DonorCentral User Guide

Welcome to DonorCentral, your online tool for managing your fund and making grant recommendations. With DonorCentral, you also can view your fund balance and fund statements, history of gifts to the fund, grants made and grants pending.

Getting Started
Go to the Oshkosh Area Community Foundation’s website: www.OshkoshAreaCF.org.
There are several ways to enter DonorCentral.

 Click on the words DonorCentral in the upper left of the home page.
 OR Hold your mouse over Donors on the section bar and select Manage Your Fund from the drop down menu.
 OR Click on the DonorCentral image of the rotating feature images under the section bar.

1. DonorCentral

2. Manage Your Fund

3. Click on the image
Registration

Registration is not necessary for individuals who already have met with a Foundation representative and signed a Fund Agreement. Your account already has been activated. The Foundation will supply you with your initial log in and password.

Using the online registration form sends an email with your contact information to one of our staff members, who will then get in touch with you during regular business hours.

You need a user name and password before access is granted. Your user name and password are system-generated when the Foundation activates your account. You can change this password at any time after your initial log in by selecting Change Your Password from the My Profile Page on the top navigation of DonorCentral. (The Foundation will not have access to your password after you have changed it from your initial account activation.)

Security is a Priority

- DonorCentral uses technology for secure communications. DonorCentral will permit donors to use DonorCentral only if their browsers support 128-bit encryption and Secure Sockets Layer (SSL) version 2.0 protocol. These technologies provide a level of security and privacy for users when they access fund information, initiate online fund transactions or send secure messages.
- DonorCentral has built-in timers that terminate access if you are not actively using DonorCentral.
- The fund information on DonorCentral is only used on this site and is not distributed or sold to any other party or site.
Logging In
Enter your User ID and Password and click Sign On.

Did you forget your password? Click on the “Forgot Your Password?” link under the Password box. You will be prompted to enter your email address so your password can be sent to you.

(The email address you enter must match the primary email address associated with your fund with the Foundation. If you have not provided your e-mail address to the Foundation, please do so in the event that you forget your password and to receive notifications about your fund activity and statements. DonorCentral will never sell or give anyone outside the company your email address.)

You are responsible for maintaining the security of your user name, password and personal fund information on DonorCentral. When you finish using DonorCentral, you should click on Logout on the far right side of the top navigation menu and close the browser. In addition, you should never reveal your user name or password to anyone.

If others associated with your fund(s) require DonorCentral access, a written request should be submitted to the Foundation. This request should include the name, address, phone and email address for the person seeking access. This request also should include authorization from the appropriate party already associated with the fund(s).
Home
After you log in, the Home page presents several options. From here you can:
- Access links to features of interest and alerts about your fund
- View your fund information, pending and recent grants and your grant history
- Recommend a grant
- Edit your profile
- Contact us and view Frequently Asked Questions
**Fund Summary**
The Fund Summary provides fund information for the month, quarter, this year, last year and all (cumulative for the life of the fund). For details in each category, click on **Down Arrow** next to each dollar amount.

**Gifts:** Your Fund Summary shows each gift that has been posted to the fund, including the date it was received, who made the gift (if not anonymous), and what kind of gift (ie, cash, stock transfer, etc.). If a gift is in the process of being transferred, it will not show on the gift history until the Foundation has received the proceeds (from a securities or asset transfer, for example).

**Grants Paid:** Your Fund Summary displays all approved grants for which a check has been processed and mailed. This information is generally posted within two weeks of making a grant recommendation unless you have given the Foundation other instructions.

**Grants Pending:** Your Fund Summary allows you to see grants that you have recommended for which funds have not yet been disbursed. This process typically takes about two weeks.

**Fund Balance:** Shows your most recent month-end fund balance.
Print or Email Your Fund Statement

To Print Your Fund Statement: Select the range of dates corresponding with the monthly statement you wish to view. Check the radio button next to View Fund Statement, then click the Get Statement button. DonorCentral will open a new window with a PDF format of your statement. From here, you can save the file or print using the menu commands in your web browser.

To Email Your Fund Statement: Select the range of dates corresponding with the monthly statement you wish to email. Check the radio button next to Email Fund Statement and enter the email address into the adjacent box. (You can send the statement to one email address at a time.) Click the Get Statement button. DonorCentral will provide confirmation that the email was sent.

Recommend a Grant
You can recommend a grant to an organization you previously supported, search our database for a nonprofit you’ve never granted to or provide information about a nonprofit that is not in our database.

Best way to locate a charity and recommend a grant

If your search results did not include the charity you were looking for, select “New Grant” to complete a grant recommendation form for a previously unsupported organization.
**Search our database:** Type the name of an organization or any key word into any of the search fields, including organization name, city, state, ZIP code or tax ID. Then click **Search.**

![Click the GuideStar button to research an organization](image)

**GuideStar:** To research an organization before you make a grant, click the **GS logo** next to the organization’s name in your search results. The logo is a link to GuideStar, a national database with detailed information on charitable organizations.

**Previously Supported Organizations:** The list of organizations you’ve previously supported is displayed on your Home Page. To support that organization again, click the **Make a Grant** button. (Some fields may need to be entered or adjusted for a different amount of support or specific cause.)

![Select the Make a Grant button to an organization you previously supported again.](image)
**Make a Grant:** When you’ve found the organization you wish to receive your grant, click on the **Make a Grant** button. DonorCentral will fill out the organization’s information on the Grant Recommendation Form. You must enter the dollar amount, even if it’s the same as a previous grant recommendation. (Grant disbursements must be in whole dollar amounts with a minimum $100 grant.)

Be sure to select the radio button in front of “I agree” under the IRS regulation declaration in order for your grant recommendation to be processed.
Once submitted, you will receive a confirmation email and the Foundation will be notified of your request. You also will be prompted to enter an email address if you would like your grant recommendation to be shared with others.

*Note: Online grant recommendations typically take two weeks for approval and payment. Grant checks are mailed on Thursday of each week. Please contact the Foundation if your grant recommendation requires a different schedule of payment.*

**Contact Us**

Click on the **Contact** link in the top navigation menu to view a complete staff listing.

If you have questions about DonorCentral, each of our staff members are trained to assist you. Please call us at 920-426-3993 for assistance, or leave a voice mail message during nonbusiness hours.

**My Profile**

Through **My Profile**, you can edit your personal information. When you make changes to any of these categories, the Foundation will be notified of your changes and we will then update your records in our database.

When you update your contact information in DonorCentral, our staff will receive a notification so that we can keep our records up to date.