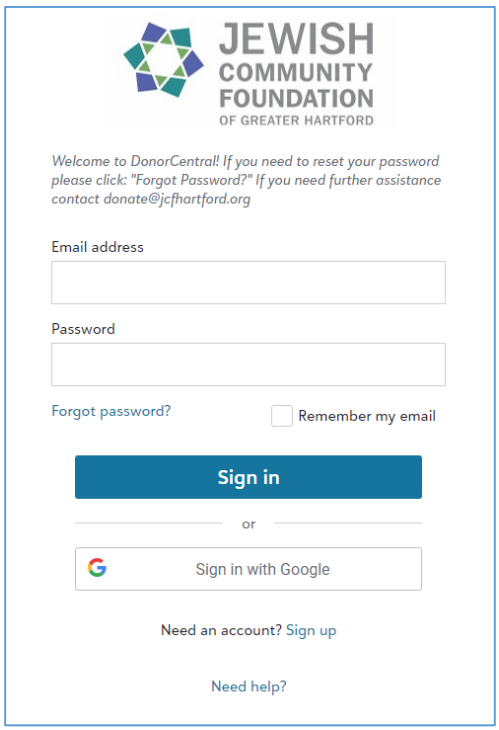
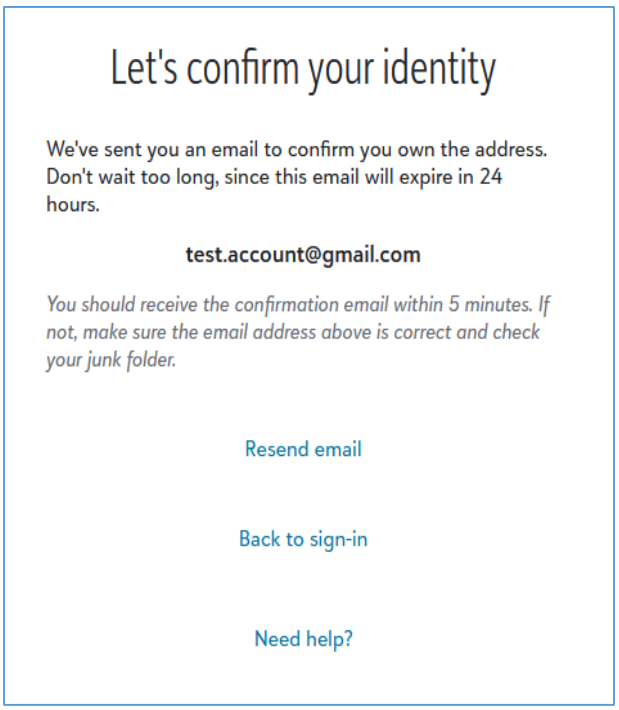
DonorCentral Quick Start Guide

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.





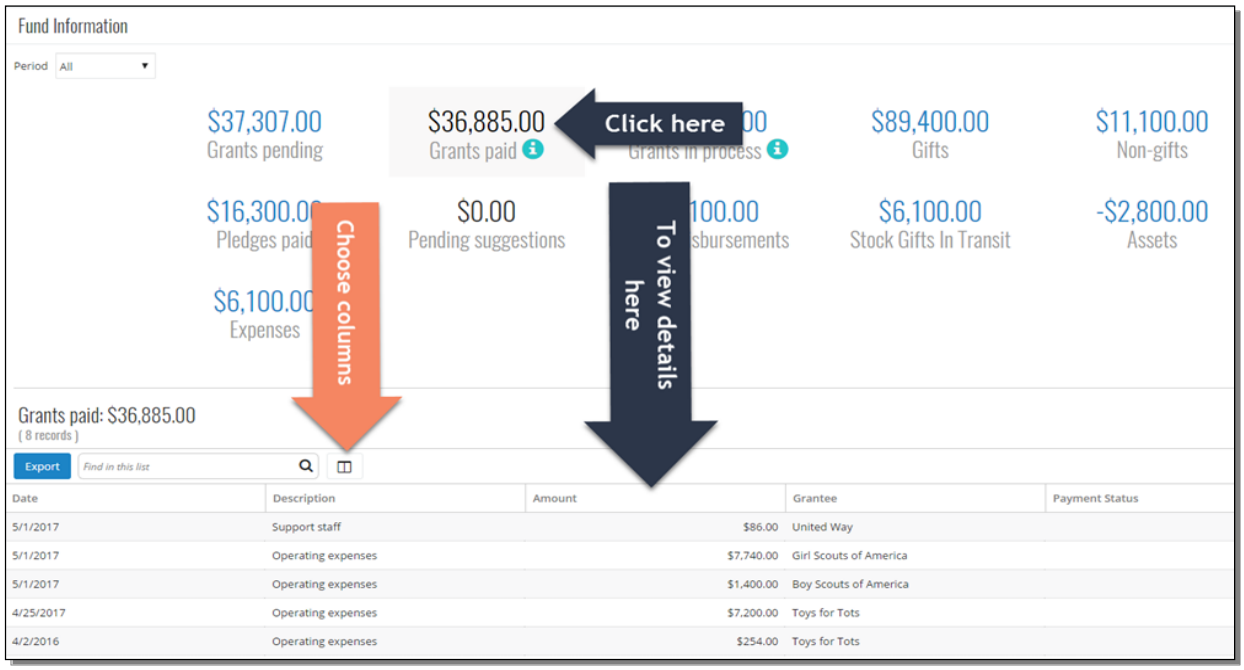
View your Fund Details (Donor Advised, Agency Funds)

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.

