



Agency Fund DonorCentral User Guide

DonorCentral is the Community Foundation's online portal that provides access to your organization's fund information. DonorCentral allows you to view latest fund balances, get fund statements, obtain information and documents to make annual grant distribution requests and review gift and distribution history.

Getting Started

Now that your Agency Endowment Fund agreement is finalized and you have received the CFNF Agency Welcome Letter, the next step is to start getting familiar with DonorCentral.

You will be receiving an email titled **Welcome to DonorCentral - Online Access for Your Community Foundation Fund!** This email will provide instructions to set-up your DonorCentral username and password. Please note, when setting up your account you must use the email address CFNF has on file. Further information will be provided in the welcome email.

COMMUNITY
FOUNDATION
Of North Florida

Welcome to DonorCentral! View your account by logging in with your Blackbaud ID. Questions? Call 850.222.2899 and we will be happy to assist you!

Sign in to continue

Blackbaud ID
sstout@cfnf.org

Password
.....

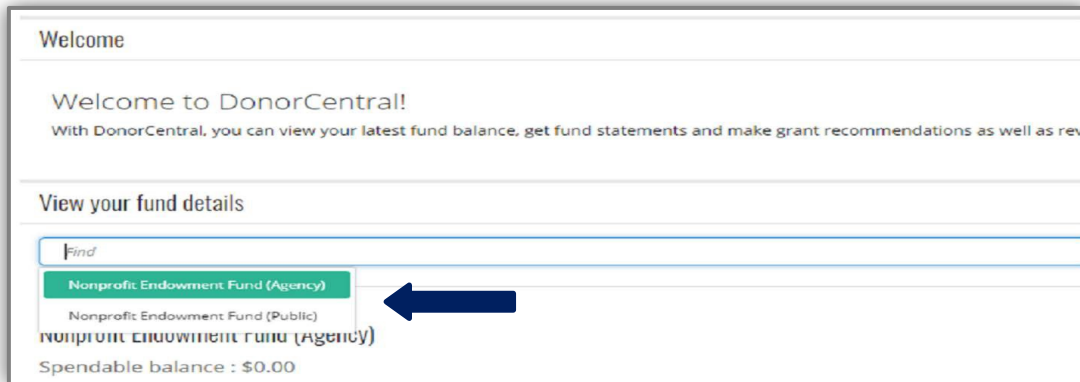
[Forgot password?](#) Remember my email

Sign in

Once you are signed in, your view reflects the Agency fund's **Dashboard**. We encourage you to scroll through this page and familiarize yourself with the available information.

To View Fund Balance(s)

Nonprofit organization endowments can have one or two fund balances to view, these are referred to as the Agency Fund and Public Fund. The Agency Fund is money that came directly from your organization for your endowment. The Public Fund is money that was given by donors, through CFNF to your endowment. The **Dashboard** view only displays one of these two funds, if both an Agency and Public fund have been created. In order to see the balance of the fund not showing, click on the word *Find*, as illustrated below.



Requesting an Annual Grant Distribution

Once you have viewed the spending balance available for one or both funds, scroll to the bottom of the **Dashboard** to find and download the **Agency Distribution Request Form**.



Agency fundholders are not required to take the available spending balance every year and can elect to forego an annual grant distribution, instead rolling it back into the balance of the fund. If a grant distribution is requested, this document must be completed in full and submitted to CFNF in order to process the distribution request.

Annual grant distribution amounts are calculated at the end of each calendar year and available spending amounts are based on the CFNF board approved 4% spending policy.

The spending policy is reviewed and approved on an annual basis. Agency funds must have a fund balance greater than \$10,000 in order to have an annual spendable balance.

View Additional Fund Information

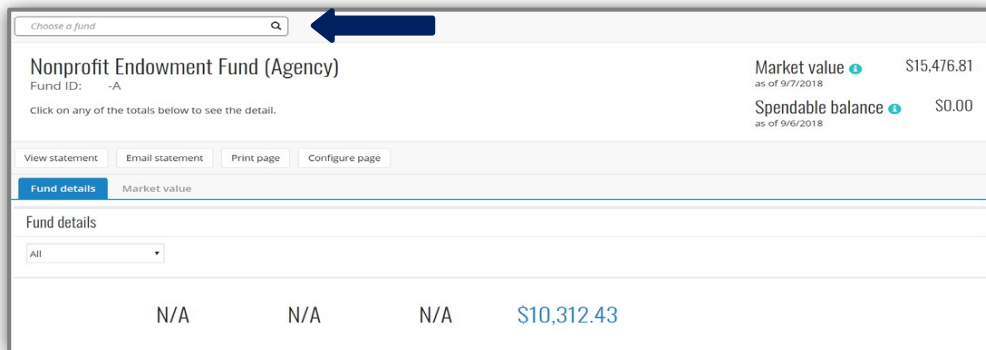
DonorCentral offers easy access to comprehensive information about your Agency Endowment Fund(s). To view fund information, you can select either the **Home** tab or the **Funds** tab at the top of your screen.

