

The Community Foundation of Western Massachusetts' DonorCentral provides a secure, online portal through which you can access your fund information. Depending upon the type of fund you advise, you may view your latest fund balances, make grant recommendations, or review gift history.

### Getting Started:

Blackbaud has increased security for logging in via two-factor authentication. Your email will require use of a unique verification code, which will be sent to your personal device or email address. This verification code is in addition to your email address and password, to add an extra layer of protection. You must complete this step. Follow the requirements outlined to set-up a new password. Once the password is confirmed, the login page will appear. Your username will be the email address that the confirmation was sent to.

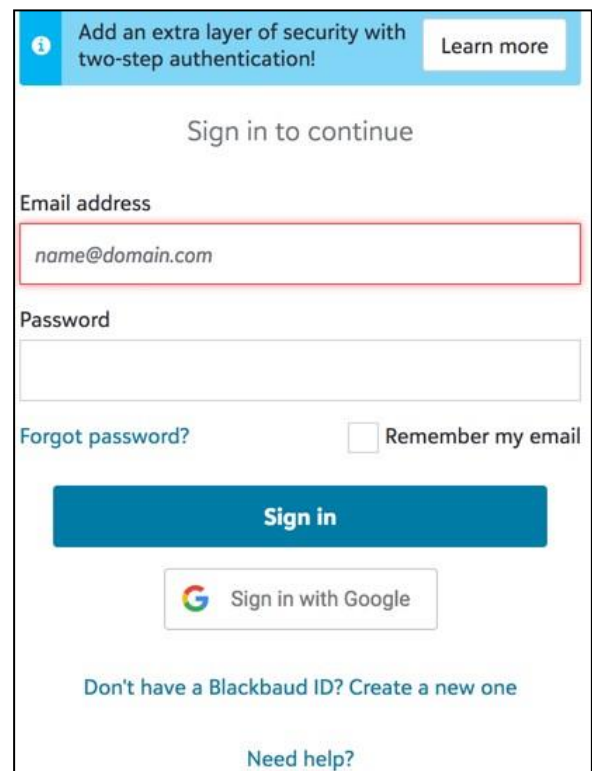
Using your email address and newly created password, login to DonorCentral.

### To login:

You can use your web browser to visit [www.communityfoundation.org](http://www.communityfoundation.org) and select the "DonorCentral" tab at the top right of the home page.

Should you forget your password (or the URL to register your password has expired), click on the 'Forgot Password' link on the login page. You will be prompted to enter the email you use for DonorCentral so that your password can be reset through your email.

Please keep in mind that the email address you enter must match the address we have on file.



The screenshot shows the login interface for DonorCentral. At the top, there is a blue notification banner with an information icon and the text "Add an extra layer of security with two-step authentication!" and a "Learn more" link. Below this is the heading "Sign in to continue". The form includes an "Email address" field with the placeholder "name@domain.com", a "Password" field, a "Forgot password?" link, and a "Remember my email" checkbox. A prominent blue "Sign in" button is centered below the fields. Below the button is a "Sign in with Google" button featuring the Google logo. At the bottom of the form, there is a link for "Don't have a Blackbaud ID? Create a new one" and a "Need help?" link.

## Navigating DonorCentral v5



DonorCentral Home Funds Grants Recommendations ▾ Gifts

### Dashboard (Home)

This page allows you to easily navigate through **Fund Info**, **Grant History**, and **Recommendation** options.

### View Fund Information (Agency, Donor Advised, Donor Designated, Scholarship Funds)

DonorCentral offers easy access to comprehensive information about the fund(s) you advise, allowing you to view and print fund information. To view fund information, you can select either the **Fund Info** tab or the **Dashboard** tab.

- From the **Fund** 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.
- From the Home tab, in the View your fund details section, start typing the name of the fund you want to review. While typing, suggestions for your funds will show, click on the fund you want to view. You will have options to See more fund details, or view the latest fund statements from the home screen.

