

A woman with long dark hair is smiling and looking at a laptop in an office. Another person is partially visible behind her. The background shows office shelves and whiteboards.

# Nonprofit Portal Guide

October 2016

 YourCause


- YourCause has created this guide to help NPOs effectively manage their engagement with corporate clients.
  - The NPO guide covers the following:
    1. New admin registration on the YourCause NPO portal
    2. Accessing Donation History
    3. ACH registration and account setup
    4. Creating and managing volunteer events
    5. Eligible NPOs to receive funds and next steps for new additions
- If at any time you need help or have a question, charities can reach the YourCause team at [charity@yourcause.com](mailto:charity@yourcause.com) or 469-607-1084

- YourCause is a free portal for nonprofits to administer their charity pages and engage with our corporate clients and their employee network of over 2.5M individuals worldwide. The portal provides administrator tools that empower charities to take their digital and workplace giving strategies to the next level.
- In 2013 alone, over 42,000 charities received a donations from YourCause's generous corporate clients and their employees. YourCause hopes to continue increasing the impact with powerful online tools that build strong partnerships between charities and corporate programs.
- Administrator Tools Include:
  - Pending Donations
  - Donation History
  - Match Verification
  - Add Volunteer Opportunity
  - View All Volunteer Opportunities
  - Edit Contact Information
  - Edit Website Information
  - Locations Served
  - Edit Logo Image
  - Edit Description/ Mission
  - Add Goal
  - Add Photos
  - Add/Edit Needs

# Admin Registration

YourCause NPO Portal

- Go to <https://npo.yourcause.com> and select “Register Now”



## Non-Profit Access & Registration

Access Your Account or Get Started by Registering Today!

### Sign In

  
  
 Remember My Login  
  
[Forgot Password?](#)

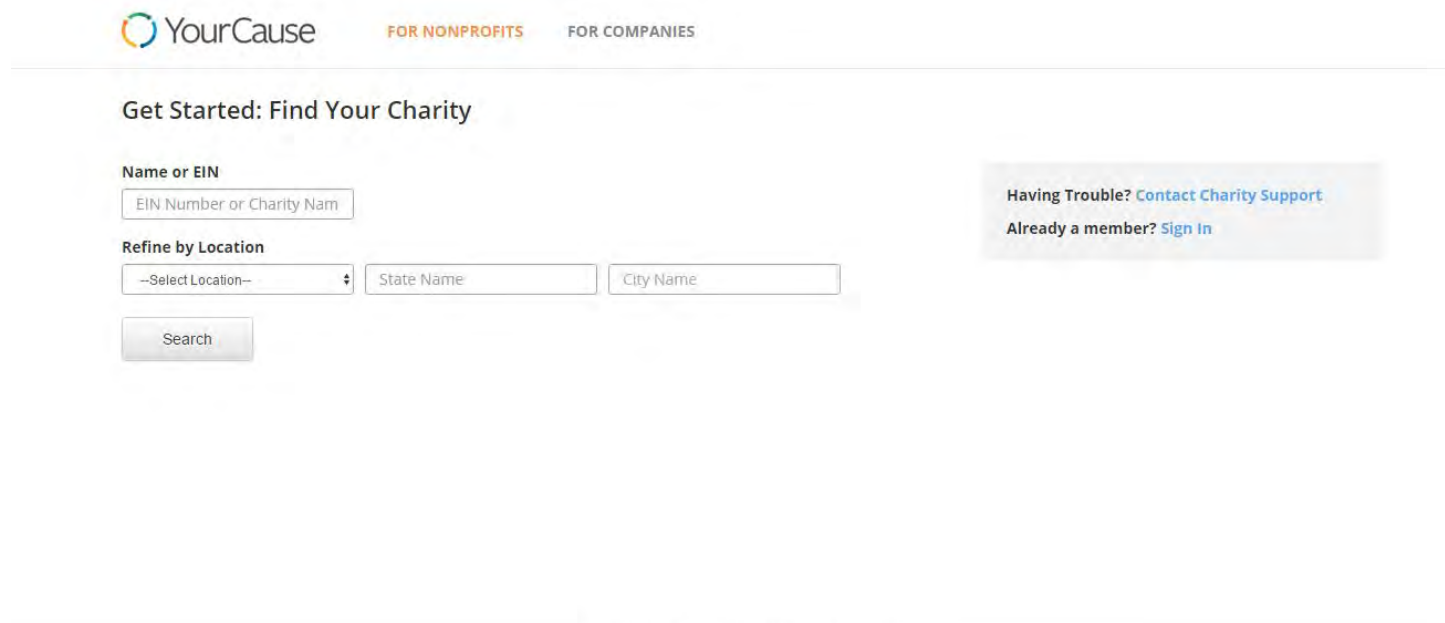
### Not a Partner?

Sign up today to access your profile and take advantage of free tools

- Unlimited Access to Donation History
- Input Volunteer Opportunities
- Sign Up for ACH Payments

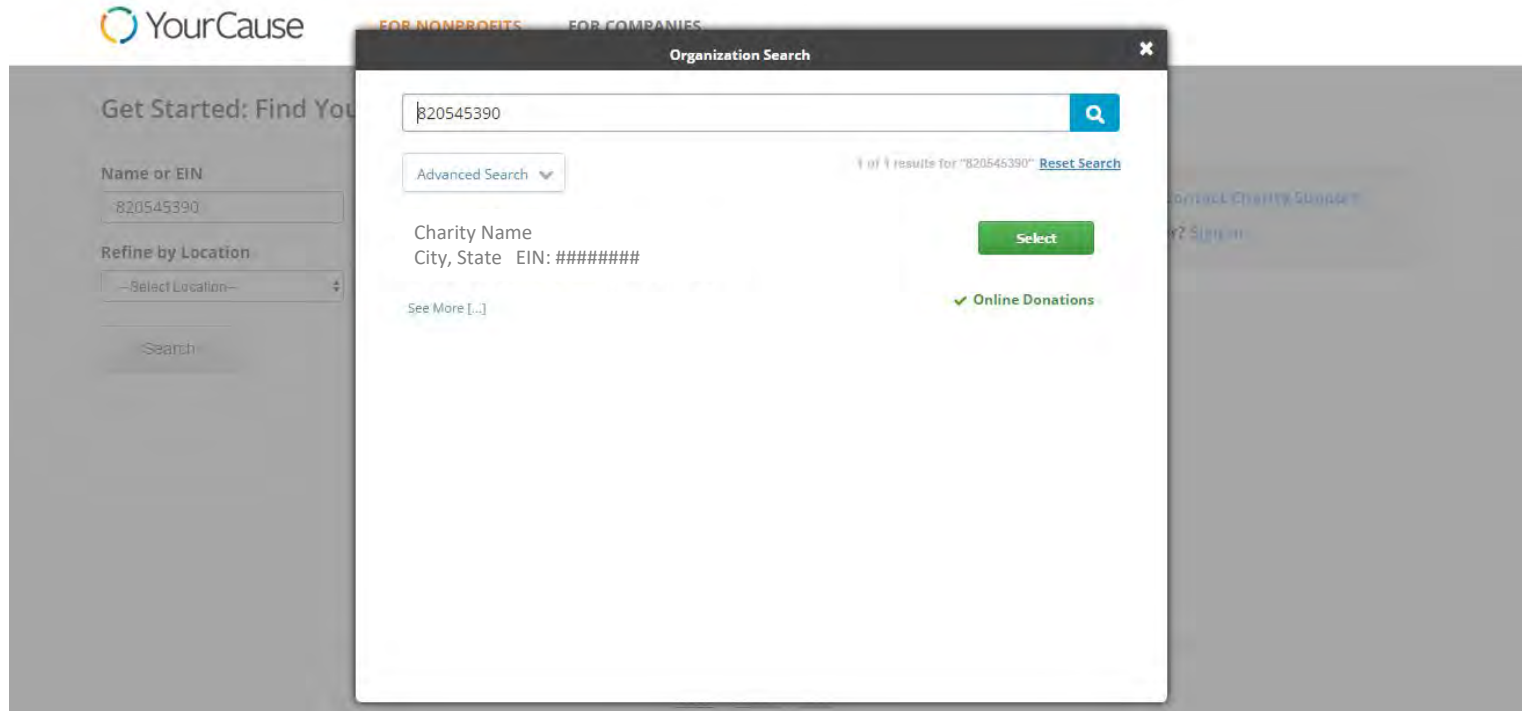
Need Assistance? [Contact NPO Support](#)

