



MATCHING GRANTS CAPTURE SYSTEM

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Table of Contents

Introduction	4
Key Terms	5
Things to Think about before you Configure	6
Matching Grant Program Configuration	7
A. Create a Bucket	8
B. Create Cross-Program Ceilings (Optional)	9
C. Create Custom Payment Types (Direct Match Only/Optional)	11
D. Configure Match Program	13
Create a Match Program Profile	14
Configure the Program Content	15
Activate Payment Types (Direct Match only)	16
Configure the Program Rules	17
Associate Designation Panel (Direct Match Only)	21
Configure Rejection Reasons (Optional)	23
Add Program Level Custom Questions (Direct Match Only/Optional)	24
<i>Associate Users (Optional)</i>	26
<i>Activate Match Program</i>	26
E. Create Matching Grant Option Set	27
MSCS Activation	31
A. Direct Match Standalone	31
Create a MGCS Website	31
Associate the Matching Grant Option Set with the Website	33
Configure the Website Content	34
Set the Donor Registration Options (Optional)	35
Activate the Website	36
B. Direct Match Integrated with SPE	37
Configure a MGCS Website	38
Activate the MGCS to OPCS SSO Link	38
Activate the OPCS to MGCS SSO Link	39
C. Direct Match Integrated with IPE	41
Configure the IPE Campaign	42
Associate the Matching Gifts Option Set with the Campaign	42
Configure the Direct Match Site Content	43
D. Designation Match	44
Configure the IPE Campaign	44
Associate the Matching Gifts Option Set with the Campaign	45



Appendix A: Sample Matching Grant Program Configurations.....	46
Sample 1: Single Direct Match Program for All Employees	46
Program Description	46
MGCS Configuration	46
Sample 2: Different Match Caps for Retirees and Employees. Shared Match Funds with Set Allocation Maximum for Retirees.	47
Program Description	47
MGCS Configuration	47
Sample 3: Company Matches Both Donations Direct to Charity and Campaign Pledges. Variance in Match Rules within Campaign. Shared Donor Match Ceiling Across Programs.	49
Program Description	49
MGCS Configuration	49
Appendix B: Knowing Which MGCS Setup is Right.....	51
Appendix C: Direct Match Donor Experience Screenshots	52
Standalone Welcome / Home Page.....	52
SPE Integrated Welcome / Home Page	52
IPE Integrated Welcome / Home Page	53
Program Guidelines Review	53
Agency Search / Selection.....	54
Agency Selection Confirmation.....	54
Transaction Details.....	55
Transaction Details with Custom Payment Type Selected	55
Registration / Donor Details.....	56
Registration / Donor Details with Custom Program Level Question.....	56
Transaction Review	57
Thank You / Claim Form Link	57
Match Request Tracker.....	58
Appendix D: Designation Match Donor Experience Screenshots.....	59
Welcome / Home Page	59
Pledge / Designation Level Details.....	59
Transaction Review	60



Introduction

Companies offer a variety of programs whereby employee donations of time and money can be “matched” by the company. The Campaign Management (CM) platform offers a highly flexible and configurable Matching Grants Capture System (MGCS) designed to support these programs.

There are two types of matching grant capture options offered within CM:

- **Direct Match:** Allows a donor to “request a match” for a donation made to an agency outside of the online pledge system. When Direct Match is used, the recipient agency must verify the gift prior to approval and distribution of the matching grant. Direct Match may be activated as a standalone website or may be integrated with a campaign level website.
- **Designation Match:** Allows a donor to “request a match” as part of the online pledge process. When Designation Match is used, the donor’s fulfillment of the pledge is used as verification of the gift and triggers the distribution of the matching grant. Designation Match can only be activated within an Impact Pledge Experience (IPE) campaign.

While it is not part of the MGCS, and therefore not a focus of this document, it is worth noting a third feature available within the standard CM system:

- **Corporate Match:** Allows the company to alert the donor via the online pledge system that the company will match donations made by participants in the company’s employee giving campaign. Unlike Direct Match and Designation Match, no match transaction record is created/captured in the system. Rather it is for informational purposes only and requires offline processing of the associated matching grant.

This document provides step-by-step instructions and other information to guide configuration of the various MGCS options. Refer to the support site documentation on **Corporate Match** for details on activating this functionality.



Key Terms


Below are some key terms you will need to be familiar with when configuring MGCS:

- **Match Program** – Parameters, rules, and grant requests associated with a specific matching grant program. Multiple match programs can be activated simultaneously within a company.
- **Bucket** – Total matching grant funds available for distribution. Multiple matching programs may be associated to the same bucket of funds.
- **Ceiling** – Maximum matching grant funds that will be allocated. Ceilings can be set as “**General**” (max for all match requests) or “**Donor**” (max for all requests made by an individual donor). Ceilings can be established for a single Match Program, or applied across multiple programs and/or buckets.
- **Match Rules** – Guidelines set within a Match Program determine the transactions that meet the basic matching program guidelines. Match rules establish the following: minimum transaction amount, maximum match amount, match rate, associated payment types, and eligible agencies.
- **Claim Form** – A form sent to the recipient agency that is used in conjunction with Direct Match programs to verify the donation. The claim form is generated by the system with pre-populated matching grant request information entered by the donor into MGCS.
- **Auto-Match** – A Designation Match setting that when activated automatically creates a matching grant transaction “behind-the-scenes.” When auto-match is activated the donor will still be able to view and edit the details of the donation transaction, however, the donor will not have the ability to view or modify the details of the match transaction.
- **Matching Grant Option Set** – A bundle of matching grant programs and ceilings. Matching grant option set also determines if the claim form or auto-match features will be active.



Things to Think about before you Configure

Prior to configuring a company's matching grant program(s) it is important to note the following:

- MGCS is an “App Featured” component located at the  **Companies** Level. Access will need to be granted to your administrator account prior to beginning the program configuration. If you are unable to see the **Matching Grants** option in the company level tree, you should contact the FrontStream Support Center to have that turned on before continuing.
- MGCS is designed to be highly configurable and capable of supporting a wide range of company matching grant programs. As such it is important that you think through how each company's program would best be configured in MGCS prior to beginning the configuration. Preparing this mapping of buckets, ceiling, match rules and other details in advance will ensure that the matching grants are being calculated correctly. Refer to **Appendix A: Sample Matching Grant Program Configurations** as a guide for completing this mapping.
- In addition to knowing which buckets, ceilings, rules, etc. are needed you will need to decide which MGCS option to use. There are four different options available: Direct Match Standalone, Direct Match Integrated with SPE, Direct Match Integrated with IPE, and Designation Match. In some cases multiple options will be used within the same company. For example: A company may match donations made directly to the charity as well as pledges made during the annual employee workplace campaign. If this company desired to have a single log-in for employees to access both online programs both Direct Match Integrated with IPE and Designation Match will be activated. Refer to **Appendix B: Knowing Which MGCS Setup is Right** as a guide for deciding which option(s) are needed to support a particular company's program.








Matching Grant Program Configuration

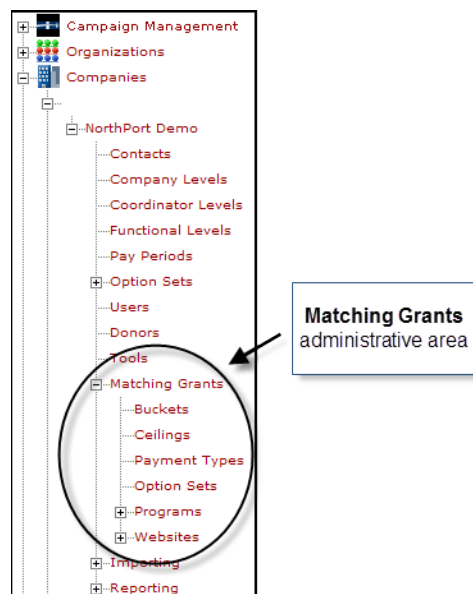
The basic steps for configuring Matching Grants are as followed:

- Create a Bucket
- Create Cross-Program Ceilings (optional)
- Create Custom Payment Types (Direct Match only/optional)
- Configure Match Program
- Create Matching Grants Option Set

Note: During the Matching Grants setup process, please contact Justin Fusco (justin.fusco@frontstream.com) to configure exports.

Each of these steps is completed in the **Matching Grants** section of the Company level. If Matching Grants has been activated for your organization, you can follow the steps below to access **Matching Grants**.

1. Select  **Companies** from the left navigation tree to access the  **Company List** page.
2. Click  next to the Company Name for the company you wish to work with to access that Company's profile page.
3. Click  on the top navigation bar to sync the navigation tree to the selected company.
4. Click  to **Matching Grants** to expand the navigation tree and access the various **Matching Grants** administrative areas.



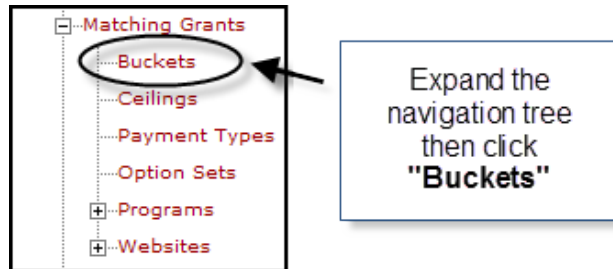
Once you have accessed this area, you can follow the step-by-step instructions provided in the sections below for completing each of the above set-up steps.



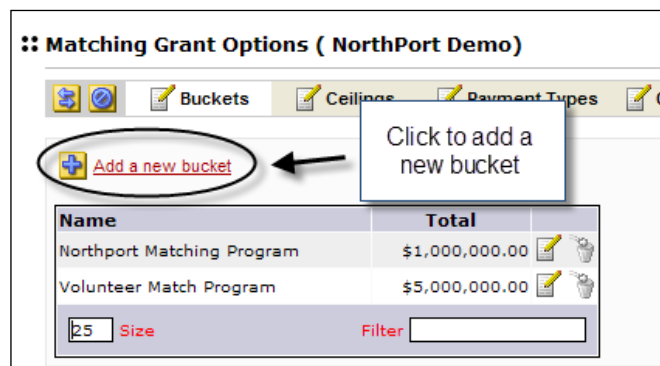
A. Create a Bucket

Buckets define the total matching grant funds available for distribution. **At least one bucket must be created for each company** – even if the company has not identified a total matching grants funding amount. Once created, a bucket can be associated to one or more Match Programs (refer to [Configure Match Program](#) for more details).

1. Click “Buckets” from the **Matching Grants** section of the navigation tree.



2. Click “Add a new bucket.”



3. Enter the required and desired optional information to define the bucket. **Note:** Required fields are indicated by an asterisk (*).

Bucket Fields		
Req	Field	Description
*	Bucket Name	This is the name that will be used to identify the bucket throughout the system.
*	Bucket Total	This is the maximum available matching funds for the bucket – enter the dollar value into the text box. Do not include any commas or current symbols. Note: Since this is a required field, a value must be entered. If the company does not have a defined match funds bucket, enter “9999999999” (as many 9s as the system will allow).



Bucket Fields		
Req	Field	Description
	Bucket Adjustment	Allows you to adjust the total dollars available for users of the online system by either a positive or negative number.

- Click **“Save / Update”** at the bottom of the page to save your settings.

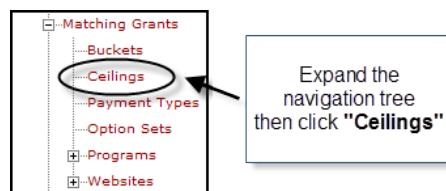
- Repeat steps 2 – 4 to create additional buckets if applicable.

