

# DonorCentral Quick Start Guide

## Adirondack Foundation February 2018

DonorCentral is the online portal used by Adirondack Foundation to provide fund advisors access to information about their fund(s). From DonorCentral, users can view current fund balances, review grant history, make new grant recommendations, and get fund statements.

In mid-February 2018, Adirondack Foundation will be updating its version of DonorCentral to enhance the user experience. The quick start guide below provides a general overview of the functionality of the updated version of DonorCentral. Important features are highlighted with red stars.★ Additional information about all of the new functionality in DonorCentral is available at any time through the DonorCentral online help.

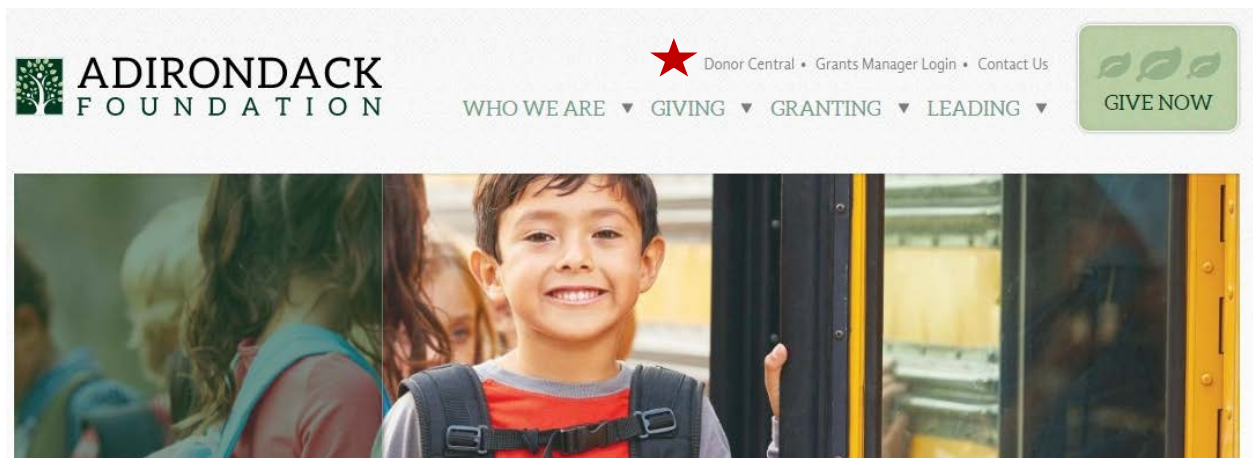
Before using this guide and the new version of DonorCentral, you will need to confirm your login information with the system administrators. If you have not received an email from DonorCentral with instructions for updating your account information, please contact Adirondack Foundation by phone at (518) 523-9904 or by email at [info@adkfoundation.org](mailto:info@adkfoundation.org).

### **Getting started**

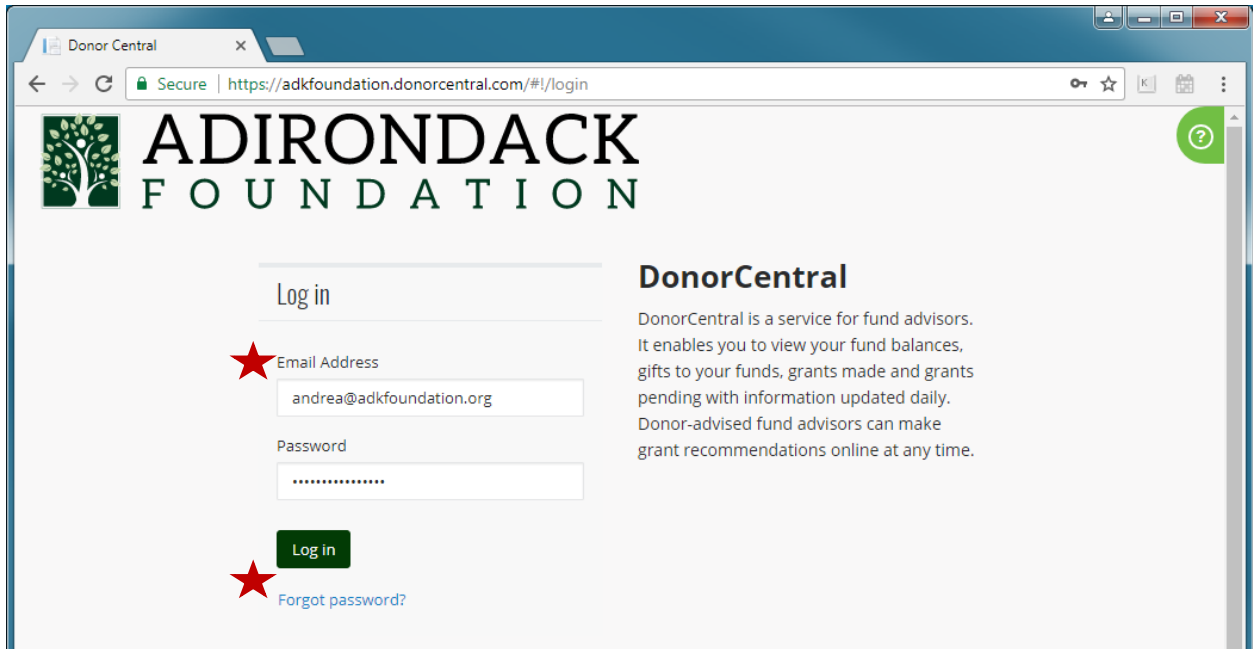
DonorCentral is available from the Adirondack Foundation homepage.

