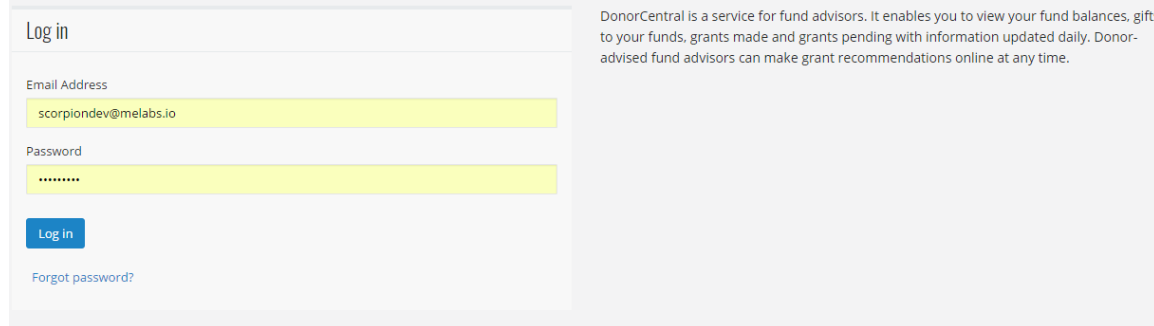Triangle Community Foundation's DonorCentral provides a secure, online portal through which you can access fund information. Depending on the type of fund you advise, you may view your latest fund balances, make grant recommendations, or review gift history.

## Getting Started

Fundholders will receive an email that includes a link to the updated DonorCentral user confirmation page. Even if you previously used DonorCentral you must complete this step. Follow the requirements outlined to set up a new password. Once the password is confirmed, the login page will appear. Your username will be the email address that the confirmation was sent to.
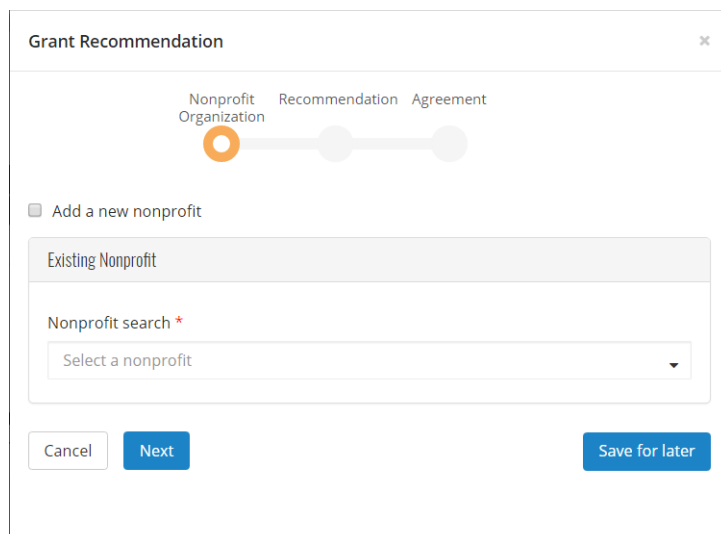
### Log in

**Email Address**

scorpiondev@melabs.io

**Password**

•••••••••

[Log in]

Forgot password?

DonorCentral is a service for fund advisors. It enables you to view your fund balances, gifts to your funds, grants made and grants pending with information updated daily. Donor-advised fund advisors can make grant recommendations online at any time.

Using your email address and newly created password, log into the application.

## Recommend a Grant (Donor-Advised Funds)

DonorCentral makes it easy for you to recommend a grant from the fund(s) you advise. You can replicate previous grants, or research nonprofits and recommend new grants.

1.  Select the **Recommendations** tab on the top menu bar, then select **New Recommendation**. The Grant Recommendation screen appears.

