

NORTH TEXAS COMMUNITY FOUNDATION

Philanthropic Solutions

A Guide to DonorCentral

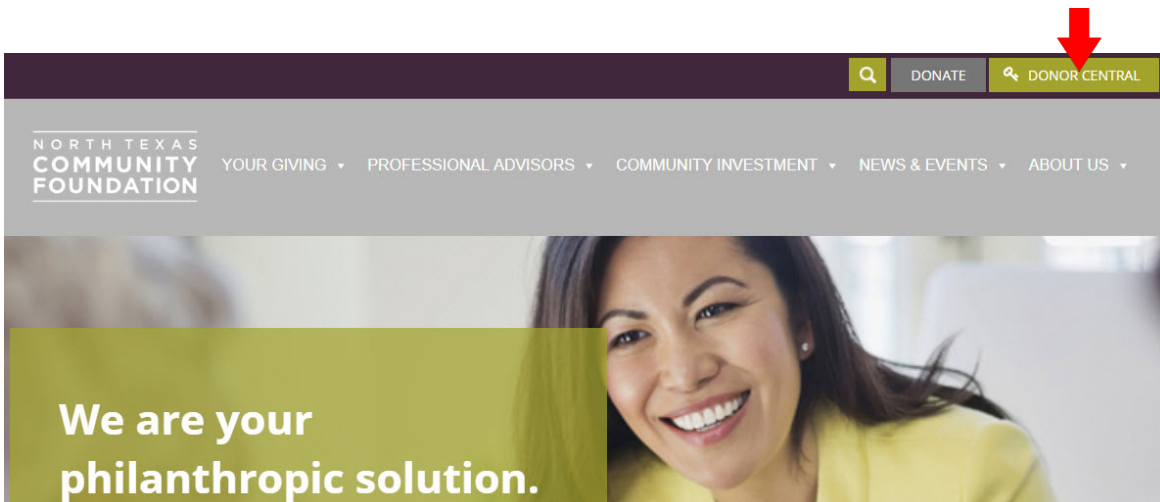
A SECURE, ONLINE SERVICE FOR DONOR ADVISORS

WELCOME TO DONORCENTRAL

The North Texas Community Foundation is pleased to offer DonorCentral, a secure online service for donor advisors and organizational fundholders. 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 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 eight characters with at least two 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' form with two input fields: 'Email Address' containing 'aradcliffe@northtexascf.org' and 'Password' with masked characters. Below the fields is a 'Log in' button and a 'Forgot password?' link. A red arrow points to the 'Forgot password?' link. On the right, there is a 'DonorCentral' section with a brief description of the service and contact information: '8am - 5pm | 817.877.0702.'

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**.
2. The Reset password screen appears. Enter the necessary information.
3. Select **CHANGE PASSWORD**.

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.

It is possible to submit multiple grants at one time. When you create the recommendation, rather than clicking the submit button, click the **SAVE FOR LATER** button on each request. Then, once they are all saved, you can go to the Dashboard menu. Scroll down to see pending grants. You can select all, or select only the ones that need to be submitted, and click submit. A message will come up telling you that an email will be sent.

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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.

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
Market value

Fund Information

Period: All

\$0.00

Grants pending

\$1,325,605.83

Grants paid ⓘ

\$0.00

Grants in process ⓘ

\$1,804,710.69

Gifts

\$0.00

Non-gifts

\$0.00

Pending gifts ⓘ

\$0.00

Pledges paid

\$28,750.00

Pending suggestions

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.*

Grants paid: \$1,325,605.83
(833 records)

Export

Q
☰

ID	Date	Description	Amount	Grantee	Payment Status ▾
20180660	4/25/2018	to Make a Difference - NOW, partnering with Hitchcock Presbyterian Church to sponsor trucks to... See more	\$9,000.00	Afya	
20180559	4/12/2018	for operating expenses	\$1,000.00	Glad to Be Here Foundation, Inc.	

VIEW GRANT HISTORY

You may view your Grant History from the **GRANT HISTORY** tab. You may filter the date range and click on the icon to view the details about the charity, payments and grant details.

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	\$507,760.00
Paid	\$507,760.00
Grants	221

The screenshot shows the Grant History interface. At the top, there is a 'Filters' button and a filter box containing 'Grant Date: 12/1/2016 through 4/19/2018'. Below this, there are two main sections: 'Pending recommendations' and 'Grant totals by year'. The 'Pending recommendations' section is expanded to show a list of grants. A red arrow points to the first entry, 'Fort Worth Chamber of Commerce', which includes the address '777 Taylor Street, Suite 900, Fort Worth, TX 76102', a grant amount of '\$7,500.00', and the fund name 'Higginbotham Community Fund'. To the right of the entry, there are two status indicators: 'Received 3/12/2018' and 'Approved'. The 'Grant totals by year' and 'Grant totals by recipient' sections are currently collapsed.

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.

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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 Amy Radcliffe at 817.877.0702 or aradcliffe@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 to search over 1.7 million nonprofits in their national database.

CONTACT US

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