**<https://www.adirondackfoundation.org/>**

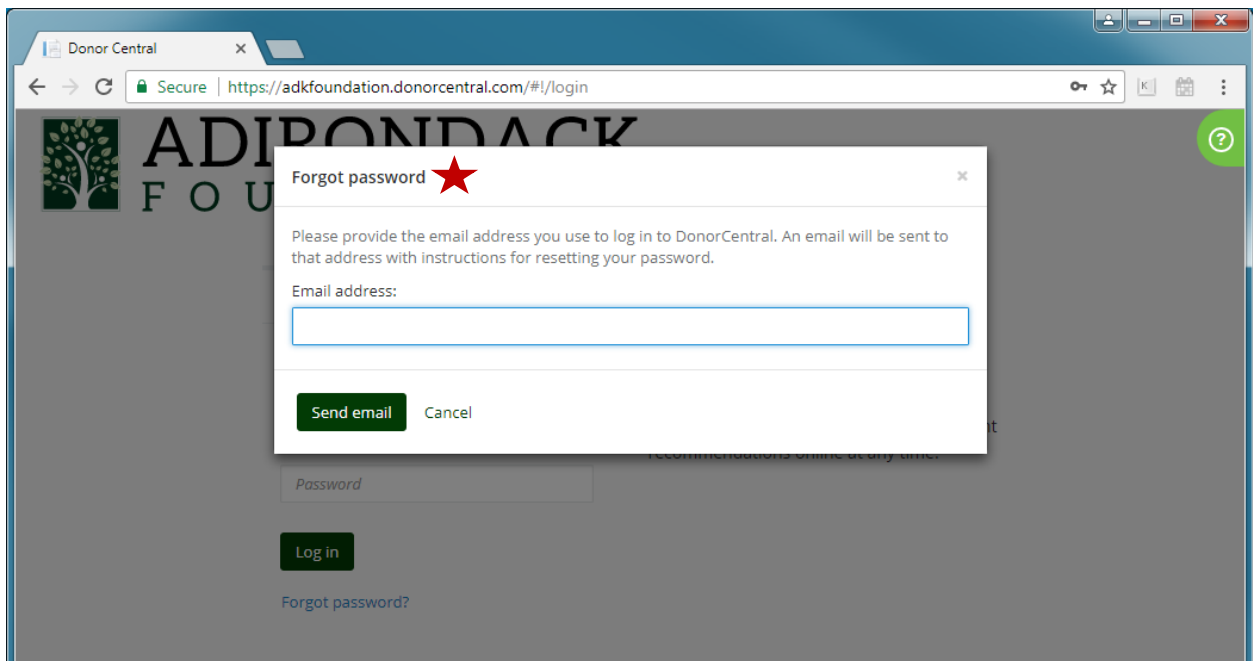
To open DonorCentral, click the **Donor Central** link at the upper right of the screen.



