



COMMUNITY
FOUNDATION
Of North Florida

DonorCentral Quick Start Guide

DonorCentral is the Community Foundation's online portal providing you access to your fund(s) information. From here you can view your latest fund balances, get fund statements, make grant recommendations, and review your history.

Getting Started

You will receive an email with directions on how to set up your Username and Password for DonorCentral. Remember the email address you use MUST be the same email on file at the Community Foundation. Once you have set up the login information you will have access to your fund information in DonorCentral.

Using your email address and newly created password, log into DonorCentral.

The screenshot shows the DonorCentral login interface. At the top left is the Community Foundation of North Florida logo. To its right is the text 'COMMUNITY FOUNDATION Of North Florida'. Below the logo is a welcome message: 'Welcome to DonorCentral! View your account by logging in with Google or your Blackbaud ID. Questions? Call 850.222.2289 and we will be happy to assist you!'. A blue banner with a white 'i' icon contains the text 'Add an extra layer of security with two-step authentication!' and a 'Learn more' button. Below this is the text 'Sign in to continue'. There are two input fields: 'Blackbaud ID' with the value 'nokelley@cfnf.org' and 'Password' with a masked password '*****'. Below the password field are two links: 'Forgot password?' and a checkbox labeled 'Remember my email'. At the bottom is a large blue 'Sign in' button.

Once you are logged in to DonorCentral, you will see your **Dashboard**. From here you can view your latest fund balance, get fund statements and make grant recommendations as well as view your history.

Recommend a Grant

DonorCentral makes it easy for you to recommend a grant from your fund(s). You can replicate previous grants you made or, using the Foundation's Local Nonprofit Directory, research charities and recommend a new grant.

1. From the Dashboard tab:

- If you have one fund, scroll down to the **Recommend a grant** button.
- If you have more than one fund go to the **View your fund details** section. Click on the **Find** field to select the name of your fund, a drop-down menu will display your funds by name and you can select which fund you would like to recommend a grant from.

DonorCentral Home Funds Grants Recommendations Control panel

Showing information for Mr. John H. Doe

Welcome

Welcome to DonorCentral!
With DonorCentral, you can view your latest fund balance, get fund statements and make grant recommendations as well as review your history.

View your fund details

Find

John Doe Family Fund

Spendable balance : \$39,085.76

The spendable balance takes into account all submitted recommendations, including those that have yet to be approved. Saved recommendations are not deducted from the balance until they are submitted.

[Recommend a grant >](#)

[See more fund details](#)

2. Select **Recommend a grant**. The Grant Recommendation screen appears.

The screenshot shows a 'Grant Recommendation' window with a close button (x) in the top right corner. Below the title bar is a progress bar with three steps: 'Charity', 'Recommendation', and 'Agreement'. The 'Charity' step is highlighted with an orange circle, while the other two are grey. Below the progress bar is a checkbox labeled 'Add a new charity'. Underneath is a section titled 'Existing Charity' containing two search options: 'Select prior recipient *' with a dropdown menu showing 'Find in this list', and 'OR Search for a recipient *' with a dropdown menu showing 'Select a charity'. A green 'Clear' button is positioned below the search options. At the bottom of the window are three buttons: 'Cancel', 'Next', and 'Save for later'.

3. Select a charity by searching for it in either of the **Recipient** fields. If the charity does not appear in the search tool, check the **Add a new charity box** at the top to create a new charity profile. If you do not see your preferred charity listed, it simply means the charity is not currently in the Foundation's database of organizations that have received grants in the past. Please add your charity and complete as much of the requested information as possible.
4. Select **Next**.
5. In the Fund section, select the fund you want used for this recommendation. Again, **if you have more than one fund, you can search for a different fund by clicking in the field provided**.

6. In the Grant section, enter the recommended **Amount**, **Grant purpose**, and any **Special request**. If you prefer to remain anonymous, select the **Advisor anonymous** option. If you select the **anonymous** option, when the grant check and letter are issued, the fund name will not appear but will state it is a grant from an “Anonymous Fund”. In addition, if you select this option, the information is hidden from other grant funders in DonorCentral.

