Donor Connect Quick Start Guide

Donor Connect is the Community Foundation’s online portal providing you access to your fund(s) information. From here you can view your latest fund balances, get fund statements, make grant recommendations, and review your history.

Logging in

You will receive an email with a link to the Donor Connect login page. When logging in for the first time, you have two options for setting up your account.

- **Blackbaud ID:** If you would like to use the default login credentials, select Don’t have a Blackbaud ID? Create a new one and provide the required information.

- **Sign in with Google:** If you utilize Google services and want Google to manage your login credentials, select Sign in with Google.

Whichever option you choose, this will be the only way you log into Donor Connect. Please ensure that for either option you provide the email address that is associated with your fund.

Recommend a Grant

Donor Connect makes it easy for you to recommend a grant from your fund(s). You can replicate previous grants you made or, using the Foundation’s nonprofit database, research charities and recommend a new grant.

1. If you have multiple funds: From the Home tab, click the Find your fund field. Select the fund from the drop down to which you want to add a new grant recommendation. Then select Recommend a grant.

2. For a single fund: Select Recommend a grant.
3. Select a grantee by searching for it in the **Grantee organization search** field. If you wish to grant to a previous grantee, click on **select prior recipient** to see a dropdown list of your previous grantees.

If the grantee does not populate, click the checkbox **Can’t find your grantee?** (at the top of the form) to add the details of the organization.

4. Click **Next**.

5. If you have multiple funds and need to change the funding source, select the fund you want used for this recommendation by clicking on **Funding source**. If you prefer for your fund to remain anonymous click on **Fund anonymous**.
6. Enter the recommended Amount, Grant purpose, and any Special request. If you do not want your names shared with the grantee, click Advisor anonymous.

7. To recommend a multi-payment grant, please specify payment schedule in the multi-payment grant schedule field. Please note the grant total should reflect the sum of all payments.

8. After all details of the grant have been entered, click Next.

9. Acknowledge the grant recommendation requirements by checking the I agree box, and then select Review.
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10. Click Submit if you are finished making grant recommendations.

At any time in the process click Save for later to store your grant recommendation without submitting. To return later and complete it, click on Home to view and/or submit your unsubmitted recommendations.

View Fund Information

Donor Connect offers easy access to comprehensive information about your fund(s), allowing you to view, print, and email fund statements. To view fund information, you may select either the Funds tab or the Home tab at the top of the page.

- **If you have multiple funds**: From the Home tab, in the ‘Find Your fund’ section, enter the name of the fund you want to view. Once it displays, select See more fund details. This takes you to the Funds tab.
- **If you have multiple funds**: From the Funds tab, select Choose a fund and select the fund from the dropdown menu.

View Grant History

Donor Connect provides a full history of your grantmaking. You can see the status of grant recommendations, see details of individual grants, and breakdown your grantmaking by year and recipient. To view grants information, you may select either the Grants tab or the Home tab at the top of the page.

- **From the Grants tab**: This page details your full history of grantmaking. To see details of individual grants, select the three dots to the left of each grantee and then select View details.

- **From the Home tab**: Scroll down to the ‘See your grants’ section. This area shows your ten most recent grant recommendations. Select See detail on an individual grant to view more information on a grantee and any grant purposes or special recognition. You can also select See full history to take you to the Grants page.

If you have any questions, please contact Charles Case, Customer Support Officer at the Community Foundation for a greater Richmond, at 804-409-5636 or customersupport@cfrichmond.org. Thank you!