

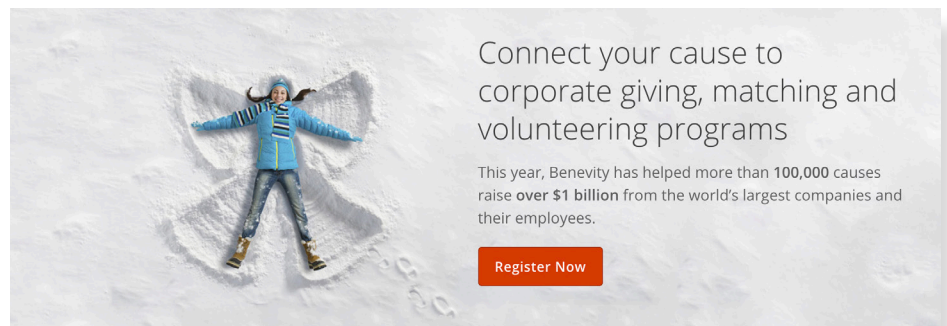
How to Register Your Charity at the Benevity Causes Portal

Hundreds of Fortune 1000 companies and millions of their employees use Benevity's software for their workplace giving, matching, granting and employee volunteering programs. The Benevity Causes Portal connects charities like yours to these donors and volunteers.

Follow these steps to fully activate your Charity Profile and start using all of the features available to you through the Benevity Causes Portal. By completing each of the steps, you will become eligible for inclusion in more giving, matching, granting and volunteering programs, gain access to detailed donor reports, and start receiving your donation payments electronically.

Step 1: Register Your Charity

- A** Go to **causes.benevity.org** and click **Register Now**.



- B** Find your **Charity Profile** in our database. Select the country where you are located, then enter either your *charity's name* or *charity registration number* (e.g. EIN in the United States).

Click **Search**.

A screenshot of the "Register Your Charity" search form. The form has a blue header with the title "Register Your Charity". Below the header, there is a list of bullet points: "Become eligible for workplace giving, volunteering and granting programs", "Retrieve donor information and donation reports", "Create a profile with your mission and logo", and "Broadcast volunteer and fundraising opportunities". The form itself is white and contains a dropdown menu labeled "Choose a country:" with "(All Countries)" selected. Below that is a text input field labeled "Now enter your charity name or EIN/RCN number:" with a placeholder "ex. American Heart Association or 135613797". At the bottom of the form is a blue "Search" button.

- C** Find and select your Charity Profile from the results. Review the details to ensure that you have selected the correct Charity Profile. Then click **Register Your Charity**.

A screenshot of a charity profile page for "WEST POTTSBORO ELEMENTARY PTA". The page has a blue header with the charity name and address: "POTTSTOWN, Pennsylvania, 19464-2921 United States". Below the header, there is a white box containing the charity's details: "WEST POTTSBORO ELEMENTARY PTA", "1329 Buchert Rd", "POTTSTOWN, Pennsylvania 19464-2921", "United States", and "Unique Identifier 463807022". To the right of this box is a red "Register Now" button and a link that says "Already have a verification code?". At the bottom right of the page is a logo featuring a heart above a hand.

D Complete the form provided by adding your contact information and setting a password. This is how you will sign in to your **Charity Profile** from now on. Use the contact details and email for the person who will be the *primary user* of this account.

Register Your Charity

Please complete your Charity Profile by filling out the following information.

Your Organization

Your organization name and registration number are not editable. If you wish to edit this information you must wait until your registration has been processed.

Organization Name *

Government Issued Charity Registration Number *

Contact Information

This information will be used to contact you once we have received and verified all required information.

Your Name *

Title

Phone Number *

E If additional information is needed, you may be required to provide verification documents. If this is the case, you will receive an email from Benevity requesting the specific documents we need to complete your registration.

Once you've completed your registration, you will have full access to update your Charity Profile and access donor reports.