B. Create Cross-Program Ceilings (Optional)

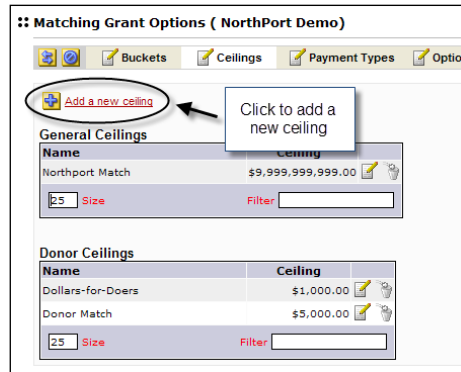
Ceilings define the maximum matching grant funds that will be allocated. Ceilings can be set as **“General”** (max for all match requests) or Donor (max for all requests made by an individual donor). Ceilings can be established for a single Match Program as part of the Match Program configuration (refer to [Configure Match Program](#) for more details). If the company has multiple programs across which a ceiling is to be applied, Company level ceilings can be created and applied across multiple programs as part of the Match Option Set (refer to [Create Matching Grant Option Set](#) for more details).

The creation of company level ceilings is an optional feature allowing for the configuration of complex Matching Programs. **Skip this step if cross-program ceilings are not needed for a particular company.**

- Click **“Ceilings”** from the **Matching Grants** section of the navigation tree.



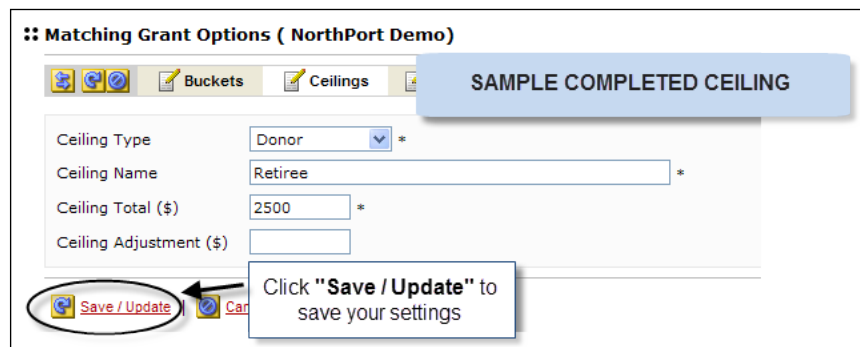
- Click **“Add a new ceiling.”**



3. Enter the required and desired optional information to define the ceiling. **Note:** Required fields are indicated by an asterisk (*).

Ceiling Fields		
Req	Field	Description
*	Ceiling Type	Establishes whether the ceiling will be applied to matching grant transactions from all donors or only for each specific donor – <i>select 'General' or 'Donor' from the drop-down list.</i>
*	Ceiling Name	This is the name that will be used to identify the ceiling throughout the system.
*	Ceiling Total	This is the maximum matching funds that will be allocated across matching programs associated with this ceiling – <i>enter the dollar value into the text box. Do not include any commas or current symbols.</i>
	Ceiling Adjustment	Allows you to adjust the total dollars available for users of the online system by either a positive or negative number.

4. Click **"Save/Update"** at the bottom of the page to save your settings.



5. Repeat steps 2 – 4 to create additional ceilings if applicable.

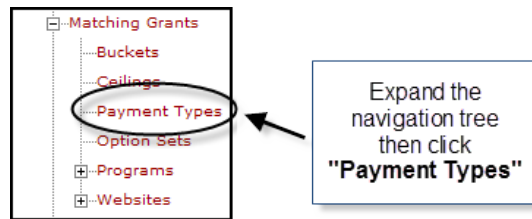


C. Create Custom Payment Types (Direct Match Only/Optional)

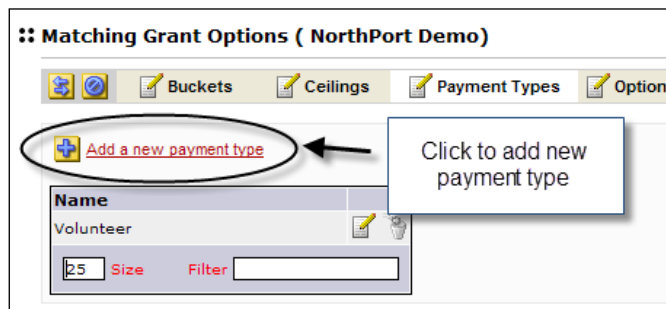
Custom Payment Types is an optional feature that can be configured for use with Direct Match Programs (this feature does not work with Designation Match) allowing for flexibility in configuring Matching Programs. **Skip this step if custom payment types are not needed for a particular company.**

Note: With custom payment types you also have the ability to create custom questions at the payment type level. These questions will appear on the *Match Grant Details* page of the match request process when a particular custom payment type is selected. Donor responses to custom payment type questions appear on the *Matching Grant Review* screen as well as the *Matching Grant Export*.

1. Click "Payment Types" from the Matching Grants section of the navigation tree.



2. Click "Add a new payment type."



3. Enter the required and desired optional information to define the payment type.

Note: Required fields are indicated by an asterisk (*).

Custom Payment Type Fields		
Req	Field	Description
*	Type Label	This is the name that will be used to identify the payment type throughout the system.
	Amount Label	This is the donation amount label that will be displayed on the donor site when the associated payment type is selected. Note: The default label is "Amount Paid."
	Date Label	This is the donation date label that will be displayed on the



Custom Payment Type Fields		
Req	Field	Description
		donor site when the associated payment type is selected. Note: The default label is “ Payment Date. ”
	Match Amount Label	This is the match request amount label that will be displayed on the donor site when the associated payment type is selected. Note: The default label is “ Match Amount. ”
Payment Type Questions		
*	Label	This is the field label that will be visible to the donor on the match request details page.
*	Field Type	Denotes the field value. The available field types are Text (which allows the donor to enter freeform text) and List (which prompts the donor to select an option from a drop down list) – <i>select ‘Text’ or ‘List’ from the dropdown list.</i> Note: The default is ‘Text.’
	Default Value	If ‘Text’ is selected as the “ Field Type, ” this denotes the default value that will appear to the donor on the pledge details page. If ‘List’ is selected as the “ Field Type, ” this denotes the drop down choices that will appear to the donor on the pledge details page – <i>enter each choice on a separate line in the box provided.</i>
	Validation	Denotes what data validation, if any, will be done by the system on the data entered by the donor – <i>select ‘None,’ ‘Numeric,’ or ‘Date’ from the dropdown list.</i> Note: The default is ‘None.’
*	Active	Denotes if this field is currently active – <i>check the box to activate.</i> Note: The default is ‘Inactive’ (unchecked).
	Required	Denotes if this field will be required – <i>check the box to require that the donor compete this field prior to completing the pledge.</i> Note: The default is ‘Optional.’

- Click “**Save/Update**” at the bottom of the page to save your settings.



Matching Grant Options (NorthPort Demo)

Payment Type Label: Volunteer *

Payment Amount Label: Number Hours Volunteer

Payment Date Label: Volunteer Since

Match Amount Label: Grant Amount

Payment Type Questions

Field Label	Field Type	Default Value	Validation	Active	Required
1 Description of volunteer work	Text		None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2 How did you learn about the volun	List	Company Event Family Member / Friend Organization Communication Volunteer Website	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	Text		None	<input type="checkbox"/>	<input type="checkbox"/>

Click "Save / Update" to save your settings

5. Repeat steps 6 – 8 to create additional custom payment types if applicable.

D. Configure Match Program

The Match Program is the core of the Matching Grants system. In addition to allowing for configuration of the basic match program rules (minimum donation amount, maximum match grant amount, and match rate), once established the Match Program becomes the hub for matching grant request tracking and processing.

The basic steps for configuring a Match Program are as followed:

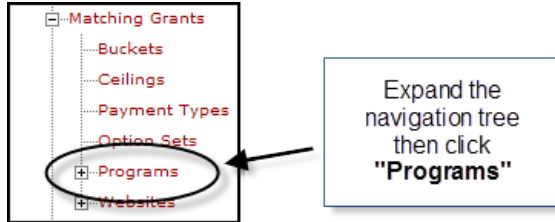
- Create a Match Program Profile
- Configure the Program Content
- Activate Payment Types (Direct Match only)
- Configure the Program Rules
- Associate Designation Panels (Direct Match only)
- Configure Rejection Reasons (optional)
- Add Program Level Custom Questions (Direct Match only/optional)
- Associate Users (optional)
- Activate Match Program

Below are step-by-step instructions for creating a Match Program. **Note:** Several of the steps are only applicable to Direct Match programs. Skip these steps when configuring a program for use with Designation Match.

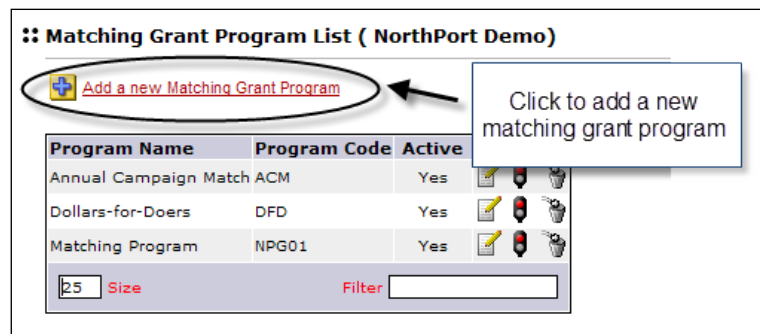


Create a Match Program Profile

1. Click **Programs** from the **Matching Grants** section of the navigation tree.



2. Click "Add a new Matching Grant Program."



3. Enter the required and desired optional information to define the ceiling. **Note:** Required fields are indicated by an asterisk (*).

Matching Program Settings Fields		
Req	Field	Description
*	Program Name	This is the name that will be used to identify the match program throughout the system. Note: If a company has multiple match programs, it is important that the name be meaningful so the programs can be easily differentiated from one another.
*	Program Code	This is the code that will be used to identify the match program throughout the system.
*	Bucket	Establishes which funding bucket this match program is associated with.
	Program Ceiling	This is the maximum matching funds available for this program – <i>enter the dollar value into the text box. Do not include any commas or current symbols.</i> Note: If there is no ceiling leave this field blank.
	Program Ceiling	Allows you to adjust the total matching funds available for this program for users of the online system by either a



Matching Program Settings Fields		
Req	Field	Description
	Adjustment	positive or negative number. Note: Applying a negative adjustment allows the company to reserve a portion of the match funds for match requests submitted offline.
	Donor Ceiling	This is the maximum amount a single donor can receive in matching funds under this program – <i>enter the dollar value into the text box. Do not include any commas or current symbols.</i> Note: If there is no ceiling leave this field blank.

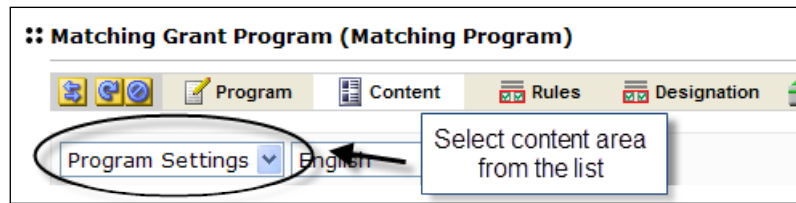
4. Click **“Save / Update”** at the bottom of the page to save your settings.

Configure the Program Content

1. Click **Content** from the top navigation bar.




2. Select the desired content area from the drop down list at the top of the page:

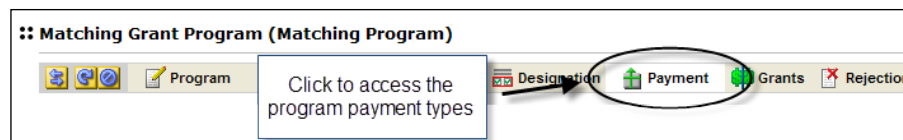


- **Program Settings:** Controls the content that appears on the donor site to describe the Match Program.
 - **Claim Form** (Direct Match only/optional feature): Customizes the matching gifts claim/verification form to include company specific content and image.
 - **Payment Type** (Direct Match Integrated with IPE only): Controls the text that appears to the donor at the top of the match request details page. **Note:** If configuring a Direct Match Standalone site or one integrated with SPE, this text is configured as part of the Matching Grant Website content **Payment Instructions** page (refer to [Direct Match Standalone](#) for more details).
3. Enter the desired content.
 4. Click **“Save/Update”** at the bottom of the page to save your settings.
 5. Repeat steps 2 – 4 until all applicable content areas are configured.