### By selecting the Fund tab or Fund Details:


- **View/Email Statement:** Gives you access to your most recent fund statements.
- **Market Value:** Shows your monthly market value as of a specific date. The Period defaults to All, but options for This Month, This Quarter, This Year, Last Year or you can enter in specific dates. Click one of the totals displayed and all related records and details display in the grid below. Hoover the mouse cursor over the information bubble to view an explanation of the total.
- **Grants Pending:** Shows grants that have been recommended and are waiting to be processed.
- **Grants Paid:** Shows approved grants for which a payment has been issued. If you have any questions about the approval of a grant, please contact [donorservices@communityfoundation.org](mailto:donorservices@communityfoundation.org) or 413-732-2858.
- **Gifts:** Shows contributions that have been posted to the fund.
- **Stock Gift Gains / Losses:** Shows your stock gift gains and losses.
- **Pending Recommendations:** Recommendations that are made on DonorCentral awaiting CFWM's due diligence process and approval.
  - You can also sort by Date, Amount, Description, and Grantee by clicking on the column you would like to sort by. Clicking on the column name will sort in ascending order, clicking again will result in descending order. (Exp. Date will sort oldest date to current date, clicking again will result in descending order. Showing the newest to oldest dates.)

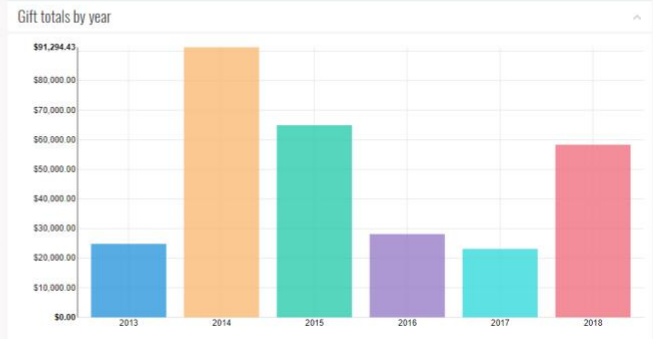
Fund Information					
Period: All	\$0.00 Grants pending	\$649,600.00 Grants paid	\$671,909.34 Gifts	-\$831.91 Stock Gift Gains / Losses	\$0.00 Pending recommendations
Grants paid: \$649,600.00 (114 records)					
Export	Find in this list	Q	☰		
ID	Date	Description	Amount	Grantee	
316632	3/8/2013		\$1,000.00	Scholarship America - Granville-Tolland Citizens' Scholarship Fou	
316631	3/8/2013	Annual Fund	\$2,000.00	Amherst College Trustees	
316914	5/23/2013	Grandparents Fund	\$1,000.00	The Renbrook School, Inc.	

- By clicking on any of the grant information, you can choose which way you wish to display your information.

## Gifts


This page lists the gifts made to any of the funds you advise, as well as gifts you have made to other funds.

- You have the option to show only your gifts by selecting the 'My gifts only' located at the top left.
- Clicking  will give an option to show you the gift details.
- Gift totals by year shows the past 6 years, this graph will change if 'My gifts only' is selected.

Gifts	Amount received Gifts	\$290,640.43 1,398
This page lists the gifts made to any of the funds you advise, as well as gifts you have made to other funds.		
<input type="checkbox"/> My gifts only		
<p>Gifts received</p> <ul style="list-style-type: none"> <li>\$100.00 10/22/2018 Reference #: 33733 <span>Processed</span></li> <li>\$100.00 10/15/2018 Reference #: 33707 <span>Processed</span></li> <li>\$150.00 10/15/2018 Reference #: 33708 <span>Processed</span></li> </ul>	<p>Gift totals by year</p> 	

## Grants

To view the fund's grant history, grant totals by year and other general grant information, select the **Grants** tab.

- **Grant totals by year:** total grant amounts per year (includes all funds you have access to).
- **Grants:** displays all grants for funds by your filtered choice.
-  \*You can see more information by clicking individually on any grant and clicking view details.
- **Grant totals by recipient:** pie graph showing all grants based on filter settings (includes all funds you have access to).

*On the 'Grants' tab, you have the option to filter grants by selecting the filter button.*



*You can filter by fund(s) and date ranges. (Filtering will change the bar and pie graphs.)*

## Recommend a Grant (Donor Advised Funds):

DonorCentral makes it easy for you to recommend a grant from the fund(s) you advise. You can replicate previous grants, or research nonprofits and recommend new grants.

