. We recommend you set your username to be the email address associated with your profile, and to use a password that uses a mix of capital and lowercase letters, numbers, and/or special characters. Click Set Username and Password to confirm.



Security > Set Username/Password

Username

Password

Confirm Password

SET USERNAME AND PASSWORD

LOGOUT

Remember to log out after your session by clicking the Logout button in the top right of your screen.



FREQUENTLY ASKED QUESTIONS

How long does it take for my grant request to be processed?

Grant requests submitted by 12 p.m. on Fridays will usually be processed the following week.

Who can I make grant requests to?

Grant recommendations must be made to qualified 501(c)(3) organizations including schools, churches and government entities.

What is the minimum amount for a grant request?

A \$250 minimum is required for each grant request.

How often are fund statements posted?

Fund statements are posted monthly, typically after the last Friday each month, and reflect the investment performance for the previous month. You will be notified via email when your fund statement is ready to be viewed in the donor portal. If you are not receiving these notification emails, please contact our team at csuite@greatermilwaukeeefoundation.org or 414-272-5805.

I don't have login information for the portal yet. What should I do?

If you have an email address associated with a fund or profile, click Login with Email to receive a temporary PIN. If you don't receive a PIN, please email csuite@greatermilwaukeeefoundation.org for assistance.

I logged in with my email. How can I create a username and password?

Click the Profile tab at the top of the portal and then the Security subtab on the left side. Then click Add Username/Password to add your information. We recommend using your email address as your username.

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

Our team does not have the ability to access your password. You can your password by clicking on the Forgot Your Password link.

If you still need assistance, please contact our team at csuite@greatermilwaukeeefoundation.org or 414-272-5805.

How do I add donor portal access for myself or another individual?

Please reach out to your philanthropic adviser who will be able to assist you.

QUESTIONS

If you have any questions about the donor portal, please contact our team at csuite@greatermilwaukeeefoundation.org or 414-272-5805.