CHARITY PORTAL QUICK GUIDE

Receiving Your Login Credentials

To access the charity portal, please use the login credentials provided on the remittance email or check paystub when distributions are processed. In the remittance advice, you will receive instructions on how to login to your organization's account:

AMERICA'S CHARITIES
Distribution Account
14150 NEWBROOK DRIVE SUITE 110
Chantilly, VA 20151
United States

America's Charities
14150 Newbrook Drive
Suite 110
Chantilly, VA 20151

Bank of Origin: Wells Fargo
Issue Date: 2021/03/12
Advice Number: E81171
Payment Amount: $100.00 USD
Vendor #: A1234567

Remittance Advice

Invoice Date	Invoice #	Invoice Description	Invoice Net Amount
2021/03/05	CF210131_A1234567	F2020 ACMC Dist ID #210131	$100.00

To obtain your agency's ONLINE PAYMENT REPORT:
STEP 1: Visit www.charities.org/reports
STEP 2: Enter your user name and password. *(See Below)*
STEP 3: Select report option. *(See Below)*
STEP 4: Enter the distribution id. *(See Below)*
Need Help? Go to: *www.charities.org/support* for online support and FAQ's or you can call us at: **(703) 957-7888**

User Name:	A1234567Charity
Password:	20151VA
Report Option:	Dist# 210131

ACKNOWLEDGEMENTS: America's Charities does not send acknowledgements to donors on behalf of your agency

This notice is to inform you that an attempt has been or will be made to send funds electronically to your bank account via ACH or Wire transfer. Receipt of this remittance advice is not confirmation of success or failure of this attempt. If you have any questions please contact our Charitable Funds Management Solutions at remittance@charities.org.

