



GREATER
TACOMA
COMMUNITY
FOUNDATION

GTCF FUND ADVISOR PORTAL REFERENCE GUIDE

ESTABLISHING YOUR PASSWORD

GTCF staff will set up your account in the Fund Advisor portal. Once the process has been initiated, you will receive an automated email from no-reply@fcsuite.com. This message will provide instructions on creating a new password for your account. Note your username and password during this process. Remember that your USERNAME IS CASE SENSITIVE.

The link in this email will expire after 30 days so DO NOT use it to access the system after you have completed the setup process.

If you did not receive an email to access the system but would like a password, please contact kausenhus@gtcf.org.

ACCESSING THE PORTAL

Access the portal anytime here: <https://gtcf.fcsuite.com/erp/fundmanager> and enter your username and password. Select the fund you want to review, and then use the menu items in the screenshots below to navigate through the Fund Advisor Portal.

NAVIGATING THE PORTAL

LOGIN SCREEN

Visit <https://gtcf.fcsuite.com/erp/fundmanager> from any web browser and most devices including smartphones and tablets to access the portal. Sign in with your unique username and password. Login information is case sensitive. *Please note that iPhone and iPad users may experience an automatic capitalization when entering information that may prevent successful login.*

FOR INDIVIDUALS WHO ADVISE MULTIPLE FUNDS

If you serve as an advisor for multiple funds with GTCF, you will see the **Choose Fund** menu once you have successfully signed in. Choose the particular fund with which you wish to interact. If you are listed as an advisor for only one fund, you will not see this screen.

NAVIGATING THE TABS

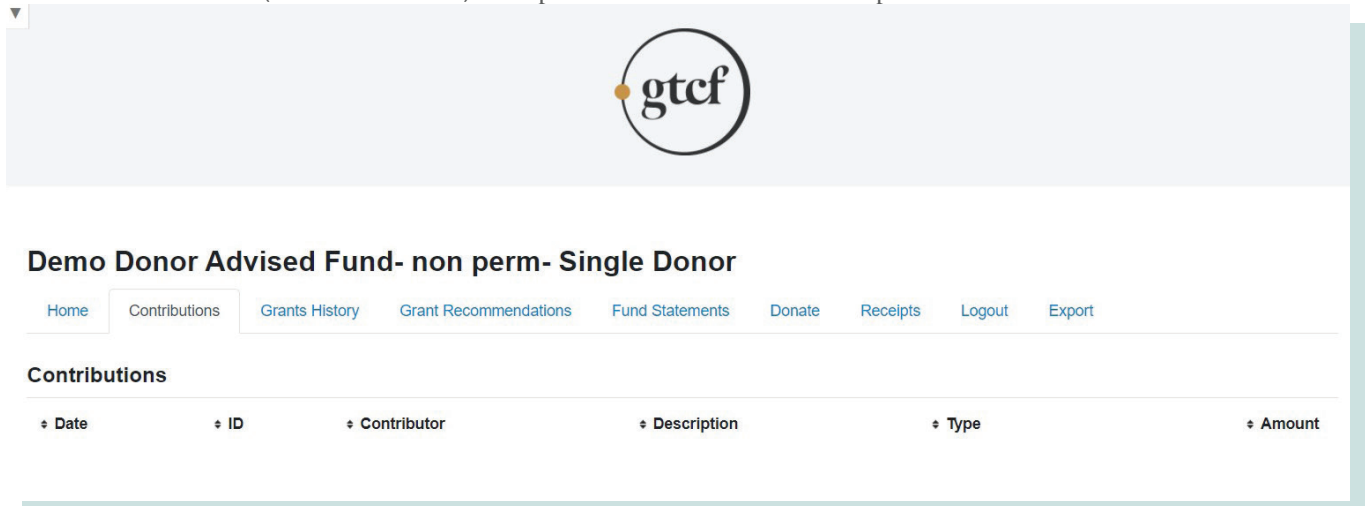
HOME

The main screen provides a general overview of your fund including the top 10 Grantees and top 10 Donors to your fund. You will also see real time updates of the current balance, grants paid, contributions to your fund, and the current advisors associated with your fund. Note that each person listed will have similar access to the Fund Advisor Portal.

Keep in mind that market gains and losses and administrative fees are only posted quarterly. Therefore current balance reflects the previous quarter's: ending balance, contributions to the fund, and grants paid from the fund.

CONTRIBUTIONS

This tab provides the detail for each contribution received into your fund. For funds which receive contributions from others, you will be able to view more detail about each donor by clicking his/her name (unless the donor has requested to remain anonymous). You can also click the **Export** option on the far-right side of the menu bar (as shown below) to export the details in an Excel spreadsheet.



