

## DonorCentral User Guide

Fund Name	
Your User ID	
Your Password	

Welcome to DonorCentral, your online tool for managing your fund and making grant recommendations. With DonorCentral, you also can view your fund balance and fund statements, history of gifts to the fund, grants made and grants pending.

### Getting Started

Go to the Oshkosh Area Community Foundation's website: [www.OshkoshAreaCF.org](http://www.OshkoshAreaCF.org). There are several ways to enter DonorCentral.

- Click on the words **DonorCentral** in the upper left of the home page.
- OR** Hold your mouse over **Donors** on the section bar and select **Manage Your Fund** from the drop down menu.
- OR** Click on the **DonorCentral image** of the rotating feature images under the section bar.



The screenshot shows the website's header with the logo and navigation links. A red arrow labeled '1. DonorCentral' points to the 'DonorCentral' link in the top right. Below the header is a navigation bar with 'Donors', 'Advisors', 'Grants', 'Scholarships', and 'About Us'. A dropdown menu is open under 'Donors', and a red arrow labeled '2. Manage Your Fund' points to the 'Manage Your Fund' option. Below the navigation bar is a rotating feature image section. A red arrow labeled '3. Click on the image' points to the 'DonorCentral' image, which is a banner with the text 'DonorCentral A portal to manage your fund online' and a background image of a hand on a computer mouse.

## Registration

Registration is not necessary for individuals who already have met with a Foundation representative and signed a Fund Agreement. Your account already has been activated. The Foundation will supply you with your initial log in and password.

Using the online registration form sends an email with your contact information to one of our staff members, who will then get in touch with you during regular business hours.

You need a user name and password before access is granted. Your user name and password are system-generated when the Foundation activates your account. You can change this password at any time after your initial log in by selecting **Change Your Password** from the My Profile Page on the top navigation of DonorCentral. (The Foundation will not have access to your password after you have changed it from your initial account activation.)



### DONORCENTRAL SIGN ON

User ID	Password	Sign On
JJ0517	*****	

[Forgot Your Password?](#)

DonorCentral is a service for donors who serve as advisors to funds at the Oshkosh Area Community Foundation. It enables you to view fund balances, gifts to the funds, grants made, and grants pending—with information updated daily. You can also recommend grants online.

Are you new to DonorCentral? **TRY IT NOW** - the demo shows how to search for projects to search interesting projects and recommend grants.

For more information on the Oshkosh Area Community Foundation DonorCentral, or to speak directly to a Program Representative, please call us at 920.426.3993. You can also [register online](#).

If you do not have a user name and password, click [register online](#)

Site Configuration | Recommendations | Alerts | [Logout to My Web](#) | Logout

Home | Make a Grant | Fund Summary | **My Profile** | Resources | Contact | FAQ

Account: Penny Hensburg | [Change](#) | [Reset](#)

**My Profile** [Change Password](#)

Change your password at any time on the My Profile tab

Main Profile Information

Name: Thomas and Penny Hensburg

E-Mail: phensburg@new-rc.com

Work Phone: 920.231.6630

Home Phone: 920.688.2837

Cell Phone: 920.478.0194

Address Information: Home Address

Address Line 1: 6360 E. Decavan Road

City/State/Zip: Oshkosh, Wisconsin 54902-7511

[Edit](#)

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

Oshkosh Area Community Foundation  
230 Ohio Street, Suite 100 | Oshkosh, WI 54902-9884  
info@OshkoshAreaCF.org | 920-426-3993

## Security is a Priority

- DonorCentral uses technology for secure communications. DonorCentral will permit donors to use DonorCentral only if their browsers support 128-bit encryption and Secure Sockets Layer (SSL) version 2.0 protocol. These technologies provide a level of security and privacy for users when they access fund information, initiate online fund transactions or send secure messages.
- DonorCentral has built-in timers that terminate access if you are not actively using DonorCentral.
- The fund information on DonorCentral is only used on this site and is not distributed or sold to any other party or site.

## Logging In

Enter your **User ID** and **Password** and click **Sign On**.



Apply online  
Donate online

Find a fund  
Manage your fund

A screenshot of the "DONORCENTRAL SIGN ON" form. The form has two input fields: "User ID" containing "110517" and "Password" containing "\*\*\*\*\*". Below the password field is a link that says "Forgot Your Password?". To the right of the password field is a "Sign On" button. A red arrow points from the left towards the "User ID" field, labeled "User ID, Password". Another red arrow points from the right towards the "Forgot Your Password?" link, labeled "Forgot Password?".

