



DonorCentral Quick Start Guide

What is DonorCentral?

DonorCentral is a secure online service for fund advisors that makes managing your fund even easier. With DonorCentral, you can:

- View your fund balance and download fund statements.
- View detailed grant and gift history.
- Submit grant recommendations.*
- Receive up-to-date information regarding donor education, community events, philanthropic news and funding opportunities.

Please take note:

Accessing your fund has never been so easy! DonorCentral updates your fund activity details daily and provides the tools you need for effective, efficient and flexible fund management.

The DonorCentral database will show historical data beginning **July 1, 2014**. For scholarship funds, you will be able to view scholarships awarded after July 1, 2017. Should you need fund information from prior years, please contact Community Foundation staff at (540) 373-9292 or info@cfrrr.org.

*Online grant recommendations can only be made on DonorCentral by fund advisors with Donor-Advised Funds. If you have a question about the type of fund you established, please contact The Community Foundation at (540) 373-9292 or info@cfrrr.org.

The Community Foundation is committed to protecting your online security and privacy. DonorCentral is a product of Blackbaud. The complete Blackbaud privacy policy can be found at: <https://www.blackbaud.com/company/privacy-policy/north-america>.

Getting Started.

Activating Your DonorCentral Account

You will receive a welcome email from DonorCentral with your login information and portal link: <https://cfrrr.donorcentral.com/>. This will direct you to the login page.

The first time you visit DonorCentral, you will need to create a password.

On the login page, locate and click **Don't have a Blackbaud ID? Create a new one.**

Fill in the form to create your Blackbaud ID. Use only the email address provided in your DonorCentral welcome email as your Blackbaud ID. This email address is associated with your charitable fund at The Community Foundation. Should you wish to change your associated email address, please contact foundation staff.

You will then receive a verification email from DonorCentral. After clicking the link in the verification email, you will be redirected to the login page. Re-enter your account email and newly created password to complete the set up process. You are now ready to access your DonorCentral charitable account!

Donor Login

For future logins, you can use the Donor Login portal on The Community Foundation's website. Visit www.cfrrr.org to locate the **Donor Login** link at the top of the screen.

Tip: You can also bookmark the DonorCentral link for quick access.

Forgot Password?

If you forget your password, click the **Forgot Password?** link on the login screen to have it sent to you directly. Use only the email address associated with your fund. Alternatively, you can call or email staff at (540) 373-9292 or info@cfrrr.org for help with accessing the site.

Change Password.

Once logged in, click on the My Profile link, and then Change Password.

If you have any questions or need any assistance, please contact foundation staff at (540) 373-9292 or info@cfrrr.org.

Navigating Your DonorCentral Dashboard Home Page

the community foundation

Our community is generous.

First time logging in? Click on: **Don't have a Blackbaud ID? Create a new one.** Need help? Please contact The Community Foundation staff at 540 373-9292 or info@cfrrr.org.

Sign in to continue

Blackbaud ID

ali.thomas@cfrrr.org

Password

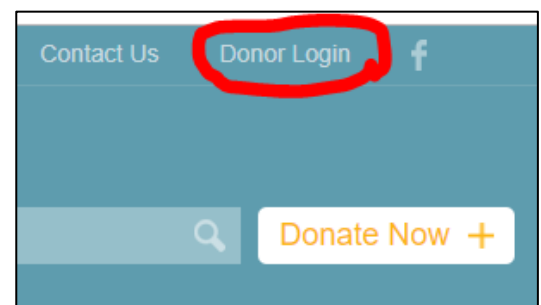
.....

