

# NAPA VALLEY

## COMMUNITY FOUNDATION

### **DonorCentral User's Guide**

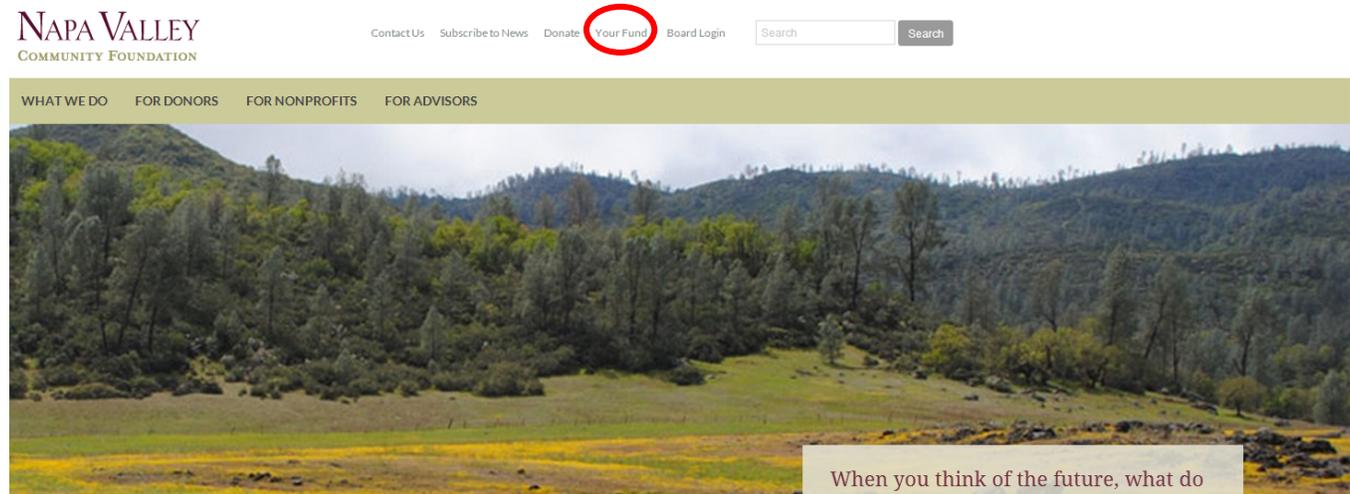
*Online Access to Your Fund and Grant Information*

## Accessing Your Fund Information via DonorCentral

Visit <http://www.napavalleycf.org/>

Click on "Your Fund" at the top of the page

You can also access DonorCentral by going to: [https://www.edonorcentral.com/login\\_2172.asp](https://www.edonorcentral.com/login_2172.asp)



Enter your user name and password on the "DonorCentral Sign On" page. If you have any trouble logging in, contact Lupe Hernandez at 707-254-9565 x18 or [grantsadmin@napavalleycf.org](mailto:grantsadmin@napavalleycf.org).



### DonorCentral Sign On

User Name:	Password:	Sign On
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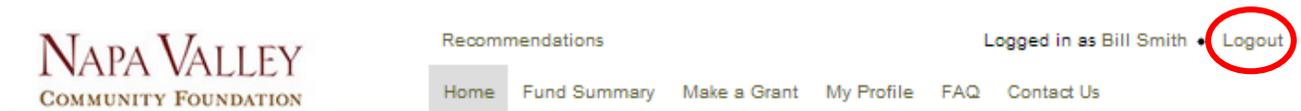
[Forgot Your Password?](#)

DonorCentral is a service for the Napa Valley Community Foundation clients and their authorized advisors and representatives to view fund balances, contributions to the funds and grants made. The information is updated daily. Napa Valley Community Foundation clients can also use this online service to make grant recommendations.

If you would like to register to use DonorCentral, [click here](#).

Take a TOUR of DonorCentral by [Clicking here](#).

When you are done using the DonorCentral site, make sure you click "Logout" to end your session.



## Modifying Your Information

Click on “My Profile” and then the “Edit” button at the bottom of the page to change your password, edit or update your contact information and select your interests (optional). We will use the interest areas from your profile to gear content on DonorCentral to the kinds of charitable programs you like to support. Make sure you click the “Save” button to save your changes.

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**My Profile**

[Change Password](#)

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**Main Profile Information**

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Name Mr. and Mrs. Bill Smith

E-Mail billsmith@gmail.com

Work Phone (555) 789-5689

Ext.

Cell Phone (555) 769-2589

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**Address Information: Home Address**

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Address Type HOME

Address Line 1 8968 Main St.

City/State/Zip Napa, CA 94559

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**Interests**

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GranteeType  Arts, Culture, and Humanities  
 Education  
 Environment and Animals  
 Health  
 Human Services  
 International, Foreign Affairs  
 Public, Societal Benefit  
 Religion Related  
 Mutual/Membership Benefit  
 Unknown, Unclassified

[Edit](#)

Click 'Edit' to modify your profile information and manage your giving preferences.

## How to Recommend a Grant from Your Fund

To recommend a grant from your Fund, click the “Make a Grant” link in the navigation at the top of the page.