After clicking the link, the DonorCentral login page will load in your browser window. Use your login information (email address and newly created password) to access the new DonorCentral. Click the **Log in** button to enter DonorCentral.



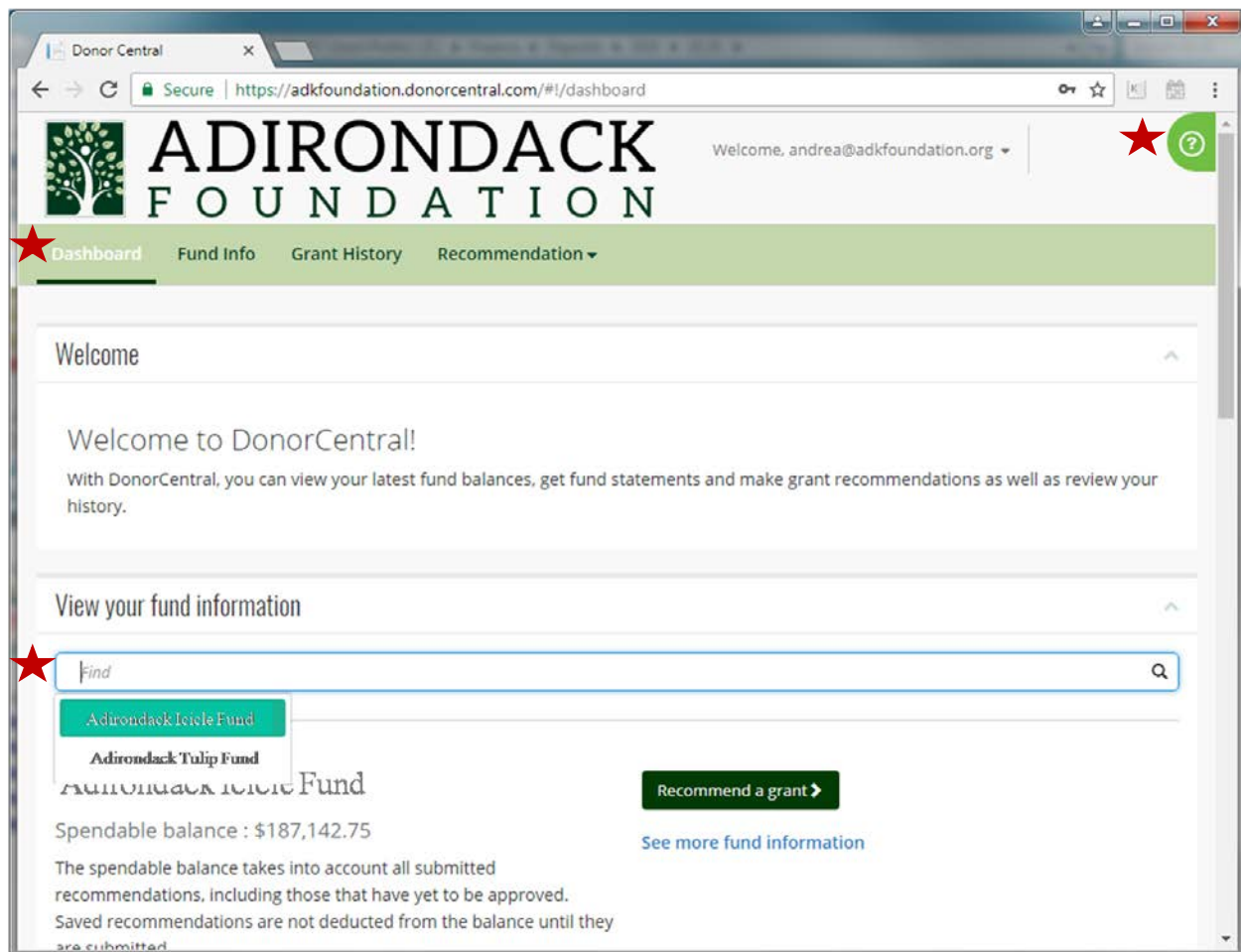
If you have forgotten your password, you can now retrieve it directly from DonorCentral. Click the **Forgot password?** link below the **Log in** button. A pop-up window will appear with instructions for how to reset your password.



After login, you will be directed to the DonorCentral Dashboard page. From this page, you will have access to the updated DonorCentral functionality that allows you to view your fund information, review your grant history, make a grant recommendation, and administer your account.