- Search for your organization by name and location or EIN, then click “Search”



The screenshot shows the YourCause website's search interface. At the top left is the YourCause logo, followed by navigation links for "FOR NONPROFITS" and "FOR COMPANIES". Below this is the heading "Get Started: Find Your Charity". The search form includes a "Name or EIN" section with a text input field labeled "EIN Number or Charity Name". Below that is a "Refine by Location" section with a dropdown menu labeled "--Select Location--", a "State Name" input field, and a "City Name" input field. A "Search" button is positioned below these fields. To the right of the search form is a grey box containing the text "Having Trouble? [Contact Charity Support](#)" and "Already a member? [Sign In](#)".

- Find your organization and click “Select” within the returned search results



- Complete registration details.

## Step 2: Register

### Create your Account

\* Email

\* Password

### Tell us about yourself:

\* First Name

\* Last Name

\* Address 1

Address 2

\* Country

State

\* City

Postal Code

Phone Number



- Upload your organization's letter of determination or other verification document and click "Register"

Upload your organization's 501(c)3 letter of determination or other proof of verification document that ensures you are eligible to become an admin.

- For Canadian charities, please provide a Form 4001 or a copy of your CanadaHelps vetting letter.
- For other International charities, please provide an official certificate of government registration in English or a copy of your vetting letter.
- For schools, please provide the school's registry that includes the administrator's name. We will also accept an official letter that is signed and dated on the school letterhead.

*.pdfs, MS Word, Excel, PowerPoint, Images. 2 MB Max*

**\* File Upload**

Browse...

No file selected.

Register

*Please upload file to register.*

- You now have temporary access to your charity page. By navigating to NPO PAGE, you will be able to edit your organization's profile.
- YourCause administrators will review your registration request and grant full access within two business days.



NPO PAGE

SALVATION ARMY NATIONAL CORP. ▾

Welcome



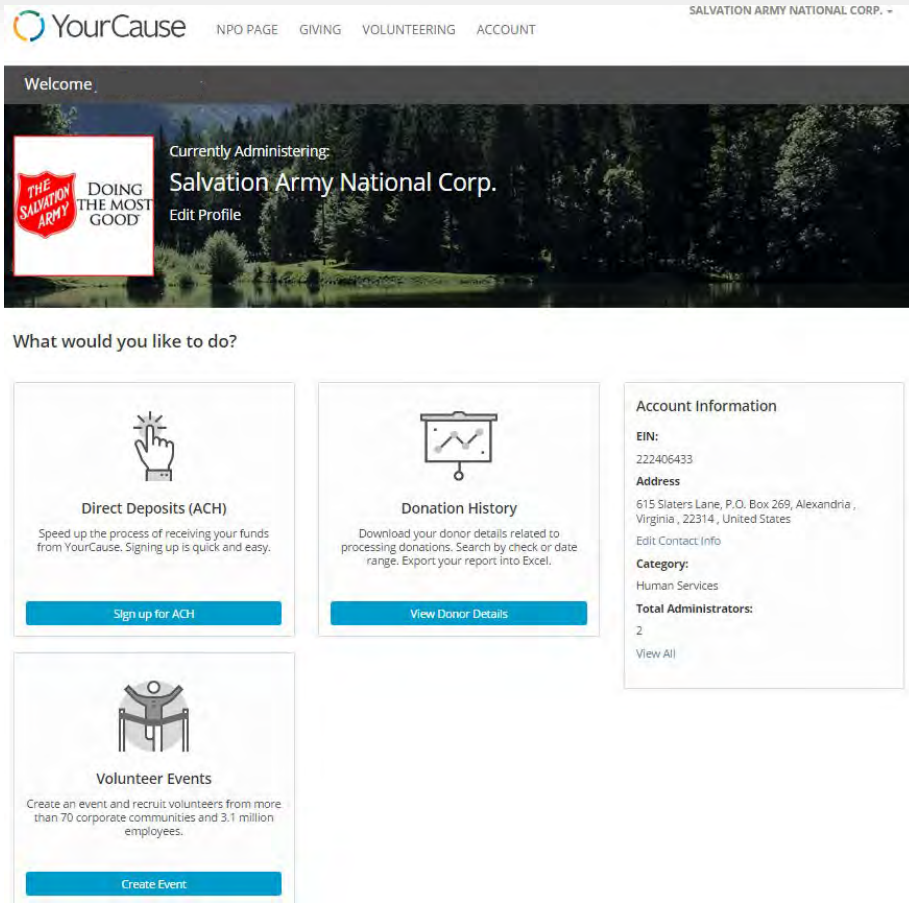
Currently Administering:

Salvation Army National Corp.

[Edit Profile](#)

You currently have limited access until your application is approved.

# How to Register



The screenshot shows the YourCause dashboard for the Salvation Army National Corp. At the top, there are navigation tabs for 'NPO PAGE', 'GIVING', 'VOLUNTEERING', and 'ACCOUNT'. The main header area includes a 'Welcome' message and a banner for 'Salvation Army National Corp.' with the text 'Currently Administering: Salvation Army National Corp.' and an 'Edit Profile' link. Below the banner, a question asks 'What would you like to do?' and presents three options: 'Direct Deposits (ACH)', 'Donation History', and 'Volunteer Events'. Each option has a descriptive paragraph and a corresponding button. To the right, there is an 'Account Information' section with details such as EIN, Address, Edit Contact Info, Category, and Total Administrators.

