



COMMUNITY
FOUNDATION
Of North Florida


DonorCentral Quick Start Guide

DonorCentral is the Community Foundation's online portal providing you access to your organization's fund(s) information. From here you can view the latest fund balances, get fund statements, request distributions, and review gift and distribution 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.

 COMMUNITY
FOUNDATION
Of North Florida

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!

i Add an extra layer of security with two-step authentication! [Learn more](#)

Sign in to continue

Blackbaud ID
nokelley@cfnf.org

Password

[Forgot password?](#) Remember my email

Sign in

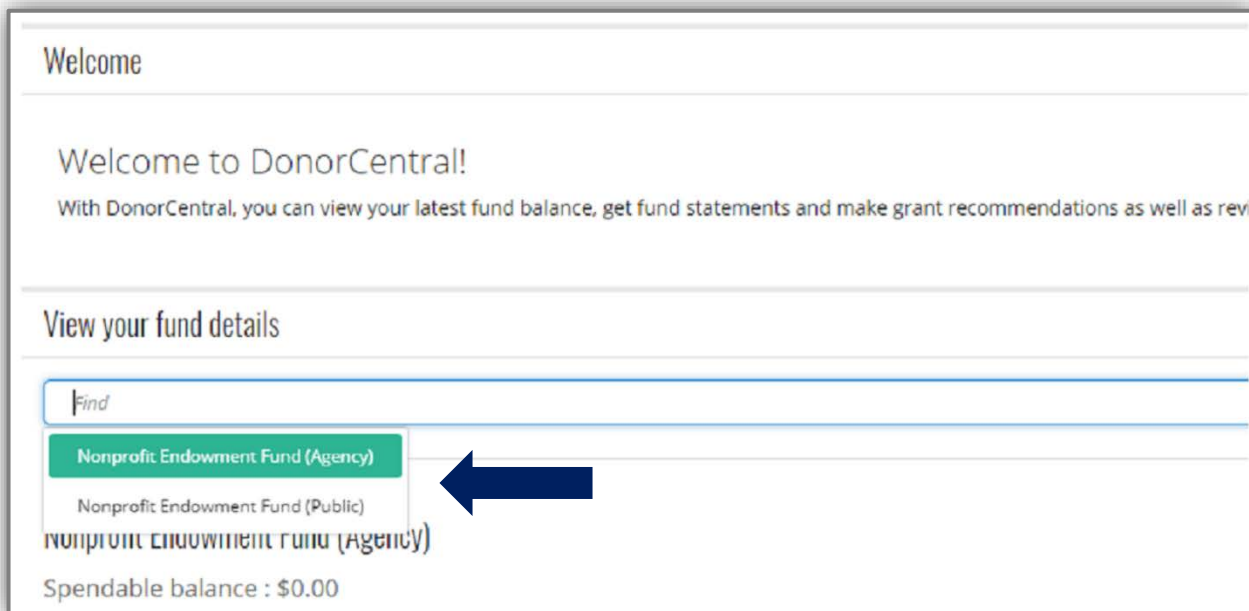
Once you are logged in to DonorCentral, you will see your **Dashboard**. From here you can view your organization's latest fund balance(s), get fund statements and request your organization's annual distribution, as well as view gift and distribution history.

Request Agency Distribution

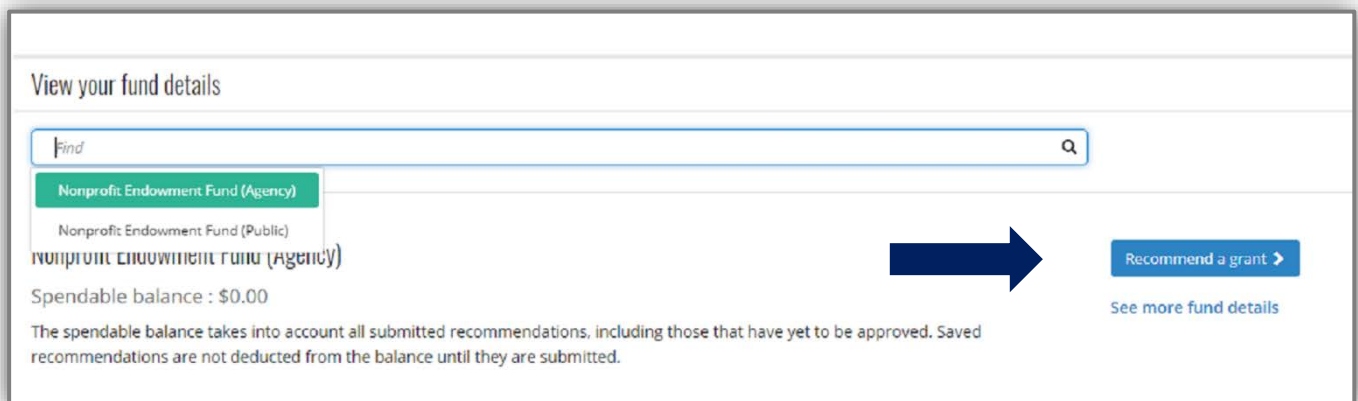
DonorCentral makes it easy for you to request a distribution from your fund(s).

