triangle community FOUNDATION
MAKE A DIFFERENCE

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

Logging in for the first time

After orientation with your fund liaison, your DonorCentral credentials will be activated. Fundholders will receive a welcome email from DonorCentral with a link to set up a user ID (either via Google ID or a Blackbaud ID) and a password. Instructions for that process are also listed below.

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Our login has changed! Reestablish your account (use your email) by logging in with Google OR create a new Blackbaud ID. Questions? Call Donor Services: 919-474-8363

ⓘ Add an extra layer of security with two-step authentication! **Learn more**

Sign in to continue

Blackbaud ID

donorservices@trianglecf.org

Password

••••

Forgot password?   ☐ Remember my email

Sign in

G Sign in with Google

Don't have a Blackbaud ID? Create a new one

Be sure to use the email address that received the welcome email when completing this process.

To create a new Blackbaud ID:
1. On the Login page, click the "Don't have a Blackbaud ID? Create a new one" link.
2. Fill in the form to create your Blackbaud ID.
3. You will be sent an email to confirm your email address associated with your Blackbaud ID.
4. Click the link on the confirmation email to confirm your Blackbaud ID.
5. You will be redirected back to the Login page.
6. Enter your newly created credentials to login.

If you prefer using a Google ID with your Gmail account
1. Click the "Sign in with Google" link.

2. You will see a Google Login.
3. Enter your Google login credentials.
4. You will then be logged in.
5. If/when you have a Blackbaud ID:
6. Enter your credentials on the Login page.
7. You will then be logged in.

Logging in after the first time

Use your web browser to visit www.trianglecf.org and select the "Log in to A Fund" link in the top center of the home page.

Forgot your password (or the url to register your password has expired)? Click "forgot password" on the login page and follow the instructions.

Please keep in mind that the email address you enter *must* match the address we have on file. If you want to change that email address, call the Donor Services line at 919.474.8363.

Recommend a Grant

DonorCentral makes it easy for you to recommend a grant from the fund(s) you advise. You can replicate previous grants or recommend new grants. The Foundation processes grants on a weekly cycle. Grants received by Sunday at 11:59 pm will usually be in the mail by the following Friday, as long as there are no due diligence issues with the nonprofit.

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

2. Select a nonprofit organization by searching for it in the Nonprofit search field or chose from a prior recipient. The search function works best when the charity name is spelled and capitalized accurately. (Type "YMCA" instead of "ymca".)

3. If you're unable to find the organization you're looking for, select the "Add a new nonprofit" box and fill out the information about the organization. Our staff will confirm new organizations meet due diligence standards. Select Next.

4. In the **Fund** section, select the fund you want to recommend from. 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. Select Next.

7. Acknowledge the grant recommendation requirements by **clicking the I agree box** and review.

8. After reviewing grant details, 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.

Reviewing Fund Information

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. In the Chose A Fund field, type the name of the desired fund to select it.

The fund name, description, spendable balance, and other details display on the Fund Info tab. 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	$500.00	$0.00	$73,075.01	$0.00	$0.00
Grants pending ⓘ	Grants paid ⓘ	Grants in process ⓘ	Gifts	Interfund Transfers ⓘ	Pending suggestions ⓘ
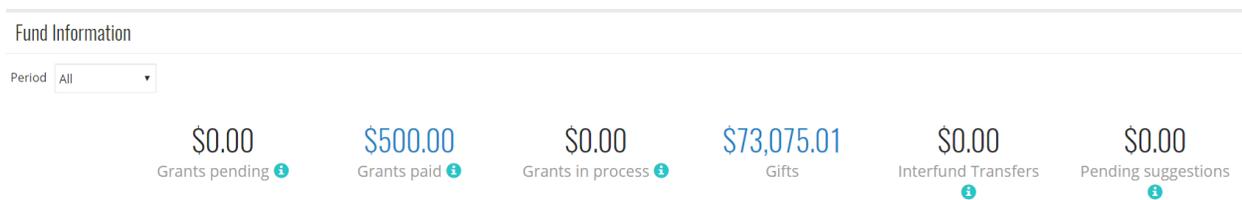
Explore Grant Opportunities

From time to time, the Foundation will share funding opportunities with fundholders. You'll see these on the dashboard tab at the bottom of the page.   To recommend to these organizations listed:

1. Locate the opportunity for which you want to recommend a grant.
2. Click **Recommend a Grant**. The Grant Recommendation screen appears.
3. 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,
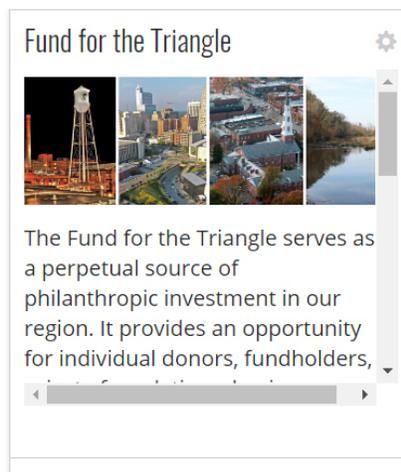
View Grant History

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.

Grantmaking FAQ

How will I know if I submitted a grant successfully on DonorCentral?
You will receive an email confirmation with the details you submitted.

How long does it take to process a grant recommendation?
Barring any due diligence issues, if we receive the grant recommendation by Sunday at 11:59 PM, the grant check will be in the mail by Friday. Occasionally it is necessary to adjust this timeline due to holidays or other one-time occurrences. If this occurs, the updated schedule will be listed in DonorCentral

How will I know when a grant has been mailed?
There are a few different places to check on DonorCentral to check the status of a grant reccomendation.
- o Navigate to Funds, then click on grants processed to see the list of grants processed from the fund.
- o Navigate to Grants; the most recently processed grant will be listed on the top left hand side. On this tab you can see the date the grant was processed.
- o Navigate to the Home tab, scroll all the way to the bottom and see the most recently processed grant listed in the tiles at the bottom, also noting the date the grant was processed.