



ePledge Administrator Guide 2019

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1. e-Pledge Requirements

In order to participate in an e-Pledge campaign, your organization will need to provide United Way of Brevard with the following:

1. [Completed ePledge Online Giving Agreement](#)
2. [Completed ePledge Set Up Form](#) and Employee Information Import File

Employee Information Import File template and additional information can be found on the ePledge information page at www.uwbrevard.org.

2. Accessing your e-Pledge site

Coordinator Access

United Way will send you an email with a link to your account with your User ID and Password embedded.

Additionally you can access your pledge management site through the Log In menu item on UWB's website www.uwbrevard.org. Click the Log In link and enter your User ID and Password. If you would like to change your password click the Forgot Password button.



Please enter your User ID and Password and click the Login button to access the site.

If you have forgotten your password click the "Forgot My Password" button, enter the email that you set up your account with (user id is optional but not required) and a password reset link and your User ID will be emailed to the address on file for your account.

If you do not have an account and are requesting access contact Lisa Miers at lmiers@uwbrevard.org or at 321.631.2742.

User ID:

Password:

1. Coordinator Welcome Page

The welcome page will display your administrative tools to manage your organization's campaign. Your organizational logo will be presented in the top left of your screen.

The following menu options are presented to you:

- Welcome - Returns you to the welcome screen for e-Pledge Coordinators
- Campaign Info/Campaign Status - Quickly review how your campaign is progressing
- Campaign Info/Documents-ePledge Documents-You can upload or download documents and files pertaining to your campaign
- Employee Management/Employees and Transactions - View your campaign data by employee. You may also email employees individually, add employees or enter proxy pledges for employees. You can also email
- Employee Management/Email Employees – Communicate with groups of employees via email. You can use default templates or build and save your own
- Reports -View or pull reports to help you manage your campaign
- Logoff-Securely close your online session



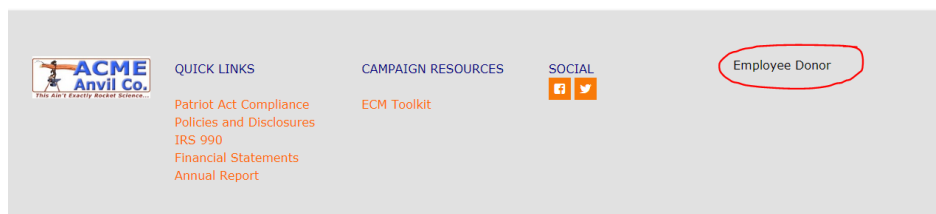
Welcome to the ePledge management portal for ACME Anvil Incorporated Training Account.
Thank you for serving as your organization's ePledge Administrator. You are now logged into the management side of your ePledge campaign site. The following options are available to you.

- **Welcome** - Returns you to this screen
- **Campaign Info**
 - Campaign Status-quickly review the status of your campaign
 - Documents-you can upload or download documents pertaining to your campaign
- **Employee Management**
 - Employees and Transactions- View your campaign data by employee. You may also email employees individually, add employees or enter proxy pledges for employees.
 - Email Employees-Communicate with groups of employees via email. You can use default templates or build and save your own
- **Reports** -View or pull reports to help you manage your campaign
- **Logoff** - Securely close your online session

Change Roles-Employee Donor (Click the Employee Donor link in the bottom right corner to switch between your administrative tools and personal donor page.)

Change Roles

Employee Donor (Click the Employee Donor link in the bottom right corner to switch between your administrative tools and personal donor page.)



