

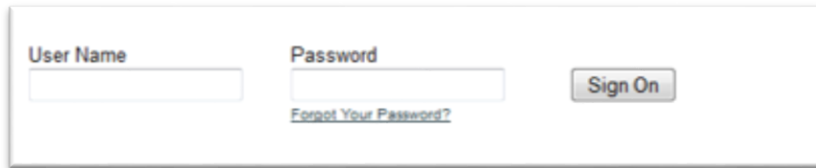
Your Guide for DonorCentral

The Oklahoma City Community Foundation is pleased to provide DonorCentral, a secure and convenient online reporting system that allows you to track gifts to your endowment fund, investment performance and annual distributions. Below are helpful steps to ensure DonorCentral is a useful tool for you and your organization. If at any time you have questions or need assistance, please contact Gayle Farley at 405/606-2910 or g.farley@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 DonorCentral Sign On page. DonorCentral access requires a user name and a password.

DonorCentral Sign On



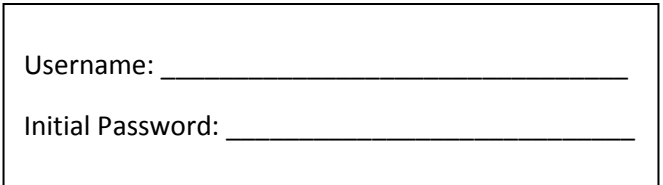
The screenshot shows the DonorCentral Sign On page. It features two input fields: "User Name" and "Password". Below the "Password" field is a link that says "Forgot Your Password?". To the right of the input fields is a "Sign On" button.

Password Protected

Each time you log in to DonorCentral you will need to enter your username and a password. Once you are logged in, you can change your password by clicking on My Profile and then clicking "Change Password."

Don't remember your user name and password?

Contact Gayle Farley at g.farley@occf.org or 405/606-2910.



The form contains two lines of text: "Username: _____" and "Initial Password: _____".

Your DonorCentral Home Page

Once you log in, you will see your organization's home page. Note that your organization's funds are individually listed. The Organization Funds hold gifts that came directly from your organization to your endowment fund. The other funds hold gifts from individual donors.

The main navigation bar includes the following links:

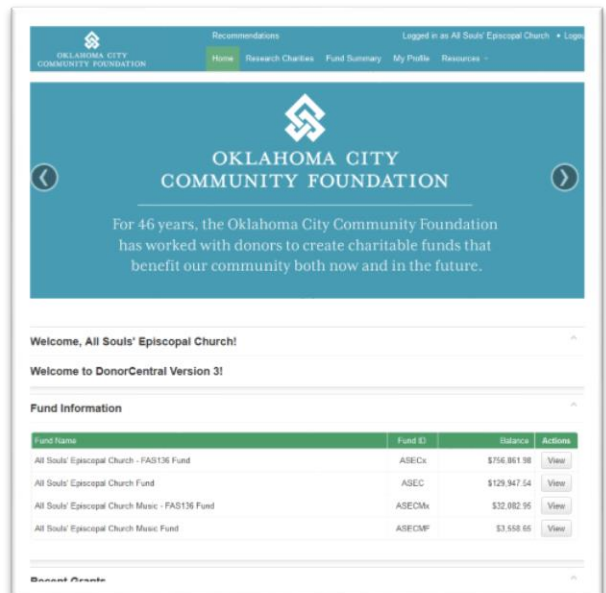
Home – brings you back to your home page.

Research Charities – is a service for donors.

Fund Summary – will be the most resourceful page.

My Profile – includes contact information and can be edited.

Resources – provides links to a Contact Us page, GiveSmartOKC.org and our online giving page.