Activate Payment Types (Direct Match only)


Note: The Matching Program Payment tab is used to configure the payment types for Direct Match programs only. For Designation Match programs the available payment types are configured as part of the **Option Package** associated to the campaign (or donor group if different from the campaign).

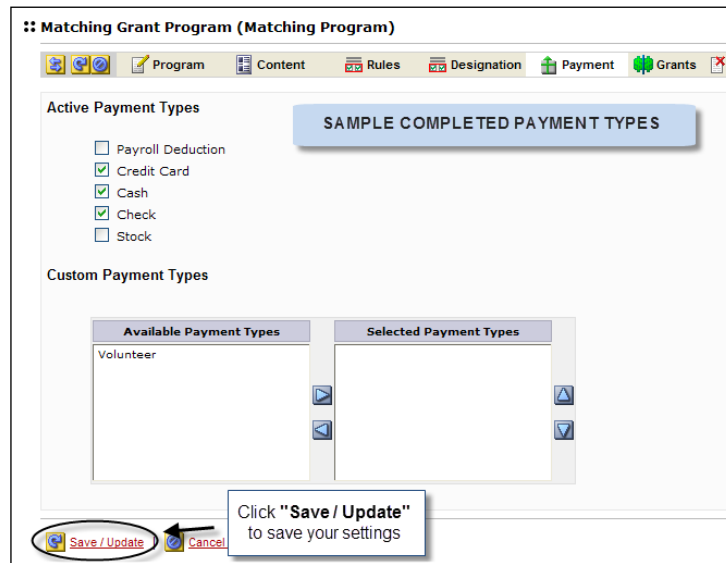
1. Click  **Payment** from the top navigation bar.




2. Indicate which of the standard payment types should be available to donors under this matching program. **Note:** By default all standard payment types are active. Uncheck the box(es) next to the payment type names to deactivate.

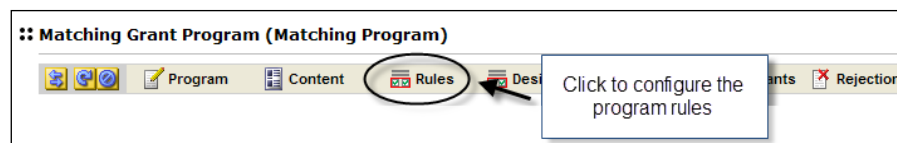


3. Indicate which of the custom payment types should be available to donors under this matching program. **Note:** By default all custom payment types are inactive. Follow the steps below to activate:
 - a. In the ‘Available Payment Types’ box highlight the payment type(s) you wish to allow
 - b. Click  to add them from the ‘Selected Payment Types’ list
4. Click **“Save/Update”** at the bottom of the page to save your settings.

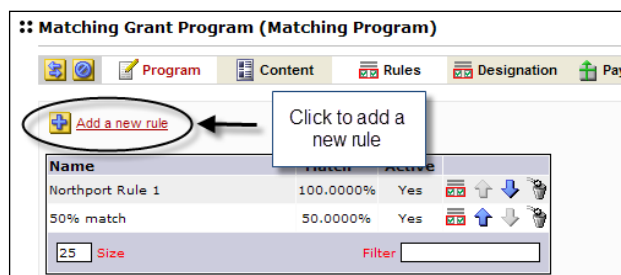


Configure the Program Rules

1. Click  **Rules** from the top navigation bar.





2. Click **“Add a new rule.”**



3. Enter the required and desired optional information to define the ceiling. **Note:** Required fields are indicated by an asterisk (*).

Matching Rule Fields		
Req	Field	Description
*	Rule Name	This is the name that will be used to identify the match rule throughout the system.
*	Match Rate	Establishes the rate at which donations will be matched. The rate can be either a percentage of the donation or a flat amount per transaction – <i>enter the rate amount into the text box, then select either 'Dollars' or 'Percentage' from the drop down list to indicate the rate type.</i> Note: The default rate type is 'Dollars.'
	Minimum Designation	Indicates the minimum donation amount that must be met in order for the gift to be matched. Note: Leave blank if there is no minimum amount required.
	Minimum Match	Indicates the minimum matching grant amount that will be disbursed. Note: Leave blank if there is no minimum grant amount.
	Maximum Match	Indicates the maximum grant amount that can be requested per donation. Note: Leave blank if there is no maximum amount.
*	Active	Indicates if this match rule is active or inactive. Note: By default the rule is inactive. At least one match rule must be active in order for the match program to work. Check the box to activate the match rule.
	Payment Types	Indicates which standard payment type(s) this rule applies to – <i>check the box(es) next to the appropriate payment type(s) to include them.</i> Note: By default all payment types are 'inactive'



Matching Rule Fields		
Req	Field	Description
		(unchecked).
	Custom Payment Types	<p>Indicates which of the available custom payment type(s) this rule applies to – <i>check the box(es) next to the appropriate payment type(s) to include them.</i></p> <p>Note: Custom payment types are applicable to Direct Match only. Only those custom payment types activated on the Match Program Payment tab will be available for selection. By default all payment types are ‘inactive’ (unchecked).</p>
	Agencies	<p>Denotes which agency(ies) the match rule should be applied to - <i>follow the steps below to configure these:</i></p> <ul style="list-style-type: none"> • Use the search area to locate the desired agency • Click to highlight the desired agency(ies) in the Search Results box • Click  next to the highlighted agency(ies) to add it to the Selected Agencies box <p>Note: If no agency is selected the Match Rule will be applied to all agencies.</p>
	Excluded Agencies	<p>Denotes which agency(ies) are ineligible for match under this rule - <i>follow the steps below to configure these:</i></p> <ul style="list-style-type: none"> • Use the search area to locate the desired agency • Click to highlight the desired agency(ies) in the Search Results box • Click  next to the highlighted agency(ies) to add it to the Selected Agencies box <p>Note: If no agency is selected, no agencies will be excluded and the Match Rule will be applied to all agencies.</p>



Matching Grant Program (Matching Program)

Program Content Rules Designation Payment Grants Rejection Reasons Questions

Rule SAMPLE COMPLETED RULE

Rule Name: Northport Rule 1 *

Match Rate: 100.00 Percentage *

Minimum Designation \$: 10.00

Minimum Match \$:

Maximum Match \$: 10000.00

Active:

Payment Types

Payroll Deduction Check
 Credit Card Direct Bill
 Debit Card Stock
 Electronic Check PayPal
 Cash

Agencies

Search: Agencies

By Identification
 By Location

search

Search Results	Selected Agencies
	Special Charities

Display Detail

Excluded Agencies

Search: Agencies


By Identification
 By Location

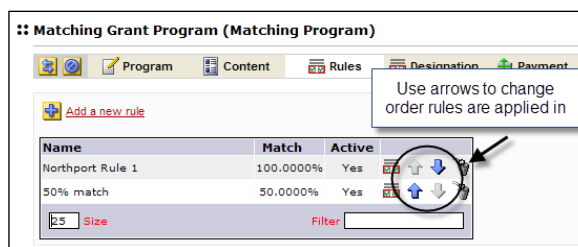
search

Search Results	Selected Agencies

Display Detail

Click "Save / Update" to save your settings

4. Click **"Save/Update"** at the bottom of the page to save your settings.
5. Repeat steps 2 – 4 to create additional rules if applicable.
6. If multiple rules have been configured use the  next to the rule names to set the order/priority the rules should be applied to a particular match request.



Associate Designation Panel (Direct Match Only)

1. Click **Designation** from the top navigation bar.



2. Enter the required and desired optional information to define the donor agency search experience. **Note:** Required fields are indicated by an asterisk (*).

Designation Fields		
Req	Field	Description
	Primary Panel	<p>INACTIVE FIELD – Primary panels are not active within MGCS.</p> <p>Note: Do not select a panel from the list. Doing so adds an unnecessary page to the match request process.</p>
	Locate An Agency Panel	Indicates the designation panel that will be available to donors selecting this matching program.
	Allow Top Level Search	<p>Defines whether donors will be able to view the agency search option on primary search page, or if donors will be required to select a panel group before the agency search option will be visible – <i>check the box to activate this feature.</i></p> <p>Note: The default is 'Active' (checked).</p>
	Search Fields	<p>Determines which fields will be available as agency search options. Also allows for custom field labels to be established – <i>check the box(es) to indicate which field(s) will be available. If desired, enter a custom field label into the box next to the field name.</i></p> <p>Note: By default all fields are 'Active' (checked).</p>
	Allow IRS Search	Defines whether donors will be able to search the IRS database to locate their agency – <i>check the box to activate this feature.</i>



Designation Fields		
Req	Field	Description
		Note: The default is 'Inactive' (unchecked).
	Allow Write In Agency	Defines whether donors will be able to write-in an agency – <i>check the box to activate this feature.</i> Note: The default is 'Inactive' (unchecked).
	Write In Agency Fields	Determines which fields donors will be prompted to provide should they select to write-in an agency. Also allows for custom field labels to be established – <i>check the box(es) to indicate which field(s) will be active and/or required. If desired, enter a custom field label into the box next to the field name.</i> Note: These fields will appear only if the “Allow Write In Agency” option is activated. By default only the Agency Name is 'Active'.

3. Click **“Save/Update”** at the bottom of the page to save your settings.

Matching Grant Program (Matching Program)

SAMPLE COMPLETED DESIGNATIONS

Primary Panel: - select panel -

Locate An Agency Panel: Zandy Demo LocateAnAgency Panel

Search Options

Allow Top Level Search

Search Field	Allow	Custom Label
Agency Name	<input checked="" type="checkbox"/>	Charity Name
EIN	<input checked="" type="checkbox"/>	
City	<input checked="" type="checkbox"/>	
State	<input checked="" type="checkbox"/>	
Zip	<input checked="" type="checkbox"/>	
Country	<input checked="" type="checkbox"/>	
Account Code	<input type="checkbox"/>	

Allow IRS Search

Allow Write In Agency

Write In Agency Field	Active	Required	Custom Label
Agency Name	yes	yes	Charity Name
Country	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Address 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Address 2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
City	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
State	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Postal Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contact Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Phone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Email Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
EIN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Click **“Save / Update”** to save your settings

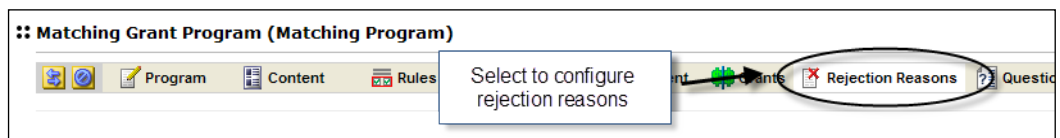
Save / Update Cancel



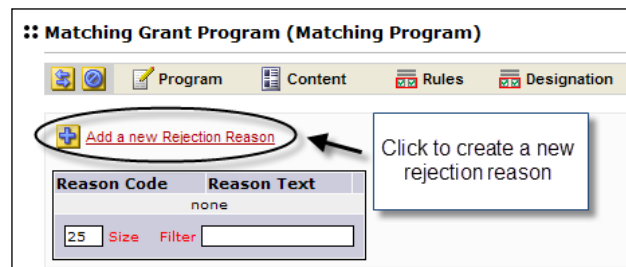
Configure Rejection Reasons (Optional)

Rejection Reasons can be established to allow the Match Program Administrator to record additional information when a matching grant request is rejected. The creation of Rejection Reasons is optional. Skip this step if rejection reasons will not be used or if they will be created at a later time.