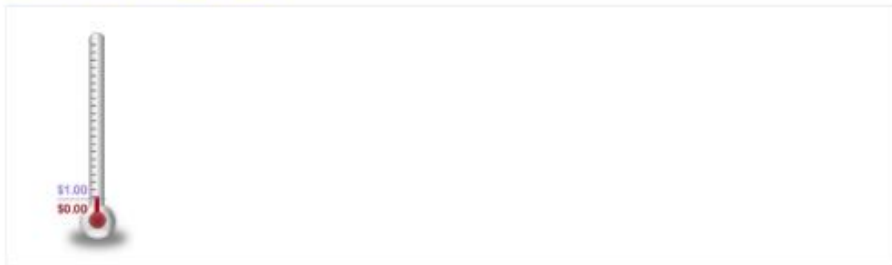
2. Campaign Info/Campaign Status Page

This page will display the organization's campaign goal thermometer as well as basic campaign information in real time such as:

Total In, Goal, # of Employees, # of Donors, Participation Rate, # of Responses, Percent Responses, Average Gift and Gift Per Capita. If applicable you can view your organization's overall three year giving history by clicking on the magnify glass icon.



Campaign Status



Total raised in thermometer includes both corporate & special event gifts from ACME Anvil Incorporated Training Account.

Name	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita
ACME Anvil Incorporated Training Account	\$1.00	\$0.00	10	1	10%	1	10%	\$1.00	\$0.10

United Way Campaign

Year	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita
2019	\$1.00	\$0.00	10	1	10%	1	10%	\$1.00	\$0.10
2018	\$0.00	\$2,000.00	10	0	0%	0	0%	\$0.00	\$0.00
2017	\$0.00	\$0.00	0	0	0%	0	0%	\$0.00	\$0.00

[Back](#)

3. Campaign Info/ ePledge Documents

This page will allow you to securely view, upload or download files pertaining to your campaign.

epledge documents

ACME Anvil Incorporated Training Account - Company

open all | close all

ACME Anvil Incorporated Training Account - Company

File Name	Description	Language	
Template-ePledge Employee Information Import.xlsx	Template-ePledge Employee Information Import	English (System default)	

4. Employee Management/Employees and Transactions Page

From this page the coordinator may perform various campaign administrative functions. Coordinators will only be able to view or access employees that they have authorization to manage.

Transactions List

To search for an employee, type the name and click on the search icon.

You may use the icons below to do the following:

- Enter an employee's pledge by proxy
- (left side) Email employee
- (left side) Update employee's information
- (left side) Delete an employee from your campaign
- (right side) Resend employee's pledge confirmation
- (right side) Delete employee's transaction
- (right side) Update employee's pledge
- Check the received box if you have the cash or check pledge payment from the employee

ACME Anvil Incorporated Training Account - Company

open all | close all

ACME Anvil Incorporated Training Account - Company

Search for employee (To display all employees that you are authorized to view enter *all in the search box.)

	Name	Pledge	Payment	Pledge Type	Payment Type	Received	e-Payment Verification	Employer Name	Employer Account
	Bunny, Mr. Bugs	\$1.00	\$1.00	Cash	Cash	<input type="checkbox"/>			ACME Anvil Incorporated 1231406
	Coyote, Mr. Wyle E.	N/R	\$0.00						ACME Anvil Incorporated 1231406

5. Employee Management/e-Mail Employees Page

From this page the coordinator may email employees in groups such as non respondents or gift amounts. United Way has provided several email templates that can be utilized. Coordinators also have the option to create their own custom messages.

Send email

To employees

Organization

ACME Anvil Incorporated Training Account - Company

open all close all

ACME Anvil Incorporated Training Account - Company

Include Subsidiaries

Transactions Created

From

To

Jun 03 2018 Jun 03 2019

With Amounts

From

To

-999999999 999999999

Send To

Respondents

Non-Respondents

Compose

e-Mail Template

*None

Sender's eMail Address

"Bugs Bunny" <coordinator@uwibrevard.org>

Subject

Rich text editor toolbar with options: File, Edit, View, Insert, Format, Table. Includes icons for bold, italic, underline, link, unlink, text color, background color, bulleted list, numbered list, indent, outdent, and undo. The editor area is currently empty.