YourCause NPO PAGE GIVING VOLUNTEERING ACCOUNT SALVATION ARMY NATIONAL CORP. -

Welcome

Currently Administering:  
Salvation Army National Corp.  
Edit Profile

THE SALVATION ARMY DOING THE MOST GOOD

What would you like to do?

**Direct Deposits (ACH)**  
Speed up the process of receiving your funds from YourCause. Signing up is quick and easy.  
Sign up for ACH

**Donation History**  
Download your donor details related to processing donations. Search by check or date range. Export your report into Excel.  
View Donor Details

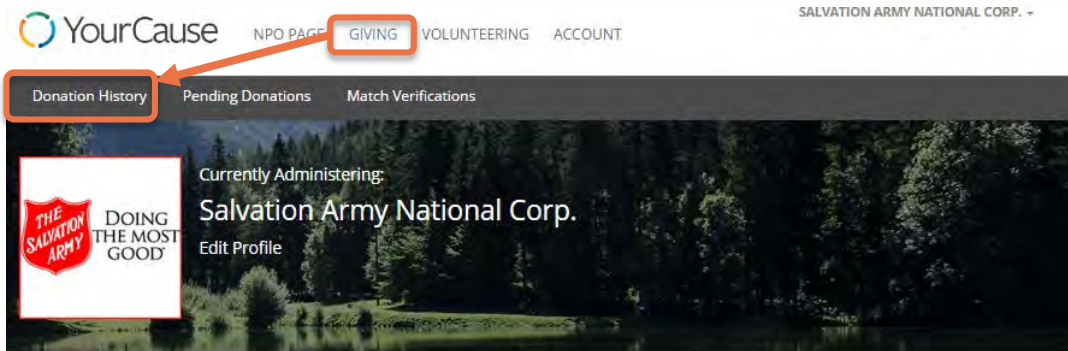
**Account Information**  
**EIN:**  
222406433  
**Address**  
615 Slaters Lane, P.O. Box 269, Alexandria, Virginia, 22314, United States  
Edit Contact Info  
**Category:**  
Human Services  
**Total Administrators:**  
2  
View All

**Volunteer Events**  
Create an event and recruit volunteers from more than 70 corporate communities and 3.1 million employees.  
Create Event

- When you receive an email that you are approved, you will be able to log in at <https://npo.yourcause.com> and utilize the various tools in the portal.
- From this landing page, you can use the tiles to navigate to your Donation History, Volunteer Events and start ACH registration
- You may also use the navigation tabs across the top of the screen


# Donation History

YourCause NPO Portal




- Navigate to GIVING > Donation History or select “View Donor Details”

What would you like to do?



**Direct Deposits (ACH)**  
Speed up the process of receiving your funds from YourCause. Signing up is quick and easy.

[Sign up for ACH](#)



**Donation History**  
Download your donor details related to processing donations. Search by check or date range. Export your report into Excel.

[View Donor Details](#)

**Account Information**

**EIN:**  
222406433

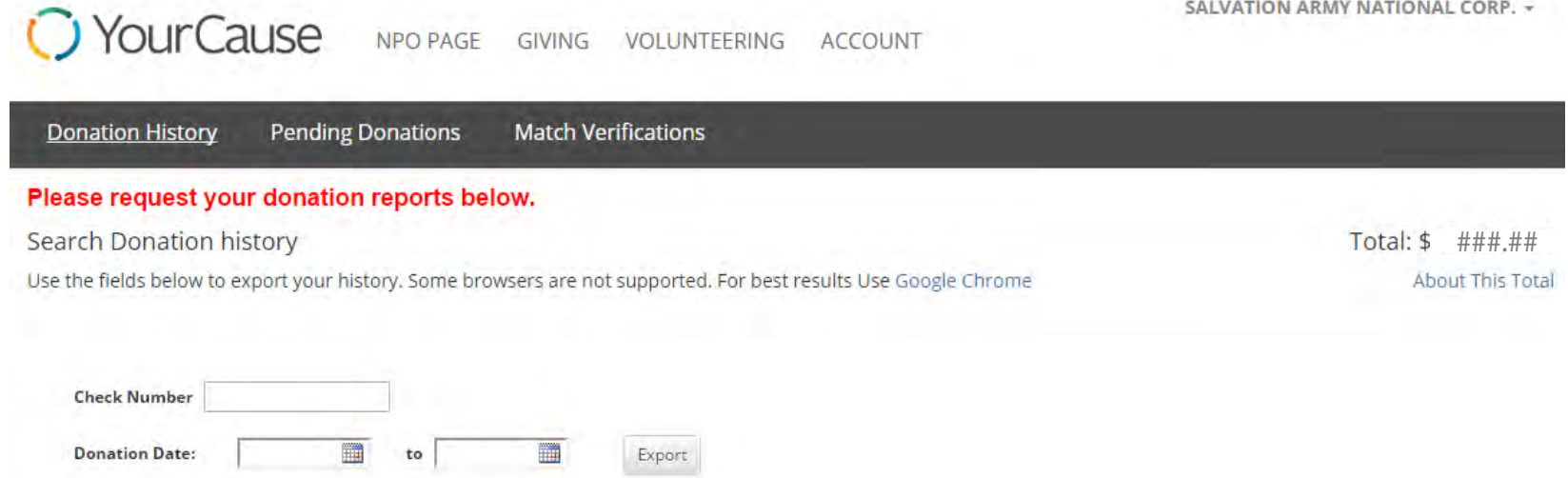
**Address**  
615 Slaters Lane, P.O. Box 269, Alexandria, Virginia, 22314, United States

[Edit Contact Info](#)

**Category:**  
Human Services

**Total Administrators:**  
2

- Search by check number OR date range. Then click “Export”, this should pull a report that will open as a CSV file.





The screenshot shows the 'Donation History' page for 'SALVATION ARMY NATIONAL CORP.'. The page has a dark navigation bar with 'Donation History' selected. Below the navigation bar, there is a red instruction: 'Please request your donation reports below.' A search bar is present with the text 'Search Donation history'. To the right of the search bar, it says 'Total: \$ ###.##' and 'About This Total'. Below the search bar, there is a text prompt: 'Use the fields below to export your history. Some browsers are not supported. For best results Use Google Chrome'. At the bottom, there are two input fields: 'Check Number' with an empty text box, and 'Donation Date:' with two calendar icons and a 'to' separator, followed by an 'Export' button.

