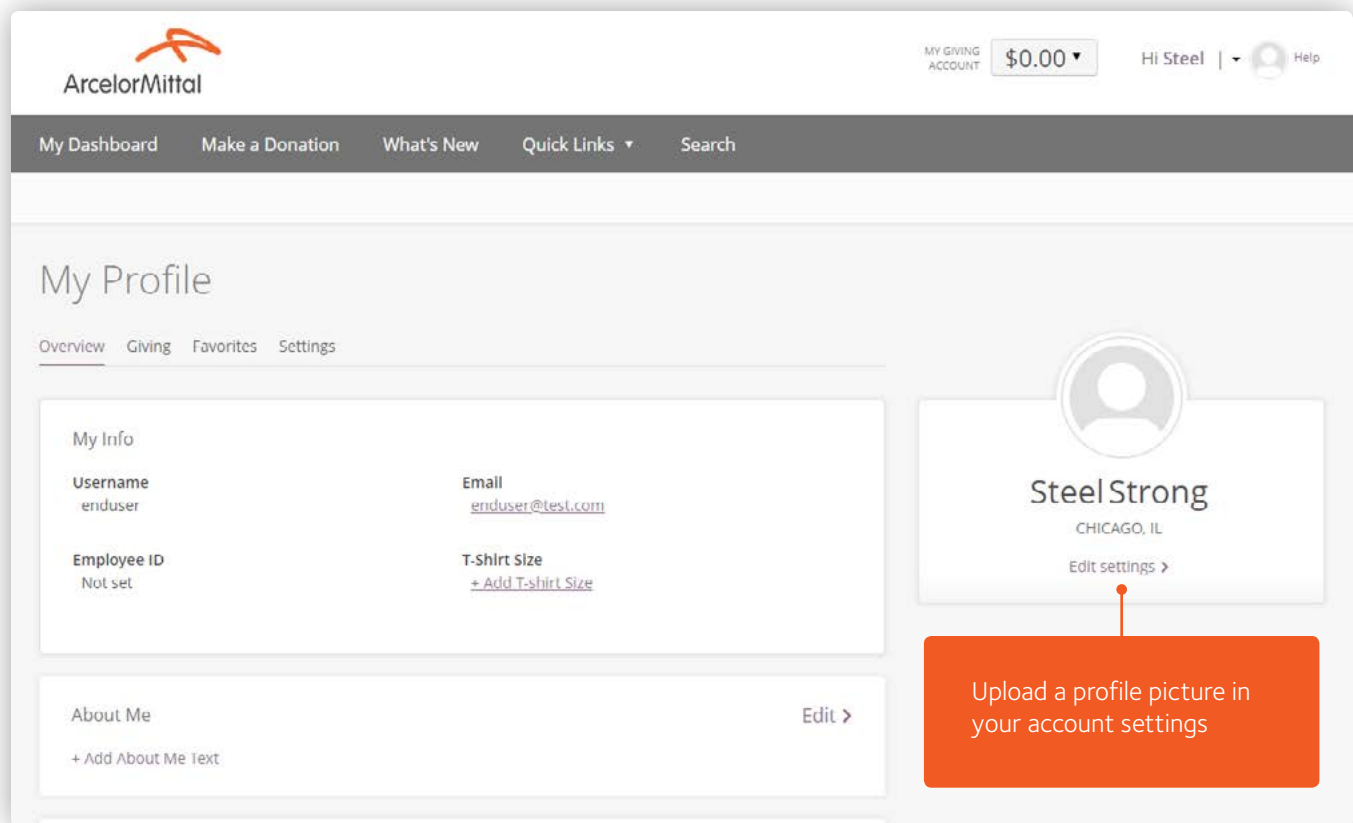


Give Boldly User Guide



Here's a quick overview of the most common features and functions of the Give Boldly website, with how-to steps provided for each. Keep this quick reference handy, and you'll be an expert in no time!

Updating your account



Change your password

- 1) Click your name in the top right corner of the screen.
- 2) Click **Settings**.
- 3) Ensure you have a valid e-mail address listed.
- 4) Enter and confirm your new password in the fields provided.
- 5) Click **Save**.

Change your address

This is the address that will appear on your donation receipts.