0 WORDS POWERED BY TINYMCE

Save As Template Name

Editable by creator only

Delete Template

Save Template

Save Template and Send

Send

Cancel

6. Web Reports Page

From this page the coordinator may pull various campaign data reports. Coordinators will only be able to view or access employees reporting data that they have authorization to manage. United Way can auto write and email these reports to you directly each morning of your campaign. If you would like to use this option you can denote that on your Campaign Set Up Form or contact UW directly to arrange report auto delivery.

Web Reports

<input checked="" type="radio"/> Acme No Response Report Who hasn't pledged?
<input type="radio"/> Acme Response Report Who has pledged?
<input type="radio"/> Acme Transaction Report Who gave via payroll, cash, check or credit card?
<input type="radio"/> Acme- All Employees Report All employees report.
<input type="radio"/> Acme- Cash and Checks Report Who gave Cash and Checks?
<input type="radio"/> Acme-Daily Status Report How many gave today?

Submit

My Outputs

The name of the report will turn blue once it has finished writing. Click the refresh button to check the status of a report.

To download a report right click the report link and save to your computer.

Refresh

There are no reports available at this time.

Cancel

Donor Access

Once your organization's e-Pledge campaign has been set up employees will receive a welcome email with their embedded user ID and password. Coordinators are able to send this email or United Way can send it on the organization's behalf.



Hello Bugs,

Welcome to ACME'S 2019 United Way Campaign.

We invite and encourage you to participate in this Campaign. Big or Small your donation will help many people in need.

Please click on the link to go to the website to donate by paycheck (amounts to be deducted weekly or bi-weekly)/cash/check/credit card.

You will have the option to donate to your local United Way chapter or any 501(c)3 nonprofit health and human service charity of your choice.

Thank you in advance for your support!


Bugs, click here to go online and make YOUR pledge to change lives and strengthen our community!

This link contains your encrypted login information; do not share or forward this e-Mail!




2. Donor Pledge Options

This page can be customized by pledge type, suggested gift amounts and gift impact information per your organization's preference.



WELCOME ABOUT US OUR WORK GET INVOLVED LOG IN **GIVE** VOLUNTEER

MY PLEDGE
MY INFO
VOLUNTEER
LOGOFF



Please select your pledge type.

Payroll Deduction

Check

Cash

Credit Card

No Gift

Please select your gift amount per pay period:

\$3 \$5 \$10 \$15 \$21 \$42 Other Amount

Deduction Per Pay:

Number Of Deductions To Make:

Total Annual Pledge:

Do you wish to designate your gift? Yes

Due to processing costs, designations must be \$72 or greater. Designations not meeting requirements will be directed to the Community Care Fund. Only 501 (c)(3) health & human services agencies are eligible.

3. Donor Designation Page (Optional)

On this page donors may choose to designate their gift to United Way's Impact Areas or any qualified 501(c3) health and human service agency.

ACME Anvil Co.
The City's Family Support Network

WELCOME ABOUT US OUR WORK GET INVOLVED LOG IN GIVE VOLUNTEER

MY PLEDGE
MY INFO
VOLUNTEER
LOGOFF

Please enter the amounts for the designations of your choice.

Total Pledge	\$130.00
Total Designated	\$130.00
Total Undesignated	\$0.00

Community Care Fund

The best way to make the greatest difference in our community.

Designation Amount

Help support our work in


Impact Area	Designation Amount
<input type="checkbox"/> Health	<input type="text"/>
<input type="checkbox"/> Education	<input type="text"/>
<input type="checkbox"/> Financial Stability	<input type="text"/>

To designate your gift to a specific agency

enter a keyword in the agency's name


4. Donor Verification Page

On this page donors will verify their information. Donors are also given the option to opt in to receive more information about United Way programs and volunteer opportunities.



WELCOME ABOUT US OUR WORK GET INVOLVED LOG IN **GIVE** VOLUNTEER

MY PLEDGE
MY INFO
VOLUNTEER
LOGOFF



Please check your info below.