- **Recommendation:** Select the Recommendation tab drop down located on the top menu bar, then select 'New Recommendation'. The Grant Recommendation form appears.
  - Select a nonprofit organization by searching for it in the Organization search field.
  - You can also search prior recipients based on organizations you have submitted grants for when using DonorCentralv5.
  - The search function works best when the charity name is spelled accurately. Use as few words as possible in the search box to yield better results. (Type Habitat instead of Habitat for Humanity of Pioneer Valley.)
  - If you're unable to find the organization you're looking for, select 'Add Organization' located at the bottom of 'Organization Search' and fill out information about the organization. Our staff will confirm the new organization submitted meets due diligence standards and that contact information is correct prior to mailing grants.
    - As part of our due diligence, all nonprofits' 501c3 status is verified through GuideStar (GS): a national database of nonprofit organizations. GuideStar is the most complete source of information about U.S. charities and other nonprofit organizations.
  - Select Next. In the **Fund** section, select the fund you want to recommend from. You can keep the fund selected or search for a different fund by typing in the field provided. To not display the fund name, select the anonymous option.
  - In the **Grant** section, enter the recommended Amount and Grant purpose. To not display the advisor's name, in the **Fund** section select the anonymous option.
  - **Recurring Grant:** To recommend a recurring grant, select the "Recurring Grant Recommendation" box at

the bottom of the Grant form and fill in the Start time, End time, Frequency, and any notes. Note that the starting date should be set to a date **at least 2 days in the future**. Recurring grants that are set to process the same day they are created do not have enough time to communicate with our system.

- Select Next.
  - Acknowledge the grant recommendation requirements by selecting the “I agree” box.
  - Select Submit.
- **Saving Grants (Submitting Multiple Recommendations):** If necessary, at any time in the process you have the option to ‘Save for later’ any grants that you choose to store without submitting. All saved grant recommendations will be listed on the Dashboard tab. To complete it later, navigate to the **Dashboard** tab, scroll down to the grant you have saved and select the organization’s name to continue the grant recommendation.
  - **Recommending Multiple Grants:** DonorCentral allows advisors to recommend multiple grants at once. By selecting ‘Save for Later’ grant recommendations will be saved to the Dashboard page. From there, grants can be selected and submitted at once.

**Unsubmitted recommendations**

Select all/none

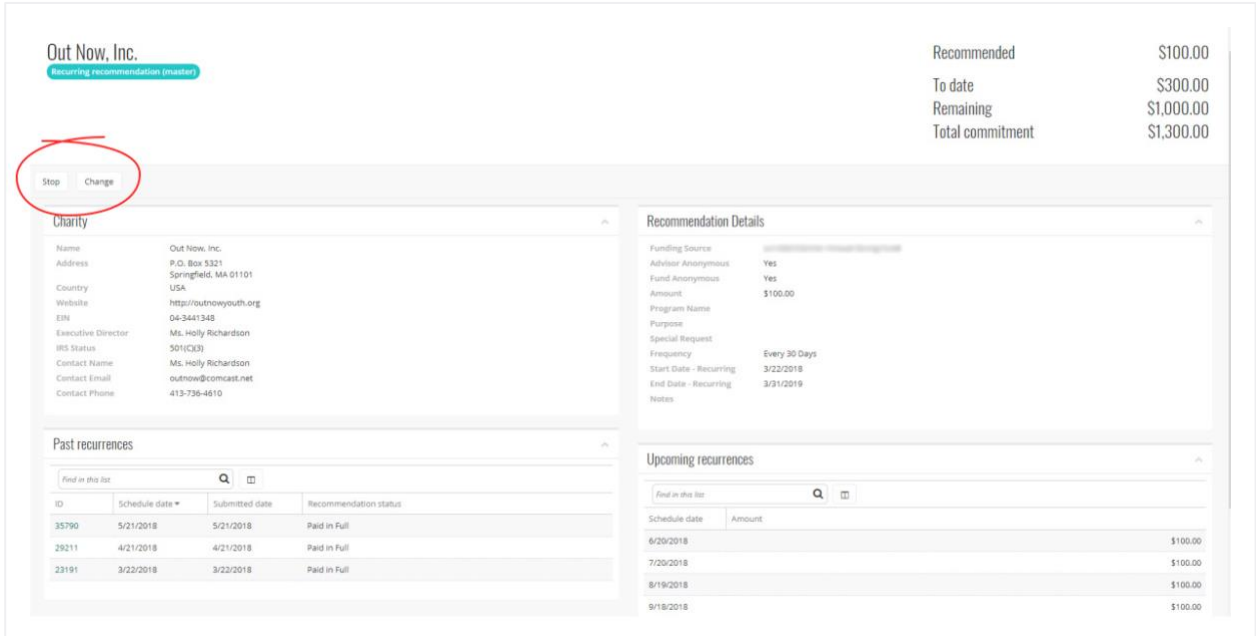
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<input type="checkbox"/>	<b>Amherst Boys and Girls Club, Inc.</b> <small>Last saved 03/14/2018 11:14AM</small> 39 North Pleasant Street Amherst, MA 01002 <a href="#">Submit</a>   <a href="#">Delete</a>	<b>\$100.00</b> Fund Name
<hr/>		
<input type="checkbox"/>	<b>A Little Easier Recovery, Inc.</b> <small>Last saved 03/14/2018 11:13AM</small> 43 High Street, Suite 120 North Andover, MA 01845 <a href="#">Submit</a>   <a href="#">Delete</a>	<b>\$100.00</b> Fund Name