## **Dashboard**

DonorCentral Functions can be accessed from the menu in green across the top of the page as well as from the full page content on the **Dashboard** screen. Return to the Dashboard at any time by clicking the **Dashboard** menu item.



You can access online help documentation at any time by clicking the *green question mark tab* at the upper right of your screen. A help panel will open with additional information about the content of the page you are on and search capabilities to get information about DonorCentral functionality. Minimize the panel again by re-clicking the *green question mark tab*.

If you advise multiple funds, click your mouse in the **Find** text box to select a fund from the drop-down menu. Scroll down on the page to **See your grant history, Explore**

**Opportunities**, and re-recommend a previously awarded grant by clicking the **Recommend** button in any section.

The screenshot shows the DonorCentral web application interface. At the top, there is a navigation bar with the following items: **Dashboard** (highlighted with a red star), **Fund Info**, **Grant History**, and **Recommendation**. Below the navigation bar, the main content area is divided into several sections:

- Welcome:** A section with the heading "Welcome to DonorCentral!" and a sub-heading "Welcome". Below this, there is a paragraph: "With DonorCentral, you can view your latest fund balances, get fund statements and make grant recommendations as well as review your history."
- View your fund information:** A section with a search bar labeled "Find" and a magnifying glass icon. Below the search bar, there is a card for the **Adirondack Icicle Fund**. The card displays a "Spendable balance : \$187,142.75" and a green button labeled "Recommend a grant". Below the balance, there is a paragraph: "The spendable balance takes into account all submitted recommendations, including those that have yet to be approved. Saved recommendations are not deducted from the balance until they are submitted." A link "See more fund information" is also present.
- See your grant history:** A section with a heading "See your grant history" and a sub-heading "See full history". Below this, there is a carousel of grant cards. The first card is for **Adirondack Center for Loon Conservation** with a balance of \$250.00 and a "Recommend again" button. The second card is for **Lake Placid Center for the Arts** with a balance of \$1,000.00 and a "Recommend again" button. The third card is for **Adirondack Explorer** with a balance of \$2,000.00 and a "Recommend again" button. Each card shows a list of grant statuses: "Received", "Approved", and "Paid" with corresponding dates and icons.
- Explore Opportunities:** A section with a heading "Explore Opportunities" and a sub-heading "Explore Opportunities". Below this, there is a carousel of opportunity cards. The first card is for **Special & Urgent Needs Fund** with the tagline "Rising to the occasion" and a "Recommend a Grant" button. The second card is for **Adirondack Foundation Fund** with the tagline "Strengthening community through philanthropy" and a "Recommend a Grant" button. The third card is for **Generous Acts Fund** with the tagline "Making a difference, together" and a "Recommend a Grant" button.

## View Fund Information

To view detailed information about the funds you advise, click the **Fund Info** menu item in green at the top of the page or scroll to the **View your fund information** section on the Dashboard page.

The screenshot shows the 'Fund Info' page for the Adirondack Icicle Fund. At the top, the 'Fund info' menu item is highlighted in green. Below the navigation bar, there is a search box for funds. The main content area displays the fund name, ID, and market value as of 1/30/2018. A 'Spendable balance' is also shown. Below this, there are buttons for 'View statement', 'Email statement', 'Print page', and 'Configure page'. The 'Fund information' section is active, showing a dropdown menu for 'Period' and several financial metrics: Grants pending, Grants paid, Grants in process, Gifts, Non-gifts, Pending gifts, Pending suggestions, Supporting Fees, and Net Investment Activity. A summary for 'Gifts' is shown with 27 records. At the bottom, there is an 'Export' button and a table of gift records.

Dashboard Fund info Grant History Recommendation

Choose a fund Find

### Adirondack Icicle Fund

Fund ID: **adkice**

Click on any of the totals below to see the detail.

**Market value** as of 1/30/2018  
The total above represents the **\$187,142.75** approximate market value of your fund but may not be up to date.

**Spendable balance** as of 1/30/2018 **\$187,142.75**  
Takes into account all submitted recommendations including those yet to be approved, but not saved recommendations that haven't been submitted.

