



Since 1975, TOTE has been committed to the people and communities we serve. Our values of Safety, Integrity, and Commitment carry through in our office and work culture, as well as how we interact with the community.

Getting Started in GivingTrax

TOTE uses GivingTrax as its primary portal for all community giving. That includes employee matching, volunteer matching, event sponsorship, grant requests, auction items and in-kind shipping.

If you have any issues or would like help setting up your account, you can email Lisa Simmons at lsimmons@totemaritime.com or Anissa Stella at astella@totemaritime.com.

How to Use GivingTrax

Access: <https://www.givingtrax.com/app/login>

Select the option to create a new account.

Once you have created your account, you will need to connect it to the organization by going to the company's GivingTrax Dashboard: <https://www.givingtrax.com/giving/tote-maritime-alaska>

A screenshot of the GivingTrax dashboard for TOTE Maritime Alaska. The page has a dark blue header with navigation links: 'Members', 'Projects', 'Sign Up', and 'Log In'. The main content area is white with a dark blue sidebar on the left. The sidebar contains a list of focus areas: 'Community Improvement', 'Environment', 'Health & Wellness', and 'Public Safety, Disaster Preparedness & Relief'. Below this is a section for 'Other considerations for a contribution are:' with a list of factors like 'How widespread the benefit' and 'How urgent the need'. Further down, it lists groups that are not eligible for donations. The main content area has a section for 'Address' with contact information for TOTE Maritime Alaska. A red arrow points from the 'Other considerations' section to a 'Connect' button, which is circled in red. The bottom of the page shows a 'Partners' section with a pagination indicator 'Page (1 of 3)'.

Initial Log-in View – The Dashboard view includes two navigation areas:

Top Navigation: The top navigation accesses the community, wishes and a link to edit your personal profile.

Main Navigation: The main navigation is a series of tabs under your profile picture.

Access these tabs to view:

- Causes you have supported
- Matching Gift Program details
- History log of your donations
- History log & status of Matching Gift requests

The screenshot displays the user dashboard for Lisa S. in Tacoma, WA. The top navigation bar includes links for Members, Projects, Volunteer Events, My Profile, My Dashboard, and Log Out. The main navigation area shows 18:30 Volunteer Service Hours and 3 Donations. Below this are tabs for Home, Matches, My Donations, Volunteer Service, and My Requests. A green notification bar indicates 'Logged In Successfully'. There are four green buttons: 'Donate \$\$', 'Request Match', 'Add Volunteer Hours', and 'See Our Impact'. A section for '2023 - TOTE Maritime Alaska Volunteer Grant' features a 'View Match Challenge' button. At the bottom, a 'Connections & Favorites' section is partially visible, showing a table with columns for Name and Action.

Online Donations:

There are four options for making online donations in GivingTrax. No matter which option you choose, you will be prompted to select the matching gift program. You also have an option to donation w/o using the program.

Four ways to donate in GivingTrax:

1. Search Community, View Nonprofit's Page, then Click "click n give" button
2. Search Wishes, View Details, then Click "click n give" button;
3. Click on "Employee Matches" tab, then click on "click n give" for the program and choose an organization from the dropdown or search by name, then
4. Click "Make Donation", choose an organization from the dropdown or search by name, then select "save & continue".

For all options:

- You will be prompted to select the matching gift program to activate it.
- You will be prompted to enter your credit card details to complete the donation.

Please Note: The address in your “my profile” must be entered first, or the credit card transaction will fail.

Matching Gift Requests for donations made elsewhere:

If you made a donation independently, you can still request a match for that donation, as long as you saved a receipt or proof of donation.

From your Dashboard, Click on the green “Submit Matching Gift” Request Button:

- i. Step 1 - Choose an organization from the dropdown or search by name, then select “save & continue”.
- ii. Step 2 - Enter the amount you donated, the date & attach a receipt, then click “save” (This step saves the donation to your donation history).
- iii. Step 3 - Click on the green “Step 3 – Submit Match” button, select the program, then “save & continue”.

Note: If you attended an event & desire to enter the event details, do so on the next screen showing the request details. Please do not alter any of the other selections.

Click on Submit Request

Donation & Matching History:

You will see your donation on the “My Donations” tab and your request on the “My Requests” tab.

Contact for Help:

Email: help@GIVINGtrax.com

Chat: Click on “get help”, then “more options” to chat or submit a ticket.

Notifications:

When TOTE Maritime Alaska takes action on your request, you will receive an email notification.