Adirondack Foundation

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 updated 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 did not receive 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.

**Getting started**
DonorCentral is available from the Adirondack Foundation homepage.

[https://www.adirondackfoundation.org/](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.

If you have not yet logged in since the 2 step authentication update, then click the link that says **Don’t have a Blackbaud ID? Create a new one**. Use this to enter your email address and 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.

Note: If you get redirected to a page other than https://adkfoundation.donorcentral.com then you are not on the correct page. Return to the Adirondack Foundation homepage to login again.

**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.
Welcome to DonorCentral!
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

Adirondack Icicle Fund
Spendable balance: $187,142.75
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.

See your grant history

Scroll through to see your pending grant recommendations, approved grants awaiting payment and paid grants. You can also see your full history - including summary information and charts - by clicking the link below or by clicking “Grant history” in the navigation bar.

Explore Opportunities

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.
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.
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.
**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.

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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.

**NOTE:** If you are making multiple recommendations, you should use the **Save for later** button so you can submit them all at the same time. This way, you will receive one email notification with all grants you are requesting, rather than an email for each one.
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.

**NOTE:** If you experience an endless moving black symbol that means the system is thinking, you can use the Save for later button. Once you have clicked Save for later, you will be directed to the home page and a list of the grants waiting to be submitted. Click the button(s) next to each grantee organization and click the Submit button. You should get a confirmation in a moment to let you know the submission has gone through.

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**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.

**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.

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 at any time.