



United Way
of South Mississippi

United Way of South Mississippi

ePledge

Administration's Manual

Welcome

Thank you for using the e-Pledge system. This Internet and e-Mail based tool, presented in partnership between your organization and United Way, is designed to make giving quick and easy.

e-Pledge significantly reduces, or even eliminates, the paper forms traditionally used in the course of an employee workplace campaign, resulting in improved efficiency for all parties.

This guide is designed to assist you in setting up and running an effective e-Pledge campaign.

What Is e-Pledge?

e-Pledge is an online pledge collection tool that fits seamlessly into your existing United Way campaign, allowing you to efficiently and safely raise money while eliminating pledge cards. It's all done through United Way of South Mississippi's secure database Andar360. E-Pledge and Andar360 work together to safely store your employees' data, send emails directly to your employees, set up a branded site just for your company, automatically track pledges and run real-time reports.

Benefits of using e-Pledge

- Reduces or eliminates the need for paper pledge forms
- Maximizes efficiency of campaign administration
- Centralizes campaign information in one shared database
- Enables real-time reporting or tracking of donors throughout the company
- Secure and confidential

After the campaign

You tell us what date to close the campaign, leaving your administrator IDs available to run reports for up to two weeks after the campaign is closed. If there were any special reports for incentives or prizes that were discussed before the campaign, those reports would be provided at this time. We would also send a payroll file to your HR department in the format requested. Lastly, we would hope to get another chance to meet with all of your key contacts to discuss the strengths and weaknesses of the e-Pledge campaign in order to prepare for next year.

The Employee Campaign Manager (ECM) should run a cash report from the e-pledge website to identify individuals who have not turned in their payment. Collect all the payments and put the money, campaign report and the cash report inside the campaign envelope you were provided.

Contact your United Way representative to come collect your envelope.

LeAnna Morgan, Director of Resource Development, 896-2213 Ext. 7108 campaign@unitedwaysm.org
LeTasha Clarke, Campaign Associate, 896-2213 Ext. 7107 rd@unitedwaysm.org
Fax: 896-2298

Appendix A is optional!!

Appendix A – Data File Layout

You need to send us an employee file at least 6 weeks prior to the start of your campaign that conforms to the following:

- The data should be sent as an Excel spreadsheet.
- Unused fields from the list below do not need to be included in the spreadsheet.
- Any fields listed below that you need us to return in the payroll file MUST be included on original employee data file.
- Any information (ex. Supervisor, location, business unit, etc.) that you would like to use to sort or filter your reports MUST be included on original employee file in Report Sort 1 to Report Sort 3.
- Please be aware we cannot import the full name of an employee in one column. The first, middle and last names MUST be separated into distinct columns.

Field #	Field Name	Data Type	Maximum Length	Required Field
1	Donor Identifier	Numeric	20	Y
2	User ID	Text	20	Y*
3	Password	Text	20	Y*
4	Prefix	Text	15	Y
5	First Name	Text	15	Y
6	Last Name	Text	25	Y
7	Middle Initial	Text	15	N
8	Suffix	Text	15	N
9	E-Mail	Text	70	Y**
10	Home Address	Text	40	Y
11	City	Text	25	Y
12	State	Text	2	Y
13	Zip	Numeric	10	Y
14	Department Name	Text	25	N
15	Department #	Numeric	20	N
16	Campaign Manager	Text	25	N
17	# of Pay Periods	Numeric	2	Y
18	Roster Name	Text	25	N
19	Report Field 1	Text	25	N
20	Report Field 2	Text	25	N
21	Report Sort 1	Text	25	N
22	Report Sort 2	Text	25	N
23	Report Sort 3	Text	25	N

* United Way can generate using a combination of the donor identifier and donor name that you provide, or some other combination that would make it a unique User ID.

