

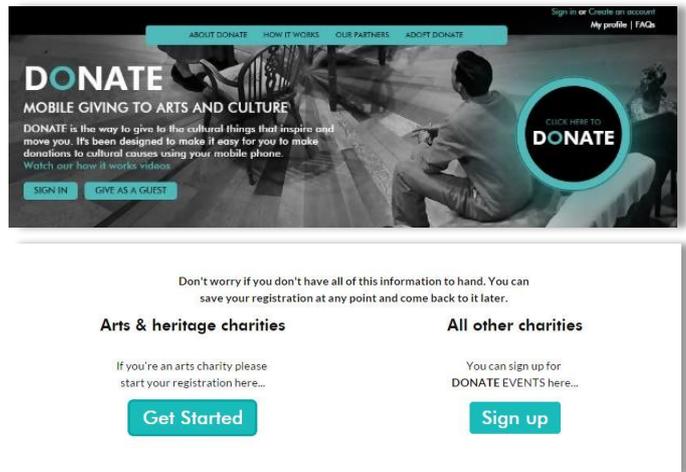
## TOOL KIT: GETTING SET UP IN 7 STEPS

It takes just seven easy steps to get set up with DONATE. The steps are outlined below followed by screen shots of the self-service portal. You'll be able to access the self-service portal once the Affiliation Agreement has been agreed. Before you get started make sure you have the following essential items: Your campaign text & image(s), charity number, charity bank details, a signed recent bank statement\* and three years of audited accounts\*\*.

### 1. Click on **ADOPT DONATE**

[www.nationalfundingscheme.org](http://www.nationalfundingscheme.org)

### 2. Click on **GET STARTED**



### 3. **ACCOUNT INFORMATION**

Enter your contact details: title, name, telephone number, email address, job title and password.

### 4. **ORGANISATION DETAILS**

Enter your organisation's details: name, address, type, size, charity number.

### 5. **WEBSITE COPY AND IMAGES**

Enter details about your campaign: Intro text, description of organisation, logo + image, cause name, short title, cause description and upload cause images.

### 6. **CONTRACT AND FINANCIALS**

- Enter the details of a person of responsibility (this should be a CEO, trustee or equivalent person authorised to sign legal or financial documents).
- Enter charity bank name, account name, account number, sort code, branch address, name of auditor (optional)
- \*Upload a recent bank statement (this must be no more than three months old and must be signed by the person of responsibility named above)
- \*\*Upload at least three years of audited accounts. If you don't have this information, please explain why in the box provided.



### 7. AFFILIATION AGREEMENT

Read the terms and conditions detailed in the affiliation agreement and tick the box. Indicate if you are the person of responsibility, if not, provide your name & job role.

#### Screen shots demonstrating the self-service portal

The screenshot shows the 'DONATE NATIONAL FUNDING SCHEME CELEBRATIONS PORTAL' dashboard. At the top right is a 'Need help?' button. Below the header is a navigation bar with buttons for 'My dashboard', 'My organisation', 'My causes', 'Promoting my causes', and 'My reports and data'. The 'My dashboard' section is active and contains two tables and a help section.

**Donations overview**

Cause	Donations	Total	Total with Gift Aid
NOV5	78	£695.00	£811.25

[View all donations](#)

**Donations channel**

Cause	WEB	SMS
NOV5	25	53

**What would you like to do?**  
[View donations](#)

**Help**  
If you need help at any point, please use the 'Need help?' button in the top right of the page.  
[View FAQs](#)

The screenshot shows the 'My causes' page. It has the same navigation bar as the dashboard. The page title is 'My causes'. Below the title is a descriptive paragraph: 'This section lets you create new causes and change the content (images and text) of existing ones. Additional features include personalising the thank you message to donors, and being able to add offline donations to your publicly displayed donation stats.' There are two tabs: 'Details' (selected) and 'Admin'. A link for 'All causes' is in the top right. On the left, there are links for 'About your organisation' and 'Media library'. The main content area is titled 'Cause details' and contains three form fields:

**Cause name**: Support Battersea Arts Centre and The Bach Choir  
64 characters including spaces

**Short title**: BatterseaBachChoir  
20 characters including spaces

**Cause summary text**: Support Battersea Arts Centre and The Bach Choir  
150 characters including spaces



- My dashboard
- My organisation
- My causes
- Promoting my causes
- My reports and data

## Promoting my cause

Here you'll find instructions on how to create signage, information on the mandatory legal copy that needs to be included and guidance on

### Cause assets

[Signage downloads and guidelines](#)

### Support Battersea Arts Centre and The Bach Choir

Below you'll find all the cause specific information needed for your signage.

Cause code	NOV5
Cause URL	<a href="http://don8.to/NOV5">http://don8.to/NOV5</a>
Cause language URL	<a href="http://don8.to/NOV5/language">http://don8.to/NOV5/language</a>
Cause projection screen URL	<a href="#">View the cause projection screen</a>
Cause QR code:	



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## Data Approved transactions

Cause NOV5 Date range from  to  Filter Clear filters Export

Cause code	Donation amount	Gift Aid amount	Total donated	Date	Donation Method	Did donor share data?
NOV5	£5.00	£1.25	£6.25	06-11-2014	Web App	No
NOV5	£5.00	£0.00	£5.00	05-11-2014	SMS	No
NOV5	£5.00	£1.25	£6.25	05-11-2014	SMS	Yes
NOV5	£5.00	£1.25	£6.25	05-11-2014	SMS	No

**Can I find out more?** Visit [www.nationalfundingscheme.org](http://www.nationalfundingscheme.org) or contact: [hello@nationalfundingscheme.org](mailto:hello@nationalfundingscheme.org) with any general enquiries or call: 020 3174 2276