# ACH Registration

YourCause NPO Portal

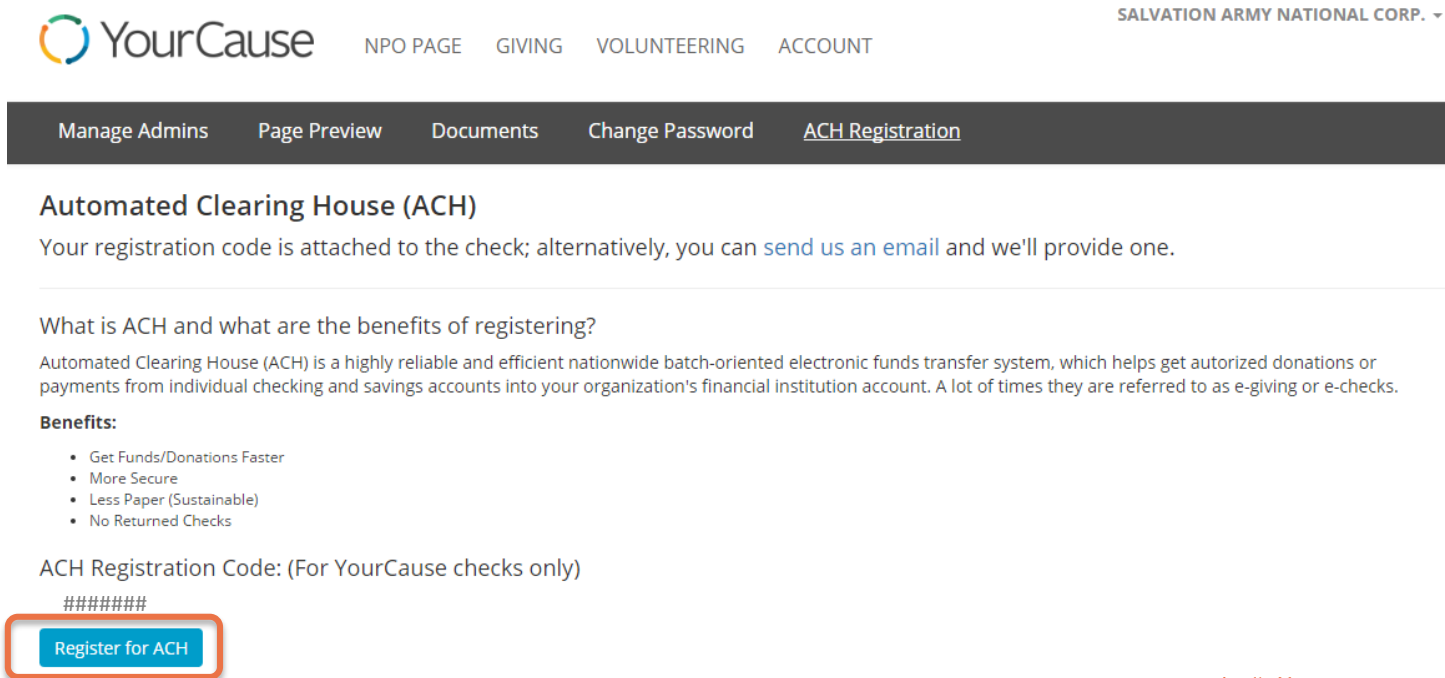
- Navigate to ACCOUNT > ACH Registration or select “ACH”

What would you like to do?

 <p><b>Direct Deposits (ACH)</b></p> <p>Speed up the process of receiving your funds from YourCause. Signing up is quick and easy.</p> <p><a href="#">Sign up for ACH</a></p>	 <p><b>Donation History</b></p> <p>Download your donor details related to processing donations. Search by check or date range. Export your report into Excel.</p> <p><a href="#">View Donor Details</a></p>	<p><b>Account Information</b></p> <p><b>EIN:</b> 222406433</p> <p><b>Address</b> 615 Slaters Lane, P.O. Box 269, Alexandria, Virginia, 22314, United States</p> <p><a href="#">Edit Contact Info</a></p> <p><b>Category:</b> Human Services</p> <p><b>Total Administrators:</b> 2</p>
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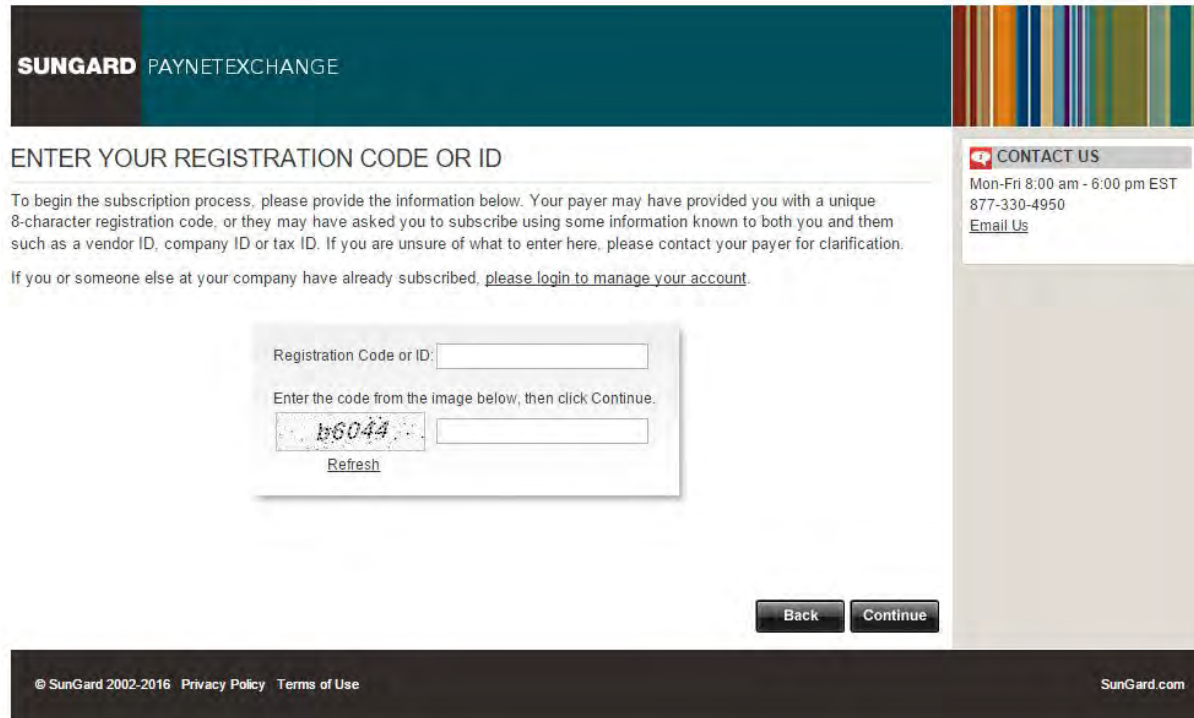


- Your organization's ACH Code should be available. If not, please use the option to "Request Code". When your registration code is available, copy the code and then select "Register for ACH".