- Dashboard
- Projects 0
- Volunteering 0
- Reports
- Cause Profile
- Certification
- Donation Method
- Settings

Your Account is 40% Complete

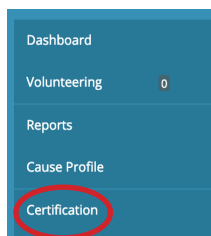
<input checked="" type="checkbox"/>	Register Your Account	Complete
<input checked="" type="checkbox"/>	Verify Your Identity	Complete
<input type="checkbox"/>	Complete Self-Certification	Not Complete
<input type="checkbox"/>	Set Up Electronic Donation Payments	Not Complete
<input type="checkbox"/>	Complete Your Profile	Not Complete

40%

Step 2: Self-Certify

Many corporations have specific eligibility requirements that charities must meet for inclusion in their giving, matching, and volunteer programs. We've prepared a Self-Certification process that allows charities to self-certify against these common eligibility requirements. Charities complete it once, renew it annually, and are automatically included in all programs for which they qualify.

- A** Click **Certification** in the left navigation of your Charity Profile dashboard.



platform (the 'Platform'). There are currently some 200 corporations representing more than 3 million employees that utilize the Platform for giving and grantmaking. Many, but not all, Benevity Clients require that charities and not-for-profits complete this Declaration in order to be eligible to receive Benevity Donations from these Benevity Clients.

Based on the answers to the questions set out below, Your Organization may be eligible for inclusion in the giving programs of a number of Benevity Clients without Your Organization having to agree to the specific eligibility criteria of each individual Benevity Client (or duplicate the effort in finding out). While Benevity can't guarantee that Your Organization will receive Benevity Donations by completing this Declaration, if Your Organization does not complete the Declaration, there will be programs that Your Organization will be automatically excluded from (even if Your Organization would otherwise be eligible), as there are many large Benevity Clients that require completion of the Declaration as a condition of inclusion.

HOW CAN MY ORGANIZATION PARTICIPATE?

- B** Click **Create New Self-Certification Declaration**.

Self-Certification Declaration

What is Self-Certification Declaration?

Many Benevity clients require charities to certify against common eligibility requirements in order to receive funds from their giving and matching programs. Complete your Self-Certification to reach more potential donors.

[+ Create New Self-Certification Declaration](#)

- C** Read through and respond to all the declarations as applicable, and then click **Submit Declaration**.

8

Your Organization will not identify any Benevity Client as a donor or use a Benevity Client's logo or brand for promotional purposes without prior written consent of that Benevity Client.

Yes, I agree

No, I do not agree

9

Your Organization will return Benevity Donations that it knows or should know are ineligible under applicable law or Benevity Client guidelines or were provided in error. This obligation is in addition to (and does not supersede) Your Organization's responsibilities set out in the Benevity Causes Portal Terms of Use.

Yes, I agree

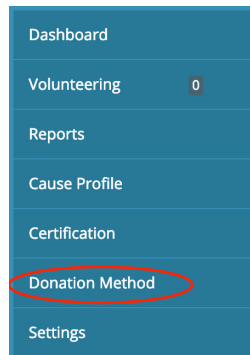
No, I do not agree

Step 3: Electronic Donation Payments

As the world moves online, checks have become too expensive and inefficient, especially when companies are handling tens of thousands of donations.

Set up Electronic Donation Payments and receive disbursements directly to your bank account safely and securely, saving you time, fees and overhead costs. **Please note: For all organizations outside of US and Canada, Electronic Donation Payments are mandatory.**

A Click **Donation Method** in the left navigation of your Charity Profile dashboard.



B Select your preferred **Donation Payment Method**.

Fill out the form provided with the necessary details. To enable **Electronic Donation Payments** you will be asked to upload a supporting document so that we can start transferring funds electronically to your bank account.

1 Choose a Donation Payment Method



Electronic Funds Transfer (EFT) Recommended

Receive funds directly to your bank account with email notifications for each disbursement. No check fees, lost checks, unnecessary paper, or minimum payment thresholds.



PayPal

Receive funds electronically via your organization's PayPal account. No check fees.



