Why should I enrol?

Reach new donors and benefit from innovative ways to fundraise

PayPal Giving Fund is a registered charity (No.1110538) that raises new funds for other charities through technology. Harnessing PayPal’s assets, we are working to create a network of donors, businesses & charities so all can participate in helping charities raise new, unrestricted funds.

It’s free to enrol with PayPal Giving Fund. Once enrolled, your charity can reach new donors, will appear on the PayPal website and app, eBay for Charity as well as Humble Bundle.

Before you start

First, you should choose a primary account holder, who must be authorised to manage the charity’s PayPal account. The primary account holder should complete PayPal’s registration and charity confirmation process, outlined in the steps below.

Once your PayPal account is set up, you can designate additional users, who may each have different levels of access depending on their role.

You will need the following in order to complete PayPal’s registration and charity confirmation process:

- **Charity’s details:**
  - Registered name
  - Charity Commission or OSCR number, if you have one
  - Registered address
  - Phone number
  - Email address
  - Website URL
  - Date charity was established

- **Charity’s bank account:**
  - Account number
  - Sort code
  - Online banking access (you can still register if online banking is not available, but the process will be delayed. You will need to check your bank statement when it arrives to verify your account).

- **Account holder’s details:**
  - Email address (this will be the primary login)
  - Job title
  - Date of birth
  - Home address

- **A trustee’s details:**
  - First and last name
  - Date of birth
  - Town and postcode of home address
  - Estimate of the average value and approximate monthly volume of transactions you’ll process through PayPal

http://beta.charitycommission.gov.uk/charity-details/?regid=1110538&subid=0
https://www.paypal.com/vc/cgi-bin/webscr?cmd=p/sell/permissions-outside
If you do not already have one, you will need to sign up for a PayPal Business Account in order to enrol with PayPal Giving Fund (PPGF). You can do this by opening a new account or by upgrading a personal account. If your charity already has a PayPal Business Account then you can proceed to confirm your account’s charity status section of this guide.

This PayPal video takes you through opening a PayPal account and enrolling with PayPal Giving Fund. You can also use this guide to help you through the process.

Creating a PayPal Business Account

1. Sign up for a PayPal Business Account

A safe, easy way to pay and get paid

2. Enter your email address then click Continue.

https://www.youtube.com/watch?v=9fXyvXvzKA4
https://www.paypal.com/uk/webapps/mpp/account-selection
3. Sign up for a business account

Sign up for a business account

Create a login

<table>
<thead>
<tr>
<th>Email address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password</td>
</tr>
<tr>
<td>Re-enter password</td>
</tr>
</tbody>
</table>

Tell us about your business

First name

Last name

Business name

Country (Optional)

Business address

Town/City

Postal code

I have read, consent and agree to PayPal’s User Agreement and Privacy Policy (including the processing and disclosing of my personal data), and I am of legal age. I understand that I can change my communication preferences at any time. Please read the Key Payment and Service Information.

Agree and Continue

Tips for Completion

1. Enter your own first and last name.

2. When filling out your ‘business name’ enter the name of your charity.

3. Omit the ‘0’ at the beginning of the phone number.

4. Do not use spaces when entering your postcode.

After ticking the box agreeing to PayPal’s User Agreement and Privacy Policy click Agree and Continue.

4. Provide more details about your organisation. Then click Agree and Continue.
5. Confirm your email address.

6. Once you have clicked the ‘Confirm your email’ button, look for a Set up Your PayPal Business Account message from PayPal in your email inbox and click on ‘Get Started Now’.

**Note:** If you do not receive the confirmation email, check your Spam/Junk mail filters. If you still do not see it, go back to the setup dashboard and:

- Click on the first step ‘First let us confirm your email’.
- Then click on ‘Confirm this email’ to send another email.
Once you have confirmed your email address, select the Link your bank account tab and click Add **bank account** within the setup dashboard. This will enable you to withdraw funds from PayPal into your charity’s bank account.

- Enter account holder’s name, business name and address
- Choose business account type Non-profit, category Charity and enter charity number
- Enter personal information for the account holder

http://www.paypal.com/activation/businessSetup
Confirm your bank account; check your account for the confirmation code sent by PayPal and enter this within the form and click confirm.

To enrol with PayPal Giving Fund your charity will need to confirm it's charitable status. By simply confirming that your PayPal account belongs to your charity, you will also get the reduced PayPal 1.4% + 20p transaction rate.

**Confirm your charity status**

1. Follow the link in the confirmation email you received (page 6) and click on Confirm your charity status. You can also go directly to www.paypal.com/charities.
2. Click Get Started.
3. Click Get Started again.
4. If you have previously entered your charity’s registration number, it will be shown (last four digits). If not, enter the charity’s number now. If not, enter your charity number accordingly.
5. Click next.
6. If your charity number cannot be automatically validated, you will be prompted to upload documentation proving your charitable status.

**The confirmation process**

a. Add bank account

Http://www.paypal.com/charities
b. Lift your account limitations

Your account limits

For security reasons, initial limits are set on the amount you can send, receive and withdraw from your PayPal account. To lift your limits, select all you want to lift and click the Lift Limits button.

Limits refer to your primary currency. If you use a different currency, we will convert the equivalent amount to your primary currency and amend the limit accordingly.

<table>
<thead>
<tr>
<th>Type of Limit</th>
<th>Amount of Limit</th>
<th>Remaining</th>
<th>Reset Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sending limit per year</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Withdrawal limit per month</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Withdrawal limit per year</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receiving limit per year</td>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Lift Limits
Return to Account Overview

c. Confirm your charity's identity

Confirm identity

We need some additional information to confirm your identity and help keep your account secure.

