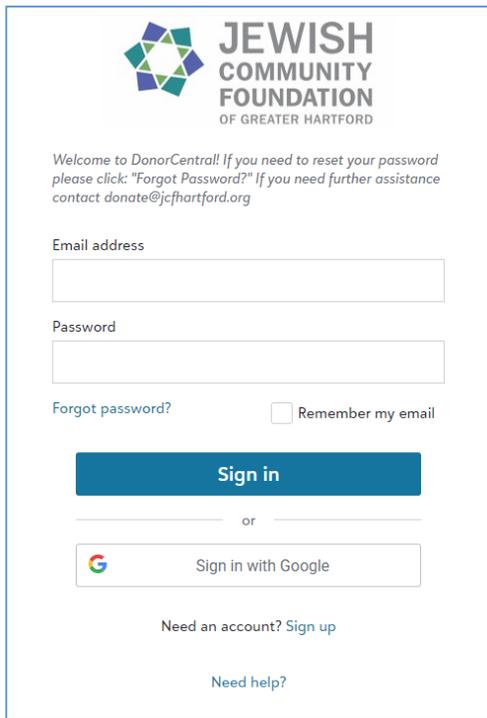


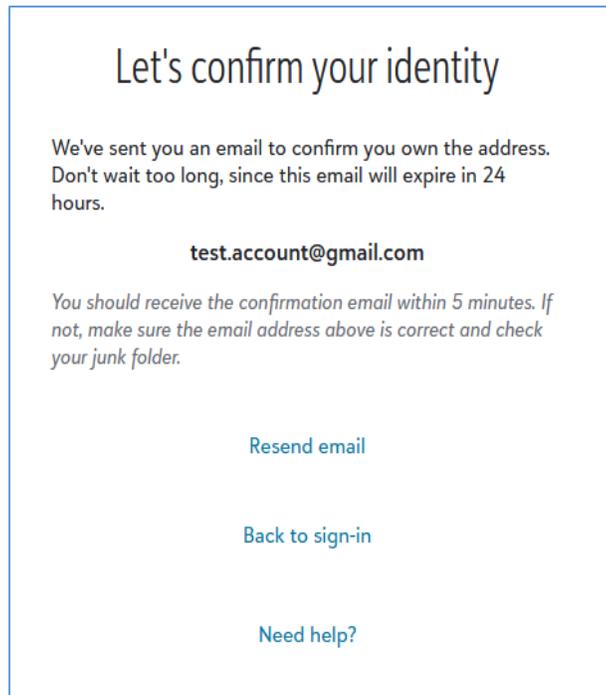
DonorCentral provides a connection to one's Donor Advised or Agency fund(s) held at the Jewish Community Foundation of Greater Hartford. View fund balances, gifts to funds, grants made, distributions and quarterly fund statements. Gift and grant information is updated daily; market information is updated monthly. Fund advisors with the appropriate privileges may recommend grants in this portal.

Getting Started

You have received a Welcome email with a link to the DonorCentral login page and instructions on how to set up your password. Once the password is confirmed, the login page reappears. You must use the same email address as the one on the Welcome email and your newly created password to log into DonorCentral.



The screenshot shows the login page for DonorCentral. At the top left is the Jewish Community Foundation of Greater Hartford logo. Below it is a welcome message: "Welcome to DonorCentral! If you need to reset your password please click: 'Forgot Password?' If you need further assistance contact donate@jc Hartford.org". There are two input fields for "Email address" and "Password". Below the password field is a "Forgot password?" link and a "Remember my email" checkbox. A blue "Sign in" button is centered. Below the button is an "or" separator and a "Sign in with Google" button with the Google logo. At the bottom, there are links for "Need an account? Sign up" and "Need help?".



The screenshot shows the identity confirmation page. The heading is "Let's confirm your identity". The text reads: "We've sent you an email to confirm you own the address. Don't wait too long, since this email will expire in 24 hours." The email address "test.account@gmail.com" is displayed in bold. Below this is a note: "You should receive the confirmation email within 5 minutes. If not, make sure the email address above is correct and check your junk folder." At the bottom, there are three links: "Resend email", "Back to sign-in", and "Need help?".

View your Fund Details (Donor Advised, Agency Funds)

DonorCentral offers easy access to comprehensive information about your fund(s), allowing you to view, print, and email quarterly fund statements. You can view fund information from the **Home** tab or the **Funds** tab.

- 1) From the **Home** tab in the **View your fund details** section, click the fund name or **See more fund details**. Either will take you to the **Funds** tab.
- 2) You will see the fund name, description, Fund Balance and Available to Spend amount and other details. The **Date Range** defaults to **All**, but can be changed to **This Month**, **This Quarter**, **This Year**, **Last Year**, or **Specific Range**.

3) Click one of the totals displayed and all related records and details display in a grid below.

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 Disbursements | \$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 | |

Annotations: "Choose columns" points to the Expenses row; "Click here" points to the Grants paid total; "To view details here" points to the Grants in process total.

You may also view more details and a graph view under the **Grants** and **Gifts** tab, example below.

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.

