

FUND PORTAL

Quick Start Guide



Jewish Community
Foundation
MILWAUKEE
JEWISH FEDERATION

The Jewish Community Foundation's online Fund Portal provides access to your Donor Advised Fund(s). Once logged in, you can review your fund balance, make grant recommendations, view the gift and grant history for your fund(s), and receive access to fund statements.

Navigate to the log in page for the portal: <https://milwaukeejewish.spectrumportal.net>

You can bookmark this site on your computer for easy access in the future.

Or you can access the portal any time from our website,

<https://www.milwaukeejewish.org/departments/philanthropy/jcf/>

and click on **FUND PORTAL** link at right.

FIND HELP

Each page in the portal has help topics to answer some questions you may have about information on the page and to guide you on how to use the system. Click the green half circle on each page for help.



NAVIGATE THE SITE

The Fundholder Home Page provides your fund balance, grant summary information, a grant history chart, a gift history chart, and more. Peruse the page for a quick view of activity associated with your fund. Link to other parts of the site from here.

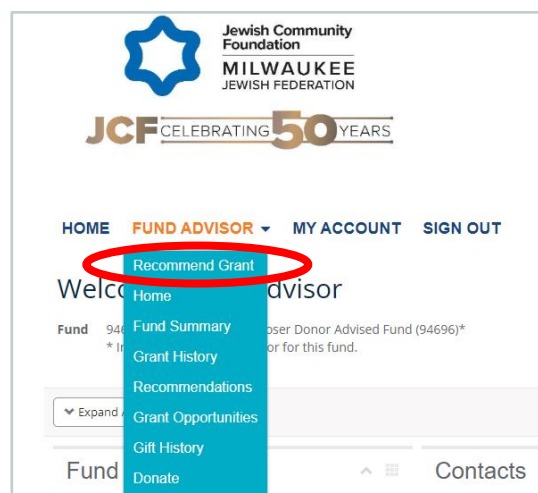
The Fund Advisor Dropdown Menu also gives you quick access all areas of the portal.



RECOMMEND A GRANT

Recommending a grant is easy. You can select organizations that you have previously granted to, search for organizations in our database, or add a new organization to recommend a grant. **All organizations are vetted by JCF staff to ensure they are eligible to receive a grant.**

Select **RECOMMEND GRANT** from the **FUND ADVISOR** menu at the top of the screen. You can then **complete information on each of 3 tabs** on the bottom half of the screen.





Recipient Tab: Under “Source Fund” you will see your fund name and basic information here. If you are a fund advisor for more than one fund, click the **Select Fund** button to select the fund from which you want to recommend a grant.

Under “Recipient Search” choose either **Past Grants** (to grant to an organization you have granted to before) or **Grants Database** (to select from our database) and click **Select**. Or, click **New Recipient** to enter a new organization not in our database.

1 Recipient **2 Grant Information** **3 Acknowledge and Submit**

Source Fund

Fund * [Your Name Here] Donor Advised Fund Select Fund
* Indicates you are an advisor for this fund.

Available Balance*	\$9,672.23
Net Assets*	\$9,672.23
Pending Grants & Payments	\$0.00

* As of 2/17/2023

Recipient Search

Click "Past Grants" (to select to an organization you have granted to in the past) or "Grants Database" (to find an organization in our database) and then click the "Select" button.

Or, click "New Recipient" to enter an organization not in our database. If you are entering a new recipient, please provide us with as much information as you have about the organization. If you are recommending a grant to a national organization and wish to support a local chapter, please include at least the local chapter's city.

Grants Database
 Past Grants

Select

[New Recipient](#)

Next

To search for an organization in the database, click **Grants Database**, hit **Select**, and search for the intended organization. Click **Select** to the left of the organization, and its information will auto-fill. Occasionally an organization will not turn up in the search results, even when you expect it will. That's okay, you can just click “New Recipient” and put in the organization name, and city if not in the Milwaukee area. We'll take care of the rest.

To recommend a grant to an organization you have supported in the past, click **Past Grants** and hit **Select**. This takes you to a Grant Recipient Search page where you can click on the **Select** button next to the organization to which you want to make a grant. The recipient information will then auto-fill.



