

DonorCentral Quick Start Guide

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.

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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.

cfwnc the community foundation of western north carolina

40 YEARS

Log in to recommend and track grants, view fund summary, (includes gift history, grants, current fund balance), research charitable organizations and quarterly statements.

Sign in to continue

Blackbaud ID

email address e.g. name@domain.org

▲ Enter your email address.

Password

▲ Enter your password.

Forgot password? Remember my email

Sign in

Sign in with Google

Don't have a Blackbaud ID? [Create a new one](#)

[Need help?](#)

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.

View statement | Email statement | Print page | Configure page

Fund details | Market value

Fund details

All

N/A Grants pending | **\$747,486.00** Grants paid ⓘ | N/A Grants in process ⓘ | **\$677,475.00** Gifts | N/A Pending gifts ⓘ | N/A Pending suggestions

Grants paid: \$747,486.00
(999 records)

Export | Find in this list | 🔍 | 🗖️

ID	Date	Description	Amount	Grantee	Payment status
20162198	7/20/2016		\$250.00	UNC School of the Arts Foundation, Inc.	Approved
20162198	7/20/2016		\$250.00	USA for UNHCR	Approved
20162198	7/20/2016		\$25,000.00	United Way of Asheville and Buncombe County	Approved
20162198	7/20/2016		\$1,000.00	Western North Carolina Public Radio	Approved
20162198	7/20/2016		\$1,000.00	Democracy North Carolina	Approved

Click here to see grant details

Click here to see gift details

Export

Choose columns displayed

Access your grant history through the **Grants** tab.

View Grant History

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.

Grants

Grant recommendations that have been submitted but not yet approved will appear below in their own section but are not included in the totals on the right. By default, the information shown represents all of your associated funds, but you can filter by fund, time-frame, or charity by clicking the Filters button.

Granted	\$1,253,286.00
Paid	\$1,233,286.00
Grants	1,477

The screenshot displays the Grants tab interface. At the top left, there is a 'Filters' button with a downward arrow. Below it, the 'Pending recommendations' section is expanded, showing three entries:

- American Lung Association-Asheville**: P.O. Box 27985, Raleigh, NC 27611-7985. Status: Received 11/27/2018, Approved. Amount: \$300.00.
- Southern Appalachian Highlands Conservancy**: 372 Merrimon Avenue, Asheville, NC 28801-1222. Status: Received 8/30/2017, Approved 8/30/2017, Paid in full 8/30/2017. Amount: \$500.00.
- Read to Succeed Asheville**: P.O. Box 18652, Asheville, NC 28814. Status: Received 8/30/2017, Approved 8/30/2017, Paid in full 8/30/2017. Amount: \$500.00.

Each entry includes a circular icon with three dots to the left of the charity name and an upward-pointing arrow to the right of the entry. A 'Fund' label is visible below the amount for each entry.

Filter by date, fund, charity

See more details

See more details

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.

The screenshot shows a web interface for fund statements. At the top, there is a search bar labeled 'Choose a fund' and a button 'Combine multiple funds'. Below this, the fund name 'Charitable Fund' is displayed, along with a redacted 'Fund ID:'. A note says 'Click on any of the totals below to see the detail.' To the right, two summary items are listed: 'Market value as of 12/11/2018' at \$15,781.78 and 'Spensible balance as of 12/11/2018' at \$5,781.78. A navigation bar contains buttons for 'View statement', 'Email statement', 'Refresh page', and 'Configure page'. Below this is a table with columns for various fund metrics. A red arrow points to the 'Email statement' button, and another red arrow points to the 'View statement' button.

Fund ID	Market value
[Redacted]	\$15,781.78

Metric	Value
Grants pending	N/A
Grants paid	\$747,486.00
Grants in process	N/A
Gifts	\$677,475.83
Pending gifts	N/A
Pending suggestions	N/A

