

## A Guide to DonorCentral

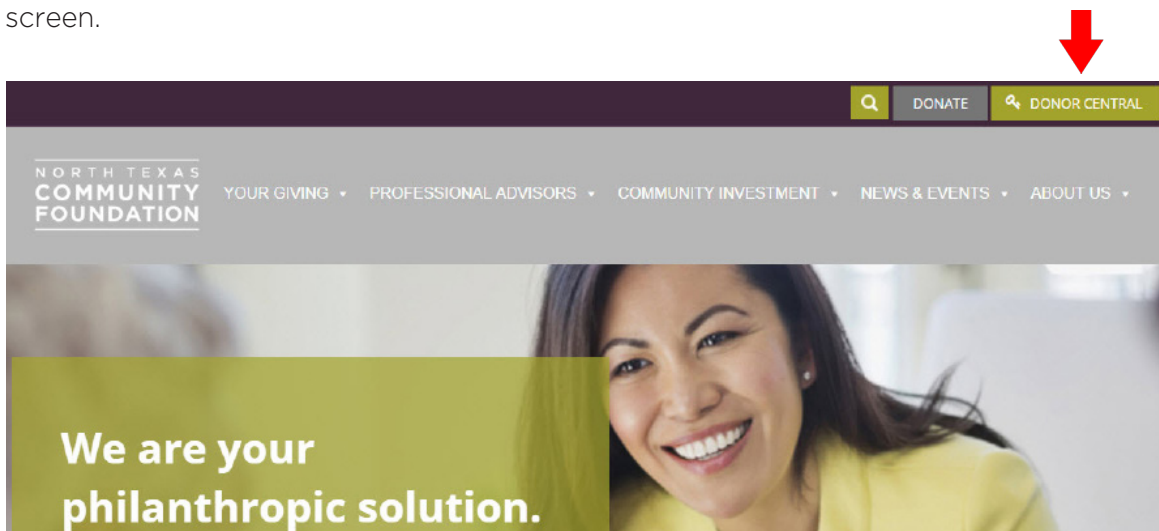
A SECURE, ONLINE SERVICE FOR DONOR ADVISORS

### WELCOME TO DONORCENTRAL

The North Texas Community Foundation is pleased to offer DonorCentral, a secure online service for donor advisors and organizational fund holders. It enables donors to view fund balances, gift history, grants made and grants pending – with information updated daily. Fundholders can also recommend grants online.

### GETTING STARTED

Go to [www.NorthTexasCF.org](http://www.NorthTexasCF.org) and locate the DonorCentral Login at the top of the screen.



Upon entering DonorCentral for the first time, you will need to set up your password. Click on “Forgot Password?” and enter the email address that we have on file for your fund. An email will be sent to you which will contain a link that will be active for 1 hour. Click on the link and create your password using at least 8 characters with at least 2 being upper case, numbers or symbols. Once you create your password, it will go to the **Log In Page** where you will re-enter your email and new password.

A screenshot of the DonorCentral login page. On the left, there is a 'Log in' section with two input fields: 'Email Address' (with a placeholder 'Email address') and 'Password' (with a placeholder 'Password'). Below these fields is a blue 'Log in' button and a link for 'Forgot password?'. On the right, there is a 'DonorCentral' heading followed by a short description of the service: 'DonorCentral is a service for fund advisors. It enables you to view your fund balances, gifts to your funds, grants made and grants pending with information updated daily. Donor-advised fund advisors can make grant recommendations online at any time.'

## RECOMMEND A GRANT

DonorCentral makes it easy for you to recommend a grant from your fund(s). You can replicate previous grants made or, using the Community Foundation's nonprofit database, research nonprofit organizations 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 you want to add a new grant recommendation. As you type, the application matches your entry to existing funds in your account.
2. Select **RECOMMEND A GRANT**. The Grant Recommendation screen will appear.
3. Select a nonprofit organization by searching for it in the Charity search field. If the nonprofit does not exist, check the **ADD A NEW CHARITY** box to create a new charity.
4. Click **NEXT**.
5. In the Fund Section, select the fund you want to use 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 grant, and when the grant check is printed, instead of having a fund name listed on the check stub, "*Anonymous Fund*" will appear.
6. In the Grant section, enter the recommended Amount, Program Name, Grant Purpose and any Special Requests. To not display your name, select the Advisor Anonymous option.
7. Click **NEXT**.
8. Acknowledge the grant recommendation requirements by selecting the **I AGREE** box.
9. Click **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 under 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.

