

Fund Advisor Portal

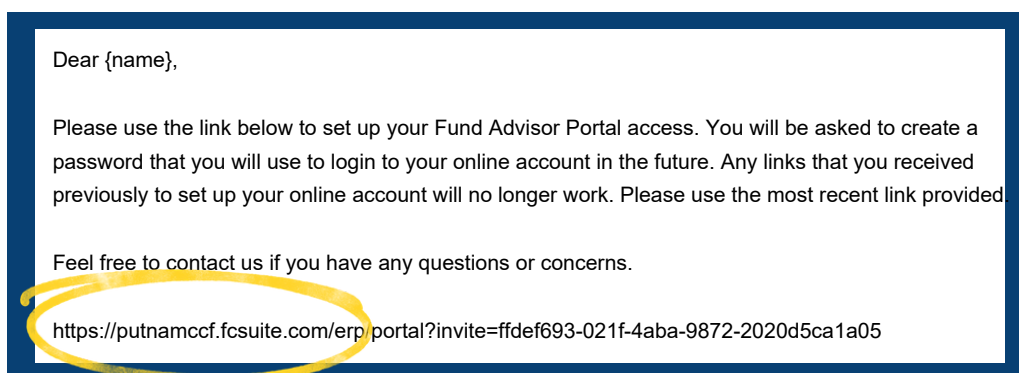
USER GUIDE



The Putnam County Community Foundation's Fund Advisor Portal is a secure website where individuals log in to explore fund details, access financial reports, and view fund statements. Fund advisors can view and manipulate data on their own, allowing them to easily access fund information as needed.

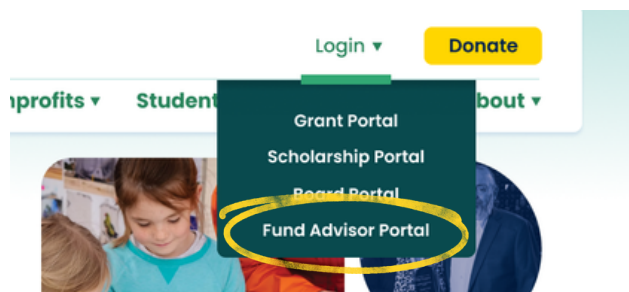
GETTING STARTED

Fund Advisors will receive an email from PCCF to establish an account. If you do not receive one, check your spam and junk folders and ensure PCCF has your current email address on file. Click the link to access the main login page and create your password.



After the initial account setup, you can access the portal using the email link, bookmarking the login page, or visiting the PCCF website at pcfoundation.org.

You can find additional resources and information for Fund Advisors by navigating to the footer of the PCCF website and clicking "Fund Advisor Resources."

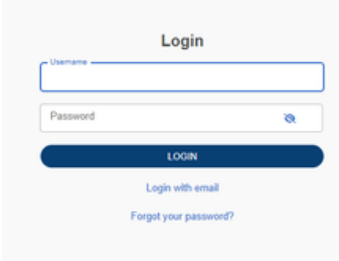


LOGIN OPTIONS

Fund Advisors can also use the “login with email” option. This will send an automated email to your inbox with a temporary PIN; when the PIN is entered, it will autofill your password.

To reset your password, click “Forgot your password?”

If you have multiple funds, you will only have one username and password.
Once logged in, you can select the fund you would like to view.



Login

Username

Password

LOGIN

[Login with email](#)