Summary Section

| Vendor #	A1234567	Issue Date	2021/03/12	Remittance Total	$100.00

Confidential and Proprietary

<u>LOGIN SNAPSHOT</u>

Charity Portal Website: www.charities.org/reports

Username: Your Unique Charity ID + charity, ex: A1234567charity

Password: Zip Code + State Abbreviation, ex: 55426MN

Once you are on the charity portal website, enter your credentials below. Please do not create a new account or request a new password. One charity account is uniquely created as distributions are sent from America's Charities to the receiving agency.
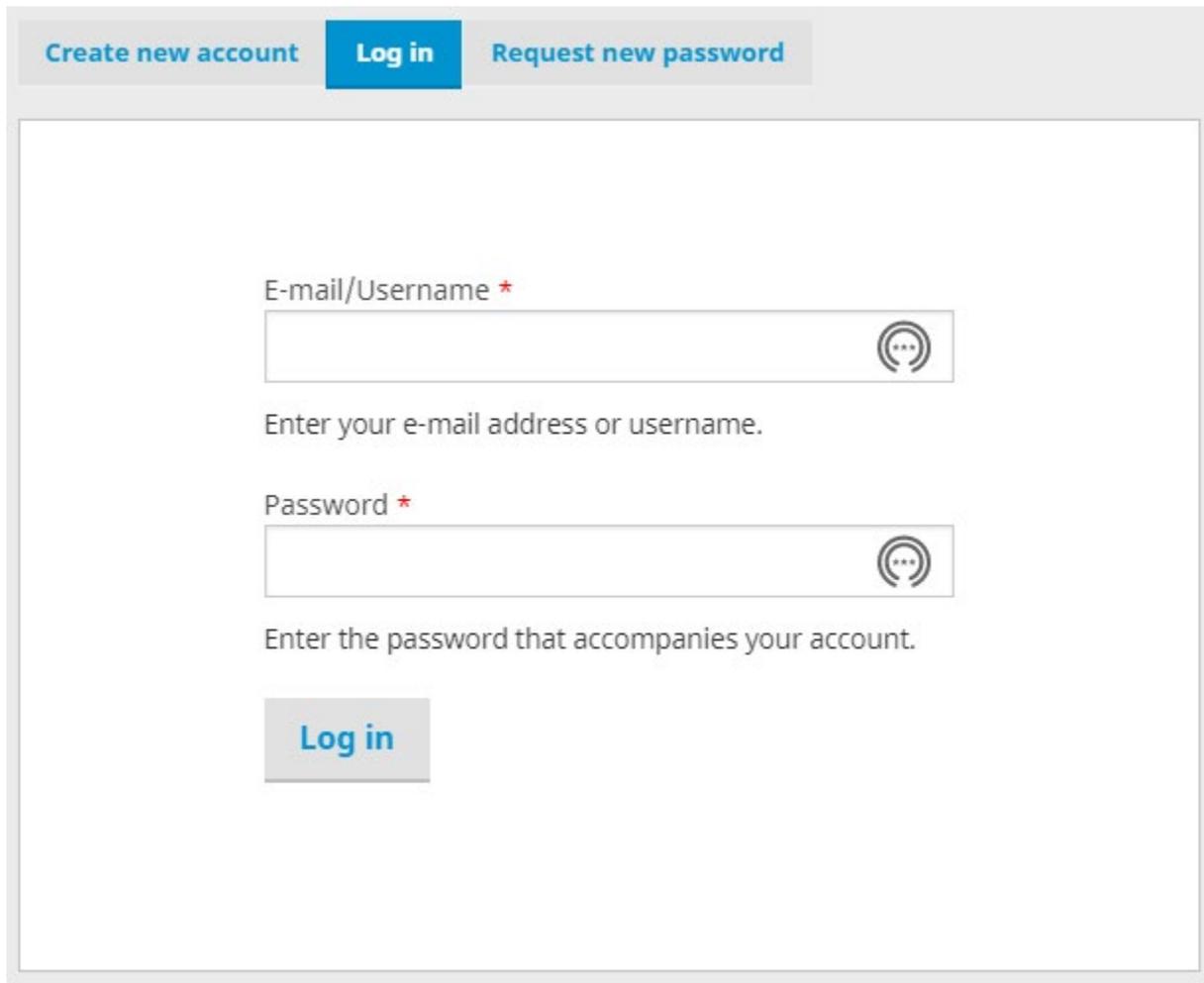
Create new account	Log in	Request new password

E-mail/Username *

Enter your e-mail address or username.

Password *

Enter the password that accompanies your account.

Log in

ACCESSING REPORTS

America's Charities Reporting Portal

America's Charities provides a robust charity portal to help you be successful in tracking your agency's pledge and distribution data. The charity portal provides the data needed to manage pledges and track incoming funds.

Dashboard

Upon logging into the Charity Portal, you will see 5 reports to choose from. Click on the report you wish to view.

To see annual pledge results and special donation instructions (i.e. notes about using designated donations for specific programs and funds, COVID-19 relief, etc), please use the Pledge Detail Report.

To retrieve donor information for a check or EFT payment, please use the Distribution Donor Detail report.

Looking for something else? Please check our Nonprofit FAQs for quick answers to common questions we receive, such as how to login, where to find donor details, when to expect another check, and how to receive funds faster via EFT.

Pledge Detail Report   Donor Acknowledgement   Campaign Summary

Distribution Summary   Distribution Donor Details

 After you choose your filter and click "Submit," the results will load. You can click on any of the columns to sort the report by that column. All reports can be exported to a spreadsheet by clicking the "Download CSV" button. Below is an overview of available reports.

Pledge Detail Report

This report displays the individual pledges made by donors. For Begin Date, enter the first day of the year. For End Date, enter "Today's Date." It contains the year-to-date totals for the current campaign and all previous campaigns.

Pledge Details

Back to reports

Note: Date Entered is the date a pledge was loaded into our database and not necessarily the date the pledge was made by the donor.

Begin Date
mm/dd/yyyy

End Date
mm/dd/yyyy

⊞ View Report Reset

This screen grab below is an example of the report view. Names have been blocked out for donor privacy.

Pledge Details

Back to reports

Note: Date Entered is the date a pledge was loaded into our database and not necessarily the date the pledge was made by the donor.