# NORTH TEXAS COMMUNITY FOUNDATION

Philanthropic Solutions

The Fund Name, Description, Spendable Balance and other details will 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 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	\$0.00 Grants in process	\$89,400.00 Gifts	\$11,100.00 Non-gifts
\$16,300.00 Pledges paid	\$0.00 Pending suggestions	\$100.00 Reimbursements	\$6,100.00 Stock Gifts In Transit	-\$2,800.00 Assets
\$6,100.00 Expenses				

Grants paid: \$36,885.00  
(8 records)

Date	Description	Amount	Grantee	Payment Status
5/1/2017	Support staff	\$86.00	United Way	
3/1/2017	Operating expenses	\$7,740.00	Boy Scouts of America	
3/1/2017	Operating expenses	\$1,400.00	Boy Scouts of America	
4/25/2017	Operating expenses	\$7,200.00	Toby for Toby	

## VIEW GRANT HISTORY

**Grant History**

Grant requests submitted but not yet approved will appear below in their own section but are not included in the totals on the right. If you'd like the information these requests are for your associated funds, feel free to filter by Fund Line Items or Charities by clicking the filters below.

Granted	\$1,580,400.00
Paid	\$1,470,857.00
Grants	306

**Pending recommendations**

- Boy Scouts of America  
\$770.00 recommended on 4/26/2017  
Operating expenses  
JOHN ADAMS FUND
- Top for Toby  
\$1,700.00 recommended on 4/26/2017  
Operating expenses  
Altique MacArthur Music Fund
- Top for Toby  
\$1,600.00 recommended on 4/26/2017  
Operating expenses  
Altique MacArthur Music Fund
- Girl Scouts of America  
\$820.00 recommended on 4/26/2017  
Operating expenses  
Altique MacArthur Music Fund
- Girl Scouts of America  
\$820.00 recommended on 4/26/2017  
Operating expenses  
Altique MacArthur Music Fund

**Grants**

- American Red Cross  
\$8,000.00 on 4/26/2017  
Operating expenses  
KIDNEY ARTS FUND  
Reimburse all grants
- Boy Scouts of America  
\$2,200.00 on 4/26/2017  
Operating expenses  
Bridge Fund  
Reimburse all grants
- Girl Scouts of America  
\$4,200.00 on 4/26/2017  
Operating expenses  
Altique MacArthur Music Fund  
Reimburse all grants

To Export your grant history, click on the Fund Info Tab and then click on the **GRANTS PAID** total. A list of all grants paid will populate with a gold Export button. *Note: This will export all grants recommended.*

### **RESET PASSWORD**

1. From the far right-hand side of the application, in the header, click the drop-down menu next to “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**.

### **VIEW FUND STATEMENTS**

Click on the Fund Info tab at the top. Then click on the **VIEW STATEMENT** button in the middle of the page. Select the date range for the statement you would like to review. These are year-to-date statements. All fund statements will be archived in this location. Also in this location, you can email yourself the fund statement or you can print the fund statement.

---

**NORTH TEXAS  
COMMUNITY  
FOUNDATION**

---

*Philanthropic Solutions*

**HOW OFTEN IS THE INFORMATION IN DONORCENTRAL UPDATED?**

Each night, except for the total net asset value, which is updated monthly.

**WHAT IF I FORGET MY PASSWORD?**

The email address you have on file with the Community Foundation is your User ID. On the login page, click on “Forgot Password?” and follow the steps to reset your password. Please keep in mind that the email address you use must be the one we have on file. Contact Ronda Moore at 817.877.0702 or [rmoore@northtexascf.org](mailto:rmoore@northtexascf.org) for any other issues.

**WHEN ARE GRANTS PROCESSED?**

Grants submitted by Tuesday at 5:00 pm will be included in that week’s grant checks, unless further due diligence is needed to verify the charity’s status. Grant checks are usually printed on Wednesdays and mailed out Friday.

**HOW CAN I LEARN ABOUT NEW ORGANIZATIONS THAT MATCH MY INTEREST AREAS?**

We are pleased to research charities that fit with your mission. Please contact Vicki Andrews to discuss this service or visit [www.guidestar.org](http://www.guidestar.org) to search over 1.7 million nonprofits in their national database.

**CONTACT US**

**Vicki Andrews**

*Director of Operations and Donor Services*  
[vandrews@northtexascf.org](mailto:vandrews@northtexascf.org)

**Amy Radcliffe**

*Donor Services and Events Coordinator*  
[aradcliffe@northtexascf.org](mailto:aradcliffe@northtexascf.org)

**Ronda Moore**

*Grants and Database Administrator*  
[rmoore@northtexascf.org](mailto:rmoore@northtexascf.org)

Fort Worth Club Building  
306 West 7th Street, Suite 1045  
Fort Worth, Texas 76102  
817.877.0702