Grant Recommendation

Fund

Funding source *

 Fund anonymous

Grant


Amount *

 Advisor anonymous

Grant purpose

Special request (Please note honorary or memorial gifts here, if applicable.)

- To recommend a recurring grant, select the **“Is recurring”** box, and fill in the Start date, End date, Frequency, and any Notes.



Grant Recommendation

Recurrence

Is recurring

Start date *
m/d/yyyy

End date
m/d/yyyy

Frequency *
90 Days

Total number of recommendations: 0
Total amount: \$0

Notes


Cancel Previous Next Save for later

- Select **Next**.

- Acknowledge the grant recommendation requirements by selecting the **‘I agree’** box.

- Select **Submit**.

If necessary, at any time in the process click **Save for Later** to store your grant recommendation without submitting. To return later and complete it, you can find it on your **Dashboard** page.



Grant Recommendation

Charity Recommendation Agreement

Important

As a donor advisor, I suggest making this grant from the above-named fund. I acknowledge that the grant suggestion must receive approval. In accordance with IRS regulations, this recommendation does not represent the payment of any personal pledge or other financial obligation of the undersigned. No goods or services or non-tax deductible benefits will be received by payment of this grant.

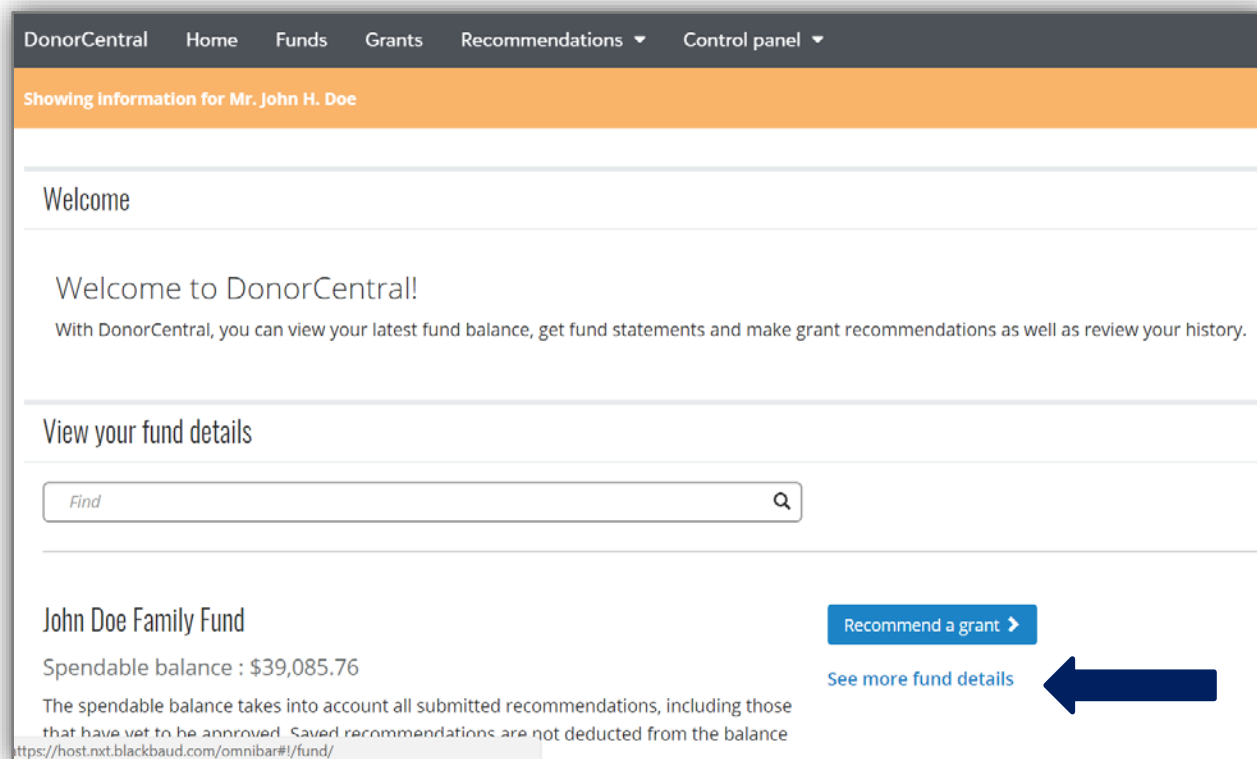
I agree

Cancel Previous Submit Save for later

View Your Fund Information

DonorCentral offers easy access to comprehensive information about your fund(s). To view fund information, you can select either the **Home** tab or the **Funds** tab at the top of your screen.