Recommend a Grant

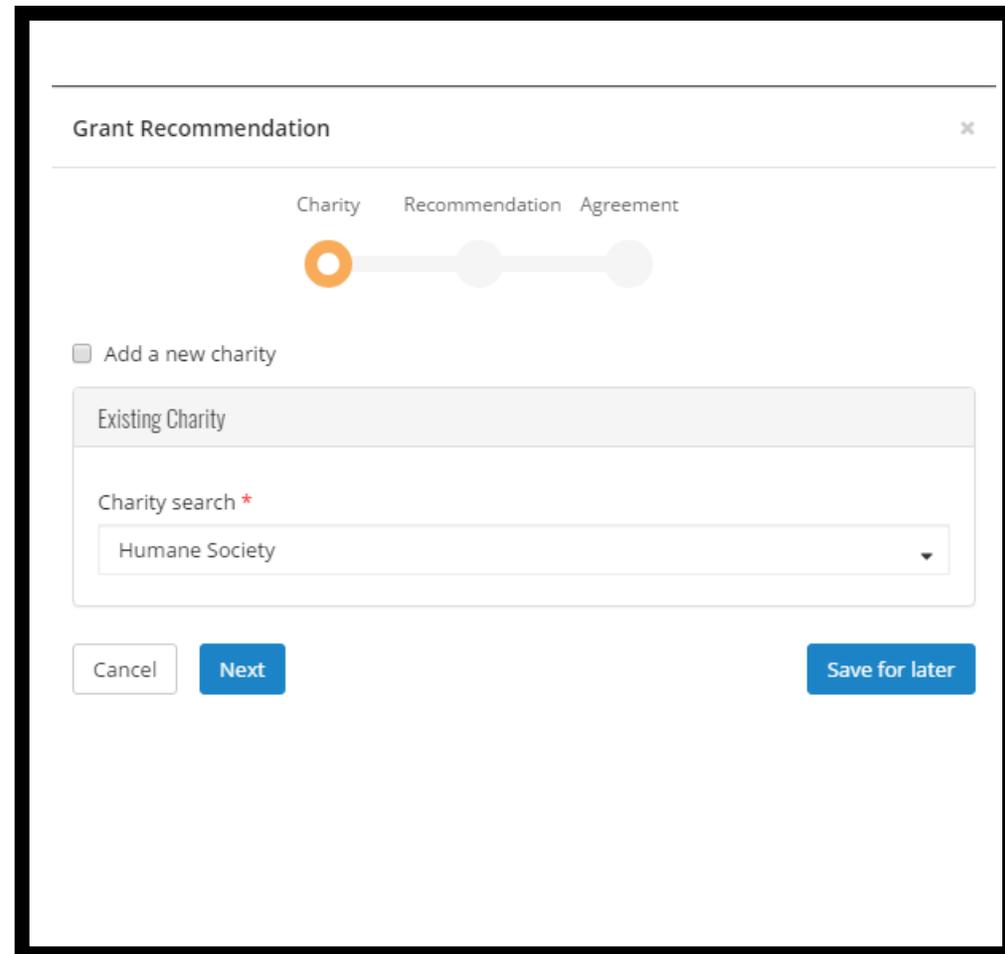
If you have a donor advised fund, you can recommend grants through DonorCentral. You can replicate previous grants made, or research charities and recommend a new grant.

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”.



Grant Recommendation

Charity Recommendation Agreement

Add a new charity

Existing Charity

Charity search *

Humane Society

Cancel Next Save for later

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”.

Grant recommendation 1

Charity Recommendation Agreement



Fund

Funding source *

Select a fund...

- Charitable Fund
- Family Fund
- Charitable Fund

Grant (Minimum is \$250) Please note, pledges cannot be paid from donor advised funds.

Amount *

\$

Advisor anonymous

Grant purpose (if needed)

Special request (if needed)

Recurrence

Is recurring



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”.

Grant Recommendation

Charity Recommendation Agreement

Important

As a donor advisor, I suggest making this grant from the above-named fund. I acknowledge that the grant suggestion must receive approval. In accordance with IRS regulations, this recommendation does not represent the payment of any personal pledge or other financial obligation of the undersigned. No goods or services or non-tax deductible benefits will be received by payment of this grant.

I agree

Cancel Previous Submit Save for later

Unsubmitted recommendations

Select all/none

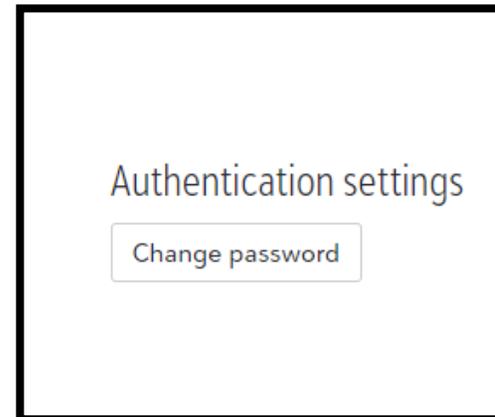
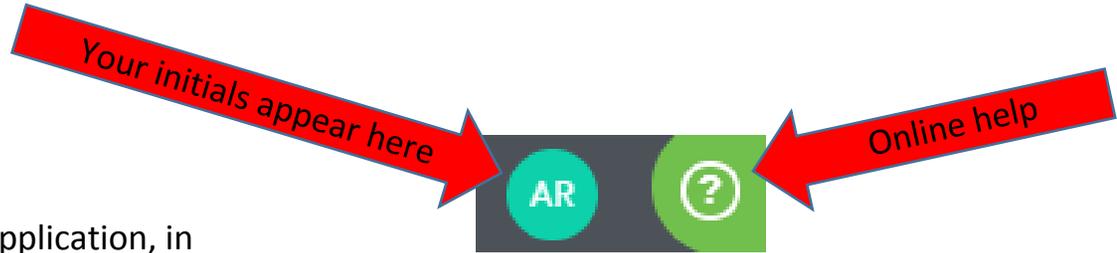
Second Harvest Food Bank of Greater New Orleans Last saved 12/13/2018 2:37PM
700 Edwards Avenue
New Orleans, LA 70123
Submit | Delete

Helpmate Last saved 12/13/2018 2:35PM
P.O. Box 2263
Asheville, NC 28802
Submit | Delete

Submit 2 Recommendations \$1,400.00 Recommended

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”.

A 'Change password' dialog box with a title bar containing a question mark and a close button. It features three input fields: 'Current password *', 'New password *', and 'Confirm new password *'. Each field has a red border and a red warning triangle icon below it with the text 'Enter your current password.', 'Enter your new password.', and 'Enter your new password.' respectively. Below the 'New password' field, there are four lines of password requirements: '- Requires 8 characters or more', '- including 3 of the following:', '- Capital letter', '- Lowercase letter', '- Number', and '- Special character (!, #, %, etc.)'. At the bottom, there are two buttons: 'Apply changes' (blue) and 'Cancel' (grey).