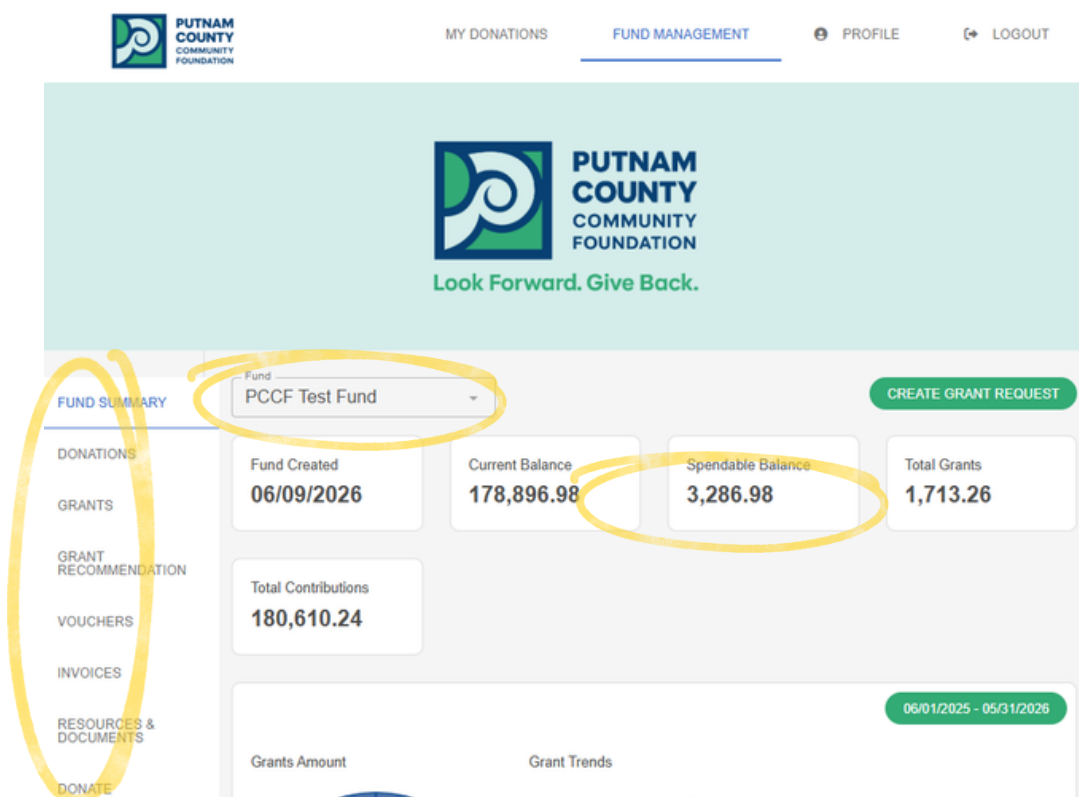
[Forgot your password?](#)

FUND SUMMARY

Once logged in, the portal will show a fund summary dashboard. This is a basic overview of fund activity, including the current balance, spendable balance, grants, and recent donations.

Things to Know

- Spendable Balance is the amount available to distribute as grants.
- If you have multiple funds, you may click on the fund name drop down to switch to a different fund.
- Click on any category in the navigation toolbar on the left for more details in a specific area of fund activity.



The screenshot shows the Fund Summary dashboard for the Putnam County Community Foundation. The dashboard includes a navigation toolbar on the left with categories: FUND SUMMARY, DONATIONS, GRANTS, GRANT RECOMMENDATION, VOUCHERS, INVOICES, RESOURCES & DOCUMENTS, and DONATE. The main content area displays the fund name "PCCF Test Fund" in a dropdown menu, a "CREATE GRANT REQUEST" button, and a summary of fund activity. The summary includes the Fund Created date (06/09/2026), Current Balance (178,896.98), Spendable Balance (3,286.98), Total Grants (1,713.26), and Total Contributions (180,610.24). A date range selector at the bottom right shows "06/01/2025 - 05/31/2026".

