

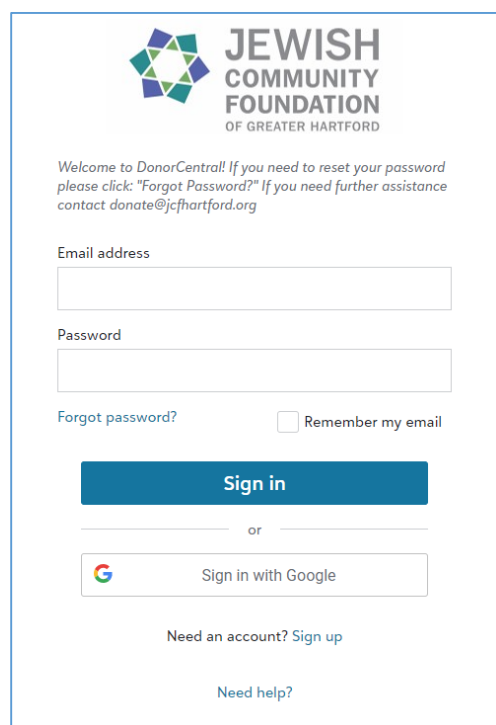



DonorCentral Quick Start Guide

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 login page for DonorCentral. It features the Jewish Community Foundation of Greater Hartford logo at the top left. Below the logo 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@jcfhartford.org". There are two input fields: "Email address" and "Password". Below the password field is a link "Forgot password?" and a checkbox "Remember my email". A blue "Sign in" button is below these. Below the button is a horizontal line with "or" in the center. Below that is a "Sign in with Google" button with the Google logo. At the bottom, there are two links: "Need an account? Sign up" and "Need help?".

 **JEWISH COMMUNITY FOUNDATION**
OF GREATER HARTFORD

Welcome to DonorCentral! If you need to reset your password please click: "Forgot Password?" If you need further assistance contact donate@jcfhartford.org


Email address

Password

[Forgot password?](#) ☐ Remember my email

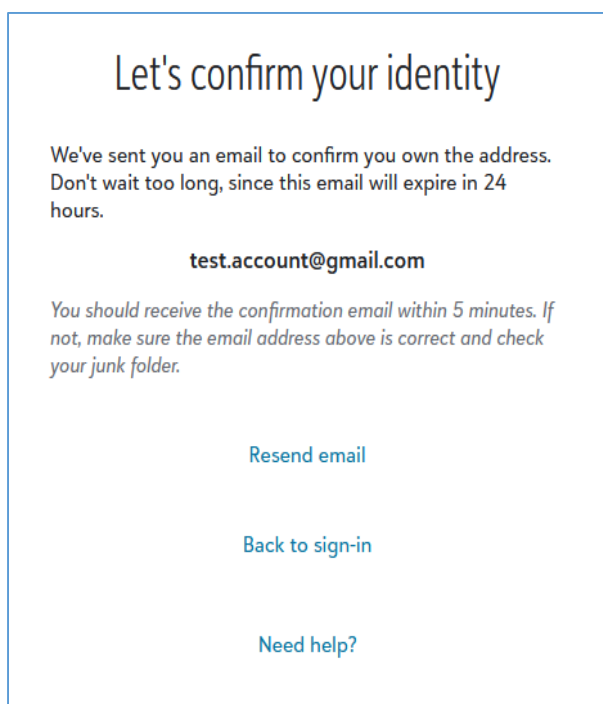
Sign in

or

 Sign in with Google

[Need an account? Sign up](#)

[Need help?](#)

The confirmation page titled "Let's confirm your identity". It says "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." Below this, the email address "test.account@gmail.com" is displayed. A message follows: "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?".

Let's confirm your identity

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.

test.account@gmail.com

You should receive the confirmation email within 5 minutes. If not, make sure the email address above is correct and check your junk folder.

[Resend email](#)

[Back to sign-in](#)

[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](#)

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:

- Orange arrow: Choose columns (points to the 'Find in this list' search bar)
- Dark blue arrow: To view details here (points to the 'Grants paid' total)
- Black arrow: Click here (points to the 'Grants paid' 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.

Filters:

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

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 3/31/2017
Operating expenses
Abigail MacArthur Hunt Fund

Toys for Tots
\$1,594.00 recommended on 3/31/2017
Operating expenses
Abigail MacArthur Hunt Fund

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

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

1 2 3 4

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
Abigail MacArthur Hunt Fund
Recommend again

Boy Scouts of America
\$3,000.00 on 4/29/2017
Operating expenses
Abigail MacArthur Hunt Fund
Recommend again

1 2 3 4

Annotations:

- Red box: Access page from Grant History tab.
- Red arrow: Click to view charity and recommendation details (points to a pending recommendation)
- Purple arrow: Click to view charity, payments, and grant details (points to the Grants list)
- Green arrow: Click arrow to expand sections (points to the expand/collapse arrow in the Grants list)

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 application window titled "Grant recommendation" with a close button (X) in the top right corner. Below the title bar are three tabs: "Charity" (selected), "Recommendation", and "Agreement".

Under the "Charity" tab, there is a section titled "Guidelines for Making Grant Recommendations" with two bullet points:

- 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.

Below the guidelines is a section titled "IMPORTANT INSTRUCTIONS FOR SUCCESSFULLY SUBMITTING A GRANT RECOMMENDATION:" with two bullet points:

- 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.

There is a checkbox labeled "Add a new charity" which is currently unchecked.

Below the checkbox is a section titled "Existing Charity" with two options:

Select prior recipient *

Find in this list [dropdown menu]

OR

Search for a recipient *

Select a charity [dropdown menu]

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

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...

☐ 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** to **Edit Password**. Note, DonorCentral does not limit login attempts; users are not locked out after several attempts.

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