**E-mail address is so you can send the user ID, password and link to the site to each employee.

Description of Data Fields

1. **Donor Identifier:** A unique # pertaining to an individual employee identifying that employee. Ex: Employee ID
2. **User ID:** A unique string of characters to each employee used as an ID to sign on to the e-pledge system. This can be set up by the United Way.
3. **Password:** Characters used with the User ID to sign on to the e-pledge system. This can be set up by the United Way.
4. **Prefix:** Employee's prefix such as Mr., Mrs. Etc.
5. **First Name:** Employee's first name
6. **Last Name:** Employee's last name
7. **Middle Initial:** Employee's middle initial or middle name
8. **Suffix:** Employee's suffix such as Jr., Sr., etc.
9. **E-Mail:** Employee's email address
10. **Home Address:** Employee's home address
11. **City:** Employee's city
12. **State:** Employee's state
13. **Zip:** Employee's zip code
14. **Department Name:** Employee's department name
15. **Department #:** Employee's department number
16. **Campaign Manager:** Name of person within company that is responsible for employee's campaign.
17. **# of Pay Periods:** The number of pays that the employee has per year
18. **Report Field 1:** Any information that the company would like to track in reports.
19. **Report Field 2:** Any information that the company would like to track in reports.
20. **Report Field 3:** Any information that the company would like to track in reports.
21. **Report Sort 1:** Any information that the company would like to use to sort the reports by.
22. **Report Sort 2:** Any information that the company would like to use to sort the reports by.
23. **Report Sort 3:** Any information that the company would like to use to sort the reports by.

Notes:

1. Campaign Manager information links employees to coordinators for reporting and administrative purposes.

2. The sort fields are used for structuring the reports. Assign your groupings and levels here for your e-Pledge reports.

Appendix B - Sample E-mail Messages

Kickoff E-mail

Welcome to the [YEAR] United Way Campaign. Our organization has enjoyed a long and successful relationship with United Way and we are looking forward to our best year ever. The United Way's mission is building community, improving lives and making every contribution count. Once again, through your generous contributions to United Way, we can make a difference in the areas of EDUCATION, INCOME, and HEALTH.

Your gift to United Way is invested in programs that help children and youth achieve their potential, help families become financially stable and independent, and improve people's health. Every pledge produces measurable results – measurable change. Even a \$2.00 per week contribution will make a huge difference in the campaign.

You may pledge your contributions through a protected website beginning [DATES OF YOUR CAMPAIGN].

Together, we can inspire hope and create opportunities for a better tomorrow.

Thank you for supporting United Way. Thank you for LIVING UNITED..

Closing E-mail

There are only [TIME] remaining for you to participate in the [YEAR] United Way Campaign. The deadline for online pledging is [DEADLINE DATES].

Remember that when you make a contribution to United Way, you become a partner for a stronger community, helping to find long-term solutions to essential health and human service needs. A pledge of any amount will help.

When you reach out a hand to one, you influence the condition of all.

Thank you for supporting United Way.

Appendix C - Sample Web Greetings

Dear Fellow Employee:

Welcome to the kick-off of the [YEAR] United Way Employee Campaign! I invite you to join me in making the greatest difference possible in our community. By supporting the United Way campaign, we can help make our community a stronger, better place to live and work.

Your gift to United Way is invested right here in our community. United Way is focused on advancing the common good: helping children and youth to achieve their potential, helping families become financially stable and independent and improving people's health.

I hope that you will join me in supporting the United Way this year. Please support your community through the [YEAR] annual United Way fundraising campaign.

When you reach out a hand to one, you influence the condition of all.

Sincerely,

Name and Title

Appendix D – e-Pledge Screen Customization

Login Page

An employee can be set up to access the e-Pledge system with a company login. We would send a link and an User ID and Password that needs to be given to each employee. When employees click the link, they will need to use the company User ID and Password to sign up with their email. After they enter their email address and other personal information, it will send them a link with a temporary password. Once they login with their email and temporary password, they have full access to the site.



LIVE UNITED

United Way of South Mississippi

A screenshot of the e-Pledge login page. The page has a dark blue header and footer. The main content area is white. At the top, it says "Welcome to United Way of South Mississippi." Below that are two input fields: "User ID:" and "Password:". Underneath the fields, there are two lines of contact information: "For E-Pledge questions please contact LeTasha Clarke lclarke@unitedwaysm.org." and "For Community Building questions please contact Aletha Burge aburge@unitedwaysm.org." At the bottom of the white area are two buttons: "LOG IN" and "FORGOT USER ID OR PASSWORD?". On the right side of the page, there is a dark blue sidebar with three circular icons and text: "GIVE", "ADVOCATE", and "VOLUNTEER". Below these are four social media icons: Facebook, Twitter, YouTube, and RSS. At the very bottom of the page, in small text, it says "Powered by Andar/360 Fundraising Software from Helix (e18.02)".