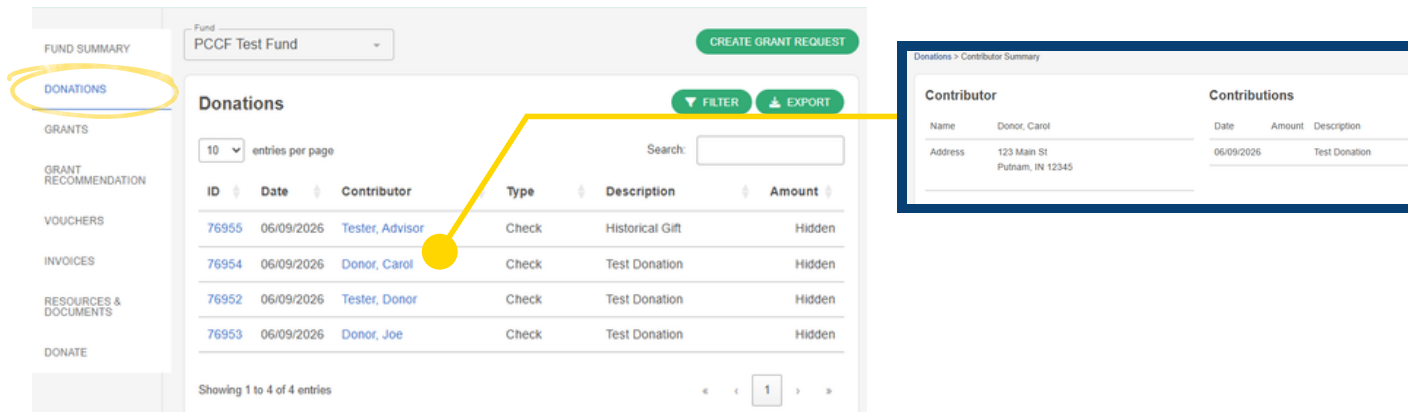
Category	Value
Fund Created	06/09/2026
Current Balance	178,896.98
Spendable Balance	3,286.98
Total Grants	1,713.26
Total Contributions	180,610.24

NAVIGATION TOOLBAR

Your navigation toolbar has options to view data according to your fund type and settings. Not all toolbars will look the same.

Donations

Fund Advisors can view donations to their fund but not the amount given. Click on the donor name to view a donor's contact information and giving history.



Donations

10 entries per page

Search:

ID	Date	Contributor	Type	Description	Amount
76955	06/09/2026	Tester, Advisor	Check	Historical Gift	Hidden
76954	06/09/2026	Donor, Carol	Check	Test Donation	Hidden
76952	06/09/2026	Tester, Donor	Check	Test Donation	Hidden
76953	06/09/2026	Donor, Joe	Check	Test Donation	Hidden

Showing 1 to 4 of 4 entries

Contributor

Name: Donor, Carol
Address: 123 Main St, Putnam, IN 12345

Contributions

Date	Amount	Description
06/09/2026		Test Donation

Grants

The grants tab offers a brief summary of distributions from the fund and grantees. Click on grant history for dates and other details.



Grants

10 entries per page

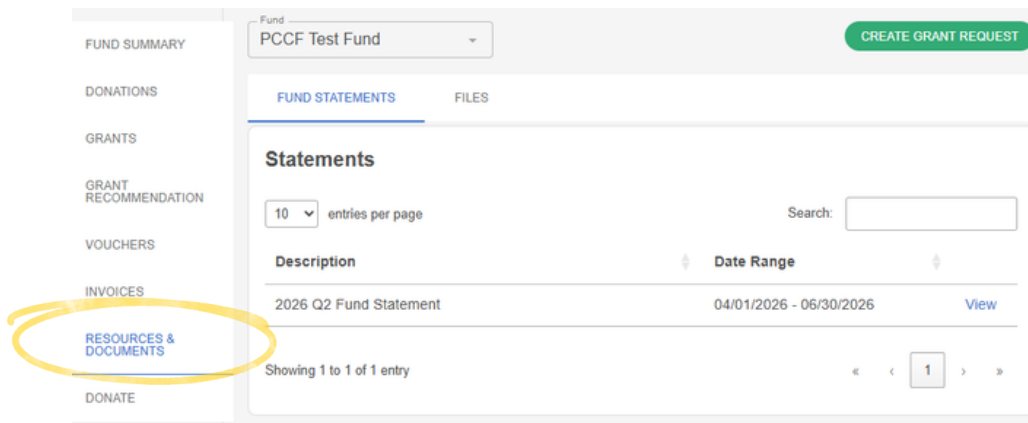
Search:

Grantee	Grants	Amount
Putnam County Fair & 4H Club Association Inc	1	500.00
Putnam County Public Library	1	1,213.26

Showing 1 to 2 of 2 entries

Resources and Documents

Fund Advisors can find published fund statements (beginning January 1, 2022) and other shared documents under the Resources and Documents tab of the toolbar. You can download these documents any time.



