



INSTRUCTIONS: HOW TO USE DONOR CENTRAL

1. Reaching Online Services

To access online services, go to www.djcf.org, and hit the link on the Home page for Donor Connection. This will take you to an introductory log-in page.

At the log-in screen, enter your **user name** and **password**, which are not case-sensitive. You may change your initial password at any time by hitting the **Change Password** button on the Donor Connection Home page.

2. Donor Connection Home Page

The opening page for Donor Connection provides quick links to the most commonly used features of the site, as well as the full site menu:

- Donor Connection Home
- Fund Summary
- Recommend a Grant
- Download Forms, which includes:
 - Special Procedures Grant Requests
 - Investment Performance Reports
 - Gifts to Your Fund
 - Asset Allocation Form
- Other Advisors
- How to Use This Site
- Contact Us
- Change Password
- Sign Off

The Fund Summary is probably where you will start most often.

3. Fund Summary

The **Fund Summary** provides a good starting point for the most common online transactions, such as searching for fund balances and grant history. Hitting the Fund Summary link will take you straight to the summary page for your fund(s).

You will see your fund name at the top of the page. Below the name of your

fund, you will see columns listing the **Contributions** and **Grants Paid**, for the current year to date, for last year, and cumulative since 8/1/2001 or inception of your fund, whichever is later. You may see the detail behind any of the figures shown in these columns by clicking once on **See Details** next to that number. You may also print any page you are reviewing by hitting the **printer icon** at upper right.

Contributions include only charitable gifts to your fund. The category does not include distributions from charitable trusts and other non-gift income. (You can see these amounts, however, if you view or print a Fund Statement.)

To see the **Contribution History**, click on See Details for the time period you want to review. You will then see a detailed list of all contributions for that period, including the date and the type of gift.

Grants Paid are those grants that have been paid during the time period you are reviewing. For example, if a grant from your fund was approved in December 2001, but paid in January 2002, that grant will be included in the 2002 Grants Paid list.

Fund Balance figure represents the market value of your fund, unless your fund is endowed.

Fund Statement allows you to view and print, or have e-mailed to you, a fund statement for the past period you select, if you have Adobe Acrobat. (If you don't already have Acrobat, hit the link at the lower left of the page.)

4. Recommend a Grant

This section allows you to recommend grants online. You may give to agencies that have received grants from your fund before, as well as recommend grants to new agencies.

Hit the **Recommend a Grant** button and you will see the **Grant Recommendation Form**. The form will have certain information filled in already.

You will need to supply the full name of the agency to receive the grant, the amount of your recommendation, and the purpose of the grant. You may provide address and contact information if you have it, but it is not required. You should also indicate your wishes regarding anonymity and any special instructions such as a grant in honor of someone.

Once completed please hit the submit button, the recommendation will be forwarded to Donor Services. You will receive an e-mail confirmation from the Foundation that we received your recommendation.

5. Download Forms

If you prefer to submit a grant recommendation by regular mail or fax, you may download a copy of the grant recommendation letter here, as well as see the site instructions, most recent investment performance, and gift instructions.

6. Other Advisors

This section shows you anyone else, such as your children, who have active advisory rights for the fund.

7. How to Use This Site

These instructions are repeated on this section of the site.

8. Contact Us

You will find the Foundation's address and phone numbers, along with e-mail addresses for key employees.

9. Change Password

At any time, you may change your password to something that is easier to remember or for security purposes. Simply hit the "password" button, type your old password, then a new password and confirm it a second time. Once completed, hit "ok" ; and your new password will be ready for the next time you log in.

10. Sign Off

When you log off here, you will be redirected to The Dallas Jewish Community Foundation's main website.

Other Useful Information

You will time out of the system after 20 minutes with no activity. If you time out, you will return to the introductory log-in page on The Dallas Jewish Community Foundation's main website and you will be asked to log in again.