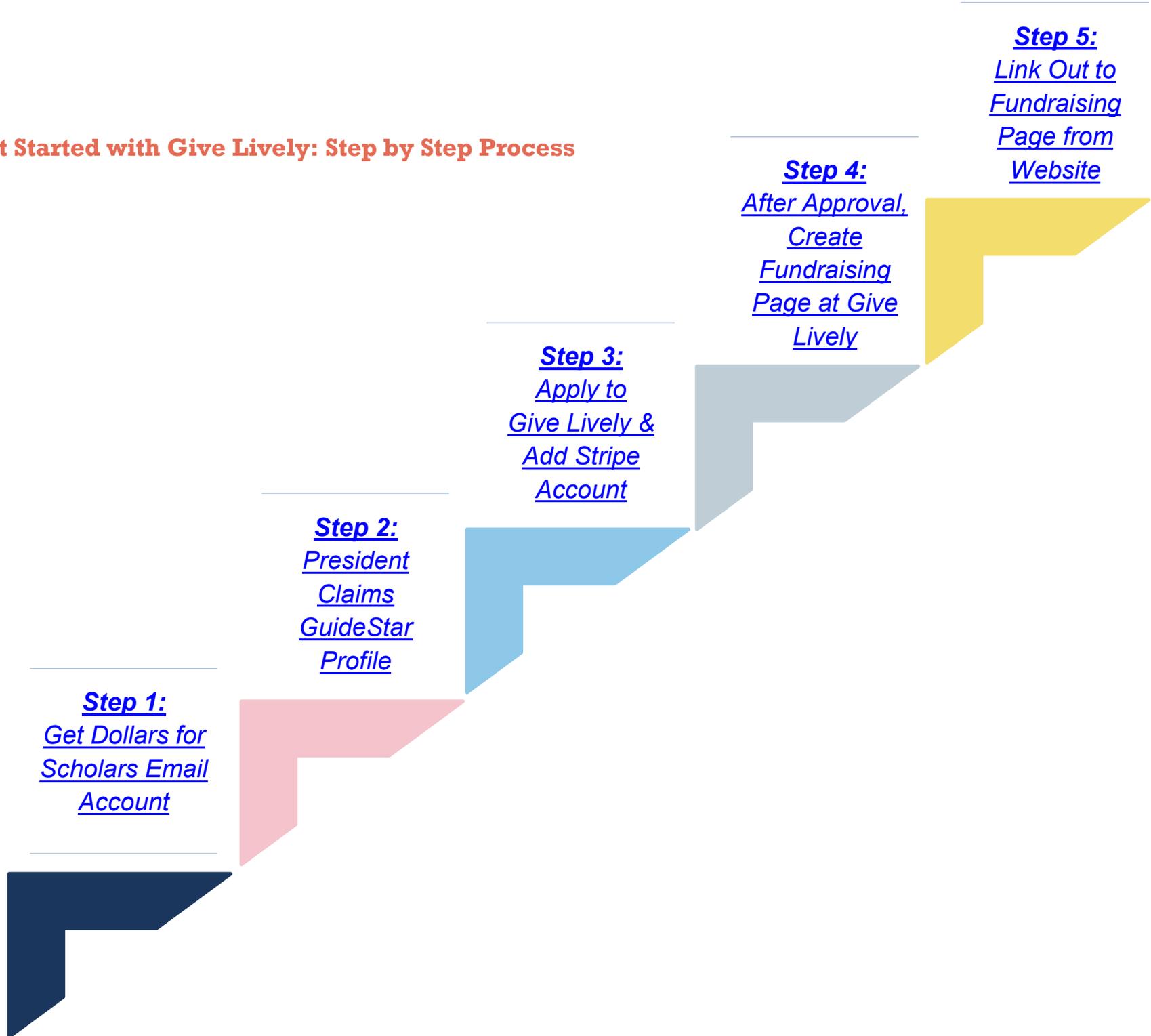


Get Started with Give Lively: Step by Step Process



Step 1

Why **An Organization Email Account is required**

- To use as the public email account listed on your Chapter Contact website page, or to:
- Set up an online fundraising donation account, and to
- Create a best practice of maintaining access to these accounts for more than just yourself.

If you do not have a Dollars for Scholars organizational email account, we can help.

- Scholarship America can provide a free Microsoft Office email account with the ending of "...@dollarsforscholars.org"
- Contact your Engagement Director to request an @dollarsforscholars.org account. We will send you a link to complete the quick sign up.

Step 2



Claiming Your Dollars for Scholars GuideStar Profile

A GuideStar profile enables your Dollars for Scholars to get noticed by potential donors and is often used to confirm non-profit status. Scholarship America has worked closely with GuideStar to make it as easy as possible to claim your Dollars for Scholars organizational profile. **Your chapter President is appointed as your Profile Manager and has permissions to claim your profile.**

Please note: you must first claim your GuideStar profile before requesting membership with Give Lively, the free online donation platform which works only with verified non-profit organizations.