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



See more fund details 
View latest fund statement (1/1/2020 - 03/31/2020)

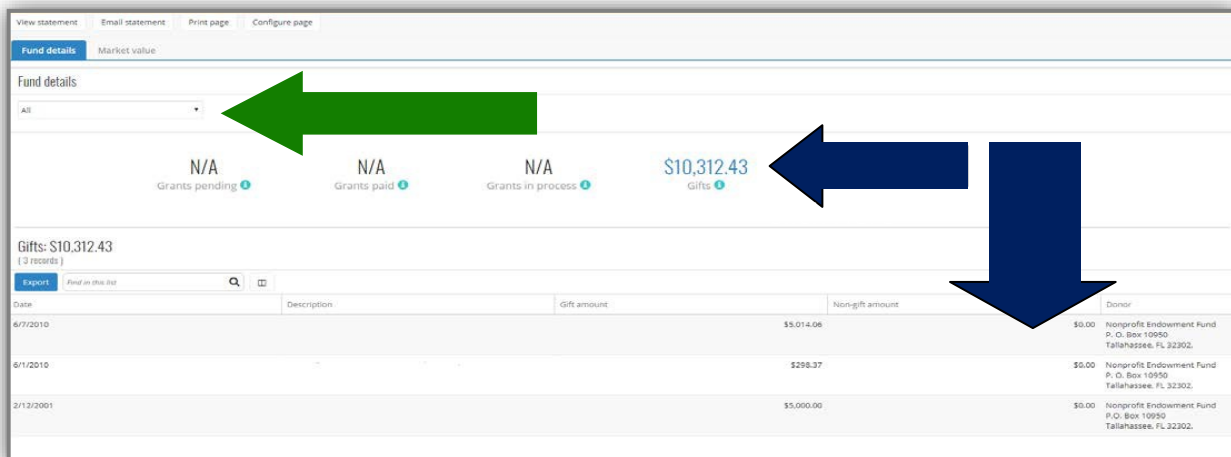
The **Funds** tab will direct you to the fund details page. Click in the **Choose a fund** field and select your fund to view. The fund name, description, Spendable balance and other details will display.



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.

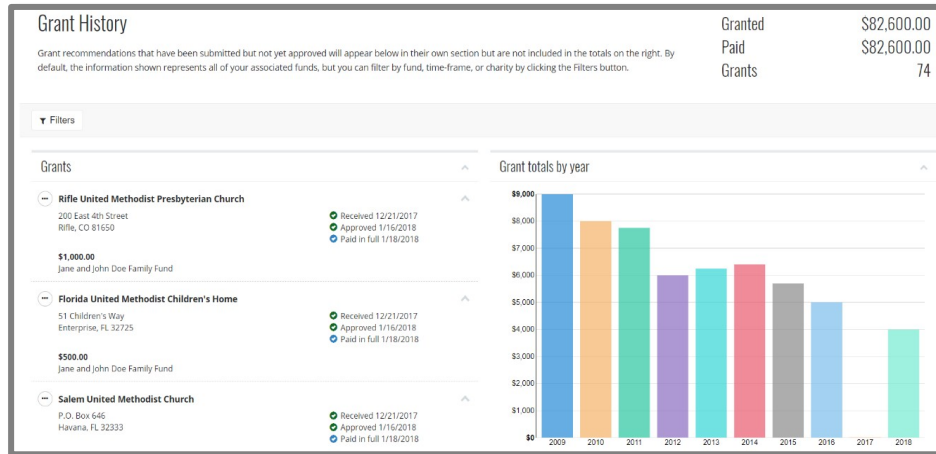
Please note that the *Market Value displayed in DonorCentral is the approximate market value of your fund but may not include the most recent investment activity.