View statement Email statement Print page Configure page

**Fund information** Market value

#### Fund Information

Period: All (dropdown menu)

Grants pending: \$0.00

Grants paid: **\$927,356.01**

Grants in process: **\$0.00**

Gifts: **\$1,115,887.56**

Non-gifts: \$0.00

Pending gifts: \$0.00

Pending suggestions: \$0.00

Supporting Fees: **-\$18.80**

Net Investment Activity: \$0.00

**Gifts: \$1,115,887.56**  
( 27 records )

Export Find in this list

| Date       | Gift Amount |
|------------|-------------|
| 10/21/2010 | \$67,533.00 |
| 10/9/2009  | \$62,595.00 |
| 10/2/2009  | \$36,729.00 |
| 10/5/2007  | \$63,856.00 |
| 10/5/2007  | \$324.62    |

This page has a lot of information. Use the scroll bar in your browser window to search and review all of the information about your fund(s). Enter information in the **Choose a fund** text box to search for other funds you advise. Click the buttons to **View statement, Email statement, Print page,** and **Configure page** to perform these functions. Hover your mouse over the *blue information dots* to see notes about items in the Fund Information section. Choose a new reporting period from the **Period** pull-down menu. View detailed information about a reporting item in blue text by clicking on the blue text. A new table will display below the **Fund Information** section with the details.

### View Grant History

To view grant history, click the **Grant History** menu item in green at the top of the page or scroll to the **See your grant history** section on the Dashboard page.

The screenshot displays the 'Grant History' dashboard with the following components:

- Navigation:** Dashboard, Fund Info, **Grant History** (marked with a red star), Recommendation.
- Summary:**
  - Granted: \$345,000.00
  - Paid: \$345,000.00
  - Grants: 33
- Filters:** A dropdown menu for filtering grants.
- Grants List:**
  - Generous Acts Fund** (marked with a red star): \$10,000.00. Status: Received (4/24/2014), Approved (4/15/2014), Paid in full (4/15/2014).
  - Adirondack Community Trust Operating Fund**: \$5,000.00. Status: Received (4/24/2014), Approved (4/15/2014), Paid in full (4/15/2014).
  - Adirondack Center for Writing**: Status: Received (9/23/2013), Approved.
- Grant totals by year:** A bar chart showing grant amounts from 2009 to 2018. The y-axis ranges from \$0 to \$125,000. The 2017 bar is the highest, exceeding \$120,000.
- Grant totals by recipient:** A pie chart showing the distribution of grants among various recipients, including Adirondack, North Count., Northern Fo., Generous Ac., Adirondack, and Other. A red star is placed over the chart.

Use the **Filters** button to view Grant History by fund, date range, or grants made to a particular charity. Minimize or expand general information about listed **Grants** by clicking on the *small gray arrow* to the right of the grant name. Hover over items in the charts to view details about each segment. If applicable, information about Pending Recommendations will also appear on the Grant History page.

To view details about a specific grant, click the *circle with dots* to the left of each grant name and select **Details**. This will bring you to a new page where in addition to viewing Grant Details, you will also be able to recommend a grant to this charity again using the **Recommend again** button at the bottom of the page.

The screenshot shows the 'Grant Details' page for the 'Generous Acts Fund'. At the top, there is a navigation bar with 'Dashboard', 'Fund Info', 'Grant History', and 'Recommendation'. The main header area includes the fund name 'Generous Acts Fund' with a red star icon to its left, and the 'Grant ID:' field. To the right, it shows 'Approved \$10,000.00 on 4/15/2014' and 'Paid \$10,000.00'. Below this is a 'Charity' section with a collapse arrow, containing fields for Name, Address, Country, Website, Executive Director, IRS Status, Contact Name, Contact Email, and Contact Phone. The 'Paid to date' section shows '1 payment \$10,000.00 paid' with a sub-total of '\$10,000.00 Paid 4/15/2014'. The 'Grant Details' section at the bottom includes Name, Amount, and Purpose. A red star icon is placed to the left of a green 'Recommend again' button at the bottom left of the page.

| Charity            |   |
|--------------------|---|
| Name               | Generous Acts Fund at Adirondack Foundation |
| Address            | PO Box 288<br>Lake Placid, NY 12946         |
| Country            | USA   |
| Website            |   |
| Executive Director | Ms. Call Brooks                             |
| IRS Status         | 501(c)(3)                                   |
| Contact Name       | Ms. Call Brooks                             |
| Contact Email      | call@adkfoundation.org                      |
| Contact Phone      | 518-523-9904                                |