1. Click **Rejection Reasons** from the top navigation bar.



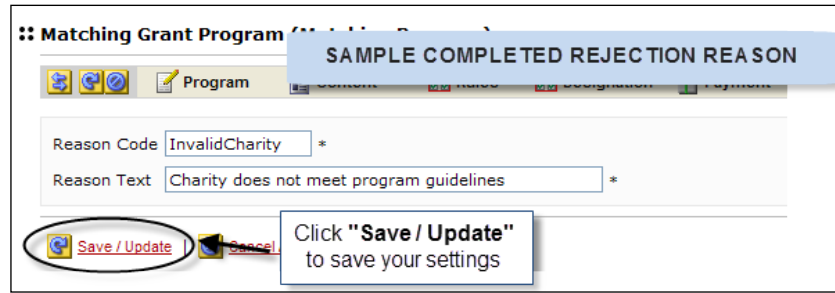
2. Click “Add a new Rejection Reason.”




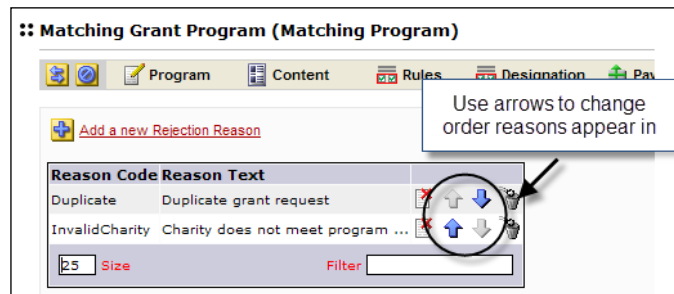
3. Enter the required information to define the rejection reason. **Note:** Required fields are indicated by an asterisk (*).

Match Rejection Reason Fields		
Req	Field	Description
*	Reason Code	This is the code that will be used to identify the rejection reason throughout the system.
*	Reason Name	This is the name that will be used to identify the rejection reason throughout the system.

4. Click “Save/Update” at the bottom of the page to save your settings.



5. Repeat steps 2 – 4 to create additional rejection reasons.
6. If multiple rejection reasons have been configured use the  next to the reason names to set the order the reasons will appear in the drop down list on the **Grants** review page.



Add Program Level Custom Questions (Direct Match Only/Optional)

When Direct Match is used custom questions can be configured at the match program level. The creation of custom questions is optional. **Skip this step if custom questions will not be used.**

Program level custom questions will appear at the top of the **Registration/Donor Details** page of the match request process for all match requests made under this program. Donor responses to custom questions appear on the **Matching Grant Review** screen as well as the **Matching Grant Questions Export**.

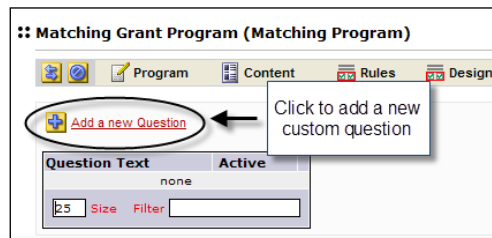
Note: If custom questions are payment type specific use the custom payment types feature. Refer to section [Create Custom Payment Types \(Direct Match Only/Optional\)](#) for more information.

1. Click  **Questions** from the top navigation bar.





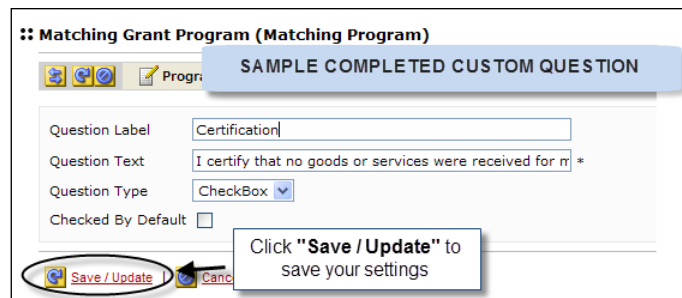
2. Click “Add a new Question.”



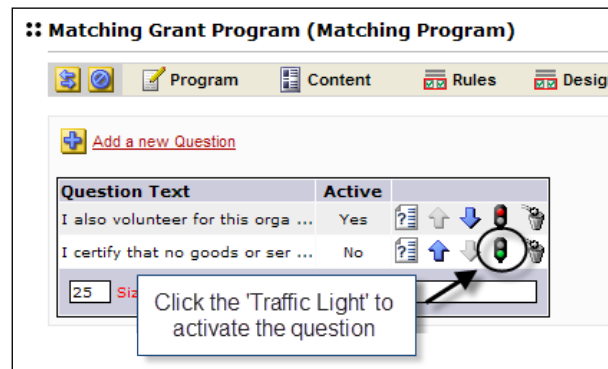
3. Enter the required and optional information to define the custom question.
Note: Required fields are indicated by an asterisk (*).


Custom Question Fields		
Req	Field	Description
	Question Label	This is the label that will be used to identify the question in the Matching Grant Questions Export.
*	Question Text	This is the text that will be displayed to the donor during the match request process. This text will also be used to identify this question throughout the system.
*	Question Type	Determines whether the response format will be ‘text’ or ‘checkbox’ - <i>select either ‘text’ or ‘checkbox’ from the drop down list.</i> Note: The default is ‘text.’
	Required	Indicates where the donor will be required to answer this question prior to submitting the grant request – <i>check the box to make required.</i> Note: The default is ‘unchecked’ (not required).

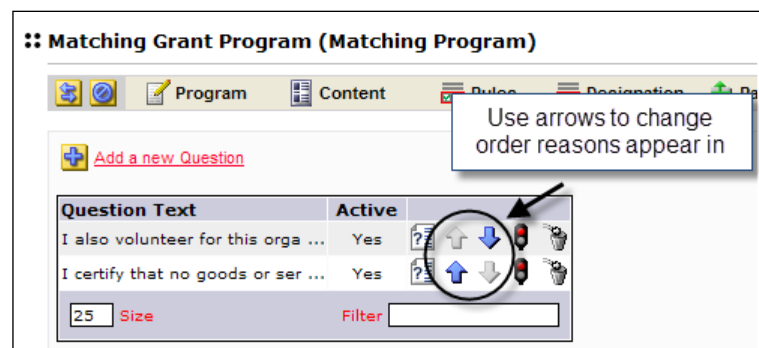
4. Click “Save/Update” at the bottom of the page to save your settings.



5. Once created, you will need to activate the question. To do this, click the traffic light icon next to the question text. **Note:** An active question will say “Yes” under the **Active** column next to the question text, and the traffic light icon will appear red.



6. Repeat steps 2 – 5 to create and activate additional custom questions.
7. If multiple questions have been configured use the  next to the question text to set the order the questions will appear in on the donor site.

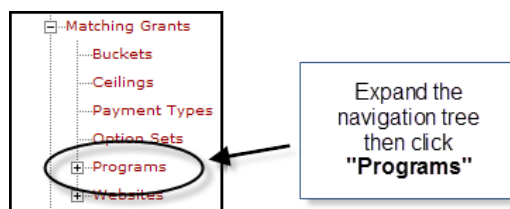


Associate Users (Optional)

Use this feature to control which administrative users can access a particular Matching Grant Program.

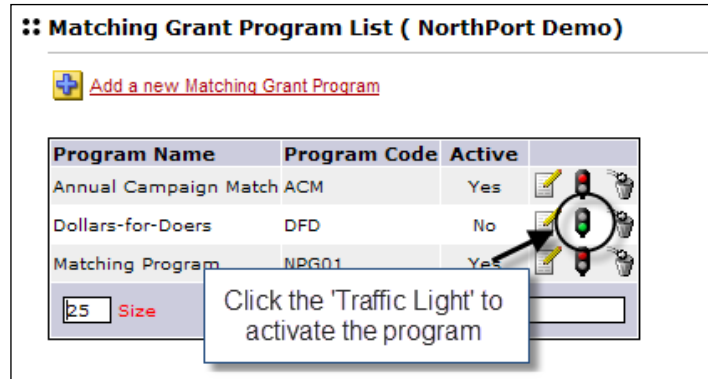
Activate Match Program

1. Click **Programs** from the **Matching Grants** section of the navigation tree to access the **Matching Grant Program List**.





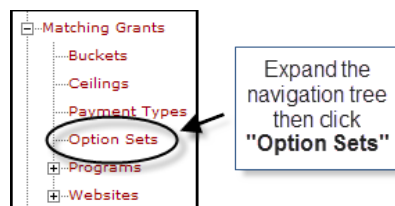
2. Click the “Traffic Light” icon next to the match program name. **Note:** An active program will say “Yes” under the **Active** column next to the program name, and the “Traffic Light” icon will appear ‘red.’



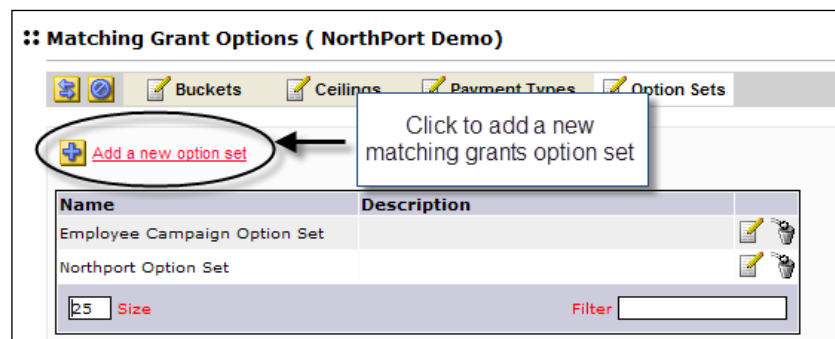
E. Create Matching Grant Option Set

The Matching Grant Option Set ties all the pieces together and establishes the settings that will be used when activating the donor matching grant request experience. Multiple option sets can be created allowing you to vary the donor experience at the website, campaign or donor group level.

1. Click “Option Sets” from the **Matching Grants** section of the navigation tree.



2. Click “Add a new option set.”





- Enter the required and optional information to define the option set. **Note:** Required fields are indicated by an asterisk (*).

Option Set Fields		
Req	Field	Description
*	Name	This is the name that will be used to identify the Matching Grant Option Set throughout the system.
	Description	Can use to provide additional details about the option set.
	Enable Auto Match	Indicates whether or not the Auto Match feature is enabled – <i>check the box to activate this feature.</i> Note: When activated a matching grant transaction is automatically created “behind-the-scenes” without offering the donor the ability to view or modify the details of the match transaction. By default this is ‘inactive’ (unchecked)
	Enable Claim Form	Indicates whether or not the Claim Form is enabled – <i>check the box to activate this feature.</i> Note: By default this is ‘inactive’ (unchecked)
	Write-in Mode	Determines which match mode will be used when a donor selects to write-in an agency. ‘Normal’ mode calculates the match amount at the time of the grant submission; ‘Deferred for Verification’ defers calculation of the match amount until the agency has been verified – <i>select either ‘Normal’ or ‘Deferred for Verification’ from the drop down list.</i> Note: ‘Normal’ mode is the default. For clients using Dedicated Distribution, the write-in mode must be set to ‘Deferred for Verification.’

- Click **“Save/Update”** at the bottom of the page to save your settings and activate the *Programs* area.



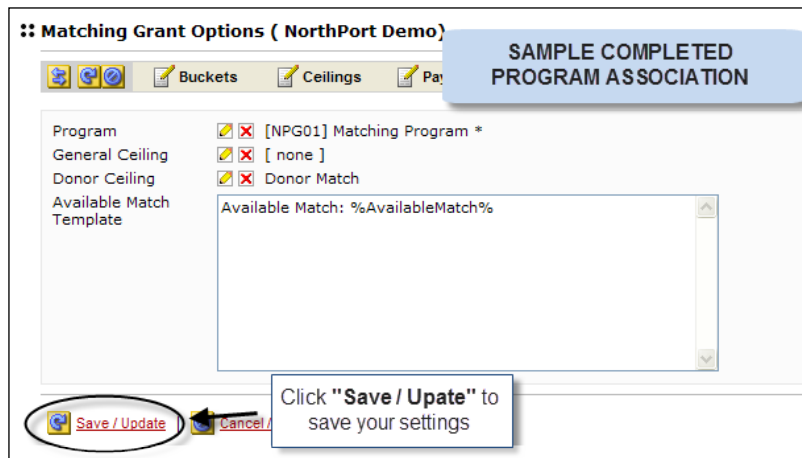
5. Click “Associate a program.”