**Did you forget your password?** Click on the “Forgot Your Password?” link under the Password box. You will be prompted to enter your email address so your password can be sent to you.

*(The email address you enter must match the primary email address associated with your fund with the Foundation. If you have not provided your e-mail address to the Foundation, please do so in the event that you forget your password and to receive notifications about your fund activity and statements. DonorCentral will never sell or give anyone outside the company your email address.)*

You are responsible for maintaining the security of your user name, password and personal fund information on DonorCentral. When you finish using DonorCentral, you should click on **Logout** on the far right side of the top navigation menu and close the browser. In addition, you should never reveal your user name or password to anyone.

If others associated with your fund(s) require DonorCentral access, a written request should be submitted to the Foundation. This request should include the name, address, phone and email address for the person seeking access. This request also should include authorization from the appropriate party already associated with the fund(s).

## Home

After you log in, the Home page presents several options. From here you can:

- Access links to features of interest and alerts about your fund
- View your fund information, pending and recent grants and your grant history
- Recommend a grant
- Edit your profile
- Contact us and view Frequently Asked Questions

Check the status of recent grant recommendations



Locate a charity and make a grant

Update your email, phone, other contact info



Support the Oshkosh Public Library! The Trust Funds for Library Excellence include five charitable endowments that will allow the Foundation to help steward donor gifts and grow the library's funds for sustainable support. [Click on the image to learn more.](#)

We will provide tips on using DonorCentral, and periodic notices regarding your fund information here

Welcome **Your Name**

Welcome to the new DonorCentral! You will notice this site looks different — it's cleaner, brighter, more inviting and easier to navigate. The team at the Oshkosh Area Community Foundation is standing by to answer questions and help you learn more. Please see our FAQ (top menu navigation) with answers to common questions.

**Alerts**

There are no alerts at this time.

Delete All

**Quick Links**

- Donate Now
- Make a Grant to a New Organization
- Research GuideStar
- Calendar of Events
- Contact Us

**Fund Information** **\$335,129.03**

Fund Name	Fund ID	Balance	Actions
Your Fund Name	XXXX	\$37,854.06	View
Your Fund Name	XXXX	\$297,574.97	View

**My Grant History**

My Grant History

- City of Oshkosh Parks Department
- Oliver Slobin Fund Profile
- Shawnee Cancer Recovery Foundation
- Oshkosh Area United Way
- Oshkosh Public Library Profile
- Madison County Fair & State Fair
- Community Congregational Church
- UW Oshkosh Foundation, Inc.
- Oshkosh Symphony Orchestra, Inc.
- Ushkosh Center for Art and Culture

Top 10 grant recipients by total \$ amount

**Recent Grants**

Grantee	Date Paid	Amount	Actions
Oshkosh Area United Way	1/7/2015	\$1,750.00	Make a Grant
Oshkosh Area United Way	3/12/2014	\$1,600.00	Make a Grant
Oshkosh Area United Way	1/23/2013	\$1,600.00	Make a Grant
Oshkosh Area United Way	12/28/2011	\$1,600.00	Make a Grant
Clyde Park Rural Fire Department	9/8/2011	\$600.00	Make a Grant

## Fund Summary

The Fund Summary provides fund information for the month, quarter, this year, last year and all (cumulative for the life of the fund). For details in each category, click on **Down Arrow** next to each dollar amount.

The screenshot shows the Fund Summary page for the Oshkosh Area Community Foundation. The page includes a navigation bar with links for Recommendations, Alerts, Home, Make a Grant, Fund Summary, My Profile, Resources, Contact, and FAQ. The user is logged in as 'Your Name'. The Fund Summary section displays a table with the following data:

Category	Amount	Action
Gifts <sup>1</sup>	\$166,093.58	Down Arrow
Non Gifts	\$50,527.20	Down Arrow
Grants Paid	\$121,915.00	Down Arrow
Fund Balance <sup>3</sup>	\$37,554.06	Up Arrow

Annotations on the screenshot include:

- A red arrow pointing to the 'Fund Summary' link in the navigation bar with the text: "Click this link to access this page".
- A red arrow pointing to the 'Fund Statement' link with the text: "Check a current or recent fund statement on screen, or email a PDF of your statement to yourself, or someone else".
- A red arrow pointing to the 'Down Arrow' next to the 'Grants Paid' amount with the text: "Click to view all past transactions".

The 'Fund Statement' section includes a date range selector (10/01/2009 - 12/31/2009), radio buttons for 'View Fund Statement\*' and 'Email Fund Statement', and a 'Get Statement' button.

