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.

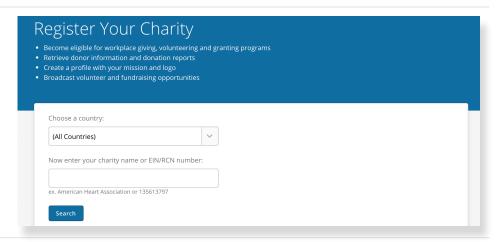
Step 1: Register Your Charity

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

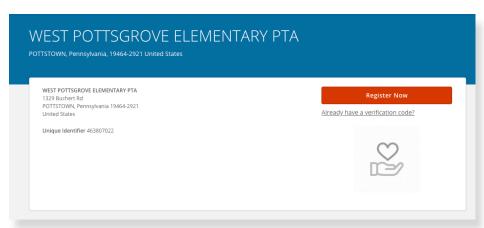


B Find your **Charity Profile** in our database. Select the country where you are located, then enter either your *charity's name* or *charity registration number* (e.g. EIN in the United States).

Click Search.

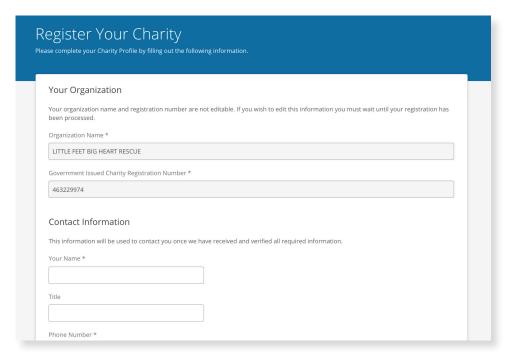


Find and select your Charity Profile from the results. Review the details to ensure that you have selected the correct Charity Profile. Then click **Register Your Charity**.



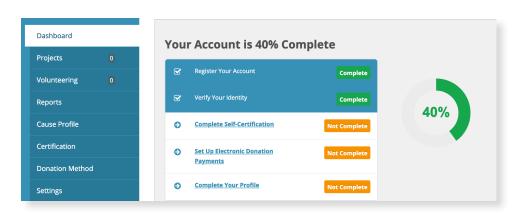


D Complete the form provided by adding your contact information and setting a password. This is how you will sign in to your **Charity Profile** from now on. Use the contact details and email for the person who will be the *primary user* of this account.



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.



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.

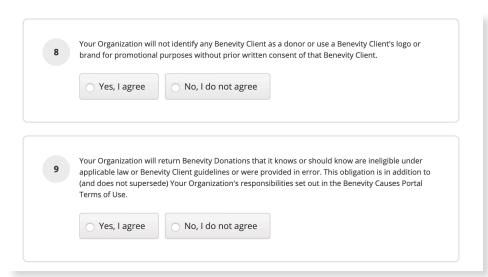
Self-Certification Declaration

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

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





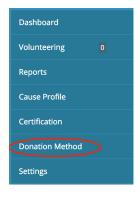
Step 3: Electronic Donation Payments

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.

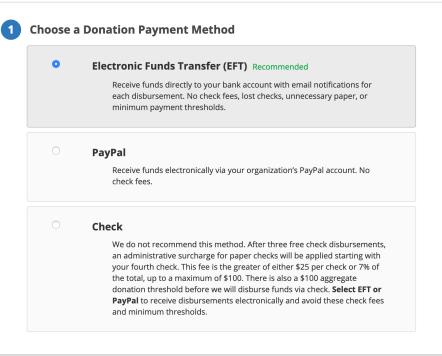


Click **Donation Method** in the *left* navigation of your *Charity Profile* dashboard.





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.



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
\square I confirm that the above details are correct *	
Submit	

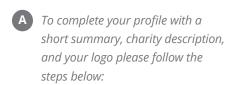
Please Note:

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!



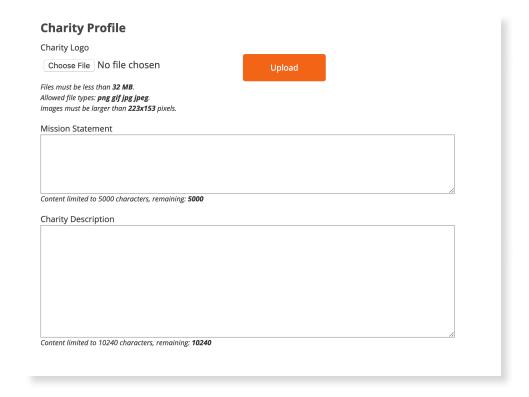
Step 4: Complete Your Profile

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.



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

*Use Part B (below) for reference.



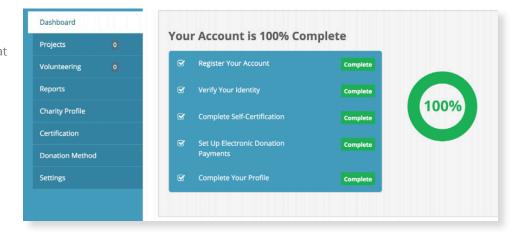


B Short Summary – think mission statement! This is the place to share a high-level summary of what your organization does.

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.

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

Find us here: #700, 611 Meredith Rd NE Calgary, AB T2E 2W5 **benevity.com** 1.866.939.1736