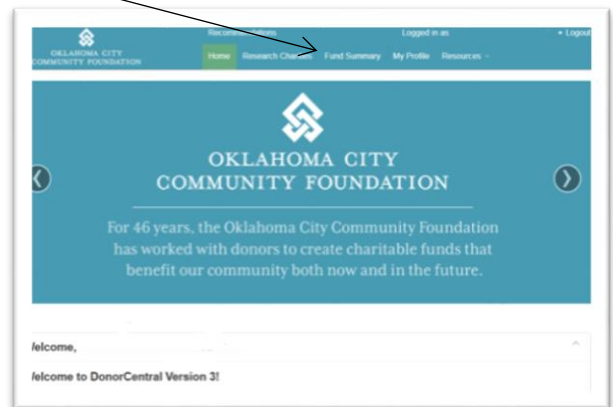
The screenshot shows the DonorCentral home page for the Oklahoma City Community Foundation. The page has a blue header with navigation links: Home, Research Charities, Fund Summary, My Profile, and Resources. Below the header is a large blue banner with the Oklahoma City Community Foundation logo and the text: "For 46 years, the Oklahoma City Community Foundation has worked with donors to create charitable funds that benefit our community both now and in the future." Below the banner, there is a welcome message: "Welcome, All Souls' Episcopal Church!" and "Welcome to DonorCentral Version 3!". Below the welcome message is a table titled "Fund Information" with columns for Fund Name, Fund ID, Balance, and Actions.

Fund Name	Fund ID	Balance	Actions
All Souls' Episcopal Church - FAS136 Fund	ASECx	\$76,961.98	View
All Souls' Episcopal Church Fund	ASEC	\$129,947.54	View
All Souls' Episcopal Church Music - FAS136 Fund	ASECMx	\$32,082.95	View
All Souls' Episcopal Church Music Fund	ASECMP	\$3,568.66	View

Using the Fund Summary Page

The fund summary page provides an opportunity to view the overall balance of your fund(s). Click on the Fund Summary link in the main navigation.

Fund Summary link on DonorCentral home page.



From the **Fund** dropdown button, you can select specific funds to view individually.

From the **Gifts** dropdown button, you can review each individual gift to your fund. The information provided includes donor name, date of gift and gift amount.

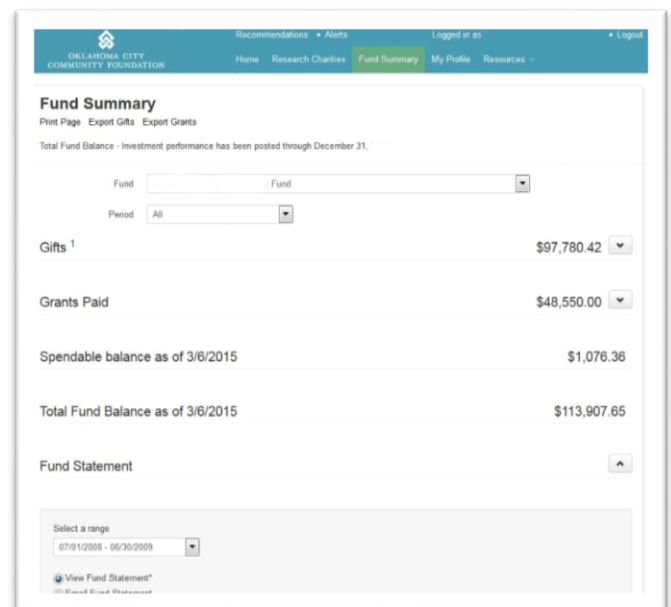
Grants Paid field reflects the annual distribution made to your organization from the endowment fund(s).

Spendable Balance represents the current year's annual distribution from the endowment fund.

Total Fund Balance represents the total fund balance as of the date listed.

Fund Statement

You can also select a range of dates to review the fund information or you can choose to email the fund statement. Please note that you can also print the page, export gifts and export grants. The exports will download in an Excel spreadsheet. Beginning with the quarter ending September 30, 2017, you will be able to access quarterly fund statements for all of your funds. The September 30th report should be available by November 1.



DonorCentral is also Mobile!

You can easily access your fund information from your mobile devices.