Click to view charity and recommendation details

Click to view charity, payments, and grant details

Click arrow to expand sections

Pending recommendations

- Boy Scouts of America: \$75.00 recommended on 4/29/2017
- Toys for Tots: \$1,594.00 recommended on 3/23/2017
- Girl Scouts of America: \$812.00 recommended on 3/15/2017
- Girl Scouts of America: \$812.00 recommended on 3/15/2017

Grants

- American Red Cross: \$8,600.00 on 5/1/2017
- Boy Scouts of America: \$2,300.00 on 4/29/2017
- Girl Scouts of America: \$1,200.00 on 4/26/2017

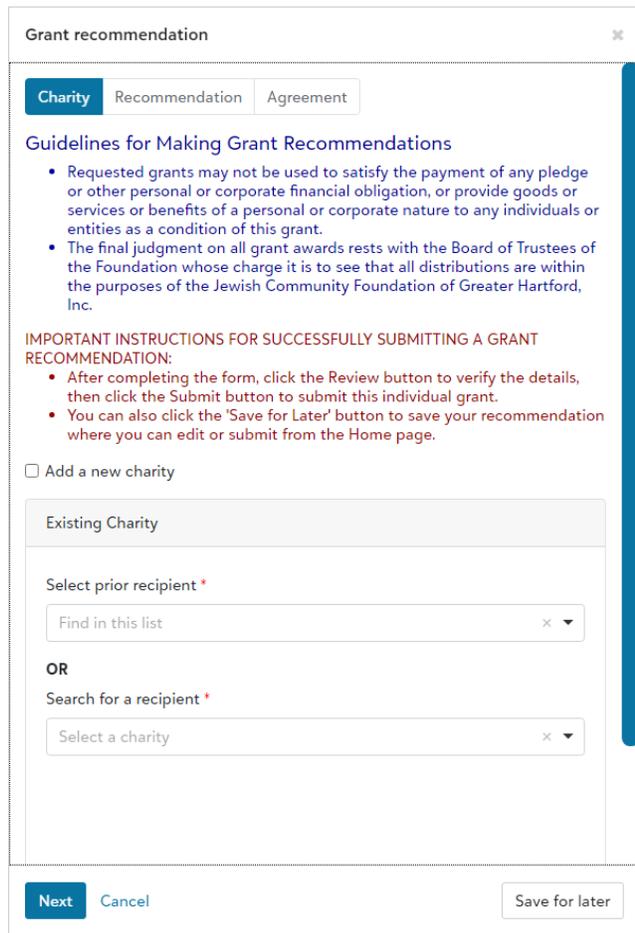
Grant totals by year

Grant totals by recipient

Recommend a Grant

DonorCentral makes it easy for Fund Advisors to recommend a grant from their Donor Advised fund(s). You may **Select prior recipient**, use the Foundation's nonprofit database, to **Search for a recipient** or **Add a new charity** for your next grant recommendation.

1. From the Home tab, in the **View your fund details** tile, select **Recommend a grant**. The Grant Recommendation screen appears.



The screenshot shows a web form titled "Grant recommendation" with a close button (x) in the top right corner. Below the title are three tabs: "Charity" (selected), "Recommendation", and "Agreement".

Guidelines for Making Grant Recommendations

- Requested grants may not be used to satisfy the payment of any pledge or other personal or corporate financial obligation, or provide goods or services or benefits of a personal or corporate nature to any individuals or entities as a condition of this grant.
- The final judgment on all grant awards rests with the Board of Trustees of the Foundation whose charge it is to see that all distributions are within the purposes of the Jewish Community Foundation of Greater Hartford, Inc.

IMPORTANT INSTRUCTIONS FOR SUCCESSFULLY SUBMITTING A GRANT RECOMMENDATION:

- After completing the form, click the Review button to verify the details, then click the Submit button to submit this individual grant.
- You can also click the 'Save for Later' button to save your recommendation where you can edit or submit from the Home page.

Add a new charity

Existing Charity

Select prior recipient *

Find in this list x ▾

OR

Search for a recipient *

Select a charity x ▾

At the bottom of the form are three buttons: "Next" (blue), "Cancel", and "Save for later" (grey).

2. **Select prior recipient**, use the Foundation's nonprofit database, to **Search for a recipient** or **Add a new charity** for your next grant recommendation.
3. Select Next.
4. In the Fund section, select the fund you want used for this recommendation. If you select the Fund anonymous option, the fund is marked anonymous and when the grant check is printed, instead of having the fund name print on the check stub, "Anonymous Fund" appears.
5. In the Grant section, enter the Amount, Grant purpose, and any Special request. To not display an advisor, select the Advisor anonymous option.

Grant recommendation

Charity Recommendation Agreement

Fund

Funding source *

Select a fund... x

Fund anonymous

Grant

Amount *

\$

Minimum \$250

Advisor anonymous

Grant purpose ?

Special Instructions including any IHO/IMO requests ?

Previous Next Cancel Save for later

6. Select Next.
7. Acknowledge the grant recommendation requirements by selecting the I agree box.

Grant recommendation

Charity Recommendation Agreement

Important

I/we understand that the requested grants may not be used to satisfy the payment of any pledge or other personal or corporate financial obligation, or provide goods or services or benefits of a personal or corporate nature to any individuals or entities as a condition of this grant. I/we further understand that final judgment on all grant awards rests with the Board of Trustees of the Foundation whose charge it is to see that all distributions are within the purposes of the Jewish Community Foundation of Greater Hartford, Inc.

I agree *

Previous Review Cancel Save for later

8. Select Submit.

If necessary, at any time in the process click **Save for Later** to store your grant recommendation without submitting. When you return, look for it in the Submit your saved grant recommendations tile.

Change Password

In the upper right corner in the header, click your initials and select **Blackbaud ID profile** to **Edit Password**. Note, DonorCentral does not limit login attempts; users are not locked out after several attempts.

Change Email address

To change the email used to access DonorCentral:

1. Click your initials in the upper right corner of page and select **Blackbaud ID profile**.
2. **Edit** the email address. **Apply changes**. An email will be sent to your new email address to confirm the change.
3. For this change to go into effect, our office must be notified. You may call the office at 860.523.7460 or email donate@jcfhartford.org.

Questions? Contact Susie Lotreck at 860.280.7715 or slotreck@jcfhartford.org