



ePledge Coordinator Guide 2021

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1. ePledge Requirements

In order to participate in an ePledge 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

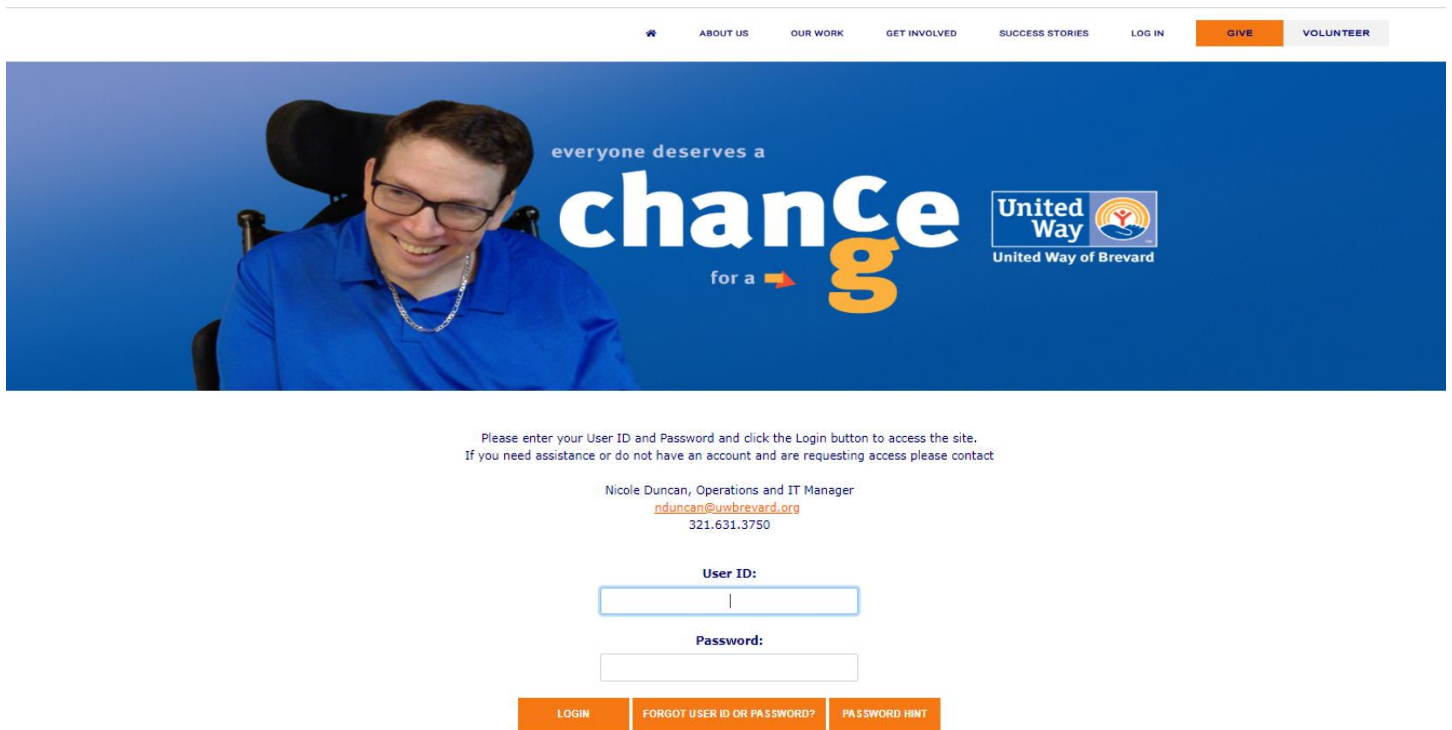
Employee Information Import File template and additional information can be found on the ePledge information page at www.uwbrevard.org.

2. Accessing your ePledge 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.

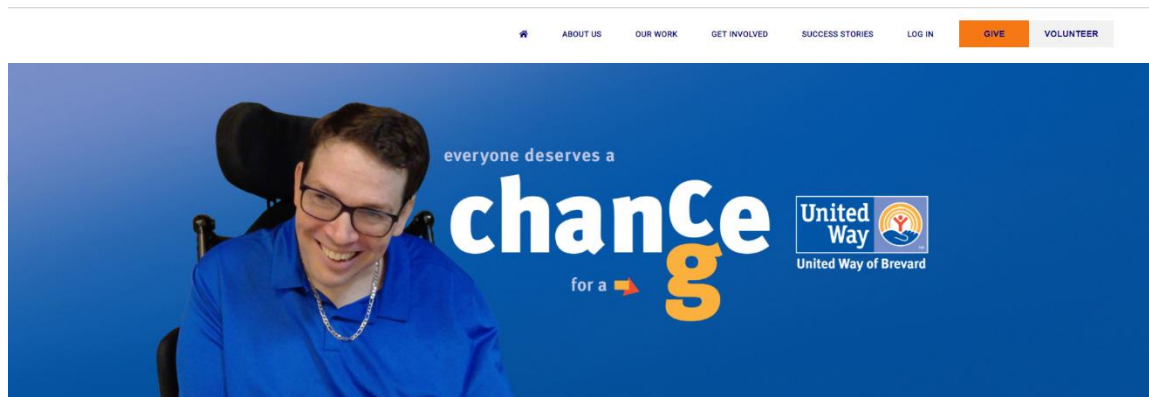


Coordinator Welcome Page

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



Welcome to the ePledge management portal for Testing Corporation.