1. From the Dashboard tab:

Find the **View your fund details** section. Click on the **Find** field to select the name of your Agency Endowment fund, a drop-down menu will display your funds by name and you can select which fund you would like to request the distribution from. This is where your **separate Agency and Public Funds** will show.



2. Select **Recommend a grant**.



3. The Grant Recommendation screen appears.

The screenshot shows a 'Grant Recommendation' window with a progress bar at the top. The progress bar has three stages: 'Charity' (indicated by an orange circle), 'Recommendation' (indicated by a grey circle), and 'Agreement' (indicated by a grey circle). Below the progress bar, there is a checkbox labeled 'Add a new charity'. Underneath, there is a section titled 'Existing Charity' containing two dropdown menus. The first dropdown is labeled 'Select prior recipient *' and has the text 'Find in this list' inside. Below it is the word 'OR' and another dropdown labeled 'Search for a recipient *' with the text 'Select a charity' inside. A green 'Clear' button is located below the second dropdown. At the bottom of the window, there are three buttons: 'Cancel', 'Next', and 'Save for later'.

4. Select your organization in either of the **Recipient** fields.

This screenshot is identical to the one above, but with two blue arrows pointing to the 'Select prior recipient *' and 'Search for a recipient *' dropdown menus, indicating where the user should select their organization.

5. Select **Next**.

- In the Funding Source section, your organization's fund name will appear. (Agency or Public depending on which you originally selected).
- In the Grant section, enter the **amount available based on the spendable balance**. The spendable balance can be found on the Home or Fund tab. In the **Grant purpose section**, simply type Annual Distribution.

The screenshot shows a web form titled "Grant recommendation" with a close button (X) in the top right corner. The form is divided into two main sections: "Fund" and "Grant".

Fund Section:

- Label: "Fund"
- Field: "Funding source *" with a dropdown menu showing "Nonprofit Fund".
- Checkbox: "Fund anonymous" (unchecked).

Grant Section:

- Label: "Grant"
- Field: "Amount *" with a currency symbol (\$) and the value "1,000.00".
- Checkbox: "Advisor anonymous" (unchecked).
- Text: "Grant purpose - Please indicate 'General Support' unless a specific purpose is desired."
- Text input field: "Annual Distribution" (currently empty).

- Select **Next**.

This screenshot shows the bottom portion of the "Grant recommendation" form, including the "Recurrence" section and navigation controls.

Recurrence Section:

- Label: "Recurrence"
- Checkbox: "Is recurring" (unchecked).

Navigation Buttons:

- Buttons: "Cancel", "Previous", "Next", and "Save for later".
- A large blue arrow points to the "Next" button.

- Acknowledge the distribution requirements by selecting the 'I agree' box.
- Select **Submit**.

Grant recommendation

Charity Recommendation Agreement

Important

FOR DONORS: In accordance with IRS regulations, grants may not result in benefits, goods or services to (a) you or members of your family or businesses you control or (b) any other advisers to the fund or members of their families or businesses they control. Failure to observe this restriction can subject you or other fund advisers to tax penalties. Prohibited benefits include the payment of pledges, event tickets, meals, sponsorships, registration fees, discounted merchandise, preferred parking and/or seating and memberships unless the membership confers nothing of value.

FOR AGENCIES: By agreeing below, you acknowledge that in order to receive a distribution from your fund, in addition to completing this online request you must also submit the Agency Distribution Request Form signed by the Secretary and Board Chair of your organization. The request form can be found on your DonorCentral dashboard as well as our website (www.cfnf.org).

I agree

Cancel Previous **Submit** Save for later

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.

