

Your Guide for the new DonorCentral

The Oklahoma City Community Foundation is pleased to provide DonorCentral, a secure and convenient online reporting system for advisors of Gift Funds and Legacy Funds. DonorCentral offers the ability to review fund balances, gift history and make grant recommendations. As of July 20, 2015, we are utilizing a new version of DonorCentral. Below are helpful steps to ensure the new DonorCentral is a useful tool for you. If at any time you have questions or need assistance, please contact Jennifer Stewart at 405/606-2912 or j.stewart@occf.org.

Accessing DonorCentral

DonorCentral is accessible through the Oklahoma City Community Foundation website: occf.org. On the website's home page, you'll find a link to DonorCentral in the navigation at the top of the screen. Click on the link and you'll be directed to the page shown at right. DonorCentral access requires a user name and a password.

New Password Requirement

When you log in to the new version of DonorCentral for the first time, you'll be asked to reset your password. After creating a new password, you'll be able to log in. Please note that passwords are case sensitive.

Don't remember your original user name and password?

Contact Jennifer Stewart at j.stewart@occf.org or 405/606-2912.

With DonorCentral, you can:

Save time with online access to fund statements

With DonorCentral, simply log in to your account and download your statements instantly, right when you need them.

Give proactively with a grant recommendation form

DonorCentral's enhanced grant recommendation form lets you log in and suggest a new grant the moment you think of it, regardless of the time or your location.

DonorCentral Mobile

You can easily access your fund and grant-making information from your mobile devices.

The image shows the "DonorCentral Sign On" form. It features a blue header with the "DonorCentral Sign On" logo. Below the header, there are two input fields: "User Name" and "Password". To the right of the "Password" field is a "Sign On" button. Below the "Password" field is a link that says "Forgot Your Password?".The image shows the "Change Password" form. It has a title "Change Password" at the top. Below the title are two input fields: "New Password" and "Confirm Password". At the bottom of the form are two buttons: "Change" and "Clear". Below the buttons is a paragraph of text: "Use the above form to change your password. To return to the previous page without changing your password, please click the back button on your internet browser. When changing your password, please adhere to the following requirements:". Below this text is a bulleted list of password requirements:

- Password must be at least 8 characters
- Password must contain at least one upper case character
- Password must contain at least one lower case character
- Password must contain at least one number
- Password must contain at least one special character (i.e. !, @, #, *, etc)

Exclusive information on your homepage – right when you log in

Your DonorCentral homepage holds significant amounts of information in individual page sections, allowing you to see the most relevant and timely information the moment you log in. Information provided to you includes:

Fund Information:

View your fund balance. Want more information? Easily drill down to access more detailed fund summary information, such as grants paid, grants pending and total gifts received.

Recent grants:

A list of your most recent grantees makes it quick and easy to keep track of the most recent organizations that received a grant from your fund.

Your giving history:

You can easily see how much each organization has received from your fund with an easy-to-read chart that breaks aggregate award amounts down by organization.

Links to Research Charities and other resources:

Click on the Research Charities link in navigation to search for nonprofit organizations by name, interest area, tax ID or location. Click on Resources to access links to GiveSmartOKC.org, a contact us page and access to our secure online giving page where you can make a credit card gift to your fund.

The screenshot shows the 'Fund Summary' page for the Oklahoma City Community Foundation. The page includes a navigation bar with 'Home', 'Research Charities', 'Fund Summary', 'My Profile', and 'Resources'. Below the navigation, there are options to 'Print Page', 'Export Gifts', and 'Export Grants'. A table displays fund statistics:

Category	Amount
Gifts ¹	\$97,780.42
Grants Paid	\$48,550.00
Spendable balance as of 3/6/2015	\$1,076.36
Total Fund Balance as of 3/6/2015	\$113,907.65

Below the table, there is a 'Fund Statement' section with a date range selector (07/01/2008 - 06/30/2009) and radio buttons for 'View Fund Statement*' and 'Email Fund Statement'.



The screenshot shows the 'Research Charities' search page. It includes a navigation bar with 'Home', 'Research Charities', 'Fund Summary', 'My Profile', and 'Resources'. Below the navigation, there is a search form with the following fields and options:

- Name: contains [text input]
- City: [text input]
- State/Province: -- Select -- [dropdown]
- Zip/Postal: [text input]
- Tax ID (optional): [text input]
- Interest Code Operator: OR [dropdown]
- Only search in prior recommendations

At the bottom of the search form, there are three buttons: 'Search', 'Clear', and 'New Grant'.