- 1) Click your name in the top right corner of the screen.
- 2) Click **Settings**.
- 3) Select **Contact Information** from the left-side navigation.
- 4) Update your address, confirm and click **Save**.

Update your time zone

- 1) Click your name in the top right corner of the screen.
- 2) Click **Settings**.
- 3) Scroll to the bottom of the page to **Locale Settings**.
- 4) Select the correct **Time Zone** from the drop-down options.
- 5) Click **Save**.

Finding your favorite charities



Search for a cause

“Causes” are what we call charities and eligible nonprofit organizations.

- 1) You can search for a cause from several different places:
 - In the “I care about...” search bar on the dashboard homepage
 - [Search](#) in the right end of the top navigation bar
 - At the bottom of the [Make a Donation](#) page
 - On the [Explore Causes](#) page
- 2) Enter the name of the organization you’re looking for in the search field.
- 3) If you know the organization’s tax identification number – in the United States, that’s called the EIN number – you can Search for that as well.
- 4) Click [Search](#).

Narrowing your search results

Sometimes a charity search will return many results. Here are some tips for narrowing your results to find exactly what you’re looking for more quickly.

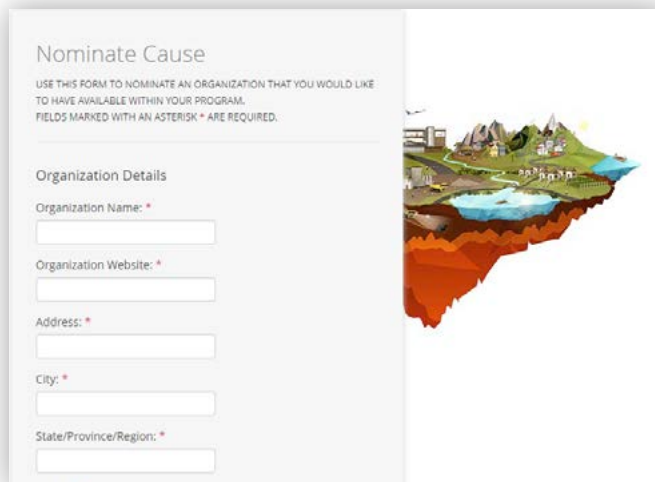
- 1) Searching by tax ID or EIN number is usually the most accurate way to find your charity.
- 2) You can search for an exact phrase by surrounding your query with quotes, ie. “Diabetes Research Institute”.
- 3) To find specific combinations you can use words like AND and OR, ie. Dogs OR Cats.
- 4) To filter out specific words, put a minus sign in front of the word, ie. Environment -Foundation.
- 5) Use the filters at the top to narrow your results according

to region or category.

Nominate a cause

If you have a particular charity in mind that you can’t find, you can nominate it to be added to the program.

- 1) Click [Quick Links](#) at the right side of the top navigation bar.
- 2) Select [Nominate a Cause](#) from the drop-down options.
- 3) Complete the form provided with the required information about your nominated organization. We will use this information to find your organization, and determine their eligibility for the program, so the more information you can provide, the better.
- 4) Click [Submit](#). Your nomination will be queued for approval.



- 5) Once we’ve determined the outcome of your nomination will receive an email letting you know.

Add a favorite cause

Once you’ve found a charity you care about, add it to your favorite causes for easy reference.

- 1) Search for the cause you want to support and click the [Favorite button](#) OR visit the cause’s profile page and click the [Favorite button](#) at the top.
- 2) See your list of favorite causes any time by going to the [My Dashboard](#) page and scrolling down. You’ll see your list on the bottom right.

Making Donations

- 1) Find the cause you want to support and click the **Donate Now** button.
- 2) Enter the amount you want to donate.
- 3) If your gift is eligible for matching, the Match Amount will appear below.
- 4) Choose your **Donation Frequency** and how you'd like to pay.
- 5) Add any comments you'd like to send to the recipient charity along with your gift.
- 6) Click **Next: Confirm Donation**.
- 7) Review the details of your donation on this confirmation page; you can click **Make changes** to this donation if you'd like to adjust anything.
- 8) Click **Submit Donation**.