6. Enter the required and optional information to associate a program to this option set.
Note: Required fields are indicated by an asterisk (*).

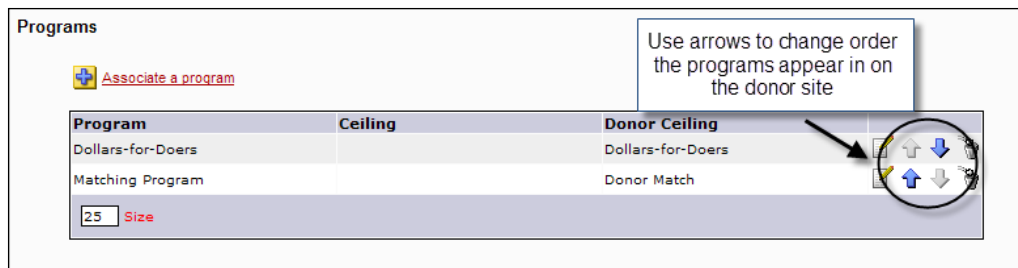
Option Set Program Fields		
Req	Field	Description
*	Program	Indicates the matching grant program you wish to associate with this option set – To do this, follow the steps below: <ul style="list-style-type: none"> • click the icon to display a list of available Programs • select the program from the list • click the <select> button
	General Ceiling	Indicates the general ceiling applicable to this program – If applicable, follow the steps below to associate the ceiling: <ul style="list-style-type: none"> • click the icon to display a list of available General Ceilings • select the program from the list • click the <select> button
	Donor Ceiling	Indicates the donor ceiling applicable to this program – If applicable, follow the steps below to associate the ceiling: <ul style="list-style-type: none"> • click the icon to display a list of available Donor Ceilings • select the program from the list • click the <select> button
	Available Match Template	Indicates the template that will be used to display the available match amount to the donor – <i>edit the text in the box to modify the template.</i> Note: The default is ‘Available Match: %AvailableMatch%’



- Click **"Save/Update"** to save your settings.



- Repeat steps 5 – 7 to associate additional matching programs to the option set.
- If multiple programs have been associated use the  next to the program name to set the order the programs will appear in on the donor site. This works only with a standalone site or SPE integrated site.





MSCS Activation


Once the Matching Grants programs and option sets have been established, follow the appropriate step-by-step instructions below to allow donors to access MGCS and request a match.

A. Direct Match Standalone

With Direct Match Standalone the donor accesses a separate matching grants website. The URL for this website can be embedded into a company hosted employee intranet or can be accessed directly via the donor’s web browser. In either case the donor will need a distinct user name and password associated with his/her donor record to access the site (**Note:** Single sign-on is not compatible with Direct Match Standalone).

The basic steps for activating Direct Match Standalone are as follows:

- Create a MGCS Website
- Associate the Matching Grant Option Set with the Website
- Configure the Website Content
- Set the Donor Registration Options
- Activate the Website

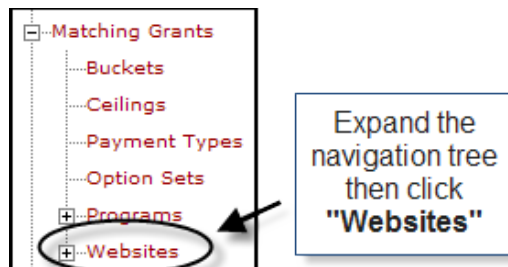
Note: The  **Programs** tab contained within website configuration is no longer active. Programs are now associated to the website as part of the Matching Grant Option Set.

Note: Once the website has been activated, donors can use the URL listed on the website profile page to access the MGCS using the user name and password associated with their donor record. If you are having issues accessing the site, check to ensure you are using “https://” vs. “http://.”

Below are step-by-step instructions for configuring a Direct Match Standalone website.

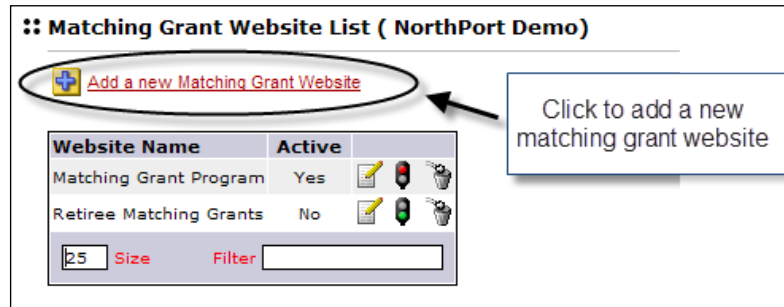
Create a MGCS Website

1. Click **Websites** from the **Matching Grants** section of the navigation tree.





2. Click “Add a new Matching Grant Website.”



3. Enter the required and optional information to define the website profile. **Note:** Required fields are indicated by an asterisk (*).

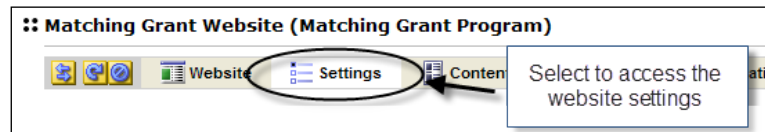
Website Profile Fields		
Req	Field	Description
*	Code	This is the code that will be used to identify the matching grant website throughout the system.
	Name	This is the name that will be used to identify the matching grant website throughout the system.
	Description	Can be used to provide additional details about the website.
	Skin	Site Design/Layout that will be used to define the 'look & feel' of the website – <i>select the desired skin from the drop down list.</i> Note: A skin designed for use with the Standard Pledge Experience (SPE) must be used.
	MGCS URL	Denotes the URL donors should use to access the online matching grant capture system (MGCS). Note: This URL is auto-generated by the system when the website is saved.

4. Click “Save/Update” at the bottom of the page to save your settings and generate the MGCS URL.



Associate the Matching Grant Option Set with the Website


1. Click **Settings** from the top navigation bar.



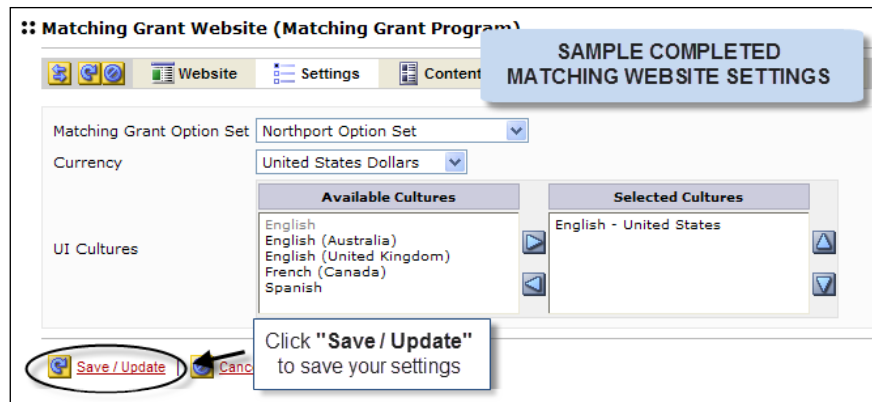
2. Enter the required and optional information to define the website profile. **Note:** Required fields are indicated by an asterisk (*).

Website Settings Fields		
Req	Field	Description
*	Matching Grant Option Set	Denotes the matching grant option that will drive the matching grant processing for grants made through this website – <i>select the appropriate matching grant option set from the drop down list.</i>
*	Currency	Denotes the currency that will be recorded for match requests made through this website – <i>select the appropriate currency from the drop down list.</i> Note: The same currency must be used for all matching grant transactions made via a single website. The default currency is 'United States Dollars.'
	UI Cultures	THIS IS A PLACEHOLDER ALLOWING FOR FUTURE INTERNATIONALIZATION OF THE MATCHING GIFTS PRODUCT. WHILE THE FUNCTIONALITY WORKS, ONLY A PORTION OF THE HARD CODED CONTENT IS CURRENTLY TRANSLATED.



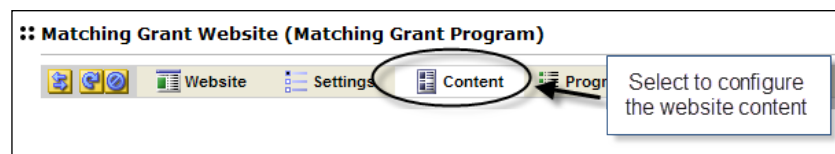
Website Settings Fields		
Req	Field	Description
		<p>Indicates which user interface (UI) cultures are active for this website - <i>follow the steps below to configure these:</i></p> <ul style="list-style-type: none"> Click to highlight the desired the culture(s) in the Available Cultures box Click the  button next to the highlighted culture(s) to add it to the Selected Cultures box <p>Note: If no cultures are selected, 'English' will be used as the default.</p>

3. Click **"Save / Update"** at the bottom of the page to save your settings.

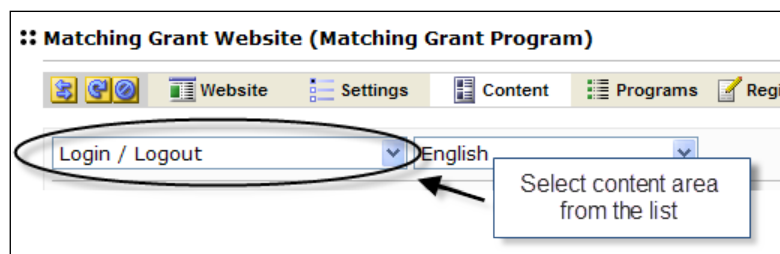


Configure the Website Content

1. Click  **Content** from the top navigation bar.



2. Select the desired content area from the drop down list at the top of the page.

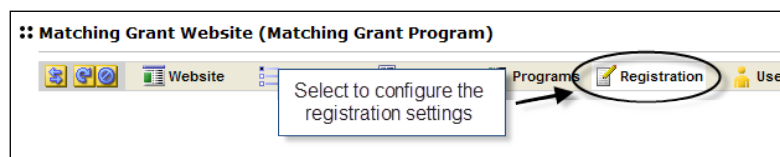


3. Enter the desired content.
4. Click **“Save/Update”** at the bottom of the page to save your settings.
5. Repeat steps 2 – 4 until all desired content areas are configured.

Set the Donor Registration Options (Optional)

Note: By default, only the Donor First Name and Last Name are visible on the donor information page of the grant request process. If desired, the system can be configured to prompt the donor to provide additional home and/or work contact information. In addition, custom fields can be created to prompt the donor to provide additional donor level details.

1. Click  **Registration** from the top navigation bar.



2. Complete the online form to define the donor registration fields.

Registration Fields		
Req	Field	Description
	Address	Indicates if home and/or work address fields will be visible to the donor – <i>check the appropriate box(es) to activate these fields and if desired make them required.</i>
	Contact Information	Indicates if home and/or work contact information (email, phone, fax) will be visible to the donor – <i>check the appropriate box(es) to activate these fields and if desired make them required.</i>
	Custom Fields	Allows for the creation and activation of custom donor record field – <i>follow the steps below to create a custom field:</i> <ul style="list-style-type: none"> • Enter a field label



Registration Fields		
Req	Field	Description
		<ul style="list-style-type: none"> • If applicable, enter the default value • Check the box under 'Active' to activate the question • If desired, check the box under 'Required' to make the field required
	Optional Fields	Indicates if the Employee ID and/or name qualifier fields will be visible to the donor – <i>check the appropriate box(es) to activate these fields and if desired make them required.</i>

3. Click **“Save/Update”** at the bottom of the page to save your settings.

Matching Grant Website (Matching Grant Program)

Website Settings Content Programs **Registration** Users

Address

Home Address Active Required

Work Address Active Required

Contact Information

Home Contact Information Active Required

Work Contact Information Active Required

Custom Fields

Field	Label	Default Value	Active	Required
1	Work Location		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2			<input type="checkbox"/>	<input type="checkbox"/>
3			<input type="checkbox"/>	<input type="checkbox"/>
4			<input type="checkbox"/>	<input type="checkbox"/>
5			<input type="checkbox"/>	<input type="checkbox"/>
6			<input type="checkbox"/>	<input type="checkbox"/>
7			<input type="checkbox"/>	<input type="checkbox"/>
8			<input type="checkbox"/>	<input type="checkbox"/>

Optional Fields

Employee Number Active

Prefix, Middle Name, Suffix, Nickname Active

Click **“Save / Update”** to save your settings

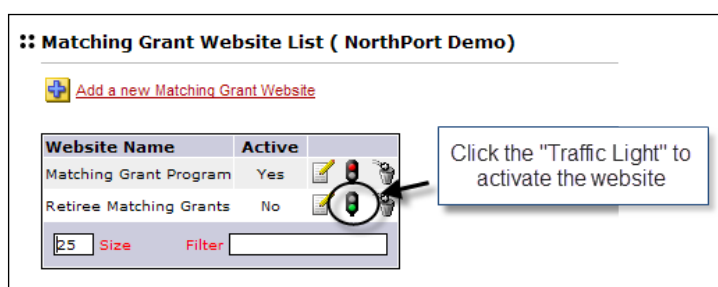
Save / Update Cancel

Activate the Website

1. Click **Websites** from the **Matching Grants** section of the navigation tree to access the **Matching Grant Website List**.