Resources & Documents

10 entries per page

Search:

Description	Date Range	View
2026 Q2 Fund Statement	04/01/2026 - 06/30/2026	View

Showing 1 to 1 of 1 entry

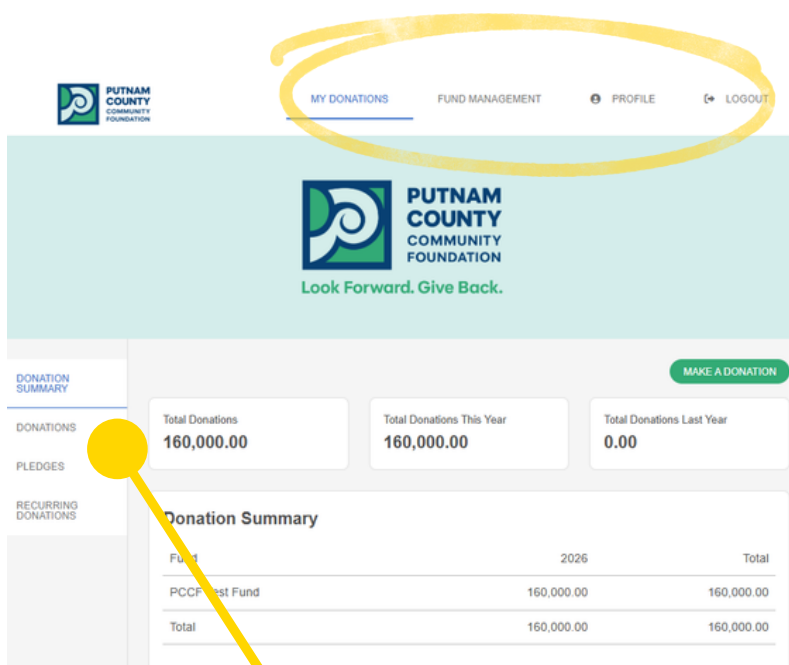
OTHER TOOLS

My Donations

The “My Donations” tab in the main navigation menu provides a summary of your own donations. Click on “Donations” for an itemized list and donation history. Use the filter and export options to generate a report based on your needs.

Profile

Update your personal information, username/password (security), and contact preferences at any time using the edit buttons; PCCF will be notified of the changes.



The screenshot shows the Fund Advisor Portal interface. The navigation menu at the top includes 'MY DONATIONS', 'FUND MANAGEMENT', 'PROFILE', and 'LOGOUT'. The 'MY DONATIONS' tab is highlighted with a yellow circle. Below the navigation bar, the 'DONATION SUMMARY' section is visible, showing a table with donation statistics for 2025 and a total amount of 160,000.00.

Fund	2025	Total
PCCF Test Fund	160,000.00	160,000.00
Total	160,000.00	160,000.00



The screenshot shows the 'My Donations' page. It includes a 'DONATIONS' tab, a 'MAKE A DONATION' button, and a table of donations. The table has columns for ID, Date, Fund, Recurring, Anonymous, Type, Description, and Amount. A single donation is listed with ID 76955, dated 06/09/2025, for the PCCF Test Fund, with an amount of 160,000.00. The page also features a search bar, a 'FILTER' button, and an 'EXPORT' button.

ID	Date	Fund	Recurring	Anonymous	Type	Description	Amount
76955	06/09/2025	PCCF Test Fund			Check	Historical Gift	160,000.00

ACCESS THE PORTAL

Scan the QR code below, visit us at pcfoundation.org, or bookmark the login page for easy access to the Fund Advisor Portal.

QUESTIONS?

For questions about how to access or use the Fund Advisor Portal, please contact the Putnam County Community Foundation at (765) 653-4978 or by email at pcf@pcfoundation.org.

For questions about the specific content found within the portal, contact Julie Thompson, Financial Services Officer, at jthompson@pcfoundation.org.

pcfoundation.org