The screenshot shows the YourCause website interface. At the top right, it says "SALVATION ARMY NATIONAL CORP." with a dropdown arrow. Below this is a navigation bar with links for "NPO PAGE", "GIVING", "VOLUNTEERING", and "ACCOUNT". A dark grey menu bar contains "Manage Admins", "Page Preview", "Documents", "Change Password", and "ACH Registration" (which is highlighted). The main content area is titled "Automated Clearing House (ACH)" and contains the text: "Your registration code is attached to the check; alternatively, you can [send us an email](#) and we'll provide one." Below this is a section titled "What is ACH and what are the benefits of registering?" followed by a paragraph explaining ACH. Under "Benefits:", there is a bulleted list: "Get Funds/Donations Faster", "More Secure", "Less Paper (Sustainable)", and "No Returned Checks". At the bottom, it says "ACH Registration Code: (For YourCause checks only)" followed by "#####" and a blue button labeled "Register for ACH" which is highlighted with a red box.

- You will be directed to our partner's site to complete registration. First, enter your organization's ACH code.



**SUNGARD** PAYNETEXCHANGE


## ENTER YOUR REGISTRATION CODE OR ID

To begin the subscription process, please provide the information below. Your payer may have provided you with a unique 8-character registration code, or they may have asked you to subscribe using some information known to both you and them such as a vendor ID, company ID or tax ID. If you are unsure of what to enter here, please contact your payer for clarification.

If you or someone else at your company have already subscribed, [please login to manage your account.](#)

Registration Code or ID:

Enter the code from the image below, then click Continue.



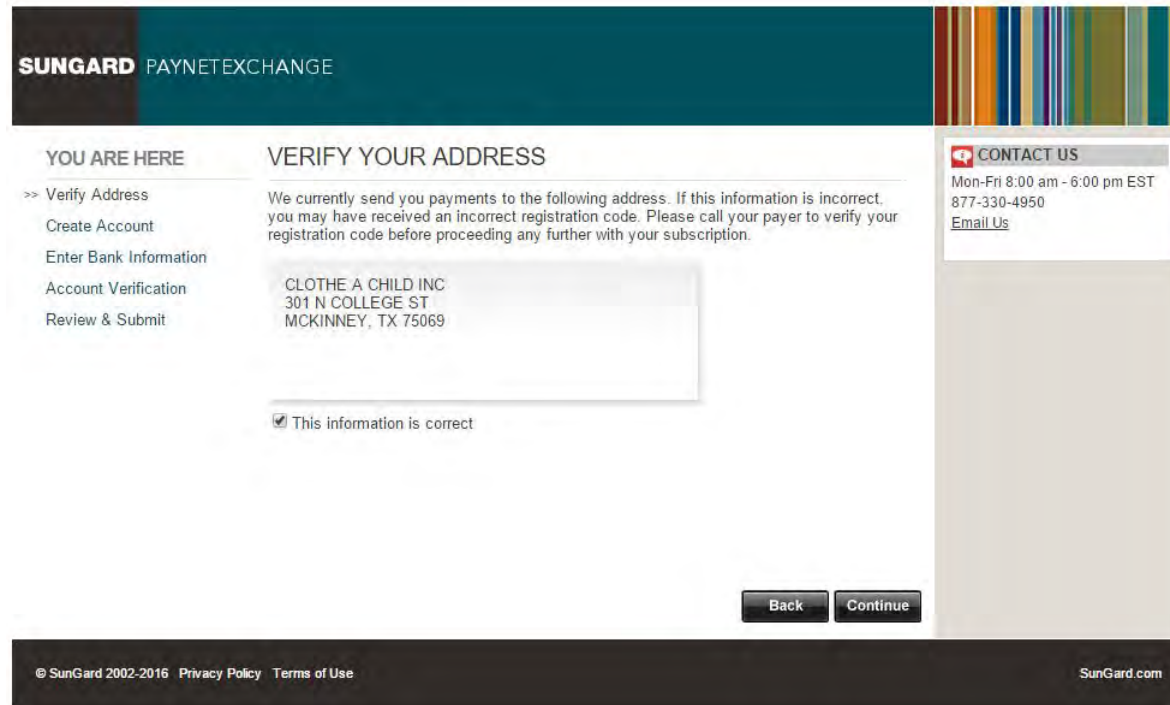
[Refresh](#)

[CONTACT US](#)  
Mon-Fri 8:00 am - 6:00 pm EST  
877-330-4950  
[Email Us](#)

[Back](#) [Continue](#)

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- Confirm your organization's address. If the address is incorrect, please contact the YourCause NPO Support team at [charity@yourcause.com](mailto:charity@yourcause.com)



**SUNGARD** PAYNETEXCHANGE

**YOU ARE HERE**

- >> Verify Address
- Create Account
- Enter Bank Information
- Account Verification
- Review & Submit

**VERIFY YOUR ADDRESS**

We currently send you payments to the following address. If this information is incorrect, you may have received an incorrect registration code. Please call your payer to verify your registration code before proceeding any further with your subscription.

CLOTHE A CHILD INC  
301 N COLLEGE ST  
MCKINNEY, TX 75069

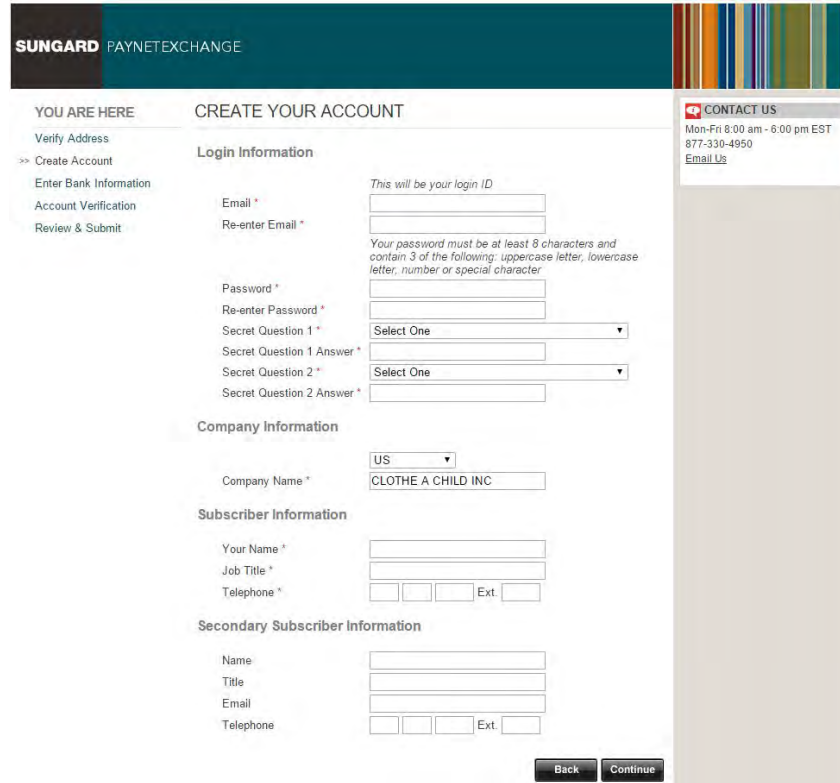
This information is correct

[CONTACT US](#)  
Mon-Fri 8:00 am - 6:00 pm EST  
877-330-4950  
[Email Us](#)

[Back](#) [Continue](#)

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- Create your account and click “Continue”.