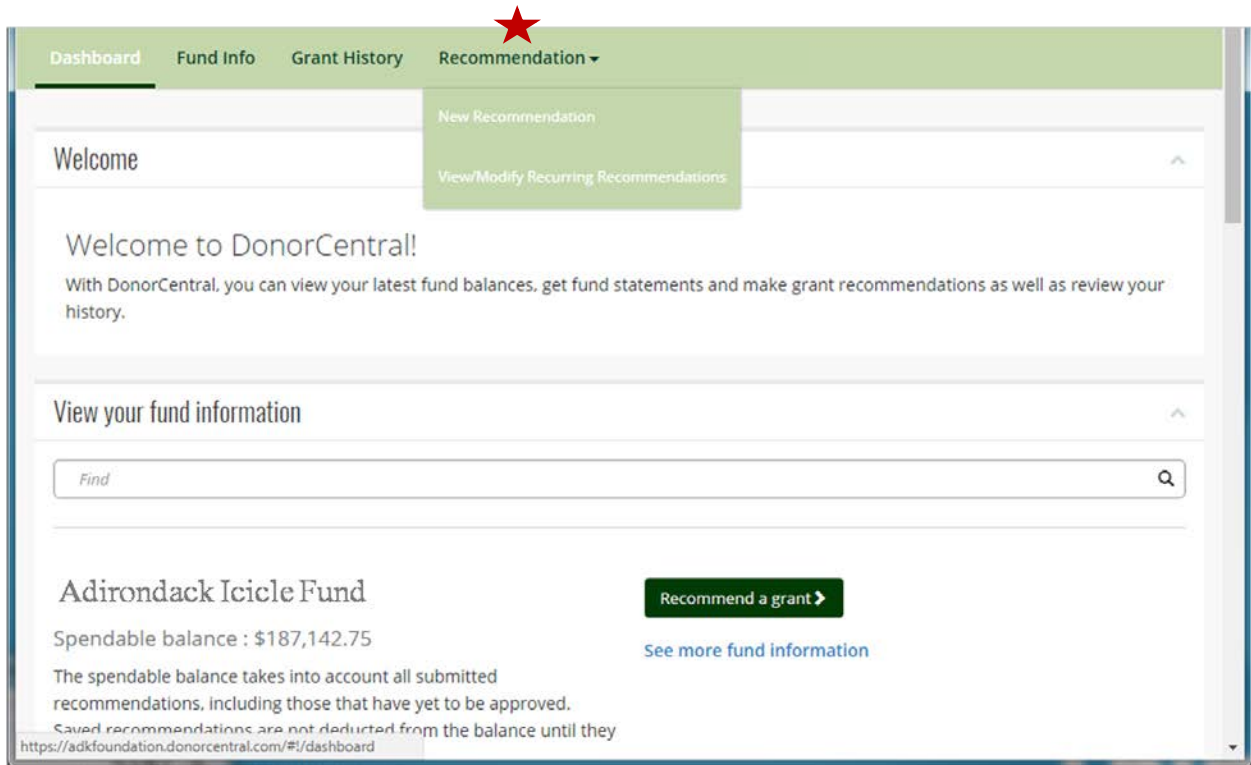
| Paid to date                         |                  |
|--------------------------------------|------------------|
| 1 payment                            | \$10,000.00 paid |
| <b>\$10,000.00</b><br>Paid 4/15/2014 |                  |

| Grant Details |                    |
|---------------|--------------------|
| Name          | Generous Acts Fund |
| Amount        | \$10,000.00        |
| Purpose       | Program support    |