To recommend a grant to an organization not in our database, select **New Recipient** and enter information about the organization. If you have completed this page correctly, the “1” above **Recipient** will turn to a green checkmark.

HOME FUND ADVISOR ▾ MY ACCOUNT SIGN OUT

Grant Recommendation

1 Recipient 2 Grant Information 3 Acknowledge and Submit

Source Fund

To move to the next page, click either the **Next** button at the bottom left or the “2 Grant Information” button on the timeline above **Source Fund**.

Grant Information Tab: Enter details about the grant including amount, payment frequency, purpose, and any special instructions (if needed). If you have completed this page correctly, the “2” above **Grant Information** will turn to a green checkmark.

1 Recipient 2 Grant Information 3 Acknowledge and Submit

Grant Information

Amount *
(Minimum amount is \$100)

Recurring Payment

Payment Frequency * ▾ ?

Grant Designation (will be included in letter to the grantee) *

Special Instructions (for JCF staff)

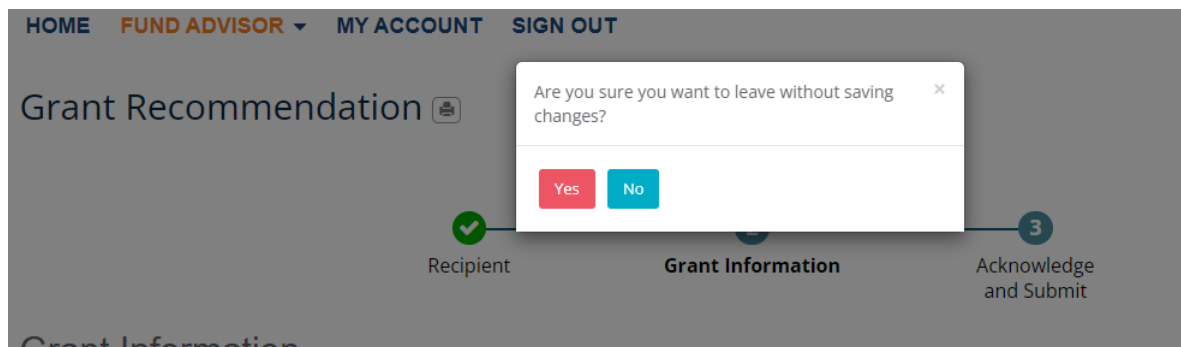


To move to the next page, click either the **Next** button at the bottom left or the “**3 Acknowledge and Submit**” button on the timeline above **Grant Information**.

Acknowledge and Submit Tab: Under “Acknowledgement” you can have a copy of the grant letter sent to another individual and/or you can check boxes if you want to keep your name, or the name of your fund, anonymous.

Under “Review and Submit,” confirm the grant recommendation requirements by checking the ‘**I Agree**’ box, adding your typed signature, and clicking the ‘**Submit**’ button. You will receive a confirmation email.

If you try to leave the grant recommendation process at any time without completing your grant your grant information will no longer be saved automatically. A pop-up will appear asking whether you want to leave the grant process without saving your changes. You can save the information by clicking **No**, returning to complete the first two screens, and then clicking **Save Draft** at the bottom of the **Acknowledge and Submit** tab:





VIEW GRANT HISTORY

Select **GRANT HISTORY** from the **FUND ADVISOR** menu. A list of your prior grants will display. You can search for specific grants using the search box and change the number of grants that will display on the page.

Pay... Status	Grant Status	Payment Amount	Payee	Payee Address	Payee City	Payee State	Payee Zip	Designation	Fund Name	Date Request...	Date Paid
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Click the **ellipsis button (...)** next to the grant and click **Open Recipient** to view organization information. You may make a grant recommendation to an organization on this list by clicking the **ellipsis button** and selecting **Create Grant Recommendation**.

VIEW GIFT HISTORY

Select **GIFT HISTORY** from the **FUND ADVISOR** menu. A list of contributions will display. You can search for specific contributions using the search box. You also can set the number of contributions to display per page.

Open	Date	Type	Donor	Amount	Reference
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*Need help or have questions about your fund portal?
We are here to help!*

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