Donor Portal Step-by-Step Guide

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As a fundholder of the Greater Milwaukee Foundation, you can access your fund information online through our Donor Portal. Within the portal, you can easily check your fund balance, 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 fund and is available 24/7 from anywhere, on any device. Need help? Contact us at csuite@greatermilwaukeefoundation.org or 414-272-5805.

INITIAL LOGIN PROCESS AND CREATING YOUR ACCOUNT

You will receive an automated email from Greater Milwaukee Foundation sent as "no-reply@fcsuite.com" with a custom invitation link to create your account in the Donor Portal. You may need to check your junk email folder. Your username will be the main email address that we have on file for your fund.

Once you click on the invitation link in the email, you will be prompted to create a password of your choice. We recommend using random words, capital letters, numbers and/or special characters to keep your account secure.

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

Delete the initial automated email after you have successfully completed this process. The link contained in the email expires after 24 hours and can only to be used once to establish your initial password. If you have not registered or need a new link, please contact your philanthropic adviser.

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Profile

Greater Milwaukee Foundation Donor Portal

Setup Access
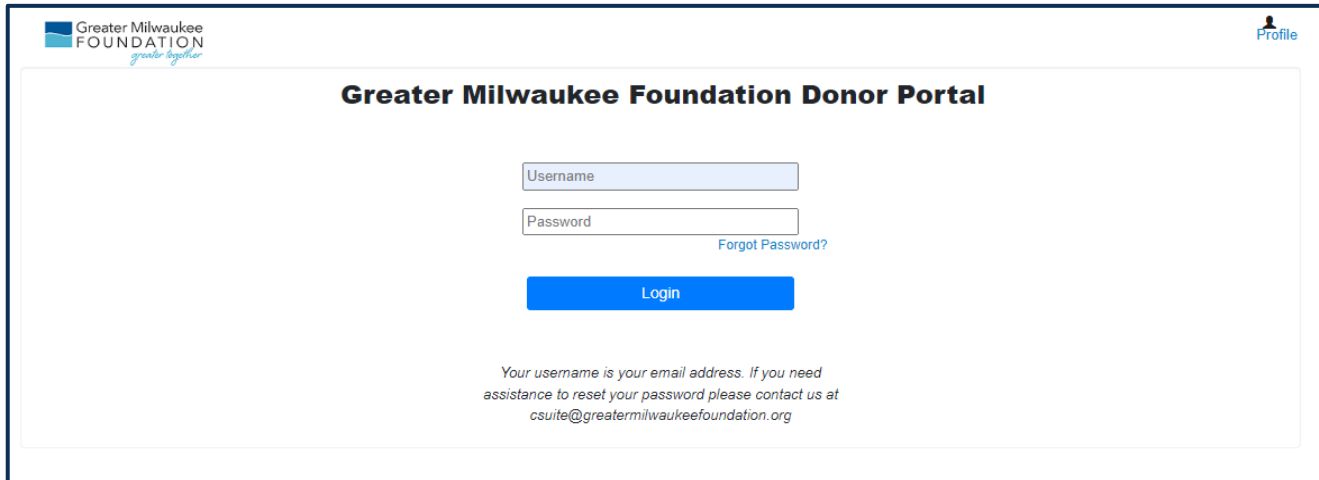
Please setup a password to access your account.

Name	
Login	
Password	
Confirm Password	

RETURNING USERS

After setting up your account, you can access the Donor Portal at any time by simply visiting http://www.greatermilwaukeefoundation.org/ and clicking on "Donor Login" in the header bar of our website (see arrow in sample screen to the right).

This will take you to the login screen where you will enter your username and password established in the "setup access" step outlined previously.

The Foundation team does not have the ability to access your password. If you forget your password, you can reset your password on the Donor Portal login page by clicking on the "Forgot Password?" link.

If you still need assistance, please contact us 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.

Visit www.greatermilwaukeefoundation.org from any web browser or device (including smartphones and tablets) to access the Donor Portal system.