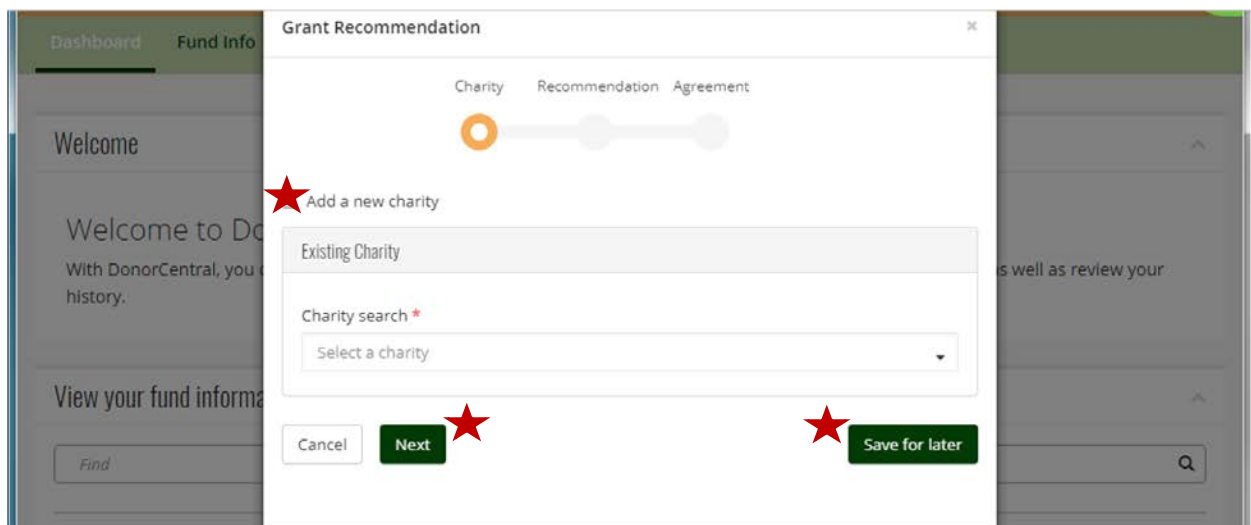
**Recommend again**

## **Recommend a grant**

To recommend a grant from the **Recommendation** menu item in green at the top of the page, select either the **New Recommendation** or **View/Modify Recurring Recommendations** link from the pull-down menu. You can also recommend a grant from the **Dashboard** page by clicking the **Recommend again** button in any of the page sections.



If selecting the **New Recommendation** menu item, a series of pop-up windows will appear to step you through the process. Follow the steps by entering information about the charity to which the grant will be applied, the funding source, the amount, and any additional requested information about the grant.





As you complete each step, click the **Next** button. Return to a previous step by clicking the **Previous** button. You can save your recommendation at any step during the process by clicking the **Save for later** button.

Grant Recommendation

Charity Recommendation Agreement

**Fund**

Funding source \*

Select a fund...