1. Create a GuideStar Account at GuideStar.org

You need to **create a GuideStar account** and request permissions to manage the profile. First, please [register and verify your email](#). **It is best to use an email address with your Dollars for Scholars organization included in the email address.** If your organization does not have an email address associated with your organization name, you can request a free one from your **Engagement Director** for use in the next step of getting your free online donation account set up with Give Lively.

2. Claim your GuideStar Profile

Click here to learn how to: [Claim Your Nonprofit Profile](#).

Briefly describe your role *

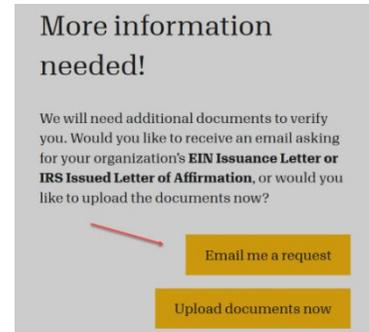
Scholarship America/Name of your organization|

45 out of 500 characters

NOTE: When filling out the section **About You** on the request page, please **add Scholarship America and the Name of your organization** in the section **Briefly describe your role**. This way GuideStar will know that you are affiliated with the parent organization.

For purposes of GuideStar, if you don't have an organization email, you may get a pop up message asking you to provide additional documentation for GuideStar to approve your request.

To bypass this, just click on **Email me a request**, if you have **added Scholarship America/Name of your organization under the role**, GuideStar will know who you are and be able to approve your request. (You can disregard the email you will receive).



APPROVAL: After you have completed filling out the form and submit the request, please allow 2-3 business days for your request to be approved.

3. Manage Your GuideStar Profile

Once GuideStar approves your request, **you will receive an auto-generated email** letting you know that you have been approved to manage the organization's profile. **Click [here](#) to view the GuideStar profile best practice guide.** This guide provides simple, easy to follow steps to walk you through the process of claiming your profile and earning Seals.

Updating your Dollars for Scholars Organization Name:

When you log back in after being an approved manager, you will be asked to list your organization name. Use your Dollars for Scholars Organization name, and not Scholarship America. Scholarship America will be listed as the name registered with the IRS, only. **Click [here](#)** for more information.

Summary Update Publish Benefits

BRONZE +
SILVER +
GOLD +
PLATINUM +

DEMOGRAPHICS +
BOARD PRACTICES
HOW WE LISTEN
ADDITIONAL INFO & DOCS +

Bronze

Contact information
What is your organization's name?

Name Registered with IRS
SCHOLARSHIP AMERICA INC

Organization Name *
Scholarship America, Inc.

EIN *
04-2296967

My organization is known by other names

What is your main mailing address?

Add Your Dollars for Scholars Organization Name

When you **Search** for your Dollars for Scholars on the main page, you should see your organization name, not Scholarship America's.



1. Add Your Dollars for Scholars logo

Once you have claimed your GuideStar Profile, you can upload your new Dollars for Scholars logo. In your account, navigate to the Silver level to the brand section to upload as indicated [here](#). Note, you do not need to complete the Silver level to have your logo appear on your GuideStar Profile. Find the current logo in your ChapterNet account in **My Affiliate Documents**. Use the logo that is for web use. For help on using the right file, see the “Affiliate Logo File Type Guide” in [Affiliate Resources](#).

2. Add a Mission Statement

Once you have claimed your GuideStar Profile, you can include a mission statement for your organization, which tells potential donors why your organization exists, whom it serves, and what it provides to those you serve. If your Dollars for Scholars has not already established a mission statement, you can find tips on writing a non-profit mission statement [here](#) and in [Affiliate Resources](#).

3. What to do if you need assistance:

If you have any problems claiming your organization’s profile or if your request mistakenly gets rejected, please reach out to GuideStar staff Robin or Melanie at support@candid.org. In the subject line please put “**Scholarship America**”

Step 3

Getting Started with Give Lively

After your GuideStar profile is claimed, and you have your Dollars for Scholars organizational email account, you are ready to apply for membership at <https://www.givelively.org/apply-for-membership>

give lively PRODUCTS ▾ MEMBERSHIP ▾ ABOUT ▾ SUPPORT ▾ LOG IN APPLY

Apply for Give Lively Membership

- 1**
APPLY
 - Fill out application for Give Lively membership
 - Connect a Stripe account to Give Lively
- 2**
PLAN
 - Allow time for Give Lively to review your application
7-10 business days
 - IN THE MEANTIME:**
 - 💰 Learn about full Stripe setup
ACH activation & nonprofit discount
 - 💡 Explore the Resource Hub
Get inspired in your one-stop shop about Give Lively
- 3**
ACTIVATE
 - If approved, receive welcome notice by email
 - Finalize Stripe setup
ACH activation & nonprofit discount
 - Complete profile and start fundraising!
 - ALSO RECOMMENDED:**
 - ▶ Attend live welcome webinar
Optional presentation and Q&A

IMPORTANT STEPS: After Stripe Account is Activated

Request your Nonprofit Discount from Stripe

Send an email to sales+nonprofit@stripe.com with the following required information in the email message:

1. Identify your name and leadership role with Dollars for Scholars
2. Type in: “I request **the Dollars for Scholars / Scholarship America nonprofit discount.**”
3. Provide your Dollars for Scholars EIN (Employer Identification Number)
4. Provide the organizational email address associated with your Stripe account.
5. Type in: “More than 80% of the donations received to our Dollars for Scholars organization are tax-deductible.”