The screenshot displays the GTCF logo at the top center. Below it, the title "Demo Donor Advised Fund- non perm- Single Donor" is shown. A navigation menu includes "Home", "Contributions", "Grants History", "Grant Recommendations", "Fund Statements", "Donate", "Receipts", "Logout", and "Export". The "Contributions" tab is active. Below the menu is a table header with columns: "Date", "ID", "Contributor", "Description", "Type", and "Amount".

GRANTS HISTORY

This tab provides detail on all grants and fund expenses paid out from your fund. The top section provides a summary of grants by recipient (grantee). Scroll past the summary section to see grants listed from newest to oldest. You can click on the filter symbol at the top right of the column to filter more information. You can also click the Export option on the far-right side of the menu bar (as shown below) to **Export** the details in an Excel spreadsheet.

- GTCF processes grants on the 15th and at the end of month. Grant requests must be submitted 5 business days before the processing deadline.
- Complete** in status column means grant has been paid.
- Other status indicators may appear throughout the grantmaking process.

Please contact grants@gtcf.org if you have questions about the status of a grant.



Demo Donor Advised Fund- non perm- Single Donor

[Home](#) [Contributions](#) [Grants History](#) [Grant Recommendations](#) [Fund Statements](#) [Donate](#) [Receipts](#) [Logout](#) [Export](#)

Grants

↕ Date	↕ ID	↕ Status	↕ Recipient	↕ Description	↕ Amount
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GRANT RECOMMENDATIONS

Use this tab to submit grant recommendations and invoices to be paid. The Grants Listing appears in the right half of the window. Here you will find each grant that has been recommended/paid from this fund listed in descending date order.

Look for the word **Complete** in the status column to confirm a grant has been successfully paid. Grant Recommendations still in the **Request** status can be canceled from this screen.

The first portion on the left side of the screen is labeled **Choose from Previous Grantee**. You can recommend additional payments to any previous recipient from this fund using this convenient tool.

Use one of the options below to recommend grant payments to new recipients not previously paid from this fund.

- Search for Other Grantees** - This box queries the complete list of nonprofit organizations holding current 501(c)(3) tax-exempt status with the Internal Revenue Service. If the name of the organization you are searching for does not appear, select **Guide Star Search** on the right.
- Enter Grantee Information Manually** - The last section allows you to manually enter the information GTCF will need to process your grant recommendation. The fields marked with a red asterisk are required; providing all the requested information allows GTCF to ensure your grant recommendation is processed as accurately and quickly as possible.

After you have recommended any grant, scroll to the bottom of the page and click the **Review** button



Demo Donor Advised Fund- non perm- Single Donor

[Home](#) [Contributions](#) [Grants History](#) [Grant Recommendations](#) [Fund Statements](#) [Donate](#) [Receipts](#) [Logout](#)

Use this form to recommend a new grant from your fund. Select a grantee from the drop-down menu or enter a new nonprofit. GTCF will receive notification of your request and process your grant. We will notify you via email once the grant has been completed.

Choose from previous Grantee

Other foundation funds

or

Search for other Grantees

Name

Grants

± Date ± Status ± Recipient ± Description ± Amount ±

FUND STATEMENTS

Your fund statements will appear under this statement tab. Your past fund statements starting in 2021 will be archived here as well. You will receive an email each quarter, letting you know when your updated fund statement is ready to view or print.



Demo Donor Advised Fund- non perm- Single Donor

[Home](#) [Contributions](#) [Grants History](#) [Grant Recommendations](#) [Fund Statements](#) [Donate](#) [Receipts](#) [Logout](#)

Statements

Description

Date Range

DONATE

This tab provides you with an opportunity to donate to your fund(s) as well as a variety of other funds at GTCF.



[Home](#)

[Donate To A Fund](#)

[Logout](#)

Donate to any of these funds online. If you have any questions, please contact us at 253.383.5622 or by email at faservices@gpcf.org.

Donate To A Fund

Fund Name	Description
Donor Advised	
Demo Donor Advised Fund- non perm- Single Donor	DONATE
Field of Interest	
GTCF Basic Needs Fund	DONATE This fund will support Basic Needs such as food, clothing, shelter, transportation, case management and related supports.

LOGOUT

We encourage you to log out when you are done accessing your fund.

HELP WHEN YOU NEED IT

GTCF'S PHILANTHROPY TEAM IS ALWAYS READY TO ASSIST WITH ANY QUESTIONS YOU MIGHT HAVE ABOUT THE FUND ADVISOR PORTAL WEBSITE. PLEASE EMAIL OR CALL KIERA AUSENHUS | KAUSENHUS@GTCF.ORG | 253.345.4174.