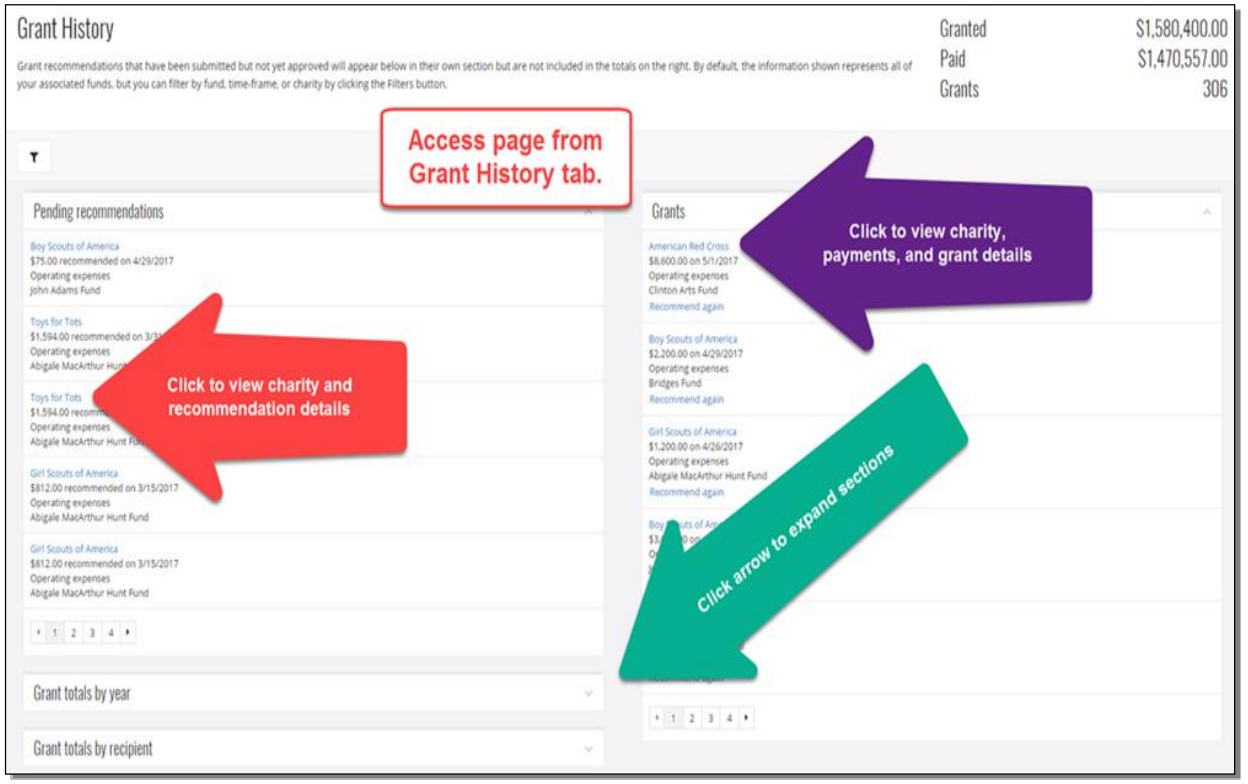
1) From the **Home** tab in the **View your fund details** section, click the fund name or **See more fund details**. Either will take you to the **Funds** tab.

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.