2. Click the traffic light icon next to the website name. **Note:** An active website will say "Yes" under the **Active** column next to the website name, and the traffic light icon will appear red.



B. Direct Match Integrated with SPE

Integrating Direct Match with SPE activates a series of **Single Sign-On (SSO)** links that allows the donor to move between the online pledge capture system (OPCS) and MGCS systems without having to provide separate log-in credentials.

The basic steps for activating Direct Match Integrated with SPE are as follows:

- Configure a MGCS Website
- Activate the MGCS to OPCS SSO Link
- Activate the OPCS to MGCS SSO Link

Note: Once established, the donor can log in to either the MGCS website (using the URL listed on the website profile) or the OPCS campaign website as the jumping off point for either program.

Below are step-by-step instructions for configuring Direct Match Integrated with SPE.



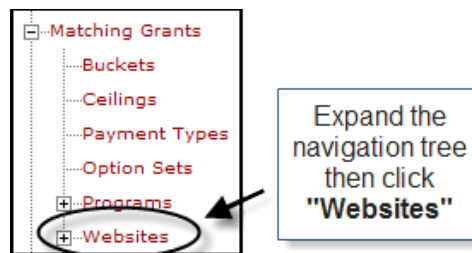
Configure a MGCS Website


Follow the step-by-step instructions in section [Direct Match Standalone](#) of this document to configure and activate a MGCS website.

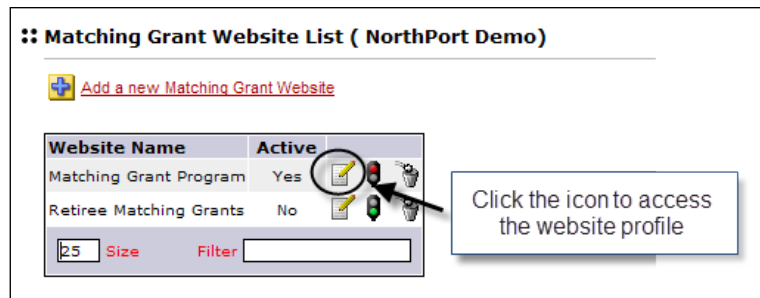
Activate the MGCS to OPCS SSO Link

The OPCS SSO link is activated under the Company > Matching Grants > Websites > Content > Login/Logout page. Follow the steps below for accessing this page and activating this feature.

1. Click “Websites” from the **Matching Grants** section of the navigation tree.



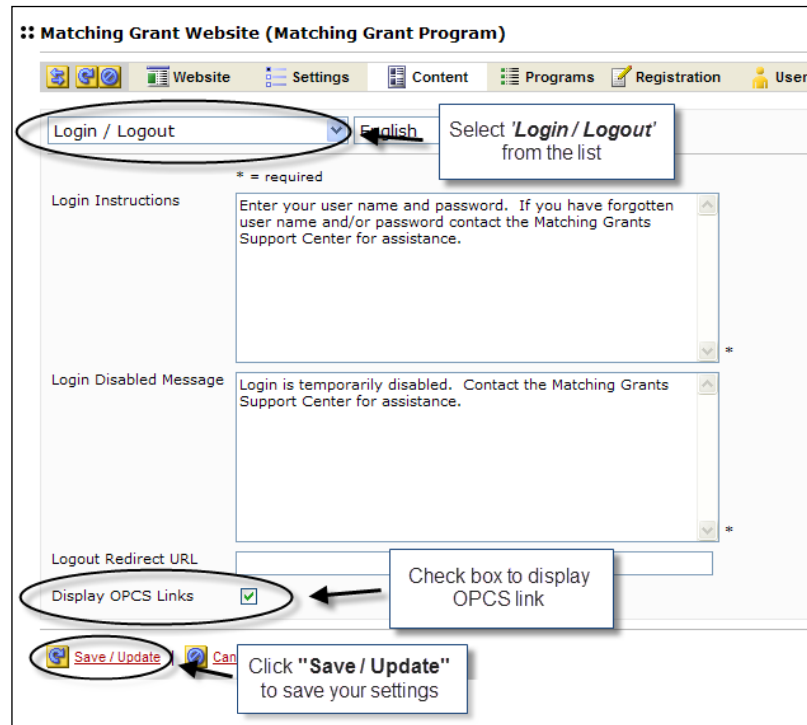
2. Click  next to the website name for the website you wish to link.



3. Click  **Content** from the top navigation bar.






4. Select “**Login/Logout**” from the drop down list at the top of the page.
5. Check the box next to “**Display OPCS Links.**”
6. Click “**Save/Update**” at the bottom of the page to save your settings.




Activate the OPCS to MGCS SSO Link

The MGCS SSO link is activated under the Campaigns > Website > Content > Login/Logout page. Follow the steps below for accessing this page and activating this feature.

Note: If “Display MGCS Links” is active a separate link will appear for each active MGCS website. The MGCS website name will be used as the link text.

1. Click  **Campaigns** from the navigation tree to access the **Campaign List** page (**Note:** This is the default page when you first login to Campaign Management).
2. Locate your campaign in the list, then click  next to the campaign name.
3. From the campaign profile page, click  to expand the Navigation Tree.
4. Click “**Websites**” to view a list of the associated campaign websites.



5. Click  next to the website name for the website you wish to link.



6. Select "Login/Logout" from the drop down list at the top of the page.
7. Check the box next to "Display MGCS Links."
8. Click "Save/Update" at the bottom of the page to save your settings.



Website (NS content, Nuzhat)

Website Content News Events Users

Login / Logout Select 'Login / Logout' from the list

Donor Login Page * = required

Login Disabled Message *

Login Instructions *

Logout Redirect URL

Display MGCS Links Check box to display MGCS link

Select Donor Group

Donor Group Label

Donor Group Continue Link Label

Donor Group Message

Password Change Notification

Active

Forgot Password Email

Active

Click "Save / Update" to save your settings

C. Direct Match Integrated with IPE

Integrating Direct Match with IPE establishes a unified donor experience allowing the donor to make campaign pledges and request a match from a single online system.

The basic steps for activating Direct Match Integrated with IPE are as followed:

- Configure the IPE Campaign
- Associate the Matching Gifts Option Set to the Campaign
- Configure the Direct Match site content

Note: Once established, the donor can login to the website built at the campaign level as the jumping off point for either program.

Below are step-by-step instructions for configuring Direct Match Integrated with IPE.



Configure the IPE Campaign

Refer to the *SETTING UP A BASIC CAMPAIGN* and *IPE – HOW TO BUILD & ADMINISTER* documents for step-by-step instructions on configuring an IPE campaign.

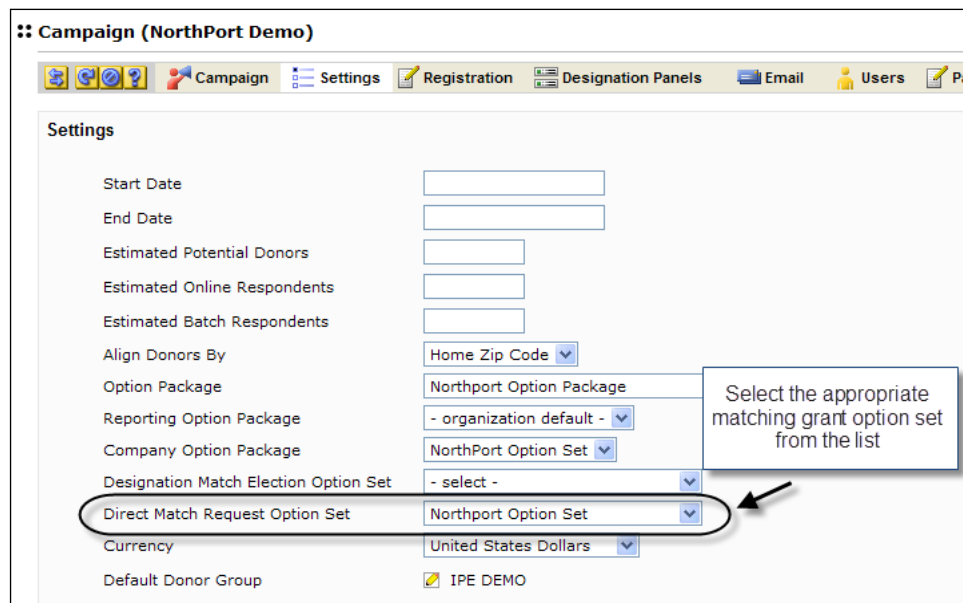
Associate the Matching Gifts Option Set with the Campaign

The Matching Gifts Option Set is associated to the campaign under Campaigns > Settings > Direct Match Request Option Set. Follow the steps below for accessing this page and associating the option set.

1. Click Campaigns from the navigation tree to access the **Campaign List** page (**Note:** This is the default page when you first login to Campaign Management).
2. Locate your campaign in the list, and then click next to the campaign name.
3. Click Settings from the top navigation bar.



4. Select the appropriate matching grant option set from the “Direct Match Request Option Set” dropdown list.






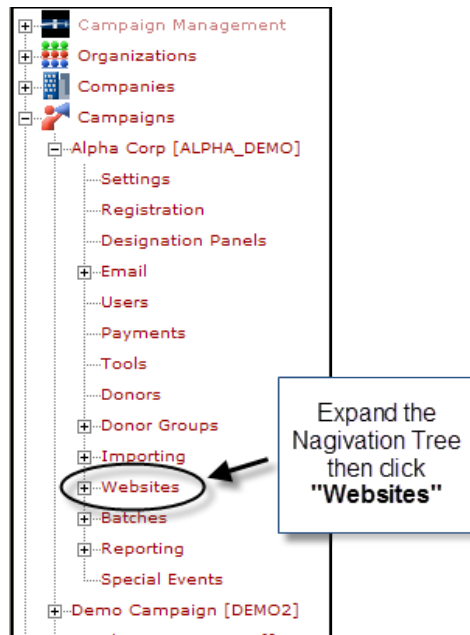
5. Click **“Save/Update”** at the bottom of the page to save your settings.


Note: The **“Direct Match Request Option Set”** can be overridden at the Donor Group Level.

Configure the Direct Match Site Content

The website content for an IPE integrated Direct Match site is configured as part of the campaign level website content (Campaigns > Websites > Content > **“Direct Match”** and **“Match Program Summary”**). Follow the steps below to configure this content.

