



Here for Good

Community Foundation

for Monterey County

DonorCentral Guide

DonorCentral is the Community Foundation for Monterey County's online fund management system. You can access detailed fund information, including your balance and gift and grant history, as well as view, print or email quarterly fund statements. Donor Advisors can also recommend grants.

If you need assistance or have any questions, please contact the CFMC Philanthropic Services team at DonorServices@cfmco.org.

ACCESS DONORCENTRAL

To access DonorCentral at any time, either:

- go directly to the login page: <https://cfmco.donorcentral.com/>
- Or
- Start at the CFMC website at www.cfmco.org/donor-central

SETTING UP YOUR ACCOUNT

You will receive a welcome email with a link to the DonorCentral user confirmation page. Follow the requirements outlined on that page, enter the email address associated with your CFMC fund, and create a password.

To finish setting up your account, you will receive an email from Blackbaud, the developer of DonorCentral, asking you to confirm your email address.

After confirming, use your email address and newly created password to log in to DonorCentral at <https://cfmco.donorcentral.com/>.

EXPIRED PASSWORD LINK

If you need a new link, please email us at DonorServices@cfmco.org and we will resend the welcome email.

FORGOTTEN PASSWORD

If you have forgotten your password, click on "Forgot password?" on the DonorCentral login page. Enter the email address associated with your fund and a temporary password will be emailed to you. If you still cannot log on, please email us at DonorServices@cfmco.org.

CHANGE YOUR PASSWORD

1. Once logged in, you will see on the top right of your screen your initials in a circle. Click there.
2. Click your email address.
3. Click edit password. Enter your current password, and then create a new password.

VIEW YOUR FUND INFORMATION

To view fund information, on the home page, click your fund name from the 'View Your Fund Details' tile, or click on 'Funds' in the top menu of your screen.

This screen displays the fund name, balances and other details. The date range defaults to all, but you can adjust to view by quarter, the year, last year or specific range.

To view a PDF of a Fund Statement, click 'View Statement', select the date range in the pop up window, and then click 'View'. To email yourself a fund statement, click 'Email Statement', select the date range in the pop-up window, and then click 'Send'. You can only email the statement to the address connected to the fund in the CFMC database.

To view information on grants or gifts, click on the blue dollar amount, and a list will appear.

The screenshot shows the 'Your Fund Name' page. At the top right, it displays 'Market value as of 4/1/2021' as \$52,538.20 and 'Spendable balance as of 4/1/2021' as \$52,038.20. Below this are buttons for 'View statement', 'Email statement', 'Print page', and 'Configure page labels'. A navigation bar includes 'Fund details', 'Market value', and 'Activity'. A 'Date range' dropdown is set to 'All'. The 'Fund details' section shows four categories: 'Grants pending' with a blue dollar amount of \$500.00, 'Grants paid' with a blue dollar amount of \$34,750.00, 'Grants in process' with 'N/A', and 'Gifts' with a blue dollar amount of \$76,808.26. The 'Pending recommendations' category is also listed as 'N/A'. Red circles highlight the dollar amounts for Grants pending, Grants paid, and Gifts.

If you have multiple funds, an option to 'Select Funds' will show on this page, allowing to view information for just one fund, or multiple funds.

This screenshot is similar to the previous one but highlights the 'Select funds' button in the top navigation bar with a red circle. The 'Fund details' section shows four categories: 'Grants pending' with a blue dollar amount of \$25,000.00, 'Grants paid' with a blue dollar amount of \$363,000.00, 'Grants in process' with 'N/A', and 'Gifts' with a blue dollar amount of \$560,000.00.

GIFTS AND GRANTS INFORMATION

You can also select Gifts or Grants along the top menu bar. This will take you to pages that show more details, including graphs of activity by year.