Forgot password? Remember my email

Sign in

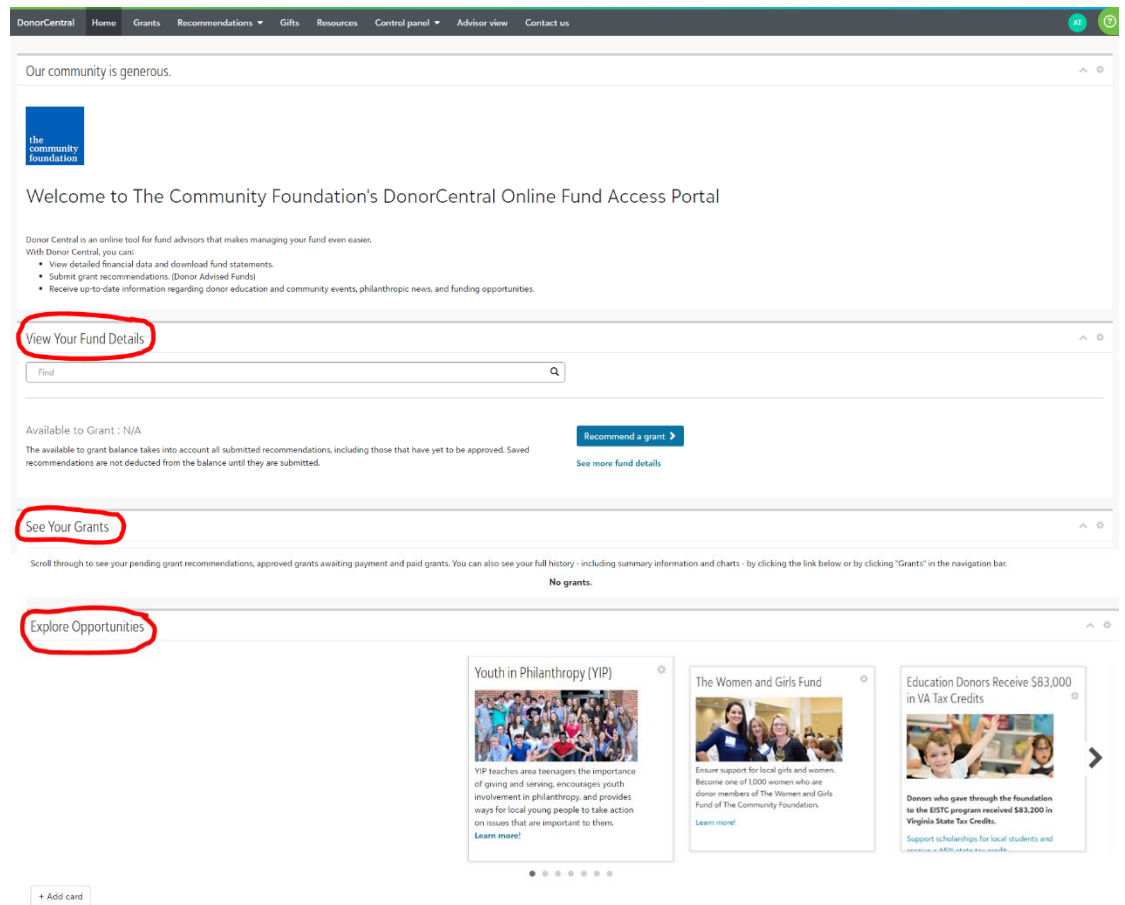
Sign in with Google

Don't have a Blackbaud ID? Create a new one



When you log in to DonorCentral, the Home page displays by default.

Your DonorCentral dashboard Home page provides easy access to important information about your fund, enables you to make new recommendations, displays the last ten grants you've submitted or saved, and includes new grant opportunity suggestions.



Your Home page contains three sections:

View Your Fund Details

Under **View Your Fund Details**, you can search for a fund and view the spendable balance. From here, you can also recommend a grant, see more fund details or download your latest fund statement.

See Your Grants

Under **See Your Grants**, you can scroll through your 10 most recent grant submissions - including pending recommendations, approved grants awaiting payment and paid grants. Select **See full history** for an overview of your grant history.

Explore Opportunities

Under **Explore Opportunities**, you can learn more about collaborative funding efforts, as well as initiatives and events open to Community Foundation fund donors.

From your Home page, you can use the navigation bar at the top of the screen to access dashboard options including the **Funds, Grants, Recommendations, Gifts, Resources, or Contact Us** pages. To access the Home page from elsewhere in DonorCentral, select **Home** on the navigation bar.

