The Community Foundation of Western North Carolina’s DonorCentral provides an online portal through which you access your fund information. From here you can view your latest fund balances, get fund statements, make grant recommendations, and review your history.

Table of Contents

Getting Started .................................................................................................................................................. 2
View Fund Information ................................................................................................................................... 4
View Grant History ......................................................................................................................................... 5
View Fund Statements .................................................................................................................................... 6
Recommend a Grant ......................................................................................................................................... 7
Resetting your Password ................................................................................................................................. 10
Getting Started

1. Blackbaud – the creator of DonorCentral – will send an email that includes a link to the DonorCentral sign in page.

2. Following the requirements outlined on that page, create your user name (“Blackbaud ID”) and password. Your username is your email address. You will then get a confirmation email from Blackbaud. Click “Confirm email”. Once confirmed, you can sign into the portal.

3. To avoid entering your user name each time you access DonorCentral, choose “Remember my email”.

4. Didn’t receive a welcome email? Please give us a call!
   
   828-367-9903 for Spencer

   828-367-9912 for Angela

5. Using a Gmail account and want to remember fewer passwords? Click “Sign in with Google” to sign in through your Google account.

6. Please contact us with any email address changes.
7. DonorCentral “syncs” each weekday at 8:30PM EST.

8. Clicking on this symbol allows you to configure columns, showing only the information you wish to see in a particular list.

9. Clicking on this symbol allows you to view more details.

10. Clicking on this symbol allows you to filter date ranges, by fund (if you advise more than one fund) and by charity name.
View Fund Information

DonorCentral offers easy access to comprehensive information about your fund(s), allowing you to view, print, and email fund statements. To view fund information, you can select either the Home tab or the Funds tab.

1. From the Home tab, if you advise only one fund, click “See more fund details”. If you advise more than one fund, enter the name of the fund you want to view in the search bar. Once your fund is chosen click “See more fund details”. This takes you to the Funds tab.

2. Or, from the Funds tab, if you advise only one fund, your fund information will be displayed. If you advise more than one fund, enter the name of the fund in the search bar. Select the desired fund.

The fund name, spendable balance, grants recommended, gifts contributed and other details will display. Click one of the totals displayed and all related records and details display in the grid below.
Access your grant history through the **Grants** tab.

1. See any pending recommendations that have not yet been approved.

2. Click on the circular icon to the left of the charity’s name and choose “View details” to see more information about the organization and the grant.

3. Click on the arrows to expand or collapse each section.
View Fund Statements

Access your quarterly fund statements through the Funds tab.

You have the option to view or email a copy.

Choose which statement you wish to see.

Please note you may have to ignore pop-up blockers in your web browser’s settings to view/download your statements in a PDF format. Contact us if you have questions.
**Recommend a Grant**

*If you have a donor advised fund*, you can recommend grants through DonorCentral. You can replicate previous grants made, or research charities and recommend a new grant.

1. On the **Home** tab, you will see your fund information. If you advise more than one fund, choose your selected fund from the search bar. Select “Recommend a grant”.

   Or, on the **Recommendations** dropdown menu, choose “New”.

2. The Grant Recommendation screen appears. The first section is the **Charity** section; select a nonprofit organization by searching for it in the “Charity search” field.

   If the organization does not appear in the “Charity search” field, check the “Add a new charity” box to add a new organization. Select “Next”.


3. The next section is the *Recommendation* section; select the fund you wish to use by choosing it from the Funding source dropdown menu. (If you advise only one fund, your fund should automatically appear in Funding source.)

4. To make your fund name anonymous, select the “Fund anonymous for this grant” option. (When the grant check is printed, “Anonymous Fund” appears as the fund name.)

5. Next, enter the recommended Amount. If you wish, you may also add “Grant purpose” and “Special request” (such as making the grant in memory of someone).

To make your name anonymous for this grant, select the “Advisor anonymous” option.

You can also recommend a grant to an organization on any recurring basis – once a month, once per quarter, every other year, etc.

To do this, simply recommend a recurring grant by selecting the “Is recurring” box, and fill in the Start time, End time, Frequency, and any Notes.

Select “Next”.
6. Lastly is the *Agreement* section; 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 to complete, look in the “Unsubmitted recommendations” tile in the **Home** tab.

Or, if you are recommending multiple grants at once, and only want one confirmation email, once you click on “Agree” in the *Agreement* section, click on “Save for Later” instead of “Submit” for each recommendation.

Then, look for the “Unsubmitted recommendations” tile in the **Home** tab. From here, you can choose “Select all/none” and then click “Submit”.
Resetting your Password

1. On the far right-hand side of the application, in the header, click on the icon with your initials next to the “Help” icon.

2. From the dropdown menu, click on “Blackbaud ID profile”

3. Under “Authentication settings” choose “Change password”.

4. Follow the instructions to create a new password and click “Apply changes”.

Authentication settings

Change password

Current password

Enter your current password.

New password

Enter your new password.

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

Confirm new password

Apply changes  Cancel