**Gifts:** Your Fund Summary shows each gift that has been posted to the fund, including the date it was received, who made the gift (if not anonymous), and what kind of gift (ie, cash, stock transfer, etc.). If a gift is in the process of being transferred, it will not show on the gift history until the Foundation has received the proceeds (from a securities or asset transfer, for example).

**Grants Paid:** Your Fund Summary displays all approved grants for which a check has been processed and mailed. This information is generally posted within two weeks of making a grant recommendation unless you have given the Foundation other instructions.

**Grants Pending:** Your Fund Summary allows you to see grants that you have recommended for which funds have not yet been disbursed. This process typically takes about two weeks.

**Fund Balance:** Shows your most recent month-end fund balance.

## Print or Email Your Fund Statement

The screenshot shows a 'Fund Statement' section with a date range selector set to '01/31/2010 - 01/31/2010'. Below it are two radio buttons: 'View Fund Statement\*' (selected) and 'Email Fund Statement'. A text input field is positioned next to the 'Email Fund Statement' option. A 'Get Statement' button is at the bottom. Red arrows and text boxes provide instructions: one points to the date range selector with the text 'Select a date range of the fund statement you wish to view. The Foundation keeps the past three statements on DonorCentral.'; another points to the 'Email Fund Statement' radio button with the text 'Email your fund statement to yourself or someone else by checking the Email Fund Statement radio button and entering the address here'; and a third points to the 'Get Statement' button with the text 'Click on Get Statement after you've made your selection'.

**To Print Your Fund Statement:** Select the range of dates corresponding with the monthly statement you wish to view. Check the radio button next to View Fund Statement, then click the Get Statement button. DonorCentral will open a new window with a PDF format of your statement. From here, you can save the file or print using the menu commands in your web browser.

**To Email Your Fund Statement:** Select the range of dates corresponding with the monthly statement you wish to email. Check the radio button next to Email Fund Statement and enter the email address into the adjacent box. (You can send the statement to one email address at a time.) Click the Get Statement button. DonorCentral will provide confirmation that the email was sent.

## Recommend a Grant

You can recommend a grant to an organization you previously supported, search our database for a nonprofit you've never granted to or provide information about a nonprofit that is not in our database.

The screenshot shows the 'Search for a Charity' form. The top navigation bar includes 'Recommendations', 'Alerts', 'Logged in as: Your Name', and 'Logout'. A 'Make a Grant' button is highlighted in the navigation bar. A red arrow points to this button with the text 'Click this link to access this page'. The search form includes fields for 'Name' (with a 'contains' dropdown), 'City', 'State/Province' (with a '-- Select --' dropdown), and 'Zip/Postal'. There are also fields for 'Tax ID (optional)' and 'Interest Code Operator' (with an 'OR' dropdown). A checkbox labeled 'Only search in prior recommendations' is present. At the bottom are 'Search', 'Clear', and 'New Grant' buttons. A red arrow points to the 'New Grant' button with the text 'If your search results did not include the charity you were looking for, select "New Grant" to complete a grant recommendation form for a previously unsupported organization'. A red box on the left side of the form contains the text 'Best way to locate a charity and recommend a grant' with an arrow pointing to the search fields.

**Search our database:** Type the name of an organization or any key word into any of the search fields, including organization name, city, state, ZIP code or tax ID. Then click **Search**.

Click the **GuideStar** button to research an organization

Boys & Girls Club of the Tri County Area 	Berlin, WI, 344 Broadway St. PO Box 254	Make a Grant	View Detail
Boys and Girls Club of Oshkosh, Inc. 	Oshkosh, WI, 501 E. Parkway Ave. PO Box 411	Make a Grant	View Detail
Boys' & Girls' Brigade Association 	Neenah, WI, 109 W. Columbian Ave. PO Box 665	Make a Grant	View Detail

**GuideStar:** To research an organization before you make a grant, click the **GS logo** next to the organization's name in your search results. The logo is a link to GuideStar, a national database with detailed information on charitable organizations.

**Previously Supported Organizations:** The list of organizations you've previously supported is displayed on your Home Page. To support that organization again, click the Make a Grant button. (Some fields may need to be entered or adjusted for a different amount of support or specific cause.)

time.

