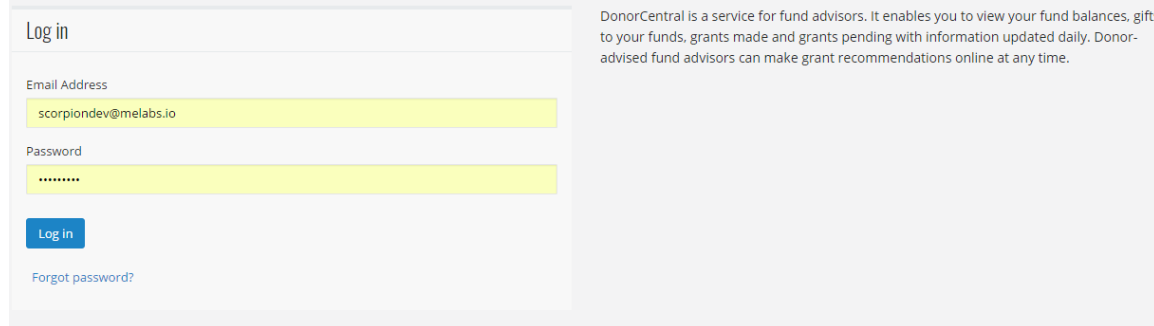


Triangle Community Foundation's DonorCentral provides a secure, online portal through which you can access fund information. Depending on the type of fund you advise, you may view your latest fund balances, make grant recommendations, or review gift history.

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.



The screenshot shows a login form with the following elements:

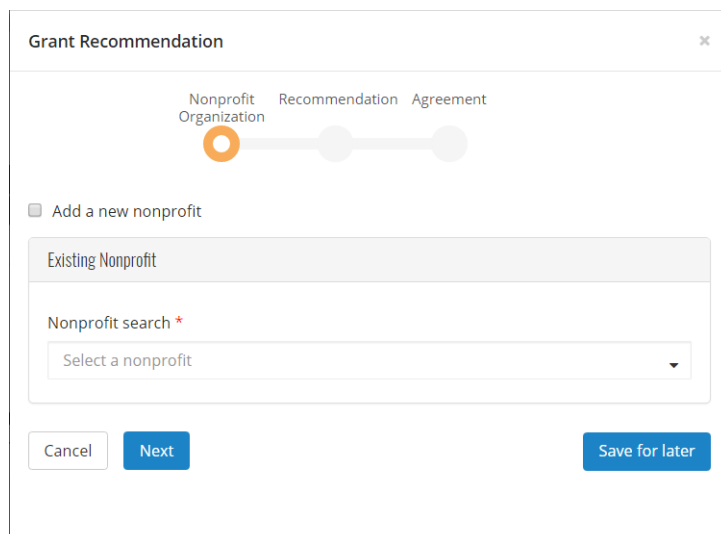
- Log in** header
- Email Address** field containing `scorpiondev@melabs.io`
- Password** field with masked characters (dots)
- Log In** button
- [Forgot password?](#) link
- Text on the right:** "DonorCentral is a service for fund advisors. It enables you to view your fund balances, gifts to your funds, 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.



The screenshot shows the "Grant Recommendation" screen with the following elements:

- Progress indicator:** A horizontal line with three circles. The first circle is labeled "Nonprofit Organization" and is highlighted with an orange ring. The second circle is labeled "Recommendation" and the third is labeled "Agreement".
- Add a new nonprofit**
- Existing Nonprofit** section containing:
 - Nonprofit search *** label
 - A dropdown menu with the text "Select a nonprofit"
- Buttons:** "Cancel", "Next", and "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.

Grant

Amount *

\$ 1000

Grant recommendation minimum is \$250.

Advisor anonymous

Grant purpose

to support the Fund for the Triangle, and Triangle Community Foundation's community programs

Recurrence

Is recurring

Cancel Previous Next Save for later

7. Select Next.

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

The screenshot shows a web form titled "Grant Recommendation" with a close button (x) in the top right corner. At the top, there is a progress indicator with three orange circles connected by a line, labeled "Nonprofit Organization", "Recommendation", and "Agreement". The "Recommendation" step is currently active. Below the progress indicator is a text box with the following text:

Important

By confirming below as Advisor to the Fund, I recommend that Triangle Community Foundation review and approve distribution(s) from the fund named and to the organization listed below. I acknowledge that approval of fund distributions rests with the Board of Directors of Triangle Community Foundation, which ensures that distributions meet IRS regulations and the policies and purposes of the Foundation. I acknowledge that grants which are not compliant with IRS regulations may impose excise taxes on the undersigned Advisors and the Foundation. I certify by checking "I agree" below that the recommendations listed do not or will not: 1) Result in tangible benefits, goods, or services being received by me or a related person; 2) Satisfy a legally binding pledge for which I or a related person have an obligation to fulfill.

I agree

At the bottom of the form, there are four buttons: "Cancel", "Previous", "Submit", and "Save for later".

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

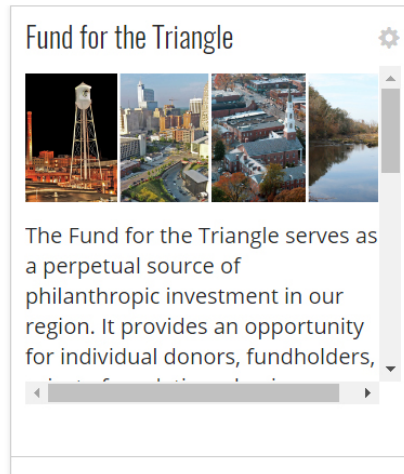
\$73,075.01
Gifts

\$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.



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.