Please note:

- You must request the distribution from both the Agency and Public Fund to request the complete balance.**
- The organization must still submit a signed Agency Distribution Request Form in order for the distribution to be processed.**

View Your Fund Information

DonorCentral offers easy access to comprehensive information about your Agency Endowment 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.

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

Nonprofit Endowment Fund (Agency)

Spendable balance : \$0.00

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

- The **Funds** tab will direct you to the fund details page. Click in the **Choose a fund** field and select your fund to view.

Choose a fund

Nonprofit Endowment Fund (Agency)
Fund ID: -A

Click on any of the totals below to see the detail.

Market value ⓘ \$15,476.81
as of 9/7/2018

Spendable balance ⓘ \$0.00
as of 9/6/2018

View statement | Email statement | Print page | Configure page

Fund details | Market value

Fund details

All ▾

N/A	N/A	N/A	\$10,312.43
-----	-----	-----	-------------

The fund name, description, Spendable balance and other details will 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 value 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 details' page with a 'Market value' tab selected. The 'Fund details' dropdown is set to 'All'. Below this, there are four summary cards: 'Grants pending' (N/A), 'Grants paid' (N/A), 'Grants in process' (N/A), and 'Gifts' (\$10,312.43). A table below lists gift records with columns for Date, Description, Gift amount, Non-gift amount, and Donor.

Date	Description	Gift amount	Non-gift amount	Donor
6/7/2010			\$5,014.08	\$0.00 Nonprofit Endowment Fund P.O. Box 10950 Tallahassee, FL 32302,
6/1/2010			\$298.37	\$0.00 Nonprofit Endowment Fund P.O. Box 10950 Tallahassee, FL 32302,
2/12/2001			\$5,000.00	\$0.00 Nonprofit Endowment Fund P.O. Box 10950 Tallahassee, FL 32302,

View Distribution History

To view distribution history information, click on the **Grants** tab. This will list and graphically depict all annual distribution made from your fund. The collective history from all funds will show here. If you have never taken a distribution from your organization’s fund, this page will state there are no grants to display at this time.

The 'Grant History' page includes a summary table:

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

Below the summary is a list of grants with details for three recipients:

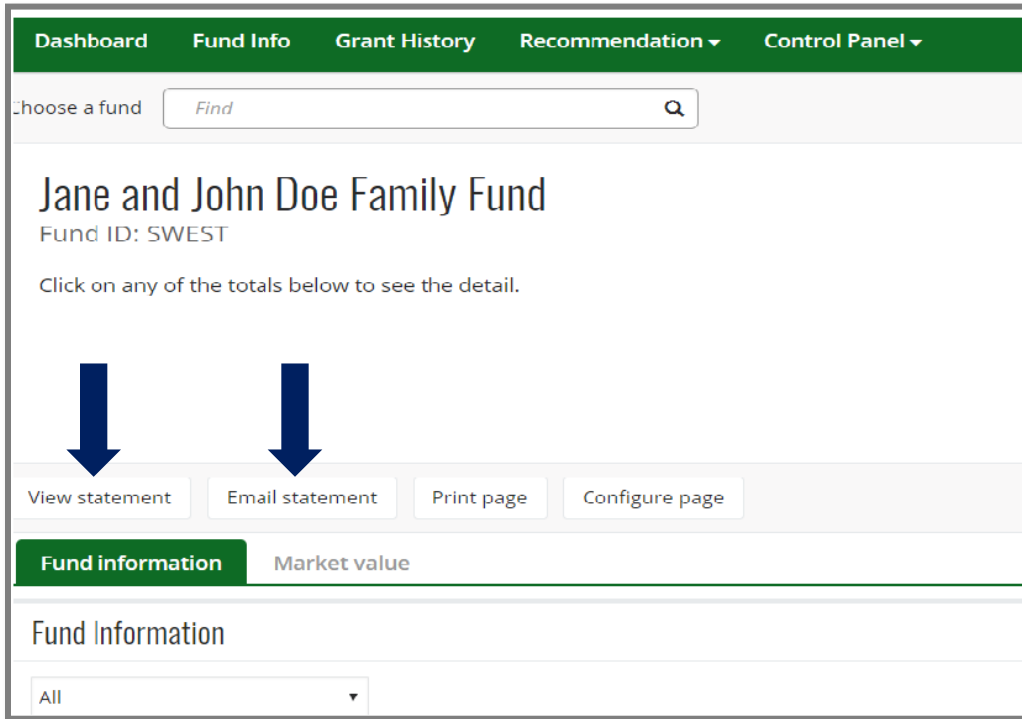
- Rifle United Methodist Presbyterian Church**: 200 East 4th Street, Rifle, CO 81650. Amount: \$1,000.00. Status: Received 12/21/2017, Approved 1/16/2018, Paid in full 1/18/2018.
- Florida United Methodist Children's Home**: 51 Children's Way, Enterprise, FL 32725. Amount: \$500.00. Status: Received 12/21/2017, Approved 1/16/2018, Paid in full 1/18/2018.
- 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.

