DonorCentral Quick Start Guide

DonorCentral is the 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 fund's history.

Getting Started

You will receive an email with a link to the DonorCentral user confirmation page. Following the requirements outlined on this page, set up your password. Once the password is confirmed, the login page appears.

Using your email address and newly created password, log into DonorCentral.

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 nonprofit database, research charities and recommend a new grant.

1. From the Dashboard tab, in the View your fund information tile, use the **Find** field to locate the fund to which you want to add a new grant recommendation. As you type, the application matches your entry to existing funds in the FIMS database.
2. Select **Recommend a grant**. The Grant Recommendation screen appears.

Grant Recommendation   ×

Charity   Recommendation   Agreement

☐ Add a new charity

Existing Charity

Charity search *

Humane Society

Cancel   Next   Save for later

3.   Select a charity by searching for it in the Charity search field.

      If the charity does not exist, check the Add a new charity box to create a new charity.

4.   Select Next.
5.   In the Fund section, select the fund you want used for this recommendation. You can keep the fund selected or search for a different fund by typing in the field provided. If you select the Fund anonymous option, the fund is marked anonymous on the Payment Plan tab in FIMS, and when the grant check is printed, instead of having the fund name print on the check stub, "Anonymous Fund" appears. In addition, if you select this option, the information is hidden from other grant funders in DonorCentral.
6.   In the Grant section, enter the recommended Amount, Program name, Grant purpose, and any Special request.
7.   To not display an advisor, select the Advisor anonymous option.

Grant Recommendation

Fund

Funding source *

John Adams Fund ▾

☐ Fund anonymous

Grant

Amount *

$ 10000

☐ Advisor anonymous

Program name

Pets for Life

Grant purpose

Pets for Life builds humane communities using innovative strategies and fresh approaches designed to extend the reach of animal services, resources, and information to under served areas. Addressing the critical need for accessible, affordable pet care, our program helps animals by empowering the people who care for them.

Special request

Recurrence

☐ Is recurring

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, look for it in the Submit your saved grant recommendations tile.

View your 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 Fund info tab or the Dashboard tab.

- From the Dashboard, in the Find field in the View your fund information section, enter the name of the fund you want to view. Once it displays, click See more fund information. This takes you to the Fund info tab.
- From the Fund info tab, in the Choose a fund field, start typing the name of the fund. As you type, the system displays funds with matching text. Select the desired fund.

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. 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.

Fund Information

Period: All

| $37,307.00 Grants pending | $36,885.00 Grants paid | **Click here** 00 Grants in process | $89,400.00 Gifts | $11,100.00 Non-gifts |

Choose columns

To view details here

| $16,300.00 Pledges paid | $0.00 Pending suggestions | 100.00 sbursements | $6,100.00 Stock Gifts In Transit | -$2,800.00 Assets |

$6,100.00 Expenses

Grants paid: $36,885.00
(8 records)

Export | Find in this list 🔍 ▥

Date	Description	Amount	Grantee	Payment Status
5/1/2017	Support staff	$86.00	United Way	
5/1/2017	Operating expenses	$7,740.00	Girl Scouts of America	
5/1/2017	Operating expenses	$1,400.00	Boy Scouts of America	
4/25/2017	Operating expenses	$7,200.00	Toys for Tots	
4/2/2016	Operating expenses	$254.00	Toys for Tots	

View Grant History

Grant History

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	$1,580,400.00
Paid	$1,470,557.00
Grants	306

Access page from Grant History tab.

Pending recommendations

Boy Scouts of America
$75.00 recommended on 4/29/2017
Operating expenses
John Adams Fund

Toys for Tots
$1,594.00 recommended on 3/3...
Operating expenses
Abigale MacArthur Hun...

Toys for Tots
$1,594.00 recomm...
Operating expenses
Abigale MacArthur Hunt Fu...

Girl Scouts of America
$812.00 recommended on 3/15/2017
Operating expenses
Abigale MacArthur Hunt Fund

Girl Scouts of America
$812.00 recommended on 3/15/2017
Operating expenses
Abigale MacArthur Hunt Fund

◄ 1 2 3 4 ►

Click to view charity and recommendation details

Grant totals by year

Grant totals by recipient

Grants

American Red Cross
$8,600.00 on 5/1/2017
Operating expenses
Clinton Arts Fund
Recommend again

Boy Scouts of America
$2,200.00 on 4/29/2017
Operating expenses
Bridges Fund
Recommend again

Girl Scouts of America
$1,200.00 on 4/26/2017
Operating expenses
Abigale MacArthur Hunt Fund
Recommend again

Boy Scouts of Ame...
$3,...

◄ 1 2 3 4 ►

Click to view charity, payments, and grant details

Click arrow to expand sections

Reset Password

1. From the far right-hand side of the application, in the header, click the drop-down menu next "Welcome, <user name>" and select Reset password.

   DonorCentral does not limit login attempts; users are not locked out after several attempts.
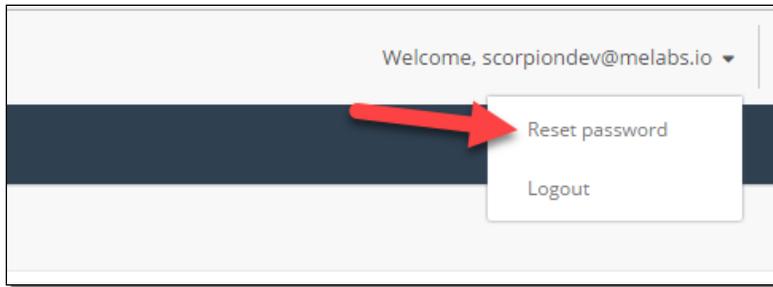
2. The Reset password screen appears. Enter the necessary information.

3. Select Change password.