Greeting Page

This is the first page that most employees will see and it is completely customized for your company. Normally, the page layout includes your company logo and a welcome message from your Campaign Chair or CEO.

Note: In order for the welcome text to fit on the screen without having to scroll down, we recommend that the text not be more than 150 words, if you are also planning to include a logo, 250 words if not. Please send us a Microsoft Word file, no formatting. If including a logo, which will be displayed in the upper right of all pages, it should be .jpg or .gif file. Size = 100h * 100w pixels.

United Way **LIVE UNITED** United Way of South Mississippi

HOME PLEDGE HISTORY MY PROFILE LOG OUT

WELCOME EMPLOYEE OF UNITED WAY OF SOUTH MISSISSIPPI, INC.!

Dear Letesha,

United Way's donors are building a better community for all of us who live and work in South Mississippi. Thanks to them, United Way can continue working in partnership to address our community's greatest needs: education, income including financial stability, health and basic human needs. Here are just a few examples of how your financial support is changing lives and helping United Way's newest program, the Dolly Parton Imagination Library, already has almost 1000 children registered. Each child that enrolls in the program will receive one book a month until they are 5 years old- making a huge impact on early childhood learning. The United Way Volunteer Center brought more than 3 million dollars worth of volunteer hours to South Mississippi. The online resource connects non-profits with potential volunteers and creates a long lasting relationship with local and national volunteers. United Way of South Mississippi recently announced the 2015-2016 Education Grant recipients and 6 programs will be receiving more than \$800,000 over the next two years. These programs focus on early-childhood learning and grade level reading, two issues that United Way is committed to improving in South Mississippi. These are just a few real life examples of how your contribution to United Way of South Mississippi touches lives in our community every day. United Way is only able to provide funding support to each of these organizations due to the generosity of donors like you. Together, we are achieving results that no one could accomplish alone. Thank you again. In the spirit of living united!

Cindy Walker CEO, United Way of South Mississippi

CAMPAIGN VIDEO 2015

Role Menu
Change Organization
ePledge Admin

GIVE
ADVOCATE
VOLUNTEER

Facebook Twitter YouTube RSS

Menu Options (Employee):

Pledge: This is where you will be able to enter your pledge for the current campaign year.

History: Allows to see your pledge history and the pledge history of your campaign.

My Profile: Your profile where you will be able to change information.

Menu Options (ECM/Administrator)

Campaign Status: The current status of your company/organization.

Reports: Where you can pull reports to see who has pledge, etc.

Employees: Can add employees on this page.

Campaign Toolkit: Link to our campaign toolkit on the United Way website.

Select Pledge Type Page

All campaigns have the following pledge type options: payroll, credit card, cash/check and the option not to give this year. If you decide to accept cash/check, your users will be prompted to send those items to a designated person at your company who will collect and forward them to the United Way. You can choose which pledge types to make available to the employees.



United Way of South Mississippi

A screenshot of the United Way ePledge system interface. The top navigation bar includes links for HOME, PLEDGE, HISTORY, MY PROFILE, and LOG OUT. Below this is a progress bar with steps: SELECT TYPE (highlighted in orange), ENTER AMOUNT, DESIGNATIONS, PREFERENCES, VERIFICATION, and FINISHED. The main content area is titled "Please select your pledge type." and lists five radio button options: "Checking/ Savings Account" (selected), "Cash", "Check", "Credit Card", "I do not wish to give at this time", and "Payroll Deduction". At the bottom of this section are "NEXT" and "CANCEL" buttons. On the right side, there is a dark blue sidebar with icons and text for "GIVE", "ADVOCATE", and "VOLUNTEER". Below these are social media icons for Facebook, Twitter, YouTube, and RSS. At the bottom of the sidebar is a "Role Menu" section with links for "Change Organization" and "ePledge Admin". The footer of the page states "Powered by Andar/360 Fundraising Software from Helix (e16.02)".

Note: Please ask everyone to login and make a selection, even if they decide to not give.

Enter Pledge Amount Page (Payroll)

The number of pay periods that appear on this page can be pre-populated for each employee. *One Time payroll deductions will be available also*

Note: a drop down box can be displayed that will allow the donor to make a one-time payroll if the company/organization prefers.