Begin Date
01/01/2020

End Date
05/18/2021

⊞ View Report Reset **🖺 Download CSV**

Date Entered	Designation	Federal EIN	Last Name	First Name	Amount	Campaign	Payment Type	Notes
04/01/2021	Cancer Care - Park Nicollet Fo	23-7346465PNCC			$ 100.00	2020 Health Partners WPG	Credit Card	
04/01/2021	Caring for Colleagues - Park N	23-7346465PNFCC			$ 50.00	2020 Health Partners WPG	Credit Card	
04/01/2021	Area of Greatest Need - Park I	23-7346465PNFAGN			$ 40.00	2020 Health Partners WPG	Credit Card	
04/01/2021	Area of Greatest Need - Park I	23-7346465PNFAGN			$ 25.00	2020 Health Partners WPG	Credit Card	

Donor Acknowledgement Report

After entering the date parameters, this report will display list of donors who would like to receive an acknowledgement from your organization. The report includes individual donor pledges, donor contact information and whether the donor would like to receive future communication from your agency.

This screen grab below is an example of the report view. Names and contact information have been blocked out for donor privacy.

Donor Acknowledgement

This report shows all donors who would like to receive an acknowledgement. The "Future Communication" column indicates if they would like further communication (mailing list, newsletter, etc.). Note: Date Entered is the date a pledge was loaded into our database and not necessarily the date the pledge was made by the donor.,

Begin Date
01/01/2020

End Date
05/18/2021

⊞ View Report   Reset   🖺 Download CSV

Date Entered	Designation	Federal EIN	Last Name	First Name	Email	Street Address	City	State	Zipcode	Amount	Campaign	Payment Type...	Future Comm...
04/01/2021	Cancer Care - Park	23-7346465PNCC								$ 100.00	2020 Health Partne	Credit Card	Do Not Allow
04/01/2021	Caring for Colleagu	23-7346465PNFCC						MN	55422	$ 50.00	2020 Health Partne	Credit Card	Do Not Allow
04/01/2021	Area of Greatest N	23-7346465PNFAG								$ 40.00	2020 Health Partne	Credit Card	Do Not Allow
04/01/2021	Area of Greatest N	23-7346465PNFAG						MN	55442	$ 25.00	2020 Health Partne	Credit Card	Do Not Allow

Campaign Summary Report

This report will show the total amount your agency has raised from one or multiple workplace giving campaigns. Entering a campaign year is optional.

Campaign Summary   Back to reports

Campaign Year (optional)

[ ]

⊞ View Report   Reset   💾 Download CSV

Campaign	Year	Amount
2020 Health Partners WPG	2020	$18,148.00

Distribution Campaign Summary Report

This report will show the total amount your agency has received for a particular distribution from one or multiple workplace giving campaigns. Please enter the distribution ID located on your remittance email or check stub. The distribution ID is a 3-digit or 6-digit number. The total on this report is the total amount of funds your agency should expect to receive.

Distribution Campaign Summary   Back to reports

Please enter numerical portion of 'Report Option:
ID___' that appears on your check stub. Ex ID123
Enter: 123

[210131]

⊞ View Report   Reset   💾 Download CSV

Company	Campaign	Year	Amount
2019 American Express Corp Match Distribution for AC Members	2019 American Express Corp Match Distribution for AC Members	2019	$7,532.52
2019 American Express Distribution for AC Members	2019 American Express Distribution for AC Members	2019	$8,785.27

Distribution Donor Detail Report

This report shows the list of donors who contributed to the funds your agency received for a particular distribution. Funds may be consolidated from one or multiple workplace giving campaigns. Please enter the distribution ID located on your remittance email or check stub. The distribution ID is a 3-digit or 6-digit number.

This screen grab below is an example of the report view. Donor names and contact information have been blocked out for donor privacy.

QUESTIONS?

Please check our Nonprofit FAQs for quick answers to common questions we receive, such as how to login, where to find donor details, when to expect another check, and how to receive funds faster via EFT

Nonprofit FAQs: https://www.charities.org/nonprofit-faqs

Call our HelpDesk Team: (703) 957-7888

Send an Email: help@charities.org

Submit a Request: https://americascharities.zendesk.com/hc/en-us/requests/new