### Grant Recommendation ✕

Nonprofit Organization   Recommendation   Agreement

☐ Add a new nonprofit

**Existing Nonprofit**

Nonprofit search *

Select a nonprofit ▼

[Cancel]  [Next]                                    [Save for later]

2. Select a nonprofit organization by searching for it in the Nonprofit search field.

   The search function works best when the charity name is spelled and capitalized accurately. (Type "YMCA" instead of "ymca".) Use as few words as possible in the search box to yield better results. (Type "Habitat" instead of "Habitat for Humanity of Durham County.")

   If you're unable to find the organization you're looking for, select the "Add a new nonprofit" box and fill out the information you know about the organization. Our staff will confirm that any new organization submitted meets due diligence standards and that contact information is correct prior to mailing grants.

3. Select Next.

4. In the **Fund** section, select the fund you want to recommend from. You can keep the fund selected or search for a different fund by typing in the field provided. If you select the Fund anonymous option, 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 recommended Amount, and Grant purpose. To not display an advisor's name, select the Advisor anonymous option.

6. To recommend a recurring grant, select the "Is recurring" box at the bottom of the Grant box, and fill in the Start time, End time, Frequency, and any Notes. Note that the starting date should be set to a date **at least 2 days** in the future. Recurring grants that are set to process the same day they are created do not have enough time to communicate with our system.



7. Select Next.

8. Acknowledge the grant recommendation requirements by **selecting the I agree box**.



9. Select Submit.

   If necessary, at any time in the process click **Save for Later** to store your grant recommendation without submitting. All saved grant recommendations will be listed on the **Dashboard** tab. To complete it later, navigate to the **Dashboard** tab, scroll down to the grant you have saved, then select the organization's name to continue the grant recommendation.

**View Fund Info (Agency, Donor-Advised, Designated & Scholarship Funds)**

DonorCentral offers easy access to comprehensive information about the fund(s) you advise, allowing you to view and print fund information. To view fund information, you can select either the **Fund info** tab or the **Dashboard** tab.

- From the **Fund info** tab, in the Choose a fund field, start typing the name of the fund. As you type, the system displays funds with matching text. Select the desired fund.

- From the **Dashboard**, in the Find field, enter the name of the fund you want to view. Once it displays, click See more fund information. This takes you to the Fund info tab.

The fund name, description, spendable balance, and other details display. The Period defaults to All, but options for This Month, This Quarter, This Year, or Last Year are also available. Click one of the totals displayed and all related records and details display in the grid below. Hover the mouse cursor over the information bubble to view an explanation of the total.

Fund Information

Period  All ▼

$0.00
Grants pending ⓘ
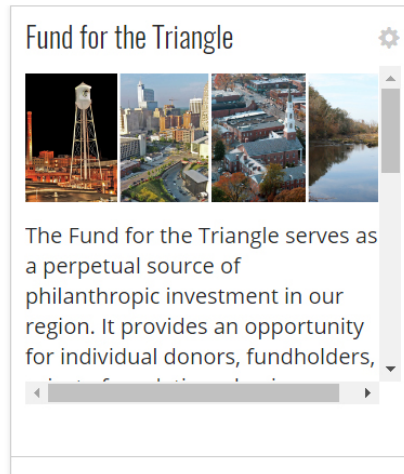
$500.00
Grants paid ⓘ

$0.00
Grants in process ⓘ

$73,075.01
Gifts

$0.00
Interfund Transfers
ⓘ

$0.00
Pending suggestions
ⓘ

**Explore Grant Opportunities**

From the **Dashboard** tab, scroll down the page to see the **Explore Opportunities** section. These are opportunities that Triangle Community Foundation would like to bring to your attention – funding opportunities connected directly to advancing our work in the Triangle community.  Locate the opportunity for which you want to recommend a grant. Click **Recommend a Grant**. The Grant Recommendation screen appears. For information about creating a grant recommendation, see the Recommend a Grant section above.

Fund for the Triangle ⚙

The Fund for the Triangle serves as a perpetual source of philanthropic investment in our region. It provides an opportunity for individual donors, fundholders,

●

**View Grant History**

To view the fund's grant history, grant totals by year, and other general grants information, select the **Grants History** tab. By using the filter at the top, you can view grants by year, by fund, or by organization.