**Note:** Online grants are processed according to the Foundation’s normal weekly grant cycle. Once submitted, an e-mail is automatically sent to the fund advisor confirming the information submitted. This e-mail does not indicate that the grant has been approved, but that the recommendation has been submitted to the Foundation for due diligence and approval.

- **Recurring Grants:** DonorCentral allows you to open your recurring grants that you have created and view with more details. When selecting the Recommendation dropdown, click on ‘View/Modify Recurring Recommendations’, from here you will see every recurring grant created in separate cards. Click on see detail to modify or view more information.
  - There are some additional features to Recurring Grants. When clicking See Details you will now see: Charity Info, Recommendation Details, Past Recurrences, and Upcoming Recurrences.
  - The top right corner will now show: Recommended (amount originally set), Grant Recommendations to-date, Remaining Amount (based on duration of recurring gift) and Total Commitment.

- You can also stop or change the recurring grant by clicking either one in the top left corner.



**Out Now, Inc.**  
Recurring recommendation (master)

Recommended \$100.00  
To date \$300.00  
Remaining \$1,000.00  
Total commitment \$1,300.00

Stop Change

**Charity**

Name: Out Now, Inc.  
Address: P.O. Box 5321, Springfield, MA 01101  
Country: USA  
Website: http://outnowyouth.org  
EIN: 04-3441348  
Executive Director: Ms. Holly Richardson  
IRS Status: 501(C)(3)  
Contact Name: Ms. Holly Richardson  
Contact Email: outnow@comcast.net  
Contact Phone: 413-736-4610

**Recommendation Details**

Funding Source: [Redacted]  
Advisor Anonymous: Yes  
Fund Anonymous: Yes  
Amount: \$100.00  
Program Name: [Redacted]  
Purpose: [Redacted]  
Special Request: [Redacted]  
Frequency: Every 30 Days  
Start Date - Recurring: 3/22/2018  
End Date - Recurring: 3/31/2019  
Notes: [Redacted]

**Past recurrences**

ID	Schedule date *	Submitted date	Recommendation status
35790	5/21/2018	5/21/2018	Paid in Full
29211	4/21/2018	4/21/2018	Paid in Full
23191	3/22/2018	3/22/2018	Paid in Full

**Upcoming recurrences**

Schedule date	Amount
6/20/2018	\$100.00
7/20/2018	\$100.00
8/19/2018	\$100.00
9/18/2018	\$100.00

## Logout

For security purposes, when you have concluded your work please logout of your DonorCentral account. The 'Logout' link is located at the top right of the webpage, 'Welcome (your email address).'

## Administrator levels

With DonorCentral v5 we have the ability to assign multiple advisors and give them rights based on pre-determined permissions.

- **Level 0:** No DonorCentral Access but can make grant recommendations outside of DonorCentral (Email, Grant Recommendation Form, Phone, etc.)
- **Level 1:** Administrator: Access to DonorCentral, and donor can make grant recommendations and view grant history (ONLY FOR ADVISED FUNDS)
- **Level 2:** Reviewer: Access to DonorCentral, but donor cannot make grant recommendations. They do, however, have the ability to see grant history details.
- **Level 3:** Limited: Access to DonorCentral, but donor cannot make grant recommendations, and they do not have the ability to see grant history details.

## Questions?

If you experience any difficulties logging in to DonorCentral, email us at [donorservices@communityfoundation.org](mailto:donorservices@communityfoundation.org) or call 413-732-2858.