- First name
- Last name
- Sex:
- Country of residence:
- Flat number (optional)
- Building name (optional)
- Building number
- Street name
- Street number
- Town/City
d. Upload proof of your identity as well as your organisation

![Image of PayPal dashboard]

**TIP** When providing proof of business registration you can screenshot your charities page on the charity commission site.

http://www.paypal.com/charities
7. Upload the charity’s bank statement or a voided cheque.

8. Your information will be reviewed within **three business days**. You will receive an email notifying you of your charity confirmation.

9. After your organisation has been confirmed as a Charity, you will receive a confirmation email and your PayPal Business Setup dashboard will be updated to show the option to **enrol with PayPal Giving Fund**.
Once you have opened your PayPal Business Account and confirmed your charity status, you are ready to enrol with PayPal Giving Fund.

1. Firstly, you will receive a charity confirmation email confirming your charity status, click *Enrol with PayPal Giving Fund*.

   ![Email from PayPal](image)

   **Great news!**
   Dear North Wales Mountain Rescue Association,
   We’ve reviewed your documents and confirmed the charity status of your business account.
   As a confirmed charity, you automatically get the reduced rate of 1.4% +20p on online transactions. There’s nothing special you need to do.

   Raise more funds as a confirmed PayPal charity.
   Now that you’ve confirmed, you can enrol with PayPal Giving Fund, connecting you to 100+ million potential donors through programs with PayPal, eBay, Humble Bundle, and other PayPal Giving Fund partners. PayPal Giving Fund charges no fees, so it’s a win-win for your cause!
   If you joined PayPal Giving Fund before July 26, 2015, maintain your ‘enrolled’ status by following the instructions recently emailed to the contact on file with PayPal Giving Fund. If you don’t have the email, contact them for details on how to proceed. If you haven’t already enrolled, join as a new member of the PayPal Giving Fund now!

   [Enrol with PayPal Giving Fund for the first time](http://www.paypal.com/activation/businessSetup)

2. Alternatively, you can click on the link from the *PayPal Business Setup dashboard*.
3. If you have access to your charity’s PayPal account, click *Continue*. If not, click *Learn more* to learn how the administrator of your charity’s PayPal account can grant you access.

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http://www.paypal.com/activation/businessSetup
Once you are enrolled with PayPal Giving Fund, you will have access to your PayPal Giving Fund Dashboard. This will help your organisation to keep track of funds raised through our programmes on a monthly basis.

Here you are able to update your mission statement, contact details, logo and call to action. These are the details that will appear on our partner websites such as eBay for Charity and PayPal.

In the dashboard, you will see the following tabs:
- Profile
- Dashboard
- Activity
- Recent donations

**Profile Page**

Here you can:
- Upload your charity logo.
- Provide your call to action and website links.
- Add your ‘About me’ information (which will also appear on your eBay for Charity profile).
- Opt into PayPal Giving fund updates and support from a new eBay listing.
Dashboard Tab

Here you can see:

- Total donations raised to date with PayPal Giving Fund.
- Your total monthly donations separated by programme.
- Donation history; a monthly breakdown that is separated by programme. Click on the green + to expand.
- Pending donations (donations that have recently been made to your charity and have not yet been paid out).
- Resources menu (quick links to your PayPal donations page, profile and settings, eBay for Charity page and eBay Direct Sellers location).

Activity Tab

Here you can:

- Download a CSV file with donation amount and any donor details.
- Filter by PayPal Giving Fund partners, programmes, from and to date.
- Where applicable, you can also see donor details.
Recent Donations Tab

- Similar to your Activity tab, this tab shows any recent donations that yet to be paid to your organisation.
- View donor details when given (those donors who don’t wish to share their details will appear as anonymous)
- Filter donations by date and view by programme
- Search donor names

FAQs

How do I know if my organisation has confirmed charity status?

You can check your organisation’s confirmed charity status by logging into your PayPal account. Select Profile from the menu at the top of the page, select Business Set-up, and then select the Account Set-up tab. If your account is confirmed, it will say: We have confirmed your charity. If not, it will say, Confirm your charity status.

How do I link my eBay and PayPal account?

You can link your PayPal account to your eBay account to save time when you buy and sell items on eBay.

To link your eBay account to your PayPal account:

1. Log in to your eBay account.
2. Click ‘My eBay’ at the top of the page.
3. Click the Account tab, and then click the PayPal Account link. You will then be asked to log into PayPal to finish linking your accounts.

https://signin.ebay.co.uk/ws/eBayISAPI.dll?SignIn&ru=http%3A%2F%2Fwww.ebay.co.uk%2F
How do I withdraw funds from my PayPal account?

1. Log in to your PayPal account.
2. Click Transfer money under «Money» on the left of the page.
3. Select the balance you would like to withdraw from and select the bank account you would like to deposit to.
4. Enter the amount and click Continue.
5. Review the details and click Transfer.

Note:
• Your bank may charge a fee to receive funds from PayPal. Ask your bank about fees for electronic funds transfers.
• If the bank is unable to process your request due to incomplete or incorrect information in your withdrawal request, the funds will be returned to your PayPal account (a return fee may apply in this case).
• Once you request a withdrawal, it cannot be cancelled.

Contact us

Thank you for your interest in PayPal Giving Fund and we look forward to working with you to raise funds for your organisation. Good luck with your enrolment, if you have any questions, please contact us.

https://www.paypal.com/uk/signin
https://www.paypal.com/gb/givingfund/contact