Organization

**\$335,129.03**

Fund ID	Balance	Actions
XXXX	\$37,554.06	View
XXXX	\$297,574.97	View

### My Grant History



- City of Oshkosh Parks Department
- Clyde Park Rural Fire Department
- Shawnee Cancer Recovery Foundation
- Oshkosh Area United Way
- Oshkosh Water Park Fund Profile
- Wabasha Stanley Fund Profile
- Community Congregational Church
- UW Oshkosh Foundation, Inc.
- Oshkosh Symphony Orchestra, Inc.
- Uregration Center for Art and Culture

### Recent Grants

Grantee	Date Paid	Amount	Actions
Oshkosh Area United Way	1/7/2015	\$1,750.00	Make a Grant
Oshkosh Area United Way	3/12/2014	\$1,600.00	Make a Grant
Oshkosh Area United Way	1/23/2013	\$1,600.00	Make a Grant
Oshkosh Area United Way	12/28/2011	\$1,500.00	Make a Grant
Clyde Park Rural Fire Department	9/8/2011	\$500.00	Make a Grant

Select the **Make a Grant** button to an organization you previously supported again.

**Make a Grant:** When you've found the organization you wish to receive your grant, click on the **Make a Grant** button. DonorCentral will fill out the organization's information on the Grant Recommendation Form. You must enter the dollar amount, even if it's the same as a previous grant recommendation. (Grant disbursements must be in whole dollar amounts with a minimum \$100 grant.)

The screenshot shows the 'Grant Recommendation Form' interface. At the top, there is a header 'Grant Recommendation Form' and a sub-header 'Grant Recommendation Form'. Below this is a 'Please note' section with IRS regulations. The form fields include: 'Funding Source' (dropdown menu with 'Your Fund Name' selected), 'Organization Name' (text box with 'Boys & Girls Club of the Tri County Area'), 'Address' (text box with 'PO Box 254'), 'Amount' (text box with a red box around it and an annotation 'Enter the grant dollar amount (must be in whole dollars, minimum \$100)'), 'Give Anonymous' (dropdown menu with 'No' selected), 'Grant Purpose' (text area), 'In Memory/In Honor of' (text area), and 'Special Instructions' (text area). Below these is an IRS regulation declaration with two radio buttons: 'I agree' (selected) and 'I do not agree'. A red box is around the 'I agree' button with an annotation 'You must select the radio button in front of "I agree" to the IRS regulation declaration'. Below the declaration is a section 'Please send acknowledgement to:' with a note 'If you would like an acknowledgement card sent to an individual for whom this grant was made in honor/memory of, please indicate below. If no acknowledgement, please skip this section.' This section has fields for 'Name', 'Addr1', 'Addr2', 'City', 'State' (dropdown), and 'ZIP'. A red bracket is around these fields with an annotation 'Complete this information if you would like an acknowledgement card sent to an individual for whom your grant was made in honor/memory of'. At the bottom are 'Save' and 'Reset' buttons. A red box is around the 'Save' button with an annotation 'CLICK SAVE TO SUBMIT YOUR GRANT REQUEST'. On the right side, there is a red annotation 'More information about your grant helps us accurately direct it and carry out your intent' pointing to the 'Grant Purpose' and 'In Memory/In Honor of' fields.

Be sure to select the radio button in front of "I agree" under the IRS regulation declaration in order for your grant recommendation to be processed.

Once submitted, you will receive a confirmation email and the Foundation will be notified of your request. You also will be prompted to enter an email address if you would like your grant recommendation to be shared with others.

*Note: Online grant recommendations typically take two weeks for approval and payment. Grant checks are mailed on Thursday of each week. Please contact the Foundation if your grant recommendation requires a different schedule of payment.*

## **Contact Us**

Click on the **Contact** link in the top navigation menu to view a complete staff listing.

If you have questions about DonorCentral, each of our staff members are trained to assist you. Please call us at 920-426-3993 for assistance, or leave a voice mail message during nonbusiness hours.

## **My Profile**

Through **My Profile**, you can edit your personal information. When you make changes to any of these categories, the Foundation will be notified of your changes and we will then update your records in our database.

OSHKOSH AREA COMMUNITY FOUNDATION

Recommendations Alerts Logged in as **Your Name** Logout

Home Make a Grant Fund Summary **My Profile** Resources Contact FAQ

**My Profile** — **Click on this tab to view My Profile**

Change Password

Main Profile Information

Name

E-Mail

Work Phone

Home Phone

Cell Phone

Address Information: Home Address

Address Line 1

City/State/Zip Oshkosh Wisconsin 54902-7611

**Edit** — **Click the edit button to modify your Profile.**

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

When you update your contact information in DonorCentral, our staff will receive a notification so that we can keep our records up to date.

Oshkosh Area Community Foundation  
230 Ohio Street, Suite 100 | Oshkosh, WI 54902-5894  
info@OshkoshAreaCF.org | 920-426-3993