**SUNGARD** PAYNETEXCHANGE

**YOU ARE HERE**

- Verify Address
- >> Create Account
- Enter Bank Information
- Account Verification
- Review & Submit

**CREATE YOUR ACCOUNT**

**Login Information**

This will be your login ID

Email \*

Re-enter Email \*

Password \*

Re-enter Password \*

Secret Question 1 \*

Secret Question 1 Answer \*

Secret Question 2 \*

Secret Question 2 Answer \*

**Company Information**

Company Name \*

**Subscriber Information**

Your Name \*

Job Title \*

Telephone \*    Ext.

**Secondary Subscriber Information**

Name

Title

Email

Telephone    Ext.




**CONTACT US**

Mon-Fri 8:00 am - 6:00 pm EST  
877-330-4950  
[Email Us](#)

- The next step will be to enter your bank information.
- Sungard will then provide details for verifying your account by making two small deposits.

## ACCOUNT VERIFICATION

*Your account information will be verified using the following process:*

-  **1. Deposits** We'll make two small deposits into your account
-  **2. View** View your bank statement in 1-2 days to see the amounts. The deposits should appear as being from SunGard.
-  **3. Enter** You will receive an email asking you to return to this site to confirm the deposit amounts. After entering the correct amounts, your account will be immediately activated and ready to receive payments.

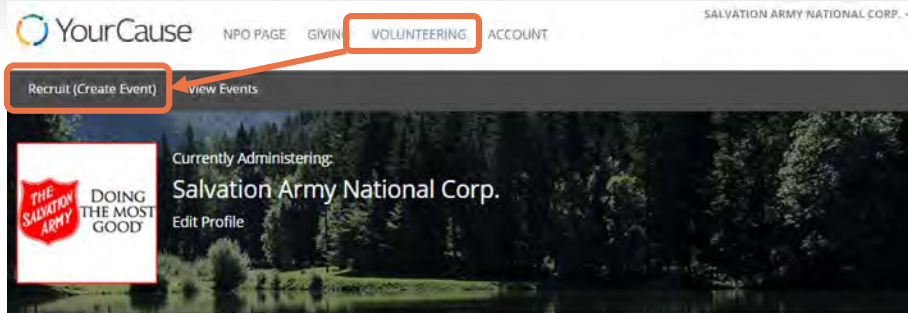
[Back](#) [Continue](#)

- The next step will be to “Verify Your Information”
- Once you have submitted all your information, Sungard will proceed with the test deposits.
- You will need to review your bank statement in 1-2 days to see the amounts. The deposits should appear as being from Sungard.
- Sungard will send an email reminding you to return to the site to verify the deposit amounts.
- After you enter the correct amounts, your account will be immediately activated and ready to receive payments.

**If you have any questions regarding the registration process on Sungard, please contact them at 877-330-4950**

# Volunteering

YourCause NPO Portal



- Navigate to **VOLUNTEERING** > **Recruit (Create Event)** or select **Create Event** from the Volunteer Events tile

What would you like to do?

**Direct Deposits (ACH)**  
Speed up the process of receiving your funds from YourCause. Signing up is quick and easy.

[Sign up for ACH](#)

**Donation History**  
Download your donor details related to processing donations. Search by check or date range. Export your report into Excel.

[View Donor Details](#)

**Account Information**

**EIN:**  
222406433

**Address**  
615 Slaters Lane, P.O. Box 269, Alexandria, Virginia, 22314, United States  
[Edit Contact Info](#)

**Category:**  
Human Services

**Total Administrators:**  
2  
[View All](#)

**Volunteer Events**  
Create an event and recruit volunteers from more than 70 corporate communities and 3.1 million employees.

[Create Event](#)



- Select the affiliate you would like the event to appear for.

[NPO PAGE](#)[GIVING](#)[VOLUNTEERING](#)[ACCOUNT](#)

SALVATION ARMY NATIONAL CORP. ▾

[Recruit \(Create Event\)](#)[View Events](#)

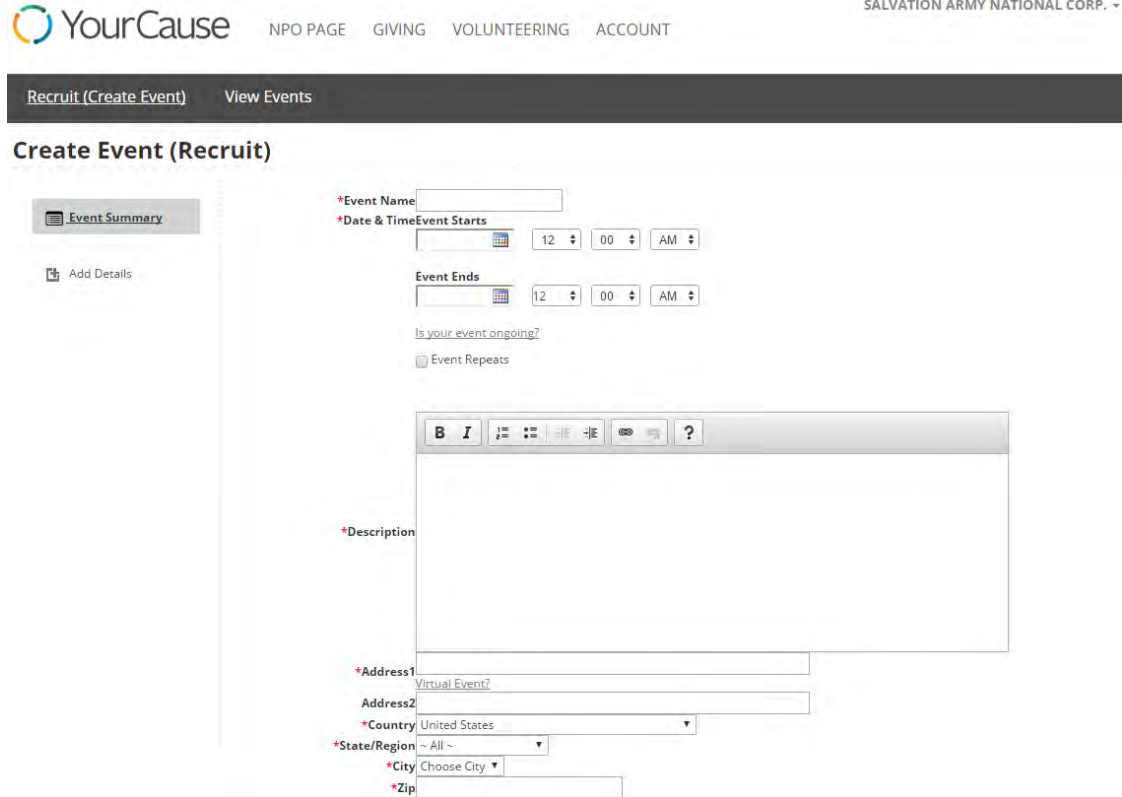
## Create Event (Recruit)

Before you begin, where would you like this event to appear?