Receiving matches

Some causes are eligible for matching! These matching funds will be automatically added when you make an eligible donation.

- 1) The green **Matching Offer** banner appears whenever a donation to a Cause will be matched.
- 2) Click **View Details** on a cause with the **Matching Offer** banner.
- 3) The matching details are described on the right side of the screen.
- 4) Click **Donate Now**.
- 5) When you enter your donation amount, the match amount will automatically appear underneath.

Use your giving account to make a donation

You might receive donation currency in your giving account as a reward for participation. You can also purchase it yourself, to use at any time. Here's how to use it to make a donation:

- 1) Find the cause you want to support and click the **Donate Now** button.
- 2) Enter the amount you want to donate.
- 3) Under **Choose a Payment Method**, select **Giving Account Balance**.
- 4) **Confirm** and **Submit** your donation.

Set up a recurring payroll donation

- 1) Find the cause you want to support and click the **Donate Now** button.
- 2) Enter the amount you want to contribute each payroll period in the donation amount field.
- 3) Under **Choose a Donation Frequency**, select **Recurring**.
- 4) Under **Choose a Payment Method**, select **Payroll Deduction**.
- 5) **Confirm** and **Submit** your donation.
- 6) Your donation will be regularly deducted from each payroll, starting with the next pay period.

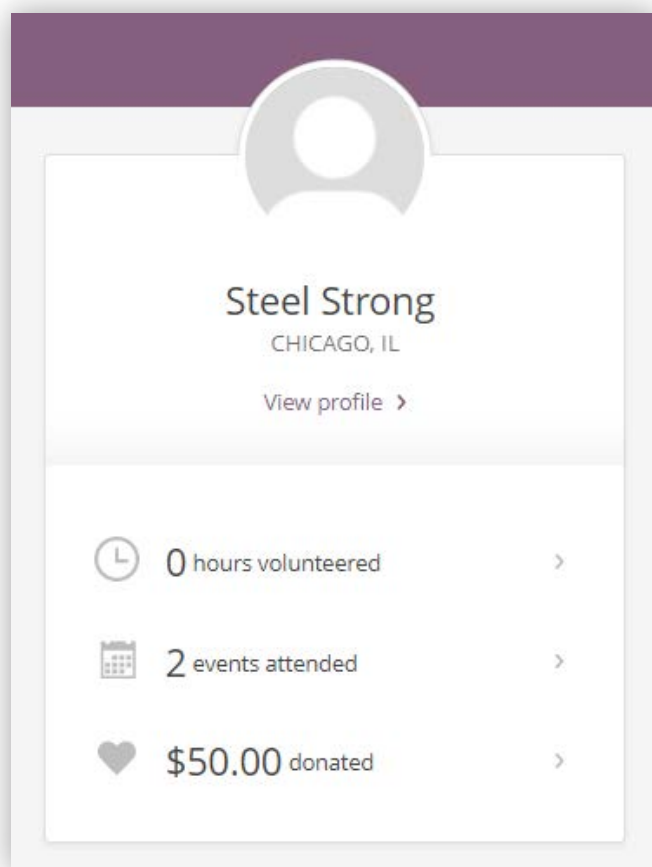
You can create, change or cancel recurring payroll donations anytime throughout the year.

Request a match

You can request a match for donations you made outside of the system.

- 1) Click **Quick Links** from the right side of the top navigation bar.
- 2) Select **Request a Match** from the drop-down options.
- 3) Submit your request following the steps provided and click **Submit**.
- 4) Your request will be queued for approval. See the status of your external match requests by clicking **My Match Requests** on your profile page.

Keeping track of your activity



View your donation history

- 1) Select **My Dashboard** at the left side of the top navigation bar.
- 2) Look for a profile summary box on the right side and click next to the **Heart icon** to search your donation activity.
- 3) View a list of your previous donations.
- 4) Find all the activity for a specific month by selecting **Click to show/hide monthly history**.
- 5) In the left navigation bar, you can also select to view your upcoming donations and match requests.

Find your donation receipts

You can view your donation receipts in two places:

- 1) On your profile page:
 - Click your **name** in the top right corner of the screen.
 - Click **My Profile**.
 - Click **Giving** and select **Donation Receipts** from the left-side navigation.