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.

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.
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.

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.
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.

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.

1. 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

2. 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

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[Benecity logo]
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.
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.

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.

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.
**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.