Adirondack Teiele Fund

Adirondack Tulip Fund

**Grant**

Amount \*

\$

Advisor anonymous

Grant purpose

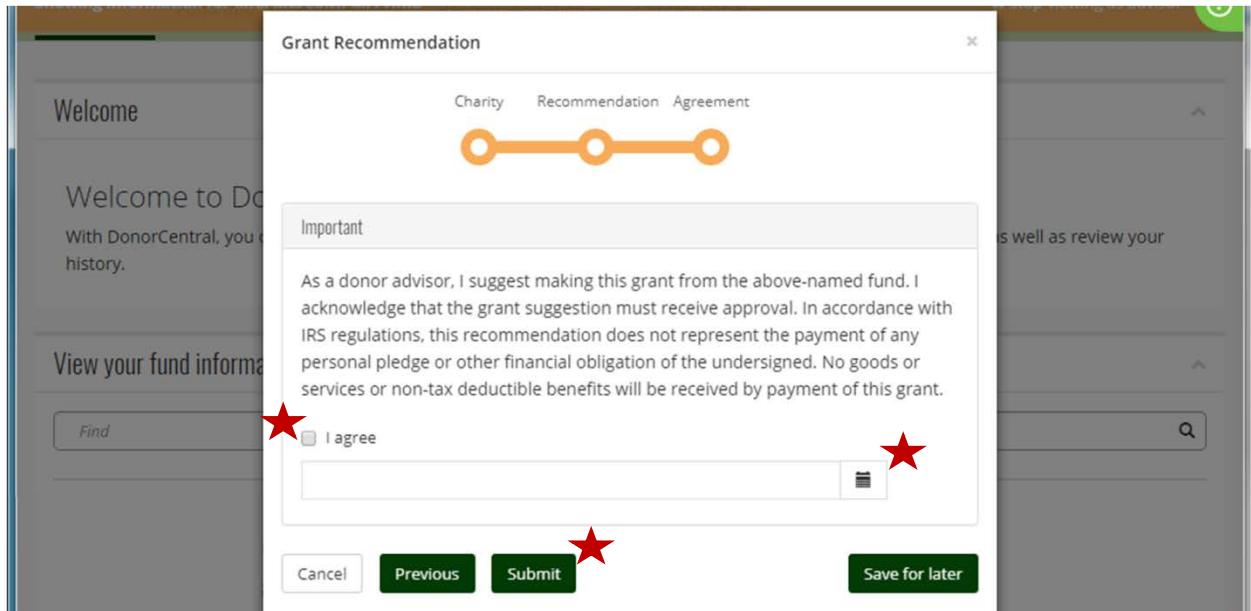
Special request

**Recurrence**

Is recurring

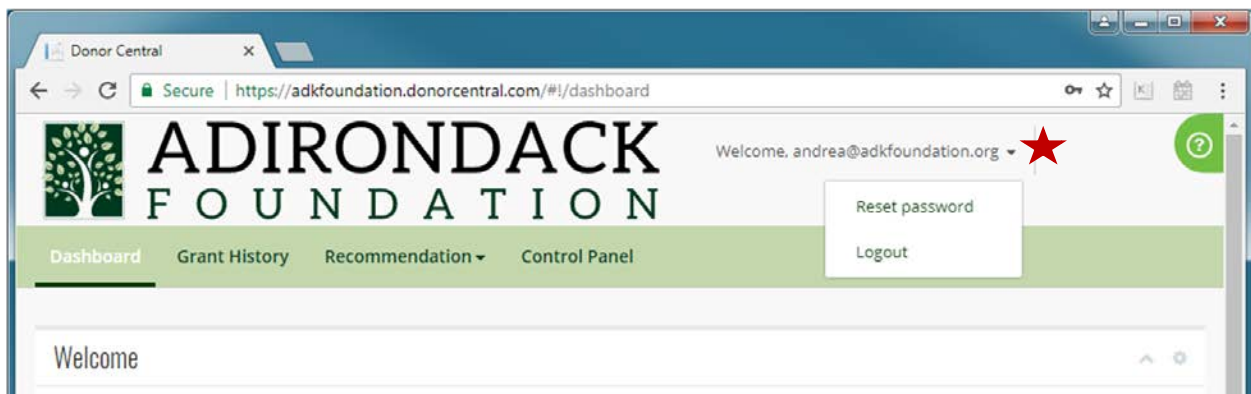
Cancel Previous Next Save for later

In the final step, you will be asked to agree to the terms of the recommendation process. Signal agreement by checking the **I agree** checkbox and selecting the date from the *calendar icon*. After taking these steps, click the **Submit** button.



### **Logout or Reset Password**

At any time when using DonorCentral, you can logout or reset your password. Click the drop-down menu next *Welcome, <user name>* at the top right of the screen and select either **Reset password** or **Logout** from the drop-down menu.



The **Logout** menu item will return you to the login page.

The **Reset Password** menu item will open the **Reset password** screen. Enter the information requested, ensuring that any new password meets the system **Password requirements**. When all password requirements have been met, click the **Change password** button at the bottom of the page. Click **Cancel** to exit the process at any time.

Dashboard Grant History Recommendation ?

★ Reset password

Old password  
Old password  
Enter your password

New password  
New password

Confirm password  
Confirm password

★ Password requirements

- ✓ 8 or more characters
- ✓ At least 2
- ✓ Capital letters ✓ Numbers ✓
- Special characters (!,@,#,\$)

★ Change password Cancel

### **Additional Information and Help**

DonorCentral has built-in checks to help ensure you are entering proper data into the system. If you forget to populate a data field or enter information that doesn't fit with the requested data type, the system will show you an error and describe your problem.

Grant Recommendation

Grant

Amount \*  
\$ abc123  
Please enter a valid dollar amount

Advisor anonymous

Grant purpose

Additional help can also be found by clicking the *green question mark tab* at the upper right of your screen. Finally, you may also contact the staff at Adirondack Foundation by phone at (518) 523-9904 or by email at [info@adkfoundation.org](mailto:info@adkfoundation.org) at any time.