If this is the first time you’re granting to a particular organization, type the name of the organization you wish to support in the “Name” field of the “Research Charities” form to search the NVCF database. You can also search by Tax ID, location, or Grantee Type.

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Logged in as [Bill Smith](#) • [Logout](#)

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### Research Charities

Look up nonprofits in NVCF's database by any of the options below to review potential matches. If your search doesn't yield any results, or if you are unable to find the organization you want to support, please go to the Home Page and click on the link to "Make a grant to a group that's not in the NVCF database."

Name

Tax Id (optional)  Example: 04555555

City  State/Province  Postal

GranteeType

Search in prior recommendations

<u>Organization Name</u> ^	<u>Location</u>	<u>Actions</u>
California Native Plant Society <span style="font-size: small; color: blue;">GS</span>	Sacramento, CA, 2707 K Street, Suite 1	<a href="#" style="border: 2px solid red; border-radius: 50%; padding: 2px;">Make a Grant</a>
California Native Plant Society - Napa Chapter <span style="font-size: small; color: blue;">GS</span>	Napa, CA, 2201 Imola Avenue	<input type="button" value="Make a Grant"/>

Page size:

Results from your search will appear under the search fields. Your search may return more than one result. Above are the results for a search of “California Native Plant Society.” There are two results. If there are more than 10 results for your search term(s), a navigation bar will appear at the bottom of the page, allowing you to see additional results. You can also click “Location” to sort alphabetically by city and state.

If there is more than one result for your search, make sure you select the organization with the correct address. It is not uncommon to have a result for the local branch of an organization and one for the national or statewide parent organization.

Once you find your desired organization, click “Make a Grant.”

If your search doesn't yield any results or if you are unable to find the organization or branch you want to support, please click the "New Grant" button at the bottom of the page. A blank grant recommendation form will open. Please fill in all of the fields marked with an asterisk.

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Site Configuration • Recommendations • Alerts Logged in as Ellen Drayton • Logout

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Advisor: (not selected)

### Research Charities

Look up nonprofits in NVCF's database by any of the options below to review potential matches. If your search doesn't yield any results, or if you are unable to find the organization you want to support, please click the New Grant button below. 

Name

City  State/Province  Zip/Postal

Tax ID (optional)  

Interest Code Operator  

GranteeType

Only search in prior recommendations

If you would like to recommend a grant to an organization you've supported in the past, click the "Make a grant to an organization my Fund has supported in the past" link in the "I Want To..." section of the home page

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Recommendations Logged in as Bill Smith • Logout

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#### I Want To...

- [Make a grant to a group that's not in the NVCF database](#)
- [Download Forms](#)
- [Make a grant to an organization my Fund has supported in the past](#)
- [Research GuideStar](#)

#### Fund Information \$964,828.41

Fund Name	Fund Id	Balance	Actions
Napa Valley Demo Fund	9999	\$964,828.41	<input type="button" value="View"/>

When the list appears, find the desired organization and click "Make a Grant" to bring up the grant recommendation form.

Below is an image of the grant recommendation form. If you were able to find the desired organization in the search results, or if this grant is to an organization you've previously supported, most of the fields will be populated automatically from the information in our database. Only fields marked with an asterisk are required, so it's ok if you aren't able to enter all of the requested information. Make sure you click "Save" when you're done.

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Recommendations Logged in as Bill Smith • Logout

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**Grant Recommendation Form**

Existing Organization in NVCF Database

To recommend a grant from your fund, please fill out the form below. Fields marked with \* are required. If you have any questions, please contact us at ellend@napavalleycf.org or (707) 254-9565.

*Upon approval, please allow 2 weeks for processing and distribution of funds to the designated organization.*

Fund Name: \*

Anonymous Grant? \*

The advisor(s) of the above named Fund of the Napa Valley Community Foundation confirm that (i) I (we) will receive no tangible benefit, goods, or services from these organizations, and (ii) these distributions will not be used to satisfy any personal financial obligation we have made to this organization.

I agree  I do not agree

Name of Grantee Organization \*

Address 1

Address 2

City \*

State \*  Zip \*

EIN or Tax ID

Amount: \*

Grant Purpose \*

By selecting the "I Agree" button, the advisor(s) of the above named Fund of the Napa Valley Community Foundation recommend approval of this distribution.

I also acknowledge that by selecting the "I Agree" button I am signing the recommendation form electronically which is equivalent to my legal handwritten signature. I (We) understand that the NVCF Board of Directors will make final approval of this request.

I agree  I do not agree

**Please note: your grant recommendations have not been submitted to NVCF yet! You must complete the steps on page 6 of this manual in order to submit them.**

After you click "Save," you will see a list of your pending grant recommendations. Review the list to make sure the grants listed are accurate. You can access your pending recommendations at any time from the "Recommendations" link at the top of the page. If you want to recommend another grant, click the "Continue suggesting grants" button. This will take you back to the page where you can search for additional organizations and make additional grants.

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Recommendations (1) Logged in as • Logout

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**Pending Recommendations** \$250.00

To submit your recommendations, check one or more of the boxes on the left and click Submit List.