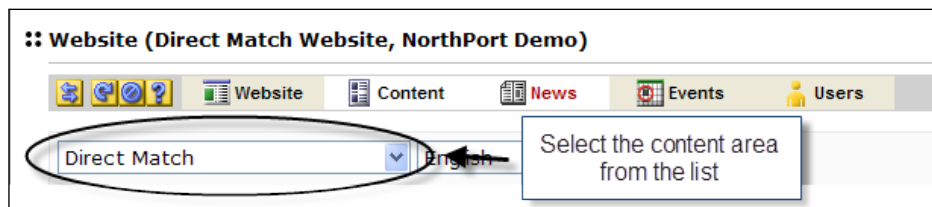
1. From the campaign settings page, click  on the top navigation bar to sync the navigation tree to the selected campaign.
2. Click **“Websites”** to view a list of the associated campaign websites.



3. Click  next to the website you wish to edit.



4. Select the desired content area from the drop down list at the top of the page:



- a. **Direct Match:** Controls the content that appears when the donor elects to “Request Match.” This page also controls the email confirmation the donor receives upon submission of the match request.
- b. **Match Program Summary:** Customizes the descriptive text that appears on the **Match Programs** information page. This content edited on this page appears as introductory text, and is in addition to the Matching Grant Program description and guidelines configured at the company level (see [Configure Match Program](#) for more information).

5. Enter the desired content.
6. Click “**Save/Update**” at the bottom of the page to save your settings.
7. Repeat steps 4 – 6 until all applicable content areas are configured.

D. Designation Match

Designation Match allows the donor to simultaneously make his/her pledge and request a match for that pledge.

The basic steps for activating Designation Match are as followed:

- Configure the IPE Campaign
- Associate the Matching Gifts Option Set to the Campaign

Note: Once established the donor can login to the website built at the campaign level as the jumping off point.

Below are step-by-step instructions for configuring a Direct Match Integrated with IPE.




Configure the IPE Campaign

Refer to the **SETTING UP A BASIC CAMPAIGN** and **IPE – HOW TO BUILD & ADMINISTER** documents for step-by-step instructions on configuring an IPE campaign.



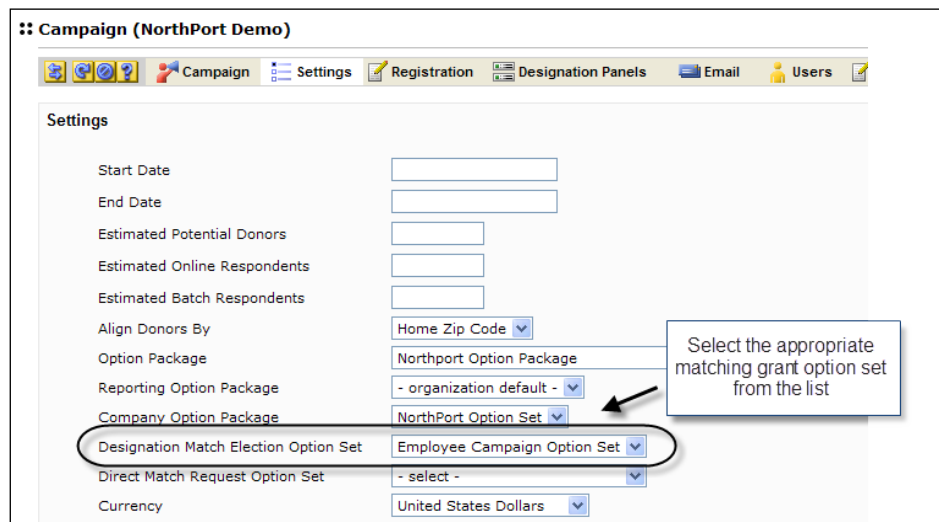
Associate the Matching Gifts Option Set with the Campaign

The Matching Gifts Option Set is associated to the campaign under Campaigns > Settings > Direct Match Request Option Set. Follow the steps below for accessing this page and associating the option set.

1. Click  **Campaigns** from the navigation tree to access the **Campaign List** page (**Note:** This is the default page when you first login to Campaign Management).
2. Locate your campaign in the list, and then click the  icon next to the campaign name.
3. Click  **Settings** from the top navigation bar.



4. Select the appropriate matching grant option set from the “**Designation Match Election Option Set**” dropdown list.



5. Click “**Save/Update**” at the bottom of the page to save your settings.

Note: The “**Designation Match Election Option Set**” can be overridden at the Donor Group Level.



Appendix A: Sample Matching Grant Program Configurations

Sample 1: Single Direct Match Program for All Employees

Program Description

Alpha Corp matches employee donations dollar for dollar up to \$5,000 per employee per year. A minimum donation of \$25 is required to qualify for the match. Donation value must be validated by the recipient charity. A total budget of \$2,000,000 has been allocated to this program – grants will be awarded based upon date of submission of the grant request.

MGCS Configuration

Buckets: Employee Match Bucket = 9999999999 (no max)

Ceilings (configured at company matching grant level): None

Matching Grant Program: Employee Matching Grant Program

- Associated Bucket: Employee Match Bucket
- Donor Ceiling: \$5,000
- Program Ceiling: \$2,000,000
- Match Rule: Employee Match Rule
 - Match Rate: 100%
 - Minimum Designation: \$25
 - Maximum Match per Gift: \$5,000 or blank
 - Payment Types: applies to all active payment types

Matching Grant Option Set: Employee Match Option Set

- Associated Program: Employee Matching Grant Program
- Associated Ceilings: None
- Claim Form Enabled

MGCS Setup Option: Direct Match Standalone



Sample 2: Different Match Caps for Retirees and Employees. Shared Match Funds with Set Allocation Maximum for Retirees.

Program Description

Delta Corp matches employee donations dollar for dollar up to \$5,000 per employee per year. The company also matches retiree donations up to \$2,500 per retiree per year. A minimum donation of \$25 is required to qualify for the match. Donation value must be validated by the recipient charity. A total budget of \$2,000,000 has been allocated to this program – grants will be awarded based upon date of submission of the grant request. To prevent retirees from monopolizing the grant funds, a maximum of \$500,000 will be awarded in grants to retirees.

MGCS Configuration

Buckets: Match Grant Bucket = \$2,000,000

Ceilings (configured at company matching grant level): None

Matching Grant Program 1: Employee Matching Grant Program

- Associated Bucket: Match Grant Bucket
- Donor Ceiling: \$5,000
- Program Ceiling: blank or \$2,000,000
- Match Rule: Employee Match Rule
 - Match Rate: 100%
 - Minimum Designation: \$25
 - Maximum Match per Gift: \$5,000 or blank
 - Payment Types: applies to all active payment types

Matching Grant Program 2: Retiree Matching Grant Program

- Associated Bucket: Match Grant Bucket
- Donor Ceiling: \$2,500
- Program Ceiling: \$500,000
- Match Rule: Employee Match Rule
 - Match Rate: 100%
 - Minimum Designation: \$25
 - Maximum Match per Gift: \$2,500 or blank
 - Payment Types: applies to all active payment types

Matching Grant Option Set 1: Employee Match Option Set

- Associated Program: Employee Matching Grant Program
- Associated Ceilings: None
- Claim Form Enabled

Matching Grant Option Set 2: Retiree Match Option Set

- Associated Program: Retiree Matching Grant Program



- Associated Ceilings: None
- Claim Form Enabled

MGCS Setup Option: Direct Match Integrated with IPE - option set configured at Donor Group level



Sample 3: Company Matches Both Donations Direct to Charity and Campaign Pledges. Variance in Match Rules within Campaign. Shared Donor Match Ceiling Across Programs.

Program Description

Omega Corp matches both employee contributions made directly to the recipient charity as well as those made through its annual employee giving campaign. A per employee maximum of \$7,500 per year in grant funds will be allocated across both programs. The guidelines for each program are as follows:

- **Matching Grants:** Omega Corp matches employee donations made direct to the charity. Such gifts are matched dollar for dollar up to the \$7,500 cross-program employee maximum per year. A minimum donation of \$25 is required to qualify for the match. Donation value must be validated by the recipient charity.
- **Campaign Match:** Omega Corp matches employee contributions made through its annual employee giving campaign. Donations of any value to one of the Omega Corp charity partners (United Way, Red Cross, American Cancer Society, and Conservation International) are matched 100%. Donations of \$50 or more to other 501c3 organizations will be matched at 50%. Gifts will be matched up to the \$7,500 cross-program employee maximum per year.

MGCS Configuration

Buckets: Match Grant Bucket = 9999999999 (no max)

Ceilings (configured at company matching grant level): Employee Match Ceiling

- Ceiling Type: Donor
- Ceiling Total: \$7,500

Matching Grant Program 1: Matching Grant Program

- Associated Bucket: Match Grant Bucket
- Donor Ceiling: blank
- Program Ceiling: blank
- Match Rule: Matching Grant Rule
 - Match Rate: 100%
 - Minimum Designation: \$25
 - Maximum Match per Gift: blank
 - Payment Types: applies to all active payment types

Matching Grant Program 2: Campaign Match Program

- Associated Bucket: Match Grant Bucket
- Donor Ceiling: blank
- Program Ceiling: blank



- Match Rule 1: Charity Partners
 - Match Rate: 100%
 - Minimum Designation: blank
 - Maximum Match per Gift: blank
 - Payment Types: applies to all active payment types
 - Included Charities: United Way, Red Cross, Cancer Society, Conservation International

- Match Rule 2: Other Charities
 - Match Rate: 50%
 - Minimum Designation: \$50
 - Maximum Match per Gift: blank
 - Payment Types: applies to all active payment types

Matching Grant Option Set 1: Matching Grant Option Set

- Associated Program: Matching Grant Program
- Associated Ceilings: Employee Match Ceiling
- Claim Form Enabled

Matching Grant Option Set 2: Campaign Match Option Set

- Associated Program: Campaign Match Program
- Associated Ceilings: Employee Match Ceiling

MGCS Setup Option:

- Direct Match Integrated with IPE: Matching Grant Option Set
- Designation Match: Campaign Match Option Set



Appendix B: Knowing Which MGCS Setup is Right

Program Need	Direct Match Standalone	Direct Match Integrated w/SPE	Direct Match Integrated w/IPE	Designation Match
Single Sign-on			X	X
Match request linked to campaign pledge				X
Request match for offline donations	X		X	
Different rules for different groups of donors			X	X
Custom Payment Type Options	X		X	
Custom questions at Match Program level	X		X	
Custom Payment Type specific Match Request Questions	X		X	
Custom Payment Type specific transaction detail labels for amount, data, and/or match amount	X		X	
Eliminate need for agency to verify donation				X



Appendix C: Direct Match Donor Experience Screenshots

Standalone Welcome / Home Page

Logged in: [Logout](#)

Northport

[Home](#)
[Matching Program](#)
[Dollars-for-Doers](#)

Welcome to the Northport Matching Grant website!

Northport takes great pride in the employee's involvement in the communities in which we live and work. In support of those efforts Northport provides matching grant funds to further the great work of the organizations our employees have partnered with.

Below is a listing of our currently active matching grant programs. To request a match select the "Request Match" link next to the appropriate program.

Matching Program
 Donate \$25 or more to an eligible organization, receive a dollar-for-dollar match up to \$2,500 per calendar year. [Request Match](#) →

Dollars-for-Doers
 Volunteer 20 hours or more for one non-profit organization during a calendar year, receive a \$500 Dollars for Doers grant payable to that organization. [Request Match](#) →

SPE Integrated Welcome / Home Page

Logged in: Timothy North : [Logout](#)

Northport

[Pledge Now](#)
[Home](#)
[Advocate](#)
[Want to Volunteer?](#)
[Leadership Levels](#)
[Help / FAQs](#)
[Contact Us](#)
[Dashboard](#)
[Privacy Policy](#)
[Matching Grant Program](#)

Welcome to Northport Employee Giving

At Northport Technologies we think of ourselves as a part of the community, and like any other good citizen, it's important for us to get involved in community action. Helping others live up to their fullest potential makes sense for our company any way you slice it. It's important to our customers, but it's also important to the people in the communities in which we live and work.

In communities across America, people are joining forces to focus on long-term solutions for problems like hunger and sickness and homelessness. Behind the scenes, they bring together the people who really care about getting to the heart of those problems. The mayors, the ministers, the experts, the volunteers and, of course, companies like Northport.