The 'Grant totals by year' bar chart shows the following approximate values:

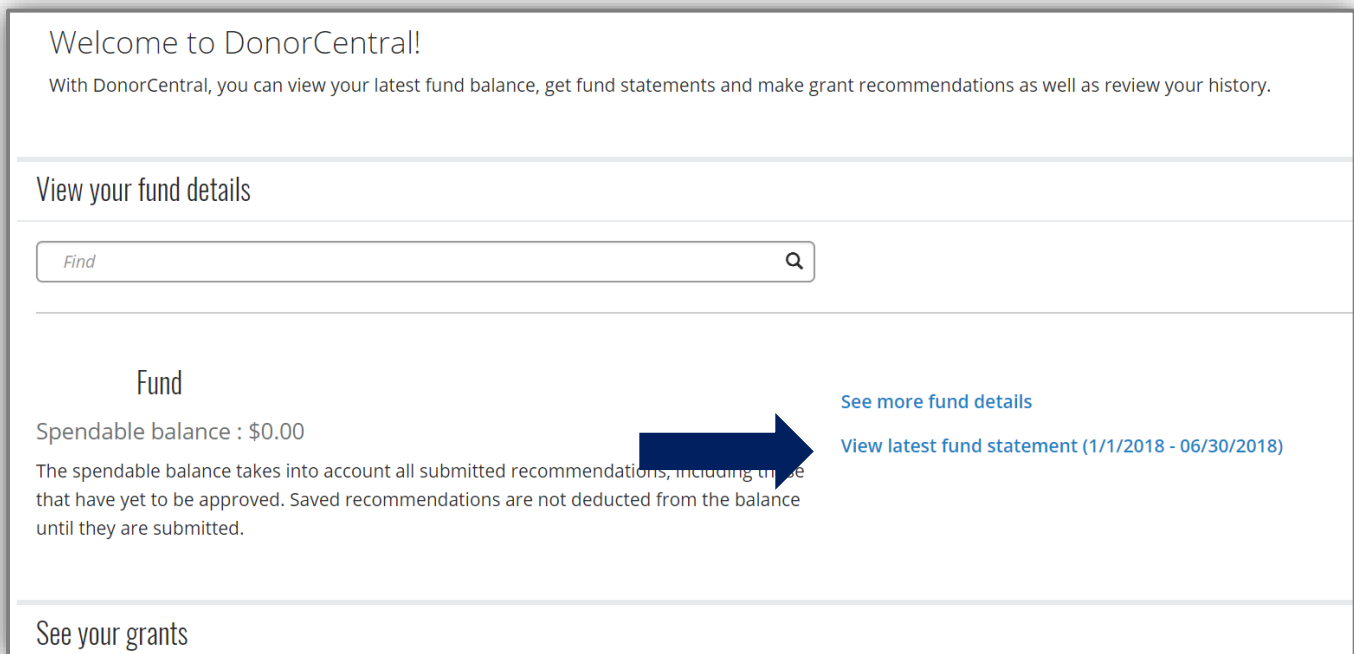
Year	Grant Total
2009	\$9,000
2010	\$8,000
2011	\$7,800
2012	\$6,000
2013	\$6,200
2014	\$6,500
2015	\$5,800
2016	\$5,000
2017	\$4,500
2018	\$4,000

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.



Find the Agency Distribution Request Form

From the **Dashboard** tab, go to the **Explore Opportunities** section at the bottom where you can view and print the **Agency Distribution Request Form**. Once completed email to Sarah Stout, [sstout@cfnf.org](mailto:ss Stout@cfnf.org).

Reset Password

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

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!



Sarah Stout
Director of Nonprofit Relations
sstout@cnf.org
850.222.2899 ext 100