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.

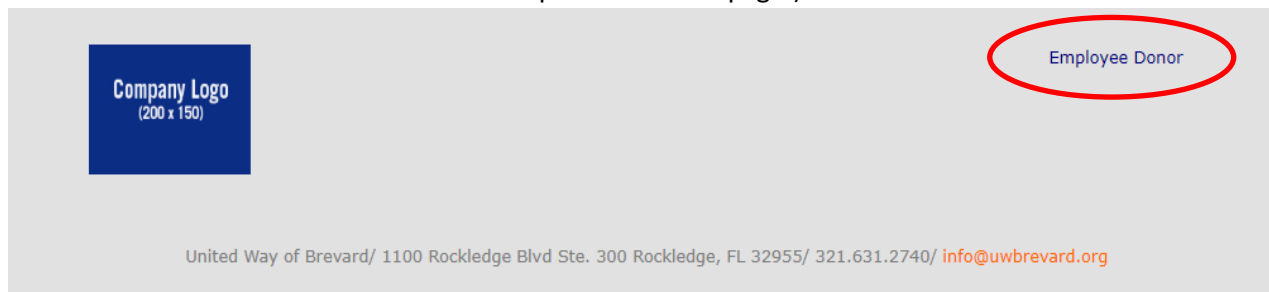
- **Welcome** - Returns you to this screen
- **Campaign Info**
 - Campaign Status-quickly review the status of your campaign
 - Documents-you can upload or download documents pertaining to your campaign
- **Employee Management**
 - Employees and Transactions- View your campaign data by employee. You may also enter proxy pledges for employees.
 - **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.)

- Employee Management/Employees and Transactions - View your campaign data by employee. You may also enter proxy pledges for employees.
- 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.)

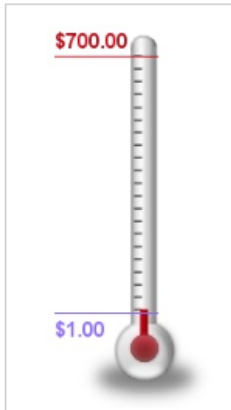


Campaign Info/Campaign Status Page

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 Testing Corporation.

Name	Campaign Type	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita	
Testing Corporation	Empl	\$1.00	\$500.00	5	1	20%	2	40%	\$1.00	\$0.20	
Testing Corporation	Corp	\$0.00	\$0.00								
Testing Corporation	Special	\$0.00	\$200.00								

Campaign Info/ ePledge Documents



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

EPLDGE DOCUMENTS

Testing Corporation - Company
123 Main Street
Cape Canaveral, Florida 32926

[open all](#) [close all](#)

Testing Corporation

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

ADD





Employee Management

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 a pledge on behalf of another employee
-  Update an employee's information
- Check the received box if you have received the cash or check pledge payment from the employee and click the orange UPDATE button
-  Resend the employees pledge confirmation email
-  Delete the employee's transaction (this transaction will still be visible in United Way's audit logs)

***If you need to add new employees to your campaign or to remove employees that have been terminated please contact ePledge Manager Nicole Duncan at nduncan@uwbrevard.org**















Testing Corporation - Company
 123 Main Street
 Cape Canaveral, Florida 32926

[open all](#) [close all](#)

 Testing Corporation

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
 	Testing Account, Mr. User 1	N/R	\$0.00						Testing Corporation	1231406
 	Testing Account, Mrs. User 3	N/R	\$0.00						Testing Corporation	1231406
 	Testing Account, Mr. User 4	\$100.00	\$100.00	Check	Check	<input type="checkbox"/>		 	Testing Corporation	1231406
 	Testing Account, Ms. User 5	N/R	\$0.00						Testing Corporation	1231406
 	Testing Account, Ms. User 6 P.	N/R	\$0.00						Testing Corporation	1231406
 	Testing Account, Ms. User 7	N/R	\$0.00						Testing Corporation	1231406

UPDATE

Web Reports Page

From this page the coordinator may pull various campaign data reports. Reports are available in both a PDF and Excel Spreadsheet. 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"/> Testing Account - All Employees Report All employees report.
<input type="radio"/> Testing Account - Cash and Checks Report Who gave Cash and Checks?
<input type="radio"/> Testing Account - Daily Status Report How many gave today?
<input type="radio"/> Testing Account No Response Report Who hasn't responded?
<input type="radio"/> Testing Account Response Report Who has responded?
<input type="radio"/> Testing Account Transaction Report Who gave via payroll, cash, check or credit card?