- From the **Home** tab, click **See more fund details**. This takes you to the Fund info tab.



- The **Funds** tab will direct you to the fund details page. If you have more than one fund, click in the **Choose a fund** field and select your fund to view.

The **fund name, description, Spendable balance and other details display**.

The **Period defaults to All**, but options for This Month, This Quarter, This Year, or Last Year are also available in the drop down menu.

Please note that the **Market Value displayed in DonorCentral is the approximate market valued of your fund but may not include the most recent investment activity.**

Under the Fund details tab, click one of the totals displayed and all related records and details display in the grid below. Hover the mouse cursor over the information bubble to view an explanation of the total.

The screenshot shows the 'Fund Information' page with a summary of financial data and a table of grants. A green arrow points to the 'All' dropdown menu with the text 'Change period here'. A blue arrow points to the '\$82,600.00 Grants paid' total with the text 'Click Here'. Another blue arrow points to the '\$82,600.00 Grants paid' total with the text 'To view details here'.

ID	Date	Description	Amount	Grantee
20005567	1/18/2018	General Support	\$1,000.00	Rifle United Methodist Presbyterian Church
20005568	1/18/2018	General Support	\$500.00	Florida United Methodist Children's Home
20005566	1/18/2018	General Support	\$1,500.00	Salem United Methodist Church
20005569	1/18/2018	General Support	\$1,000.00	St. Mary's Hospital Foundation
20005001	12/21/2016	General Support	\$750.00	Aspen Valley Land Trust
20005000	12/21/2016	General Support	\$500.00	Florida United Methodist Children's Home
20004999	12/21/2016	General Support	\$1,000.00	Rifle United Methodist Presbyterian Church

View Grant History

To view grant history information, click on the **Grants** tab. This will list and graphically depict all grants made from your fund. If you have multiple funds, the collective grant history from all funds will show here.

The screenshot shows the 'Grant History' page. It includes a summary of granted and paid amounts, a list of grants with their details and status, and a bar chart showing grant totals by year from 2009 to 2018.