Think of the lives we can change and the community we can shape by working together. And then imagine the impact that the people of Northport Technologies can make nationwide and around the world. With that thought in mind, please give as much as you can, or as some people say, until it feels good.

Alex Jacob
 President
 Northport

Link to active MGCS website appears



IPE Integrated Welcome / Home Page

Logged in: Jenn FINDER | [Logout](#)

Northport

- Home
- View Investment Cart
- Request Match**
- Checkout
- Find Agencies
- Help / FAQs
- Giving History
- Match Programs**
- Dashboard
- My Account

Welcome Jenn!

At Northport Technologies we think of ourselves as a part of the community, and like any other good citizen, it's important for us to get involved in community action. Helping others live up to their fullest potential makes sense for our company any way you slice it. *It's important to our customers*, but it's also important to the people in the communities in which we live and work.

... as much as you can, or as some people say, until it feels good.

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BETTER. TOGETHER.

Link to "Request Match" appears on navigation bar

Link to "Match Programs" guidelines appears on secondary navigation bar

Program Guidelines Review

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Northport

- Home
- Matching Program**
- Dollars-for-Doers

[Continue](#) →

The Northport Corporation Foundation provides a way for you to increase the impact of your personal contribution to schools, scholarship funds, universities, and environmental organizations through the Foundation's Matching Gifts Program. The Foundation strongly believes that investing in these institutions will strengthen the vitality of the communities in which Northport Corporation employees live and work. By matching employees' contributions, the Foundation hopes to foster and support employee involvement in education and environmental stewardship., etc.

Program Guidelines

The Northport Corporation Foundation will match eligible gifts on a dollar-for-dollar basis. The minimum eligible gift is \$25; the maximum is a total of \$2,500 per calendar year per employee, and \$1,000 per calendar year per retiree. The Foundation will match gifts made in cash, by check, or by credit card. Gifts must be made by the employee to the qualified school, university, scholarship fund, or environmental organization, not merely pledged, and must support the organization's primary mission. Gifts must be charitable contributions that are deductible for federal income tax purposes.

The interpretation, application, and administration of this program will be determined solely by the Foundation, and its decisions shall be final. The program may be suspended, changed, revoked, or terminated at any time without notice. The budget that the Foundation sets aside each year for the Matching Gifts Program accommodates a high level of participation. However, forms received will be processed on a first-come, first-served basis each calendar year until that current year's Matching Gift budget is exhausted. Completed forms must be received by January 31 of the year following the gift date to be eligible.

What Gifts Are Not Eligible?

- * Gifts to individuals, individuals' projects, alumni groups, fraternities or sororities, auctions, raffles, or advertisements.
- * Tuition payments, student fees, subscriptions, insurance premiums, or membership dues.
- * Gifts that generate a benefit (e.g., admission to sporting or special events for the employee).
- * Gifts to educational programs at non-academic institutions such as libraries, music conservatories, art institutes, or other non-profit organizations.
- * Gifts to preschools.
- * Gifts to schools, universities, scholarship funds, or environmental organizations outside the United States of America.
- * Gifts to institutions that do not meet The Northport Corporation Foundation's policy on non-discrimination.
- * Gifts to organizations that engage in illegal activities.
- * Gifts to organizations classified as private foundations under Section 509(a).

[Continue](#) →

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Agency Search / Selection

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Northport

← Back
Continue →

- Home
- Matching Program
- Dollars-for-Doers

Find an agency

Country:

Agency Name:

EIN:

City:

State:

Zip: with this zip

Acct. Code:

[→ search](#)

Displaying results 1 - 20 of 44

1 2 3 Next →

[Return to Full List](#) • Search Results

↑	select	Boys and Girls Club Hagerstown, MD More...
↑	select	Boys & Girls Club of Frederick County Frederick, MD More...
↑	select	Boys & Girls Clubs of Harford County Aberdeen, MD More...
↑	select	Boys and Girls Clubs of Central Maryland Baltimore, MD

Agency Selection Confirmation

Logged in: Jenn Finder : [Logout](#)

Northport

← Back
Continue →

- Home
- Matching Program
- Dollars-for-Doers
- Match Request Tracker

Recipient Agency

Boys & Girls Clubs of Greater Washington Inc.

Serving 35 000 at-risk youth annually throughout Greater Washington with academic enrichment career exploration character/leadership development arts programming health and life skills and sports/recreation.

←

← Back
Continue →

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Attraction, connection.



Transaction Details

Logged in: Jenn Finder : [Logout](#)

Northport

[Home](#)
[Matching Program](#)
[Dollars-for-Doers](#)
[Match Request Tracker](#)

← Back
Continue →

Payment Information

Enter the details of your matching grant request as indicated below.

Payment Type:

Payment Date:

Amount Paid: \$ (min. \$10.00)

Match Amount: \$ / \$0.00

← Back
Continue →

Transaction Details with Custom Payment Type Selected

Logged in: Jenn Finder : [Logout](#)

Northport

[Home](#)
[Matching Program](#)
[Dollars-for-Doers](#)
[Match Request Tracker](#)

← Back
Continue →

Payment Information

Enter the details of your matching grant request as indicated below.

Payment Type:

Description of volunteer work:

How did you learn about the volunteer opportunity?:

Volunteer Since:

Number Hours Volunteered: \$ (min. \$20.00)

Grant Amount: \$ / \$0.00

← Back
Continue →

Custom payment type questions

→



Registration / Donor Details

Logged in: Jenn Finder : Logout

Northport

Home | Matching Program | Dollars-for-Doers | Match Request Tracker

← Back | Continue →

Below is the information we have on file for you. Please review and update if appropriate.

Personal Information

First Name: Jenn
Last Name: Finder

Work Contact Information

E-mail Address: jfinder@northporttech.com (optional)
Phone Number 1: (optional)
Phone Number 2: (optional)
Fax Number: (optional)

Work Address

Country: United States
Address 1: 2201 Wisconsin Ave, NW (optional)
Address 2: Suite 250 (optional)
City: Washington (optional)
State: District of Columbia (optional)
Zip Code: 20007 (optional)

← Back | Continue →

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Registration / Donor Details with Custom Program Level Question

Logged in: Jenn Finder : Logout

Northport

Home | Matching Program | Dollars-for-Doers | Match Request Tracker

← Back | Continue →

Below is the information we have on file for you. Please review and update if appropriate.

also volunteer for this organization (check the box)

Program level custom question

Personal Information

First Name: Jenn
Last Name: Finder

Work Contact Information

E-mail Address: jfinder@northporttech.com (optional)
Phone Number 1: (optional)
Phone Number 2: (optional)
Fax Number: (optional)

Work Address

Country: United States
Address 1: 2201 Wisconsin Ave, NW (optional)
Address 2: Suite 250 (optional)
City: Washington (optional)
State: District of Columbia (optional)
Zip Code: 20007 (optional)

← Back | Continue →

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Transaction Review

Logged in: Jenn Finder : [Logout](#)

Northport

Home

Matching Program

Dollars-for-Doers

Match Request Tracker

← Back
Submit Match Request →

Please review the details of your grant request. Click "Submit" to record your request.

edit Match Information

Program	Matching Program
Organization	Boys & Girls Clubs of Greater Washington Inc.
Payment Type	Check
Amount Paid	\$50.00
Match	\$25.00
Payment Date	5/6/2010

edit Personal Information

Name	Jenn Finder
Home Address	5801 Smith Blvd Rockville, MD 20852
Work Address	2201 Wisconsin Ave, NW Suite 250 Washington, DC 20007
Work E-mail	jfinder@northporttech.com

← Back
Submit Match Request →

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Atlanta, connected.

Thank You / Claim Form Link

Logged in: Jenn Finder : [Logout](#)

Northport

Home

Matching Program

Dollars-for-Doers

Match Request Tracker

[Print match request summary](#) ↑ [Logout](#) →

Thank You!

Thank you for your participation in our Matching Giving Campaign and making the choice to support your favorite charities. Your generosity is critical to helping those in need. A confirmation of your pledge will be sent via email.

Please print the claim form and sent it to the agency for verification of your gift.

[Download Claim Form](#)

[Print match request summary](#) ↑ [Logout](#) →

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Match Request Tracker

Logged in: Jenn Finder : [Logout](#)

Northport

[Home](#)
[Matching Program](#)
[Dollars-for-Doers](#)
[Match Request Tracker](#)

Below is a listing of the matching grant requests you have made.

Match Tracking Summary						
12000016692	Agency Name	City, State, Zip	Grant Amount	Matching Funds Distributed To Date	Claim Form	
Approved	Boys & Girls Clubs of Greater Washington Inc.	Silver Spring, MD 20910	\$50.00	\$0.00		Download
12000016693	Agency Name	City, State, Zip	Grant Amount	Matching Funds Distributed To Date		
Pending Agency Verification	Boys & Girls Clubs of Greater Washington Inc.	Silver Spring, MD 20910	\$100.00	\$0.00		
12000016697	Agency Name	City, State, Zip	Grant Amount	Matching Funds Distributed To Date		
Pending Approval	Special Company Charity 1	Anywhere, NC 27560	\$260.00	\$0.00		



Appendix D: Designation Match Donor Experience Screenshots

Note: The Designation Match donor experience is nearly identical to the IPE donor experience. The screen shots below show the differences when Designation Match is active.

Welcome / Home Page

Logged in: Jenn Finder : [Logout](#)

Home
View Investment Cart
Checkout
Find Agencies
Help / FAQs
Giving History
Match Programs
Dashboard
My Account

Welcome Jenn!

At Northport Technologies we think of ourselves as a part of the community, and like any other good citizen, it's important for us to get involved in community action. Helping others live up to their fullest potential makes sense for our company any way you slice it. It's important to our customers, but it's also important to the people in the communities in which we live and work.

With that thought in mind, please give as much as you can, or as some people say, until it feels good.

Special Company Charity 1

Special Company Charity 2

➤ Add to Investment Cart ➤ Learn More

➤ Add to Investment Cart ➤ Learn More

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Match. Combined.

Pledge / Designation Level Details

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Home
View Investment Cart
Checkout
Find Agencies
Help / FAQs
Giving History
Match Programs
Dashboard
My Account

Annual Campaign Match
Give a dollar, get a dollar up to \$1000.
Available Match: \$740.00

Match Program information & currently available match

Boys & Girls Clubs of Greater Washington Inc.
Serving 35 000 at-risk youth annually throughout Greater Washington with academic enrichment career exploration character/leadership development arts programming health and life skills and sports/recreation.

Donation Information

Payment Type: Payroll Deduction - per pay-period

Donation Amount: \$5.00 /pay period = \$5.00 x 26 = \$130.00

Special Instructions: (optional)

I wish to remain anonymous.

Match Election

	Match Request	Match Available
<input checked="" type="radio"/> Annual Campaign Match	\$130.00	(\$1.00 - \$130.00)
<input type="radio"/> Decline Match		

Recognition / Acknowledgement

Special Recognition: None (optional)

➤ Continue

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Match. Combined.



Transaction Review

Logged in: Jenn Finder : [Logout](#)

Northport

← Back
Submit Contribution →

Please review your entire contribution below, using the "Edit" buttons to make any changes. If you are satisfied, please click "Submit Contribution" to complete this process. You will then have the opportunity to print your receipt.

[edit](#) **Your Investments**

Name	Donation	Payment
Special Company Charity 1		
	\$260.00	Payroll Deduction
Match Program	Annual Campaign Match	\$15.00 / pay period
Match	\$260.00	\$380.00
Remain Anonymous	No	
Boys & Girls Clubs of Greater Washington Inc.		
Match Program	Annual Campaign Match	
Match	\$130.00	
Remain Anonymous	No	

Match details displayed on transaction review page

[edit](#) **Personal Information**

Name	Jenn Finder
Home Address	5801 Smith Blvd, Rockville, MD 20852
Home Phone	
Home Email	
Work Phone	
Work Email	jfinder@northporttech.com

← Back
Submit Contribution →