Name	Prefix:	First:	Middle:	Last:	Suffix:
	Mr.	Bugs		Sunny	

Home Address

Address Line 1:
3425 Froggylove Lane

Address Line 2:

City:	State:	Zip Code:
Cocoa	Florida	32922

Country:
United States of America

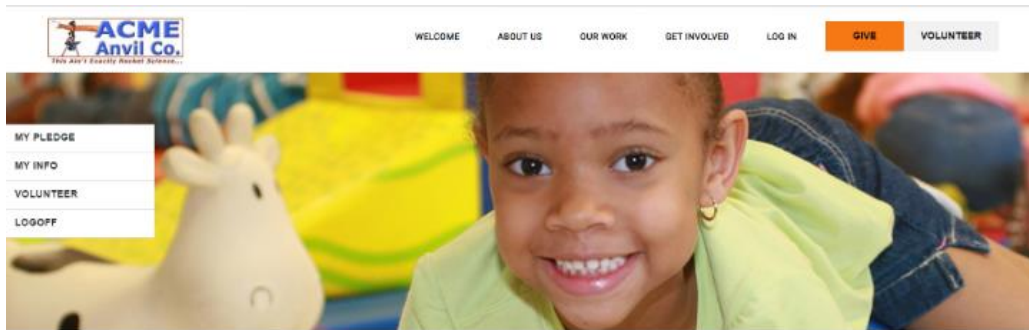
Items marked with an asterisk (*) are required.

- I wish to receive an acknowledgement of my gift from the specified agency or agencies.
- Volunteer (I'd also like to volunteer. Send me more information)
- Diamond Donors (I have given to United Way for 25 years or more.)
- Emerging Leaders (Early to mid-career professionals giving \$500 or more) Or I will step up to leadership giving \$250 in year 1, \$350 in year 2 and \$500 in year 3.
- Women United (Network of philanthropic women giving \$500+)
- I'm giving 2 hrs pay per month. (Chairman's Club)

[Previous](#) [Cancel](#) [Next](#)

5. Pledge Confirmation Page

On this page donors will review and confirm their selections. Once confirmed, donors may explore other website options and/or print their confirmation. An email will also be sent to the donor with the transaction information. (example below).




Please review your pledge and confirm it below:

Pledge Type:	Payroll Deduction
Number of Deductions:	26
Deduction Per Pay:	\$5.00
Total Current Pledge:	\$130.00
Total Pledge Year To Date:	\$131.00

Designated To:	Amount
Community Care Fund (Community Care Fund)	\$130.00
Total Designated	\$130.00
Total Undesignated	\$0.00

Confirmation may take a few moments to display. Please click the confirm button only once. Thank you.



United Way of Brevard

Hello Bugs,

THANK YOU for changing lives and strengthening our community.

Throughout the coming year, your gift will provide access to books and caring mentors to help struggling readers. You are helping people on the road to financial stability through financial education classes. You are preventing child abuse. You are reducing hunger.

Please stay informed about the impact your gifts will make by visiting www.uwbrevard.org or following us on [Facebook](#).

This e-mail is a confirmation of your pledge to make a gift. Your pledge and designation information are summarized below:

Pledge Reference Number: 23700/515312


Transaction Information:

Pledge Type: Payroll Deduction
 Number of Deductions: 26
 Deduction Per Pay: \$5.00

Designation Information:

Community Care Fund (Community Care Fund) \$130.00
Total Designated: \$130.00
Total Undesignated: \$0.00
Total Pledge: \$130.00

Again, thank you for changing lives!



United Way of Brevard | Changing Lives and Strengthening Communities

To unsubscribe, click [HERE](#).
 1100 Rockledge Blvd, Suite 300
 Rockledge, FL 32955
www.uwbrevard.org

6. Questions

United Way is available to assist your organization's Human Resources, Information Technology and Legal departments with security, internal or governmental statutory compliance issues.

If you need assistance please contact:

Emily Orndorff

Vice President, Operations and Information Technology

eorndorff@uwbrevard.org

321.615.3958