SUBMIT

MY OUTPUTS

The name of the report will turn orange 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

Show Outstanding

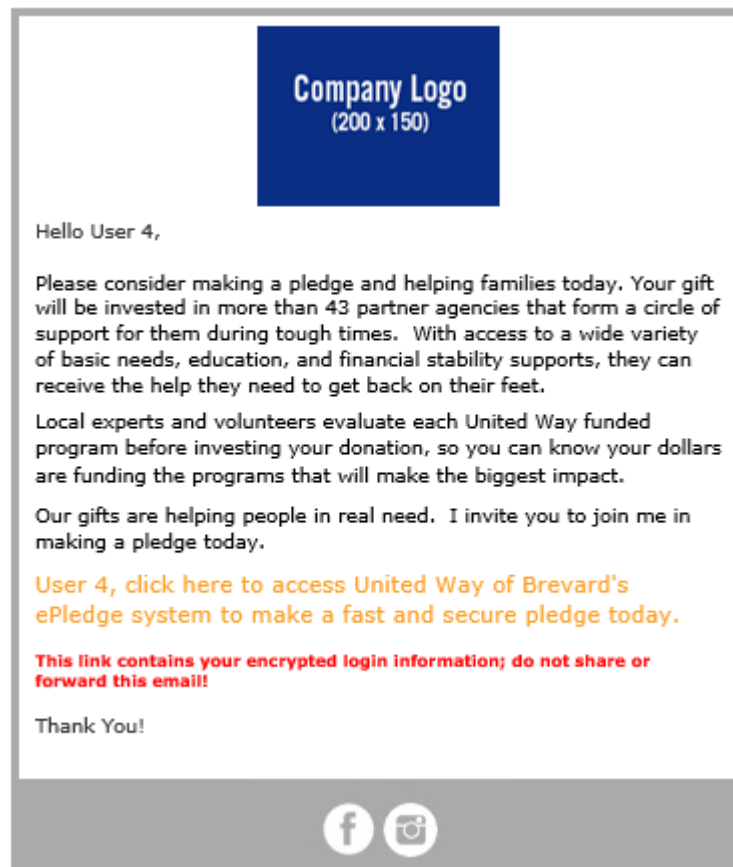
<input type="checkbox"/>	Job Number	Job	Names	Date	#Pages	Size	Type	Status	Description
<input type="checkbox"/>	751449	Testing Account No Response Report	Testing Corporation - Pledge No Response Report	06/03/2020 09:15:06 AM	0	3535	csv	Ready	
<input type="checkbox"/>	751449	Testing Account No Response Report	Testing Corporation - Pledge No Response Report	06/03/2020 09:15:05 AM	3	35389	pdf	Ready	

DELETE

CANCEL

3. Donor Access

Once your organization's ePledge campaign has been set up employees will receive a welcome email with their embedded user ID and password.



Donor Pledge Options

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

PLEASE SELECT YOUR PLEDGE TYPE



Payroll Deduction



Credit Card



Check



Cash



No Gift

Please select your gift amount per pay period:

\$3

\$5

\$10

\$15

\$21

\$42

Other Amount

Deduction Per Pay:

0

Pay Periods Per Year:

26

Total Annual Pledge:

\$0.00

Donor Designation (Optional)

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

▼ OPTIONAL- DESIGNATE YOUR GIFT

Due to processing costs designations must be at least \$72

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

Early Grade Reading



This initiative focuses on the importance of early brain development and its impact on later educational success.
[Read more...](#)

Your investment amount:

Equity in Brevard



United Way will invest in organizations, networks and programs that spark dialogue and action to improve equity in Brevard.
[Read more...](#)

Your investment amount:

Mission United



United Way is committed to helping those who have served our country overcome challenges transitioning from active duty.
[Read more...](#)

Your investment amount:

Community Care Fund



United Way supports a broad range of safety net services and invests in programs that keep people from reaching crisis points.
[Read more...](#)

Your investment amount:

OTHER NONPROFIT AGENCIES

To search for an agency enter a keyword in the agency's name and click the SEARCH button.

SEARCH

Donor Verification

In this section 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. To complete the pledge the employee must click the CONFIRM button.

PLEASE REVIEW YOUR CONTACT INFORMATION

Name	Prefix:	First:	Middle:	Last:	Suffix:
	Ms.	User 5		Testing Account	
Home Address	Address Line 1:				
	123 Penny Drive				
	Address Line 2:				
	City:	State:	Zip Code:		
	Melbourne	Florida	32940		
	Country:				
	United States of America				

Items marked with an asterisk (*) are required

- Diamond Donors (I have given to United Way for more than 25 years)
- Volunteer (I'd also like to volunteer. Send me more information)

- Yes, please share stories and other information with me of how my donation is making an impact in Brevard.**

CONFIRM

CANCEL

Pledge Confirmation Page

On this page donors will see a summary of their selections. 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).


FOR YOUR RECORDS...

AN EMAIL CONFIRMATION WILL ALSO BE SENT.

Reference Number:	23700-564967
Pledge Type:	Payroll Deduction
Pay Periods Per Year:	26
Deduction Per Pay:	\$3.00
Total Current Pledge:	\$78.00

LOGOFF AND CLOSE YOUR ONLINE SESSION

PRINT



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

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, Finance, Operations and Information Technology

eorndorff@uwbrevard.org

321.615.3958

Nicole Duncan

Manager, ePledge and Information Technology

nduncan@uwbrevard.org

321.615.3750