Check

We do not recommend this method. After three free check disbursements, an administrative surcharge for paper checks will be applied starting with your fourth check. This fee is the greater of either \$25 per check or 7% of the total, up to a maximum of \$100. There is also a \$100 aggregate donation threshold before we will disburse funds via check. **Select EFT or PayPal** to receive disbursements electronically and avoid these check fees and minimum thresholds.

C Review your details and click **Submit**. Once we've reviewed the information provided, you will receive an email confirming that you've successfully set up **Electronic Donation Payments**.

Account Currency	CAD
Transit Number	
Financial Institution Number	
SWIFT/BIC Code (required to receive international funds)	
Bank Name	
Bank Address Line 1	
Bank Address Line 2	
Bank Address Line 3	
City	
ZIP / Postal Code	
State / Province / Region	Alberta

I confirm that the above details are correct *

Submit

Please Note:

If you are located in North America and choose to keep checks as your donation payment method, an administrative surcharge for paper checks will be applied starting with your fourth check. This fee is the greater of either \$25 per check or 7% of the total, up to a maximum of \$100. We strongly encourage all charities to set up electronic donation payments to receive disbursements via direct deposit and avoid these fees!

Step 4: Complete Your Profile

To help increase your exposure and visibility, we recommend that you make the following enhancements to your profile so that you can provide potential donors with as much information about your organization as possible.

A To complete your profile with a short summary, charity description, and your logo please follow the steps below:

1. Log in to the **Causes Portal**
2. Click on **Charity Profile** on the left-hand side menu
3. Select **Edit Charity Profile**
4. Update your organization's details, then scroll down and click **Save**

**Use Part B (below) for reference.*

Charity Profile

Charity Logo

No file chosen

Files must be less than **32 MB**.
Allowed file types: **png gif jpg jpeg**.
Images must be larger than **223x153 pixels**.

Mission Statement

Content limited to 5000 characters, remaining: **5000**

Charity Description

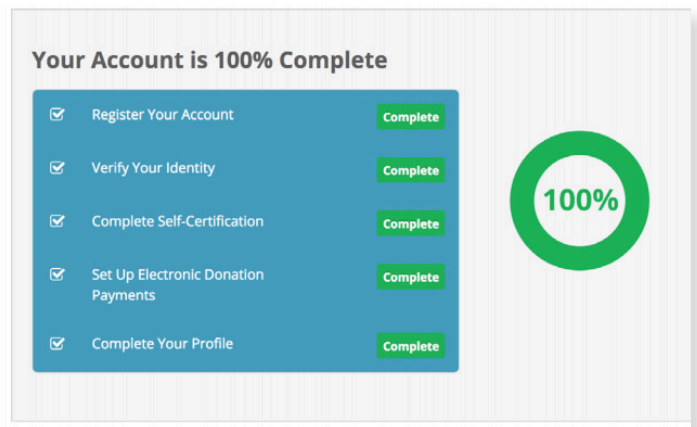
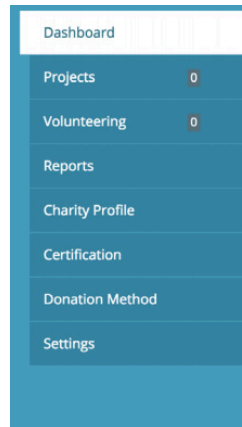
Content limited to 10240 characters, remaining: **10240**

B Short Summary – think mission statement! This is the place to share a high-level summary of what your organization does.

Charity Description – this should be a detailed description of your organization. Let donors and volunteers know about your latest news and upcoming initiatives.

Online Presence – share links to your website, Twitter and Facebook.

Logo – a picture is worth a thousand words! Help get instant recognition from donors and reinforce your brand with your logo!



For more information about accessing donor reports, updating your Charity Profile, and making the most of the features available to you through the Benevity Causes Portal, check out the resources available on our **Help** page.

Any questions?

We're happy to help. Email us at causes@benevity.org and we'll help you with your registration.

Find us here:

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Calgary, AB T2E 2W5

benevity.com