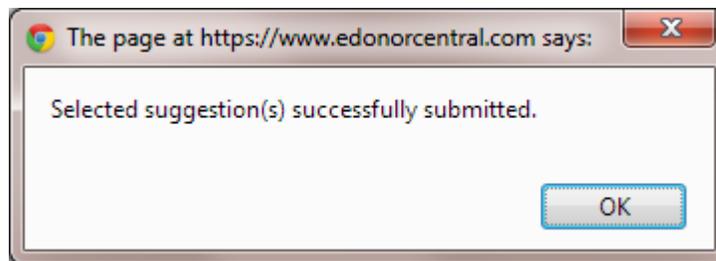
<input type="checkbox"/>	Organization Name	Amount	Actions
<input type="checkbox"/>	Cope Family Center	\$250.00	<input type="button" value="Edit"/> <input type="button" value="✕"/>

## Submitting your Grant Recommendations to NVCF:

To submit one or more of your grant recommendations to NVCF, click the “Recommendations” link at the top of the page and check the box or boxes next to the grant(s) you wish to submit. Click “Submit List” to send your recommendations to our Grants Administrator for processing.

The screenshot shows the Napa Valley Community Foundation website interface. At the top, there is a navigation bar with the logo on the left and links for 'Home', 'Fund Summary', 'Make a Grant', 'My Profile', 'FAQ', and 'Contact Us' in the center. On the right, it says 'Recommendations (1)', 'Logged in as', and a 'Logout' link. Below the navigation bar, the main content area is titled 'Pending Recommendations' with a total amount of '\$250.00'. A message states: 'To submit your recommendations, check one or more of the boxes on the left and click Submit List.' Below this is a table with columns for 'Organization Name', 'Amount', and 'Actions'. The first row is 'Cope Family Center' with a checked checkbox, an amount of '\$250.00', and 'Edit' and 'X' buttons. At the bottom of the table, there are three buttons: 'Continue suggesting grants', 'Recent Grants', and 'Submit List', with the 'Submit List' button circled in red.

You will receive the following on-screen notification when your grants are submitted. You also will receive an email confirming your grants.



To see the grant(s) you just submitted, click “Fund Summary” at the top of the page and scroll down to the “Submitted Recommendations” section.

## Submitted Recommendations

\$500.00

Date ▼	Grantee	Amount	Description
7/10/2013	Cope Family Center	\$250.00	for general support
7/8/2013	Napa Valley Hospice & Adult Day Services	\$250.00	for general support

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## View your Fund Information

On the “Fund Summary” page you can view your Fund’s balance, the grants that have been paid, the grants you have submitted to NVCF but are not processed yet, the gifts made to your Fund, and your PDF fund statements.

Logged in as **Bill Smith** • [Logout](#)

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### Fund Summary

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[Export Grants](#)

Fund:

Period: 

- All
- This Month
- This Quarter
- This Year
- Last Year

Grants Paid \$84,651.00

Date	Grantee	Amount	Description	Grant Status
6/18/2012	Catholic Charities	\$4,768.00	St. Joseph Home for Children in furtherance of charitable purposes	
12/28/2011	Carmel Mission Foundation, Inc	\$12,500.00	Mission Restoration	
6/18/2011	Catholic Charities	\$4,922.00	general support	
6/18/2011	Catholic Community Fd-Community Priorities	\$2,461.00	Community Priorities Fund 25100A	
6/23/2010	Community Hospital Foundation	\$10,000.00	Cancer Fund	
9/27/2009	Archdiocese of St. Paul and Minneapolis	\$0.00	General Support	
4/15/2009	John Ireland-IHM Campus	\$50,000.00		Approved

Page size:

Gifts \$968,828.13

Date	Description	Gift amount	Non-gift amount	Donor
1/3/2013	Check	\$5,000.00	\$0.00	Bill Smith
12/30/2012	14,250 shares ABC Corp common stock	\$823,828.13	\$0.00	Bill Smith
5/2/2012	Check	\$50,000.00	\$0.00	Bill Smith
1/3/2010	Check	\$5,000.00	\$0.00	Bill Smith
1/2/2009	Check	\$85,000.00	\$0.00	Bill Smith

Page size:

Fund Statement ↑

Select a range

Your Fund’s entire grant and gift history is included in the “Fund Summary” section. If you only want to see the fund activity for a restricted length of time (i.e. the last month, quarter or year) you can select the “Period” from the drop-down menu toward the top of the page.

To view a PDF version of either of your two most recent Fund Statements, select the date range you want to see from the drop down menu in the “Fund Statement” section and click the “Get Statement” button.

### Fund Statement

Select a range

07/01/2012 - 12/31/2012

View Fund statement\*

Email Fund statement

Get statement

Fund Balance	\$555,555.55
Available to Spend	\$536,356.55

## Troubleshooting

If you have any questions or you are having trouble with any of the items listed above, please contact Lupe Hernandez, [grantsadmin@napavalleycf.org](mailto:grantsadmin@napavalleycf.org) or (707) 254-9565 x18 for assistance.