--- Select Affiliate --- ▾  
--- Select Affiliate ---  
General (All Communities)  
Corporation Name

[Next](#)

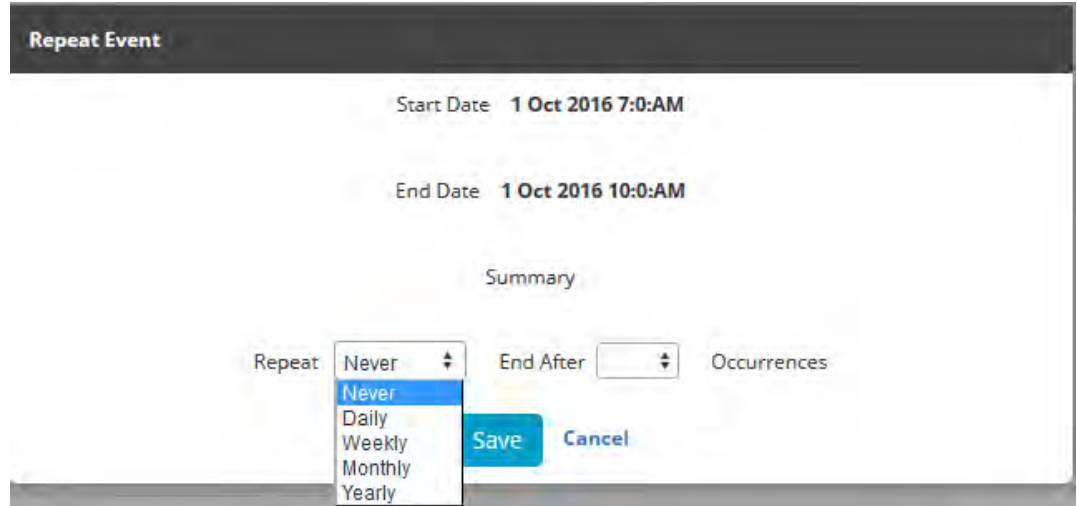
- Fill in your event details
- All details on this page are required, please be sure to use the address where the event will occur if different from the address of your organization
- Note the options to set your event to repeat, be ongoing or as a virtual event



The screenshot shows the 'Create Event (Recruit)' form in the YourCause system. The page header includes the YourCause logo, navigation links for 'NPO PAGE', 'GIVING', 'VOLUNTEERING', and 'ACCOUNT', and the text 'SALVATION ARMY NATIONAL CORP. >'. Below the header, there are two tabs: 'Recruit (Create Event)' and 'View Events'. The main heading is 'Create Event (Recruit)'. On the left side, there is a sidebar with 'Event Summary' and 'Add Details' buttons. The main form area contains the following fields and options:

- \*Event Name:** A text input field.
- \*Date & Time Event Starts:** A date and time picker showing 12:00 AM.
- Event Ends:** A date and time picker showing 12:00 AM.
- Is your event ongoing?:** A checkbox.
- Event Repeats:** A checkbox.
- \*Description:** A rich text editor with a toolbar containing Bold (B), Italic (I), Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, and Help (?) icons.
- \*Address1:** A text input field with a 'Virtual Event?' link below it.
- Address2:** A text input field.
- \*Country:** A dropdown menu currently set to 'United States'.
- \*State/Region:** A dropdown menu currently set to 'All ~'.
- \*City:** A dropdown menu currently set to 'Choose City'.
- \*Zip:** A text input field.

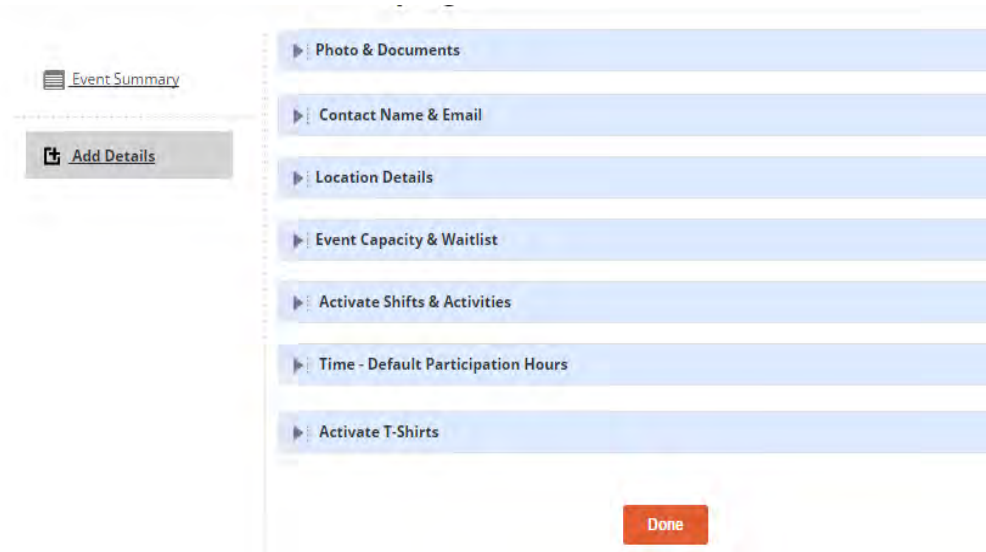
- If your event repeats, select the start and end time of the first day, then check the 'Event Repeats' option
- A pop up will appear and you will be able to set when it repeats, it will automatically recreate the event for the set amount of occurrences.
- Once you complete the event creation, you can view all occurrences under [View Events](#)
- If your event is ongoing, an end date will not be necessary.



The screenshot shows a 'Repeat Event' form with the following fields and options:

- Start Date:** 1 Oct 2016 7:0:AM
- End Date:** 1 Oct 2016 10:0:AM
- Summary:** (empty text area)
- Repeat:** A dropdown menu with options: Never, Daily, Weekly, Monthly, Yearly. The 'Never' option is currently selected.
- End After:** A dropdown menu with a downward arrow.
- Occurrences:** A text input field.
- Buttons:** 'Save' (blue) and 'Cancel' (grey).