IMPORTANT:*If you access the Donor Portal from a shared computer or device, we strongly encourage you to use the Logout option after completing each session. This ensures no one other than you has access to the system.*

DONOR PORTAL FEATURES

Once you are logged in, your fund's homepage will appear. If you manage multiple funds, you will see a "Choose Fund" menu. Choose the fund you wish to review from the drop-down menu.

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.

The tabs at the top of the page display different features available to you as a Fund Adviser:

Home - Your homepage is a quick snapshot of your fund's most recent activity. This tab shows your fund's current balance, all fund advisers, recent contributions, and recent grant history. Note that each Fund Adviser listed will have similar access to the Fund.

All Gifts to Fund - Allows you to see and dive into your historical giving.

All Grants - Shows your grant history with options to dive into your historical grants.

Request a Grant - Allows you to make a grant request from your fund and see recent grant statuses. *Note: Online grant requests are only available to Donor-Advised Funds at this time.*

Fund Statements - Shows your fund statements. Next to the fund statement you wish to view, click "Print" and the system will generate a PDF in a new window that you may view, save, or print.

Make a Gift - Opens a new window for you to contribute to your fund, or other funds managed at the Foundation. You may also set up a recurring donation.

Logout - Remember to use the "Logout" tab to close your Donor Portal. You will be automatically logged out after a period of inactivity even if you do not log out.

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SUBMITTING A GRANT REQUEST

To recommend a grant from your fund, click the Request a Grant tab.

Recommending a grant is a three-step process:

STEP ONE — CHOOSE A GRANTEE

Choose a Grantee in one of four ways:

A. **Choose from Previous Grantee**
Choose the organization you want to support from this drop-down list of organizations you have previously supported.

B. **Other Foundation Funds**
Choose a Strategic Priority fund you want to support from this drop-down list of funds.
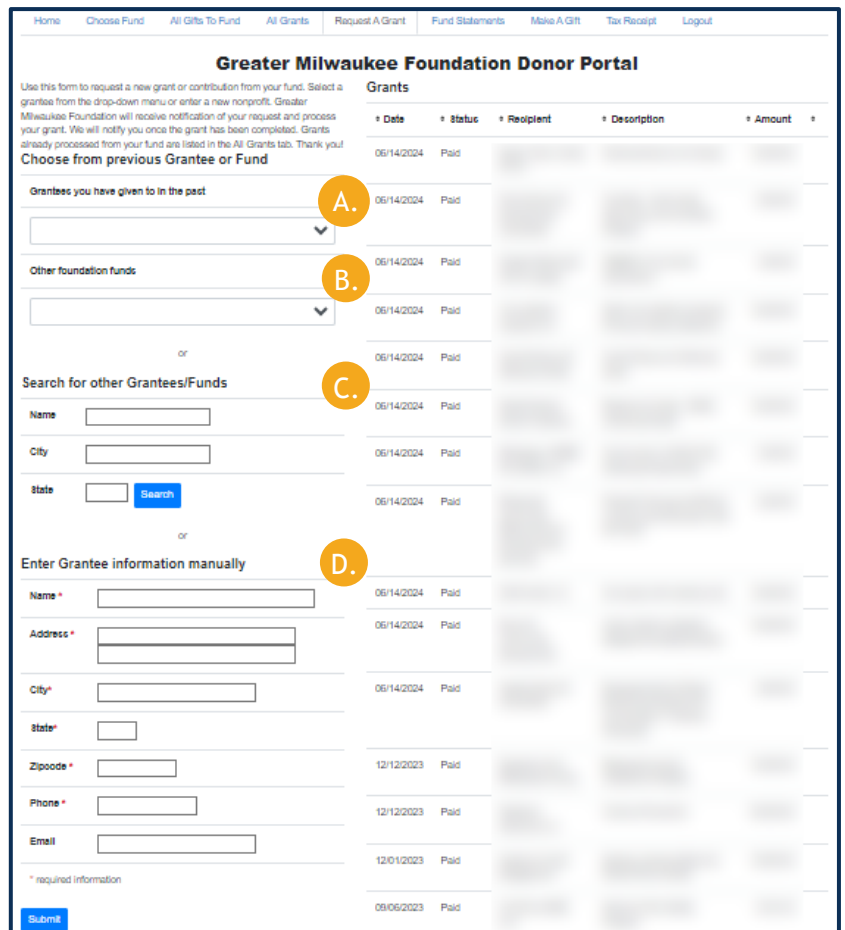
C. **Search for Other Grantees**
Search for the organization you want to support in GuideStar, the world's largest database of nonprofit organizations.
The more keywords used, the better the search results will be. Once you find the organization you want to support, click *CreateRequest.*

