Thank you for setting up a donor advised fund (DAF) account with Wycliffe Foundation!

This guide is designed to help you access and navigate the online Portfolio Review website. Scroll through the entire document to see a walk through or use the following links to jump to a section of interest.

If you have questions that this document does not answer, please contact the Foundation staff by email at Foundation@wycliffe.org or you can speak with Priscilla Rogers by phone at 407-852-3685.

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Access the DAF Website

There are two ways to navigate to the DAF portfolio review website:

1. Type “wycliffe.org/DAFlogin” into your browser

2. From the wycliffefoundation.org website, click on the “Manage Your Donor-Advised Fund” button located in the top right-hand corner of the home page:
First Time Signing Into Your Account
&
Forgot Password

- Login Page:  
  - User: Enter your email address as your User name
  - Password: Leave password box blank when logging in the first time.
  - Select “Forgot Password”

Enter your information on the “Forgot Password” page:

- DonorView user ID: Enter your email address
- Add your telephone number
- Select “Text Message” or “Call” for verification.
- Click “Send verification code”
Enter the verification code sent to you and click “Continue”

Reset Password:
- The system will prompt you to enter a new password.
- Choose a new password at least 6 characters long, but no longer than 20 characters. It must contain at least 2 letters and 2 numbers.
Donor Dashboard

After you set up your new password, you will see your Donor Dashboard where you can recommend a grant, add to your fund, see your contribution activity and grant history as well as your current balance.

Two ways to navigate the website

1. Use the Menu on the left side of the page
2. Use the dropdown above the words “DONOR DASHBOARD” by placing your curser over “MANAGE YOUR DAF”.

MENU Options:

- Donor Dashboard
- Fund Activity
- Contribution Activity
- Recommend a Grant
- Grant History
- Recurring Grants
- My Profile
- Forms & Documents
- Add to My Fund
Fund Activity & Statements

Select “Fund Activity” from the Menu to view your “Fund Activity” page

Click the dropdown under the “Search” area to select the range of time you would like to view your fund activity.

You may also download statements from this page
Contribute to your DAF

Use the “Add to My Fund” button to contribute to your DAF account using an e-check or credit card.

- **Note:** There is a processing fee for credit card donations and this amount will be deducted from the amount that is added to your DAF account.
“Online Contribution” page:

- If you have multiple Donor Advised Funds, click the dropdown arrow under the blue “FUND” bar and select the DAF you would like to add funds to.
  - Enter the amount you wish to add to your DAF.
- You can click the check box if you wish to add extra to cover the fees that are charged for credit card donations.
  - Verify the rest of the information, then click on “Continue to payment information.”
On the “Payment & Confirmation” page:

- Select payment type: online check (no fees) OR credit card.
- Enter the required information and click “Submit”.

Payment & Confirmation

Jason June
123 main street
City, FL 18360

Purpose: Test June Account
Total Amount to be Charged: $1,030.00

Payment Type: [Online Check] [Credit Card]

Card Type: American Express Card
Card Number: 1234123412341234
Security Code: ...

Exp. Month: 7
Exp. Year: 2021

Comment(s):
Make a Grant from your DAF

Use the “Recommend a Grant” button to request a grant be made from your DAF account.
On the “Recommend Grants” page, you can:

- Repeat a prior grant
- Create a new grant
- Search by charity name or key word
- Click on “New Grant” by one of those listed on the grantee list

If you have multiple Donor Advised Funds, click the dropdown arrow under the blue “FUND” bar and select the DAF you would like to add funds to.

If you use the search feature, you will see a link to Guidestar if you wish to find a different charity or research charities you may be interested in.
Once you click on “New Grant”, you will be directed to the “Grant Entry” page to enter the amount and any designation.
On the “Grant Entry” page:

- You can choose to make it a single or recurring grant.
- Enter the amount and grant date.
- “Name of Contact” box – This is if you have a contact at the charity that we can reach out to if we have questions about the grant purpose. This is not required.
- “Grant Purpose” box - Select Project, Member or General Support.
- “Please Specify” box – If you choose Project or Member, please include the project name/number or the member’s name and number.
- The “Information to Share” section is what you want the charity to see.
  - You can make it anonymous if you wish.
• Click “Submit Grant” at the bottom of the “Grant Entry” page to continue to the confirmation page.

• If everything looks good, click on “Confirm Grant Recommendation” to submit your grant request.
Update your Profile (address, phone, email, password)

Select “My Profile” from side menu or drop down and then choose the item to update. You may:

- Update your mailing address
- Update your email address
- Update your phone number
- Change your Password

You will need to click the “Save” button BEFORE moving to another tab to make another change.