Category	Amount
Granted	\$82,600.00
Paid	\$82,600.00
Grants	74

Grants

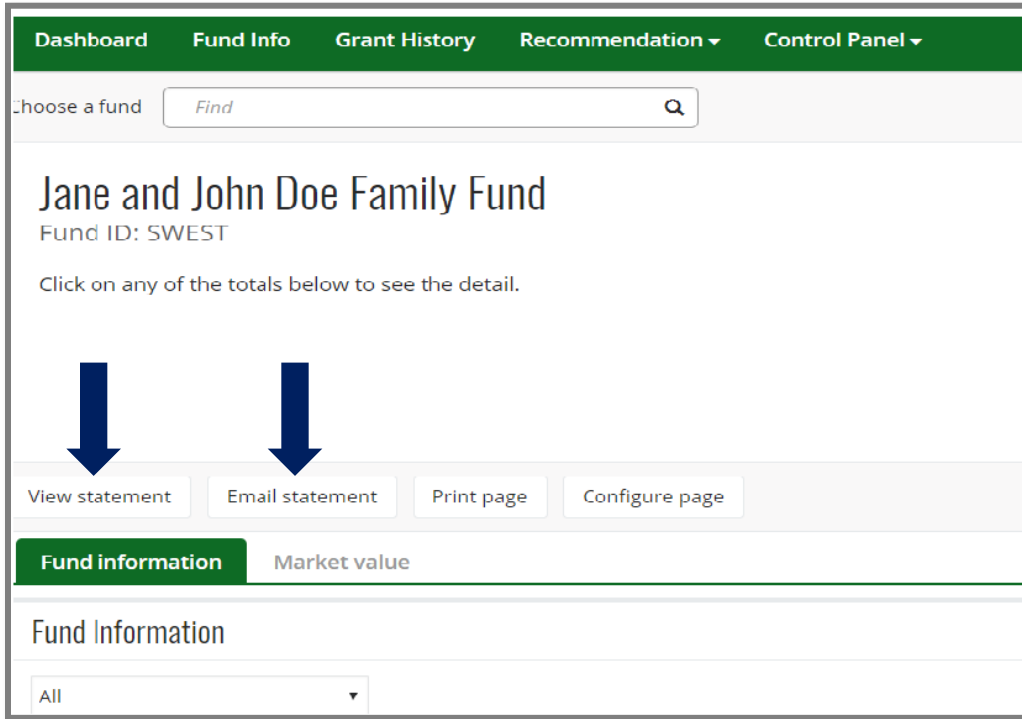
- Rifle United Methodist Presbyterian Church**
200 East 4th Street
Rifle, CO 81650
Status: Received 12/21/2017, Approved 1/16/2018, Paid in full 1/18/2018
Amount: \$1,000.00
Grantee: Jane and John Doe Family Fund
- Florida United Methodist Children's Home**
51 Children's Way
Enterprise, FL 32725
Status: Received 12/21/2017, Approved 1/16/2018, Paid in full 1/18/2018
Amount: \$500.00
Grantee: Jane and John Doe Family Fund
- Salem United Methodist Church**
P.O. Box 646
Havana, FL 32333
Status: Received 12/21/2017, Approved 1/16/2018, Paid in full 1/18/2018

Grant totals by year

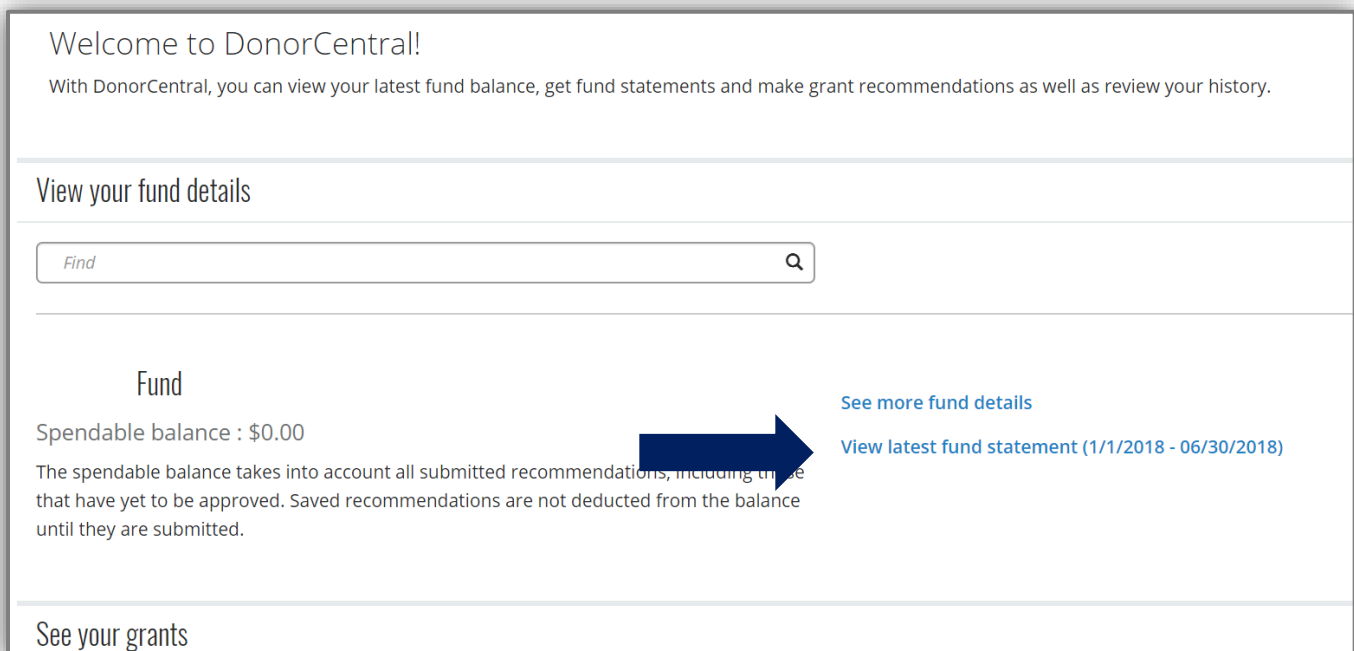
Year	Total Amount
2009	\$9,000.00
2010	\$8,000.00
2011	\$7,800.00
2012	\$6,000.00
2013	\$6,200.00
2014	\$6,400.00
2015	\$5,800.00
2016	\$5,000.00
2017	\$0.00
2018	\$4,000.00

