

Grantee History Portal Guide



As a Greater Milwaukee Foundation grantee or scholarship beneficiary, you can access your grant and/or scholarship information online through our grantee history portal. Within the portal, you can easily view information about the status of funded grants, grant payments, grant letters, and any scholarships your organization may have received (if applicable). The grantee history portal serves as a knowledge management tool 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 organization. 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 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 of the form, 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. Underneath the button, there is a link that says 'Login with username/password'.

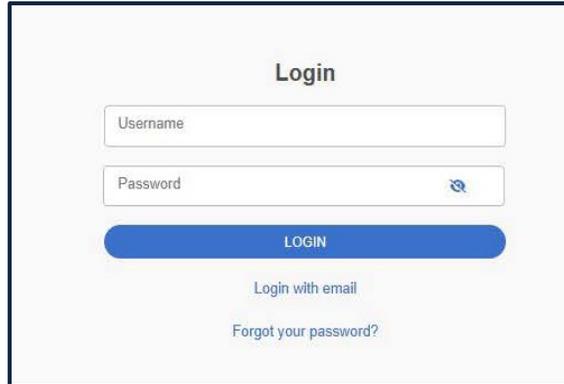
Next, enter your email address and click Login.

The screenshot shows a 'Verify your pin' form. At the top, there is a message: '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 is a 'Pin' input field. Underneath the field is a blue 'LOGIN' button. At the bottom of the form, 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 grantee history 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 Grantee History Portal.



The screenshot shows a login interface with the following elements:

- Header: Login
- Input field: Username
- Input field: Password (with an eye icon for visibility toggle)
- Button: LOGIN (blue)
- Link: Login with email
- Link: 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 (see previous section of this document).

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 our team at csuite@greatermilwaukeeefoundation.org or 414-272-5805.

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

IMPORTANT: If you access the grantee history 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 will have access to the system.

GRANTEE HISTORY PORTAL NAVIGATION

Once you are logged in, you will see the Summary page. Across the top of the page, you will see the total distribution of funds from the Greater Milwaukee Foundation to your organization as well as a breakout of the total funds granted for the current and previous years, if applicable.

The screenshot displays the 'Grantee' summary page. At the top right, there are links for 'GRANTEE', 'PROFILE', and 'LOGOUT'. The main content area is titled 'Grantee' and contains three summary boxes: 'Total Distributions' (14,206,262.69), 'Total Distributions This Year' (523,890.00), and 'Total Distributions Last Year' (807,178.00). Below these is a 'Grant Award Summary' table with columns for years from 2025 to 2010. The table lists various funds and their corresponding grant amounts for each year.

This login includes total distributions and total distributions across the current and previous years.

To drill down further into the grantee history details, click “Grants” on the navigation bar on the left side of your screen. A total of 10 grants will be listed per page as a default. Each grant’s ID, date, name of the fund, status, description and dollar amount will appear.

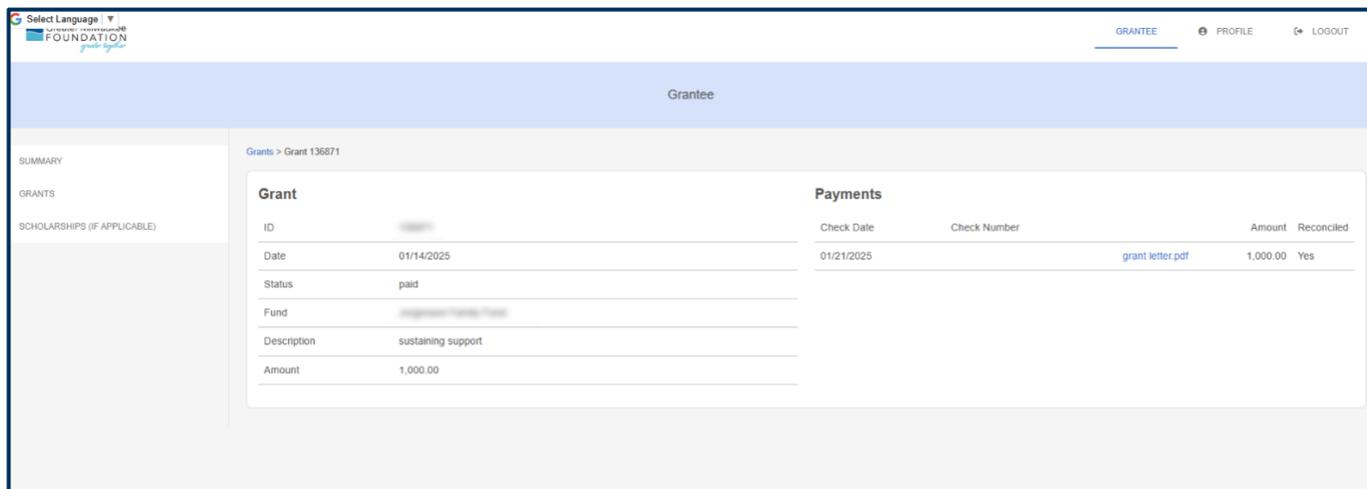
The screenshot displays the 'Grants' page. At the top right, there are links for 'GRANTEE', 'PROFILE', and 'LOGOUT'. Below the navigation bar, there are buttons for 'FILTER' and 'EXPORT'. A search bar is present. The main content area is titled 'Grants' and shows a table with columns for ID, Date, Fund, Status, Description, and Amount. The table lists 10 grants with their respective details.

