DonorCentral Quick Start Guide

DonorCentral is the online portal to your fund information. From here you can view your latest fund balances, get fund statements, make grant recommendations, and review your giving history. You can access DonorCentral anytime via the GWCF website or https://greaterworcester.donorcentral.com.

Getting Started

1. You will receive an email with a link to the DonorCentral login page. The first time you visit, you will need to set up a Blackbaud ID by clicking: Don’t have a Blackbaud ID? Create a new one. DonorCentral is a product of the company Blackbaud.

   Your username MUST BE the email address GWCF has on file for you. If you wish to change the email address we have on file, contact us at (508) 755-0980.

2. Follow the instructions to create your Blackbaud ID. *Remember: Your ID is your email address and a password of your choosing. These are the credentials you’ll use every time to login to DonorCentral.

3. Once you enter your ID information, the system will send you an email to confirm your account. Follow the link to do this.
4. Once you confirm your account, you can **log in to DonorCentral**. We recommend you bookmark the **login link** so you can get to it easily. If you don’t, you can always find the link to DonorCentral at [greaterworcester.org](http://greaterworcester.org).

**The Dashboard**

The dashboard (pictured below) is the DonorCentral homepage. It offers you a snapshot of your fund and your granting. From here you can view your fund’s spendable balance, review your grant history, and click through to recommend a grant. Use the navigation bar across the top of the page to view your fund and grant making in more detail. At any time, you can return to the dashboard page by selecting **Home**.

![DonorCentral Dashboard Screenshot](image)

- **At a glance view your spendable balance!**
- **Click here to recommend a grant!**
**Recommend a Grant**

DonorCentral makes it easy for you to recommend a grant from your fund. You can replicate previous grants you made or search organizations in the GWCF database and recommend a new grant. Here’s how:

1. From the **Dashboard** page, under **View your fund details**, use the **Find** field to select your fund. *Note: Only funds for which you are an advisor will appear in search fields on this site.*

2. Next, select the blue **Recommend a grant** button. The Grant Recommendation screen will appear.

3. Select an organization by searching for it in the **Organization Look Up** field.

   If the organization does not appear, that means GWCF has not granted to them before. That’s ok! Check the **Add a new organization** box to create a new record.

4. Select **Next**.
5. In the **Fund section**, select your fund. If you are the advisory on multiple funds, select the one you want used for this grant recommendation.

6. In the **Grant section**, enter the recommended Amount, Program name, Grant purpose, and any Special request.

   You can also select the **Advisor anonymous** or **Fund anonymous** option.

7. Select **Next**.

   *Note:* At any time in the process click **Save for Later** to store your grant recommendation without submitting it. To return later and complete it, look for it in the **Submit your saved grant recommendations** section.
8. Acknowledge the grant recommendation requirements by selecting the I agree box.

9. Lastly, select Submit. You’re done!

View Your Fund Information

DonorCentral offers easy access to comprehensive information about your fund, allowing you to view, print, and email fund statements. To view fund information, you can select either the Fund tab or the Dashboard (Home) tab from the uppermost navigation bar.

- From the Fund 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 your fund.

- From the Dashboard, in the Find field in the View your fund information section, enter the name of the fund you want to view. Once it displays, click “See more fund information.” This takes you to the Fund 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 your cursor over the information bubble to view an explanation of the total. GWCF updates fund statements monthly, usually around the 15th, so that is when you’ll see the most up to date information about your fund.
View Grant History

To view your grant making history, select the Grants tab from the upper most navigation bar. Here, charts detail your grant totals by year and by recipient. You can also view your pending grant recommendations.
Forgot Your Password?

If you forget your password or would like to reset your password, go to the DonorCentral login page and click **Forgot Password?** Blackbaud will send an automated email to the address on file with GWCF (also known as your Black ID username) with prompts to reset it.

If you have tried to reset your password and your login attempts fail, or if you cannot remember your username, contact Donor Services at Greater Worcester Community Foundation.

Your Donor Services Team

If you have any questions or require assistance granting from your fund, contact the GWCF team at [donorservices@greaterworcester.org](mailto:donorservices@greaterworcester.org) or 508.755.0980.

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