HOME PLEDGE HISTORY MY PROFILE LOG OUT

SELECT TYPE

ENTER AMOUNT

DESIGNATIONS

PREFERENCES

VERIFICATION

FINISHED

Did you know that .99 of every donated dollar stays HERE in South Mississippi? And, for every \$1 that you give, \$6.43 is reinvested back into this community!

(Gifts of at least \$104 may be designated to one registered 501 (c) 3 that serves populations in Hancock, Harrison, Pearl River and/or Stone Counties, OR to any other United Way.)

Deduction Per Pay:

\$0.00

Pay Periods Per Year:

24 Deductions

Total Annual Pledge:

\$0.00

Do you wish to designate your gift? Yes

Enter Pledge Amount Page (Cash)

If you allow cash pledges, you will need to provide us with specific instructions for the donor regarding how to get their cash to the designated collection person at your company. This can be sent over at the same time as the welcome message for the home page.



United Way of South Mississippi

A screenshot of a web application interface for entering a cash pledge. The interface has a dark blue header with navigation links: HOME, PLEDGE, HISTORY, MY PROFILE, and LOG OUT. Below the header is a progress bar with six steps: SELECT TYPE, ENTER AMOUNT (highlighted in orange), DESIGNATIONS, PREFERENCES, VERIFICATION, and FINISHED. The main content area is white and contains the following text: "Did you know that .99 of every donated dollar stays HERE in South Mississippi? And, for every \$1 that you give, \$6.43 is reinvested back into this community!" followed by a note in parentheses: "(Gifts of at least \$104 may be designated to one registered 501 (c) 3 that serves populations in Hancock, Harrison, Pearl River and/or Stone Counties, OR to any other United Way.)". Below this is a text input field for "Pledge Amount" with the value "\$0.00" and a checkbox for "Do you wish to designate your gift?" with "Yes" selected. At the bottom left are three buttons: NEXT, BACK, and CANCEL. On the right side, there is a dark blue sidebar with three icons and text: "GIVE", "ADVOCATE", and "VOLUNTEER". Below these are social media icons for Facebook, Twitter, YouTube, and RSS. At the bottom right of the sidebar is a "Role Menu" section with two options: "Change Organization" and "ePledge Admin". At the very bottom of the page, there is a small footer: "Powered by Andar/360 Fundraising Software from Helix. (e18.02)".

Enter Pledge Amount Page (Credit Card)

Donors can use either MasterCard, Discover, VISA and American Express to make pledges.

Donor puts in credit card information after the verification page

The screenshot shows a web interface for entering a pledge amount. At the top, there is a navigation bar with links: HOME, PLEDGE, HISTORY, MY PROFILE, and LOG OUT. Below this is a progress bar with steps: SELECT TYPE, ENTER AMOUNT (highlighted in orange), DESIGNATIONS, PREFERENCES, VERIFICATION, and FINISHED. The main content area features a message: "Did you know that .99 of every donated dollar stays HERE in South Mississippi? And, for every \$1 that you give, \$6.43 is reinvested back into this community! (Gifts of at least \$104 may be designated to one registered 501 (c) 3 that serves populations in Hancock, Harrison, Pearl River and/or Stone Counties, OR to any other United Way.)". Below the message are input fields for "Pledge Amount" (set to \$0.00) and "Payment Start Date" (Jul 28, 2016). There are radio buttons for "Payment Frequency": Bi-Monthly, Monthly, Quarterly (selected), and Today. At the bottom left are buttons for NEXT, BACK, and CANCEL. On the right side, there is a dark blue sidebar with icons and text for "GIVE", "ADVOCATE", and "VOLUNTEER", along with social media icons for Facebook, Twitter, YouTube, and RSS. Below these is a "Role Menu" section with links for "Change Organization" and "ePledge Admin". At the very bottom of the page, it says "Powered by Andar/360 Fundraising Software from Helix (e18.02)".

Enter Designations Page

Donors can designate to any 501c3 nonprofit organization that is in our 4 counties (Harrison/Hancock, Pearl River and Stone). They can also designate to any United Way in the United States. They can "write in" an organization if they are not in our system.