ID	Date	Fund	Status	Description	Amount
	04/09/2025		voucher	unrestricted use	50,000.00
	03/28/2025		paid	general support	2,000.00
	03/18/2025		voucher		470,890.00
	01/14/2025		paid	sustaining support	1,000.00
	12/19/2024		paid		250.00
	12/18/2024		paid	the General Fund	1,000.00
	12/18/2024		paid	Joy House	1,000.00
	12/18/2024		paid	sustaining support	1,000.00
	12/17/2024		paid		20,000.00
	12/10/2024		paid	sustaining support	10,000.00

Showing 1 to 10 of 507 entries

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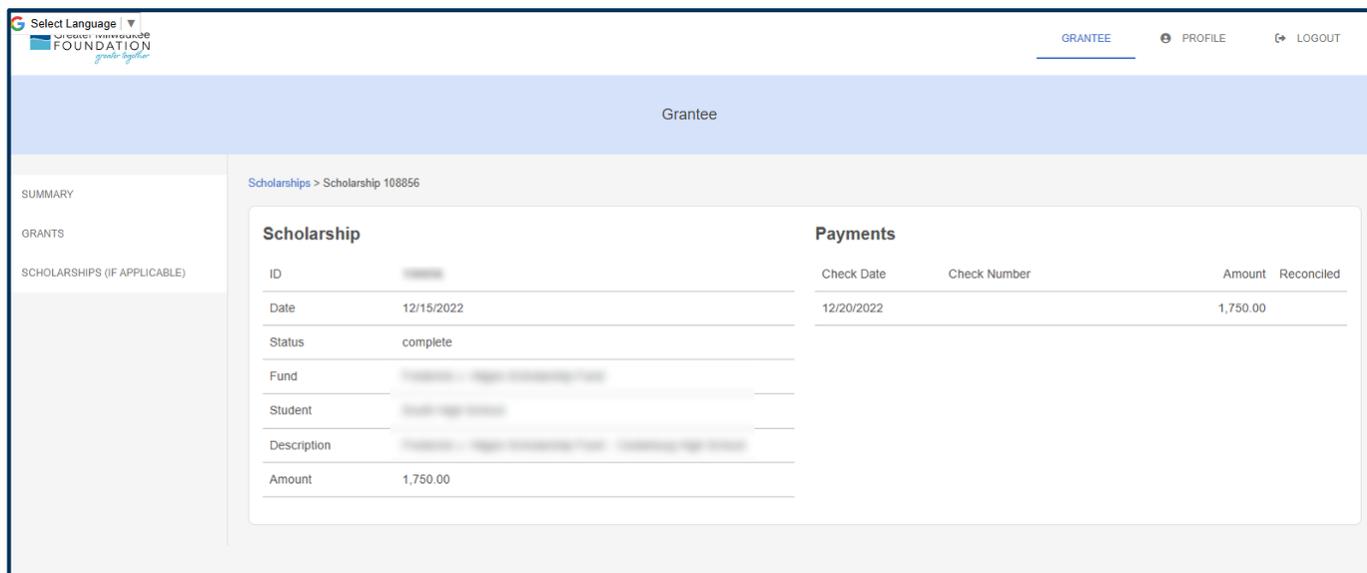
To view additional information about a specific grant's payment and grant letter, find the ID column, and click on the blue number (i.e., the grant ID).



The screenshot shows the 'Grantee' portal interface. On the left is a navigation menu with 'SUMMARY', 'GRANTS', and 'SCHOLARSHIPS (IF APPLICABLE)'. The main content area is titled 'Grants > Grant 136871'. It features two tables: 'Grant' and 'Payments'.

Grant		Payments			
ID	136871	Check Date	Check Number	Amount	Reconciled
Date	01/14/2025	01/21/2025	grant letter.pdf	1,000.00	Yes
Status	paid				
Fund	Operating Fund				
Description	sustaining support				
Amount	1,000.00				

If your organization is a scholarship beneficiary, click "Scholarships (if applicable)" on the navigation bar on the left side of your screen. To view additional information about a scholarship, click on the scholarship ID number.



The screenshot shows the 'Grantee' portal interface with the 'SCHOLARSHIPS (IF APPLICABLE)' option selected in the navigation menu. The main content area is titled 'Scholarships > Scholarship 108856'. It features two tables: 'Scholarship' and 'Payments'.

Scholarship		Payments			
ID	108856	Check Date	Check Number	Amount	Reconciled
Date	12/15/2022	12/20/2022		1,750.00	
Status	complete				
Fund	Operating Fund				
Student	John Doe				
Description	Operating Fund - Sustaining Support				
Amount	1,750.00				

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 a GMF staff member may still contact you about your current grant application and/or award.

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.



The screenshot shows a web form titled "Security > Set Username/Password". It contains three input fields: "Username", "Password", and "Confirm Password". Each of the "Password" and "Confirm Password" fields has a small eye icon to its right, indicating a toggle for password visibility. At the bottom of the form is a prominent blue button labeled "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

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

If you have an email address associated with your organization's grant, click Login with Email to receive a temporary PIN. If you don't receive a PIN, please email csuite@greatermilwaukeefoundation.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@greatermilwaukeefoundation.org or 414-272-5805.

How do I add access for myself or another individual?

Please reach out to our team at csuite@greatermilwaukeefoundation.org for assistance in adding or modifying access to the portal.

QUESTIONS

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