View or Request Fund Statement

To view or request a fund statement(s), select the **Funds** tab. Then select **View Statement** to view online or select **Email Statement** to have a link sent to you.



You can also **view your latest fund statement** from the **Home** Tab by clicking on the link.



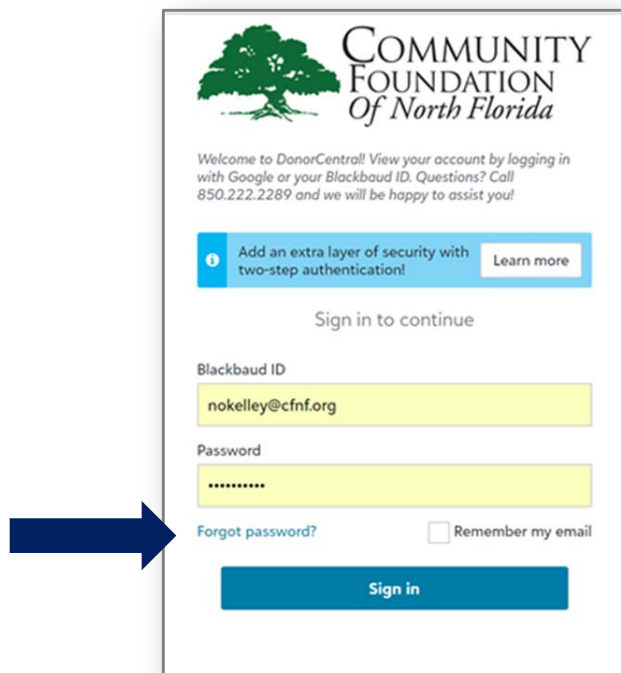
Explore Local Nonprofits

From the **Dashboard** tab, from the **Explore Opportunities** section at the bottom you can view the **Local Nonprofit Directory** which will give you access to information about local nonprofits that you may be interested in supporting with a grant from your fund.



Reset Password

1. From the log in page, simply click on Forgot Password?

A screenshot of the login page for the Community Foundation of North Florida. At the top left is a logo featuring a green tree. To its right, the text "COMMUNITY FOUNDATION Of North Florida" is displayed in a serif font. Below the logo and name, a welcome message reads: "Welcome to DonorCentral! View your account by logging in with Google or your Blackbaud ID. Questions? Call 850.222.2289 and we will be happy to assist you!". A blue notification box contains the text "Add an extra layer of security with two-step authentication!" and a "Learn more" link. Below this is the text "Sign in to continue". The login form includes a "Blackbaud ID" field with the email "nokelley@cfnf.org" entered, and a "Password" field with masked characters. Below the password field is a "Forgot password?" link, which is highlighted by a large blue arrow pointing from the left. To the right of the "Forgot password?" link is a checkbox labeled "Remember my email". At the bottom of the form is a blue "Sign in" button.

2. You will receive an email that includes a link to reset your password. Click reset password, complete the form and click Submit.

Reset password

Password *

*- Requires 8 characters or more,
- including 3 of the following:
- Capital letter
- Lowercase letter
- Number
- Special character (!, #, %, etc.)*

Confirm password *

Submit

Cancel

Questions about DonorCentral? We are here to help!



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