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

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

8. Select Next.

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

10. 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.
**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.

![Image of DonorCentral interface showing fund information]

- 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.

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

Questions about DonorCentral? We are here to help!

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