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



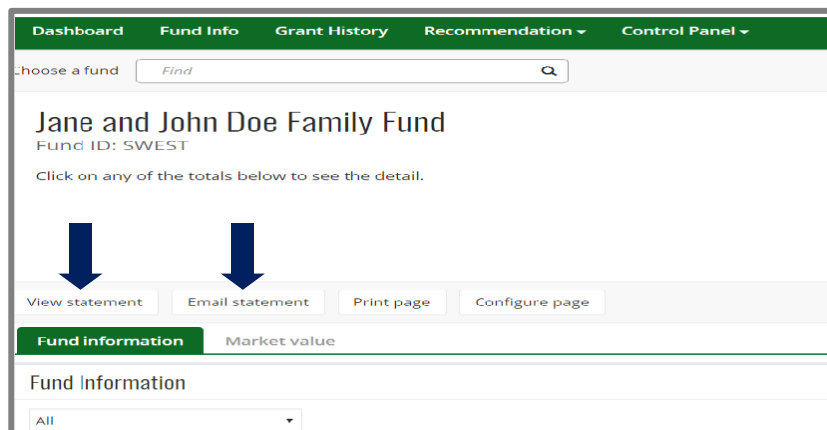
View Distribution History

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 a distribution has never been taken from your organization's fund(s), no grants to display at this time will appear.

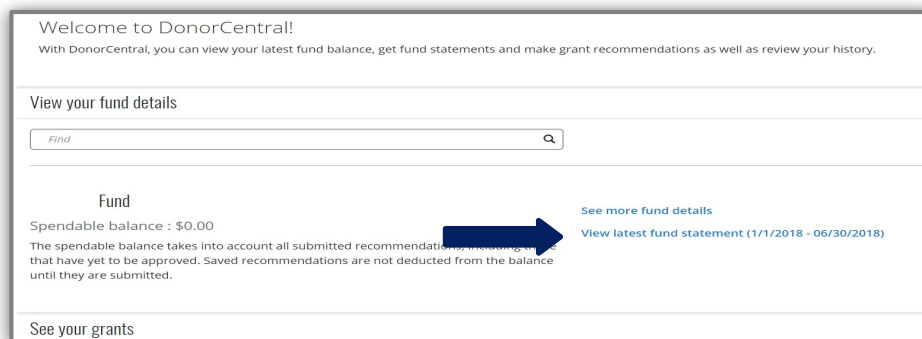


View or Request Fund Statement

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.

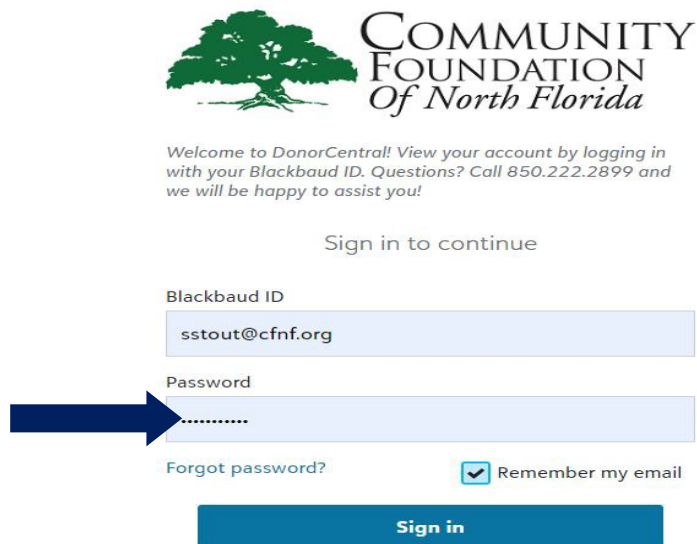


You can also **view the latest fund statement in the Dashboard** by clicking the **Home** Tab and the link.



Reset DonorCentral Password

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



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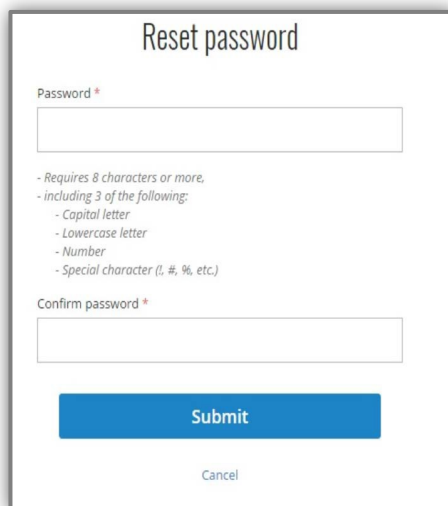
Blackbaud ID
sstout@cfnf.org

Password

Forgot password? Remember my email

Sign in

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 *

Confirm password *

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

Submit

Cancel

We are here to help! For questions about DonorCentral please contact:

Sarah Stout
Director of Nonprofit Relations
sstout@cfnf.org
(850) 222-2899