DonorCentral Dashboard Options

1. Funds Page

View fund details by clicking the **Funds** tab at the top of your screen in the navigation bar. On the Funds page, you can view details for a single fund or for multiple funds at once, access your fund statement and view market value details.

Note: If the foundation manages more than one fund on your behalf, use the drop down **Choose a fund** menu to select the appropriate fund.

The summary displays the **Market Value** and the **Available to Grant** balance of your fund. **Available to Grant** indicates the amount available for grant recommendations as established through your fund agreement and the foundation's spending policy.

Click **View Statement** and select a statement period to download a copy of your desired fund statement. You can also choose to email a copy of this statement to the email address associated with your fund by selecting **Email statement**.

In the **Fund details** tab, select any of the hyperlinked amounts and scroll down to view details. Select the **Market value** tab to view market value details.

The screenshot shows the DonorCentral interface with the 'Funds' tab selected in the navigation bar. A search box labeled 'Choose a fund' is at the top. The main content area displays 'The Fund' with a 'Fund ID:' field. Below this, there are buttons for 'View statement', 'Email statement', and 'Print page'. A 'Date range' dropdown is set to 'All'. The 'Fund details' section shows a grid of financial metrics:

Metric	Value
Grants Payable	N/A
Grants Paid	\$150,192.50
Grants in Process	N/A
Gifts to the Fund	\$983,089.25
Non-Gifts	\$6,651.16
Pending Gifts	N/A
Pending Grant Recommendations	N/A

Additional information shown includes 'Market Value as of 6/30/2019' at \$1,400,075.52 and 'Available to Grant as of 7/8/2019' at \$20,000.00.

2. Grants Page

View grant history by clicking the **Grants** page at the top of your screen in the navigation bar. Use the Grants page to view historic details about your grants, including a list of approved grants, grant totals by year and grant totals by recipient. To filter the information that displays on the Grants page by fund, date range or charity name, click the **Filters** button.

The screenshot shows the DonorCentral interface. The navigation bar at the top includes 'DonorCentral', 'Home', 'Funds', 'Grants' (circled in red), 'Recommendations', 'Gifts', 'Resources', and 'Contact us'. The 'Grants' page title is displayed, along with summary statistics: 'Granted \$150,192.50', 'Paid \$150,192.50', and 'Grants 11'. A 'Filters' button is visible. The main content area is divided into two sections: 'Approved grants' and 'Grant totals by year'. The 'Approved grants' section lists three grants from 'Mental Health America of Fredericksburg' and 'Lloyd F. Moss Free Clinic', each with details on their status (Received, Approved, Paid) and amounts. The 'Grant totals by year' section features a bar chart showing grant totals for the years 2015 through 2019. The chart shows a significant increase in 2017. A legend below the chart identifies the recipients: Community F., Lloyd F. Mo., Arts & Cult., Germanna Co., Friends of..., Downtown Gr., Mental Heal., and Other.

3. Recommendations Page

To make a grant recommendation in DonorCentral, navigate to the **Recommendation** page in the navigation bar and click on **New**.

Please note: only Donor Advised Fund donors will be able to access the Recommendations page.

If you have a question about the type of fund you established, please contact The Community Foundation at (540) 373-9292 or info@cfrrr.org.

The screenshot shows the DonorCentral navigation bar. The 'Recommendations' dropdown menu is open, and the 'New' option is circled in red. The navigation bar includes 'DonorCentral', 'Home', 'Funds', 'Grants', 'Recommendations', 'Gifts', 'Resources', and 'Contact us'. The main content area below the navigation bar displays the text 'Our community is generous.' and 'Manage recurring'.

Step 1 - Select a Nonprofit Organization

To recommend a grantee, click in the **Search for a recipient** box and start typing the name of the grantee organization. DonorCentral will provide a list of results that you can choose from to populate this field.

To pick an organization you have supported in the past, use the **Select prior recipient** dropdown menu to choose the grantee organization.

To recommend a grantee that is not on the foundation's list of pre-screened organizations, click the **Add a new nonprofit** check box at the bottom of the window and fill in as much information as possible about the organization you wish to support. You do not need to know all of the organization's contact information, but we do need the name, city and state.