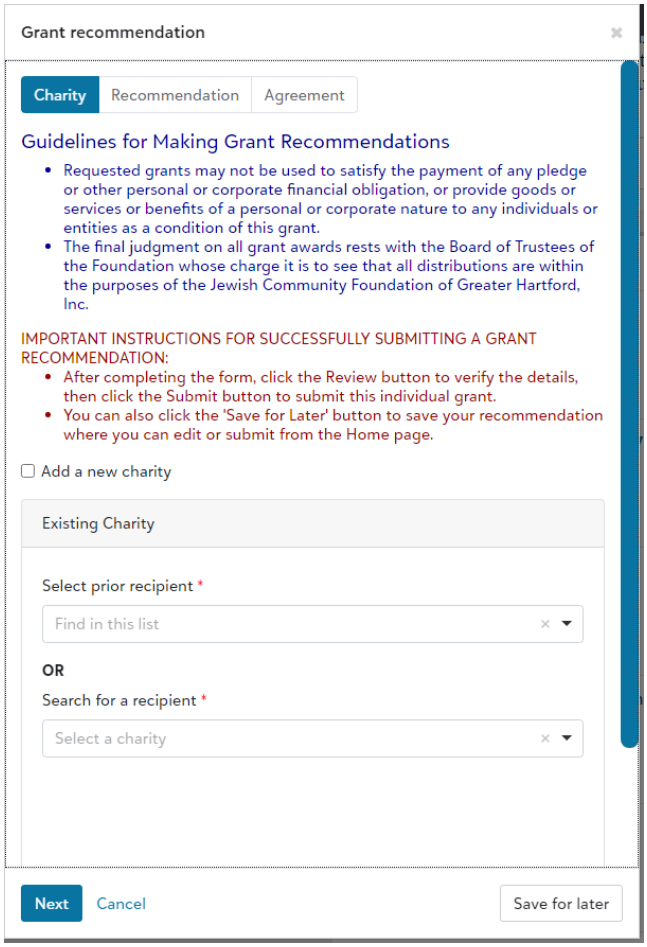
You may also view more details and a graph view under the **Grants** and **Gifts** tab, example below.



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.

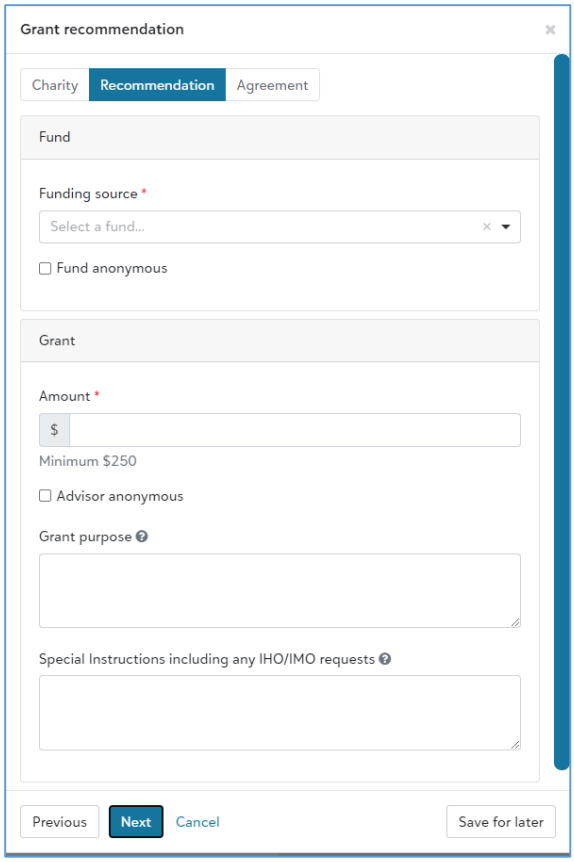


2. **Select prior recipient**, use the Foundation's nonprofit database, to **Search for a recipient** or **Add a new charity** for your next grant recommendation.

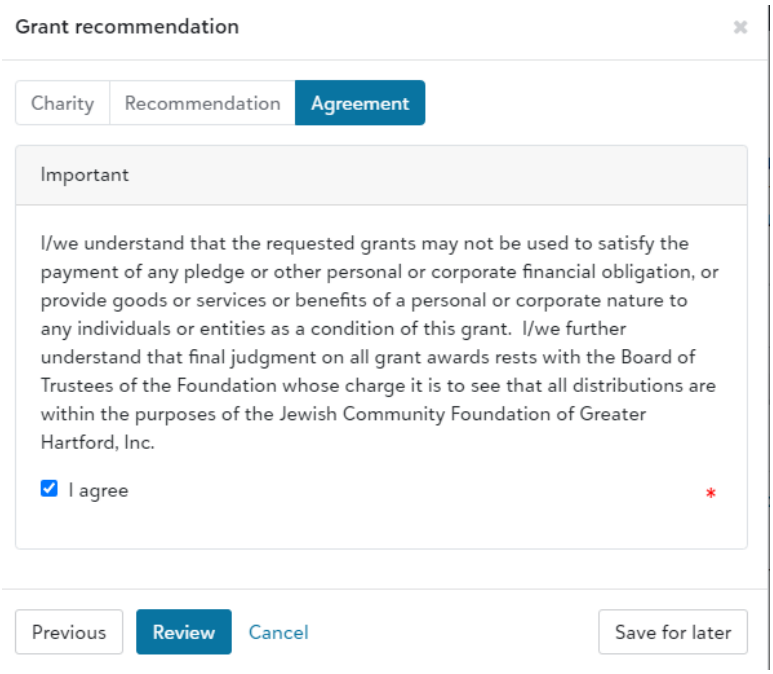
3. Select Next.

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.



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



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