Click on the “Send Email” button. You will receive an email communication from Stripe back to your organizational email account offering you the nonprofit discounted pricing. You must respond and accept the discounted terms which should be applied to your Dollars for Scholars email account within 5-7 business days of the acceptance.

Enabling ACH Payment option for your donors

Take this step **AFTER** your Stripe account is set up and active.

1. Login to your Stripe Account at <https://dashboard.stripe.com/login>
2. Once logged in, simply click on this link: <https://stripe.com/docs/ach>
3. You will see a page that says ACH Guide, and a blue button to enable ACH terms. Click on the blue button and you will see it turn to a white button that says activated.
4. Make a test donation using the bank account option. If it successfully transmits, the ACH payment function is enabled.

Step 4

Set up your Dollars for Scholars Core Profile and Fundraising Page

1. [Follow Easy Setup Instructions](#) at GiveLively.org
2. Below are examples of Dollars for Scholars Fundraising Pages linked out from Dollars for Scholars Website Donate Now Pages. For help with color selection, see our “Brand Standards/Usage Guide” in [Affiliate Resources](#).



[Donate Now | Stamford Dollars for Scholars](#)

Our mission is to mobilize the local community to raise funds and provide scholarships to make post-secondary education possible for deserving students. We were con...

secure.givelively.org



[Donate Now | Fairport-Perinton Dollars for Scholars](#)

Our mission: We help our community

secure.givelively.org



[Donate Now | Lincoln Heights Dollars for Scholars](#)

Our mission is to mobilize our community, through scholarships and educational support, to make post-secondary success possible for Lincoln Heights students. Our goal...

secure.givelively.org



[Donate Now | Jefferson Dollars for Scholars](#)

The mission of Jefferson Dollars for Scholars is to expand access to educational opportunities for all Jefferson Parish public school students ...

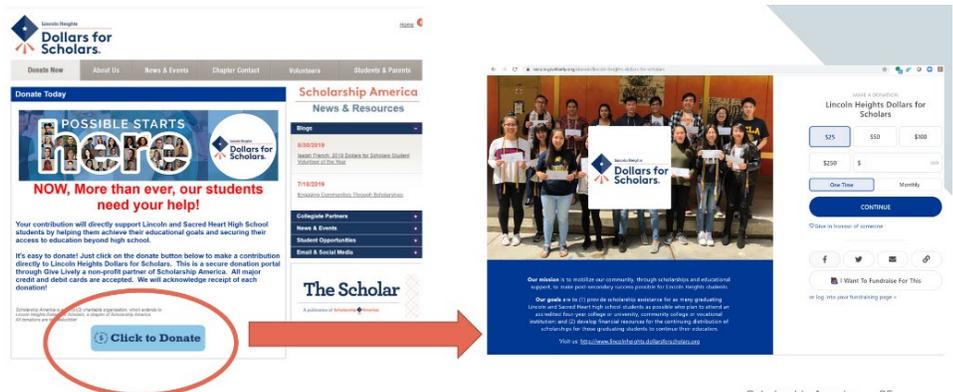
Step 5

Connecting Dollars for Scholars Website to Give Lively Page

ChapterNet is more than a website, it's a scholarship management system that contains student data, protected by privacy laws. We do not allow any embedding of outside links **onto** ChapterNet, called "widgets." However, you can **link out** to third party websites from your Donate Now Page. See below, and for general information about updating your website, see your **Affiliate Resources**.

Link your Dollars for Scholars website to Give Lively from the **Click to Donate Button**.

TIP: Please make sure that **ALL** donation links on your website point to the Give Lively site.



TIP: Make a small test donation using your Give Lively fundraising page to ensure all is working.

How to Link DONATE NOW Page to Give Lively Fundraising Page:

View this short video: <https://youtu.be/ZcKvtt5ygRU> on how to link out to your Give Lively page.

In your **ChapterNet account**, changes can be made to your website. In the **Chapter Content Control** section at the **Donate Now Page**, paste the **complete** Give Lively website address, including the **https://** into the **Donate Override Field**. This will link the two pages. NOTE: You will find the Give Lively link within your Give Lively Nonprofit Admin Portal using the "Copy Link" button. And paste into ChpaterNet.