The screenshot shows the 'Grant recommendation' form at the 'Nonprofit Organization' step. A progress bar at the top indicates the current step. Below the progress bar, the 'Select Your Grantee' section contains a search box labeled 'Search for a recipient *' with a dropdown menu 'Select a nonprofit'. Below this is an 'OR' section with a 'Select prior recipient *' dropdown menu 'Find in this list'. A 'Clear' button is located below the dropdowns. At the bottom of the form, there is a 'Next' button and a 'Save for later' button. A checkbox labeled 'Add a new nonprofit' is also present.

Note: The Community Foundation is committed to the highest level of professional and ethical standards in all areas of operation, including donor services and grantmaking. Foundation staff perform due diligence on each new nonprofit to ensure it meets our standards of quality. All grantee organizations must be approved by the Board of Governors before they can be included on the foundation's list of pre-screened organizations.

Step 2 - Recommendation Details

Confirm Fund Information

Your fund will automatically populate in the **Funding source** section. If you are the advisor on multiple funds, please use the dropdown menu to select the fund you would like to grant out of for this recommendation.

Confirm Grant Amount

Please enter the dollar amount you wish to grant. The minimum amount is \$250. You may not exceed your spendable balance.

If you wish for the foundation to conceal your name from the grantee, please check **Anonymous**.

Although not required, by filling in the **Project/Program to be funded** and **Grant Purpose/Description**, you help facilitate swift action on your grant recommendation.

You can also add notes to share any special instructions for the staff at The Community Foundation.

The screenshot shows the 'Grant recommendation' form at the 'Recommendation' step. The progress bar at the top is updated. The 'Fund' section contains a 'Funding source *' dropdown menu 'Select a fund...'. Below this is the 'Grant' section, which includes an 'Amount *' input field with a '\$' symbol, a checkbox for 'Anonymous - Do not share my name with the grant recipient.', and a 'Project/Program to be funded' input field. Below the input field, there is a note: 'i.e. "General Operating Support" or provide the name of a project/program.' At the bottom of the form, there is a 'Previous' button, a 'Next' button, and a 'Save for later' button.

Step 3 - Agreement, Review and Submit

To finalize your grant recommendation, confirm you have read and understand advisory regulations, then click **Review**. If everything looks correct, simply click **Submit**.

If you need to make any changes, use the **Previous** button to return to a prior screen.

You may also choose to **Save for later**.

Please note: grant recommendations will be completely processed within 7 - 10 business days. Grants to new organizations require full board approval.

The screenshot shows a progress bar at the top with three steps: 'Nonprofit Organization', 'Recommendation', and 'Agreement'. The 'Agreement' step is currently active. Below the progress bar is an 'Important' section with a paragraph of text and a checkbox labeled 'I agree'. Below that is a 'Submit Grant Recommendation' section with instructions on how to proceed. At the bottom, there are three buttons: 'Previous', 'Review' (highlighted in blue), and 'Save for later'.