- Once you have populated all required fields for your event, select “Add More Details”. This section allows you to add additional information, please note important details to add below:
- **Contact Name & Email:** Add contact info for the person in charge of the event
- **Event Capacity and Waitlist:** Please add the maximum number of participants for your event
- After you have added all necessary details, select **Done**



The screenshot shows a user interface for adding event details. At the top, there is a tab labeled "Event Summary". Below it is a button with a plus icon and the text "Add Details". To the right of this button is a vertical list of seven expandable sections, each with a right-pointing arrow and a title: "Photo & Documents", "Contact Name & Email", "Location Details", "Event Capacity & Waitlist", "Activate Shifts & Activities", "Time - Default Participation Hours", and "Activate T-Shirts". At the bottom right of the interface is a red button with the text "Done".

- You will be able to view the newly created event under **VOLUNTEERING > View Events**
- From the **View Events** page, you have the ability to:
  - Edit & Delete each event
  - Export the list of participants by selecting the paper icon to the right of the event and below the number of participants and hours.

The screenshot shows the 'View Events' page for 'SALVATION ARMY NATIONAL CORP.'. The navigation bar includes 'Recruit (Create Event)' and 'View Events'. Below the navigation, there are tabs for 'NPO Created Events (2)' and 'Employee Created Events (93)'. A filter dropdown is set to 'Upcoming'. The main content area displays two event cards. Each card includes the Salvation Army logo, the text 'DOING THE MOST GOOD', the event name, location ('This is a virtual event'), and date ('10/25/2016 12:00:00 AM - 10/26/2016 12:00:00 AM'). Below the date are 'Edit' and 'Delete' links. To the right of each event card, the participant count is 'Participants:0' and the hour count is 'Hours:0'. An orange callout box with the text 'Export participant details' has an arrow pointing to a paper icon located below the 'Hours:0' text for the first event.

# Eligible NPOs and Additions

YourCause NPO Portal

- **Eligible Organization to Receive Funds**
  - YourCause partners with Silicon Valley Community Foundation (SVCF), a 501(c)(3) public charity, for back office services including organizational vetting and payment processing services. As a charitable organization, SVCF must take reasonable steps to ensure that all of its assets (including money granted to other organizations) are used to further its own Section 501(c)(3) charitable purposes. It must also comply with special limits on the use of donor advised funds.
  - **501(c)(3) organizations** that are in good standing with the IRS and Pub 78 verified or listed on the BMF.
  - **509(a)(1)** Publicly supported charities including schools, hospitals and religious organizations that receive their public support primarily from gifts, grants and contribution from a broad group of donors.
  - **509(a)(2)** Exempt purpose activity-supported charities (i.e. zoos and museums which charge admission fees and also receive gifts, grants and contributions from a broad group of donors).
  - **509(a)(3) Type I and Type II** These organizations carry out their exempt purpose by specifically supporting another charitable organization, usually another public charity. Depending on the relationship between the supported organization and the supporting organization, these organizations are classified as a specific “Type.” SVCF will grant to 509(a)(3) Type I and Type II. Note: Type III organizations are not eligible to receive grants from SVCF through this program.
  - **501(c)(3) Private Operating Foundations** is any private foundation that spends at least 85% of its adjusted net income or its minimum investment return, whichever is less, directly for the active conduct of its exempt activities. The foundation must also meet either the assets test, the endowment test or the support test.
  - **170(c)(1) Government Agencies**
  - **Accredited public schools** as identified by the U.S. Department of Education
  - **A supplemental list** of organizations that have been vetted as a result of previous SVCF grant making or at the request of a client.

- **Next Steps for Current Ineligible Organizations**
  - If you think you meet the eligibility criteria and are currently not eligible to receive donations within the YourCause platform, then read below for additional information.
  - **501(c)(3) Organizations** must meet the above criteria to be eligible to automatically qualify to receive donations from SVCF. The most typical reason a 501(c)(3) organization is ineligible is because it is a 509(a)(3) Type III or a private non-operating foundation. SVCF cannot support grants to these types of organizations through this program. If you do meet the above criteria, then it may be that your “type” is listed as “unknown” within the IRS databases. To determine your type as classified by the IRS, please look at your IRS determination letter. If your determination letter does not state a supporting organization type, you may request a determination from the IRS using Form 8940 – Request for Miscellaneous Determination. Check the IRS website for additional information.
  - **Public Schools** must be on the U.S. Department of Education NCES listing, which can be found at <http://nces.ed.gov/ccd/schoolsearch/>. If your public accredited school is not on this list, then please contact them by accessing the current contact information located at <http://nces.ed.gov/help/webmail/> and ask to be added to the list.
  - **Private Schools** must meet the above eligibility criteria to be automatically eligible to receive donations directly from SVCF. Even if a private school is accredited and listed on the NCES listing of accredited private schools, then it must still meet the above eligibility criteria. Many private schools are aligned with fundraising or other organizations that are eligible to receive donations on its behalf. If this is the case for your private school, then the YourCause corporate client employee can give their donation to the eligible organization and list the private school in the designation field. For the private school to be included in the database independently, the corporate client employee must contact YourCause through standard processes and request that the private school be added to the database as a “child” of the eligible organization. The employee must provide as much information on both organizations as possible. YourCause will then verify the relationship and eligibility of the parent organization and add the private school to the database if approved. All funds will be directed to the eligible organizations. YourCause’s corporate client can also pay SVCF a vetting fee to have the educational organization vetted and added to a SVCF supplemental list of eligible organizations if approved.



- Next Steps for Current Ineligible Organizations
  - If you think you meet the eligibility criteria and are currently not eligible to receive donations within the YourCause platform, then read below for additional information.
  - **501(c)(3) Churches/Religious Organizations** For IRS specific information for churches and religious organizations, visit <http://www.irs.gov/Charities-&-Non-Profts/Churches-&-Religious-Organizations>. Churches and religious organizations must meet the requirements listed above to be automatically eligible to receive grants from SVCF. If a religious organization has elected not to file for recognition by the IRS, a YourCause corporate client must request to have the religious organization vetted and added to the SVCF supplemental list of eligible organizations if approved.
  - **170(c)(1) Organizations / Government Agencies** For IRS specific information relating to tax information for federal, state and local government, visit <http://www.irs.gov/Government-Entities/Federal,-State-&-Local-Governments>. Government agencies must meet the eligibility requirements listed above to be automatically eligible for grants from SVCF. If a government entity has not received a governmental information letter from the IRS, then a YourCause corporate client must request to have the government entity vetted and added to the SVCF supplemental list of eligible organizations if approved.



How are we different?

Real. Passionate. Dedicated