D. **Enter Grantee Information Manually**
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 a red 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.*

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.

STEP TWO — GRANT DETAILS

In the description field, please provide 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.

All grants are approved by the Greater Milwaukee Foundation's Board of Directors. A $250 minimum is required for each grant request and grants up to and including $250,000.00 are typically paid within one to two weeks and approved during the Foundation's quarterly board meetings. Foundation policy requires all grants over $250,000.00 to be approved by the board prior to payment. This may be done via electronic board ballot to help expedite the payment process.

The fund name and contact information for the primary fund adviser is shared with grantees. You can also choose to remain anonymous by selecting the Anonymous checkbox. Your name and fund name will remain anonymous to the grantee.

Please note that recurring grant commitments will only deduct the current year commitment from your fund's spendable balance. You can track the payment history and upcoming schedule of recurring grants by referring to the original request in the All Grants tab of the Donor Portal.

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

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STEP THREE — REVIEW AND SUBMIT REQUEST

Review your grant request details and click Submit Request. Once you submit the request, our team will begin processing the grant request.

| Home | Choose Fund | All Gifts To Fund | All Grants | Request A Grant | Fund Statements | Make A Gift | Tax Receipt | Logout |

Greater Milwaukee Foundation Donor Portal

Review Grant Requests

Grantee	Fund	Description	Amount	Anonymous
		Additional Notes:	$ 250.00	No
		Total	$ 250.00	

Submit Grant Requests

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VIEWING GRANT HISTORY

To review your most recent grant history, click the All Grants 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 yellow Cancel button.

Cancelled means your grant request has been cancelled.

Pending means that our team is currently processing your grant request.

Approved means your grant request has been approved but not yet paid.

Paid means that the grant request has been approved and a check has been paid out to the organization.

Completed means the grant request has successfully been fulfilled.

ID	Date ▼	Status	Recipient	Description	Advisor	Amount	
128842	06/14/2024	Paid					Copy
128840	06/14/2024	Paid					Copy
128832	06/14/2024	Paid					Copy
128834	06/14/2024	Paid					Copy
128828	06/14/2024	Paid					Copy
128798	06/14/2024	Paid					Copy
128821	06/14/2024	Paid					Copy
128839	06/14/2024	Paid					Copy
128831	06/14/2024	Paid					Copy

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DONOR PORTAL 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@greatermilwaukeefoundation.org or 414-272-5805.

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

It could take an entire day for the system to fully process each custom URL and send the autogenerated email. Check your Spam or Junk folder for an email from no-reply@fcsuite.com.

If it hasn't arrived within a few days, please email csuite@greatermilwaukeefoundation.org so that we can manually resend the information you will need to get up and running.

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

The custom URL inside the auto-generated email was only provided to establish your password.

To access the portal, go to greatermilwaukeefoundation.org and click on the Donor Portal login at the top right corner of our website. This will take you to the login screen where you will enter your username and password.

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

Our team does not have the ability to access your password. You can reset your password on the Donor Portal login page by clicking on the "Forgot Password?" link.

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

I need to 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@greatermilwaukeefoundation.org or 414-272-5805.