4. Gifts Page

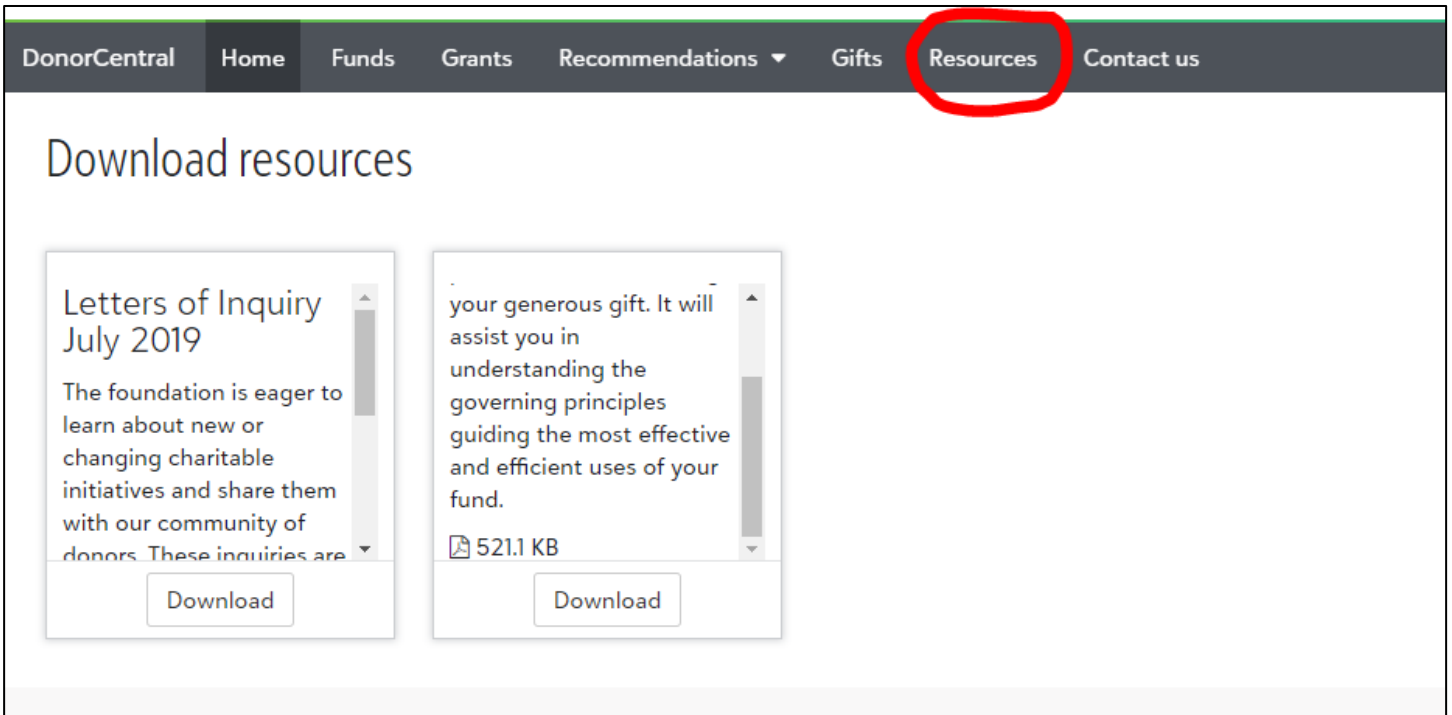
Review gifts made to your fund or other funds at the foundation by clicking the **Gifts** page at the top of your screen in the navigation bar.

The screenshot shows the 'Gifts' page in the DonorCentral system. The navigation bar at the top includes 'DonorCentral', 'Home', 'Funds', 'Grants', 'Recommendations', 'Gifts' (highlighted with a red circle), 'Resources', and 'Contact us'. The main content area is titled 'Gifts' and shows a summary of 'Amount received Gifts' as '\$1,005,444.25' and '168' gifts. Below this is a list of 'Gifts received' with three entries, each showing the amount, date, reference number, and a 'Processed' status. To the right is a 'Gift totals by year' bar chart showing the total amount received for each year from 2015 to 2019.

Year	Amount Received
2015	\$624,296.60
2016	\$100,000.00
2017	\$150,000.00
2018	\$624,296.60
2019	\$100,000.00

5. Resources Page

Download resources - files like the Donor Handbook or Summary of Requests for Funding - that you can use to assist in managing your fund by clicking the **Resources** page in the navigation bar.



DonorCentral Home Funds Grants Recommendations ▾ Gifts **Resources** Contact us

Download resources

Letters of Inquiry July 2019

The foundation is eager to learn about new or changing charitable initiatives and share them with our community of donors. These inquiries are...

Download

your generous gift. It will assist you in understanding the governing principles guiding the most effective and efficient uses of your fund.

521.1 KB

Download

6. Contact Us Page

The Community Foundation staff are here to answer any questions - please use the **Contact Us** page if you require any assistance!

Questions?

Contact The Community Foundation at (540) 373-9292 or by email info@cfrrr.org.