United Way of South Mississippi

HOME PLEDGE HISTORY MY PROFILE LOG OUT

SELECT TYPE ENTER AMOUNT **DESIGNATIONS** PREFERENCES VERIFICATION FINISHED

Please use the options below to designate your pledge. Any undesignated dollars will go directly to the United Way of South Mississippi.

Total Pledge	\$120.00
Total Designated	\$0.00
Total Undesignated	\$120.00

[Click here to designate to specific agencies:](#)

AGENCY SEARCH

NEXT
BACK
CANCEL

GIVE
ADVOCATE
VOLUNTEER

Role Menu
Change Organization
ePledge Admin

Powered by Andar/360 Fundraising Software from Helix (e16.02)



United Way of South Mississippi

HOME PLEDGE HISTORY MY PROFILE LOG OUT

SELECT TYPE ENTER AMOUNT **DESIGNATIONS** PREFERENCES VERIFICATION FINISHED

Total Pledge	\$120.00
Total Designated	\$0.00
Total Undesignated	\$120.00

Agencies
Agency:
Keyword
Book Number
City
State
Zip Code
 Search for partner agencies only
SEARCH

Write-Ins
Write-in the agency of your choice
WRITE IN

NEXT
BACK
CANCEL

GIVE
ADVOCATE
VOLUNTEER

Role Menu
Change Organization
ePledge Admin

Powered by Andar/360 Fundraising Software from Helix (e16.02)

Prefrences Page

The preference page is where the employee checks that all their personal information is correct. You may change the information on this page or on the "MyProfile" page

HOME PLEDGE HISTORY MY PROFILE LOG OUT

SELECT TYPE > ENTER AMOUNT > DESIGNATIONS > PREFERENCES > VERIFICATION > FINISHED

PLEASE CHECK YOUR INFORMATION BELOW.

*Personal Email Address: [REDACTED]

*Main Address (No PO Box)

*Address Line 1: [REDACTED]

Address Line 2:

*City: Biloxi *State: Mississippi *Zip Code: 39532

*Country: United States of America

Items marked with an asterisk (*) are required

I wish to remain anonymous, please.

Send me an e-mail confirmation of this pledge

Yes, I am a Loyal Contributor. I have donated 10 years or more to United Way.

I have been a Loyal Contributor since [dropdown]

NEXT

BACK

CANCEL

GIVE

ADVOCATE

VOLUNTEER

f t YouTube RSS

Role Menu

Change Organization

ePledge Admin

The anonymous and email confirmation options will be on every site

The confirmation email should arrive upon completion of their pledge. The confirmation email will contain whatever verbiage was provided to us by your company for the message as well as a breakdown of the same information displayed on the confirmation screen above.

Loyal Contributor: Someone who has donated to ANY United Way for 10 years or more

Note: Confirmation e-mails will be sent to the employee's e-mail address.

Verification Page

The verification page is where the employee reviews their pledge information. If changes are needed, click the **Back** buttons to return to the appropriate page to make corrections and then move forward using the **Next** buttons until they have reached the verification page again. ***DO NOT PRESS THE BACK BUTTON ON THE BROWSER***



LIVE UNITED

United Way of South Mississippi

Pledge Type:	Payroll Deduction
Pay Periods Per Year:	24
Deduction Per Pay:	\$5.00
Total Current Pledge:	\$120.00

Send me an e-mail confirmation of this pledge
Confirmation page may take a few moments to display. Please click Confirm only once. Thank you.

CONFIRM Your pledge will be recorded... Thank you!
BACK Go back and change pledge information
CANCEL Exit e-Pledge (no pledge will be recorded)

Role Menu
Change Organization
ePledge Admin

Powered by Andar/360 Fundraising Software from Helix (e16.02)

The anonymous and email confirmation options will be on every site

Once everything is correct, select the **Confirm** button. Please hit this button only once. It may take several minutes to process the gift.

The confirmation email should arrive upon completion of their pledge. The confirmation email will contain whatever verbiage was provided to us by your company for the message as well as a breakdown of the same information displayed on the confirmation screen above.

Note: Confirmation e-mails will be sent to the employee's e-mail address.

For credit card pledges, continue to page 16

For credit card pledges. Any other pledge types may skip this page

Afer pressing the "Continue" button on the verification page, you will come to the page to enter your billing information.

Make sure the billing information associated with your credit/debit card is correct. Also enter your credit/debit card information below as well.

HOME PLEDGE HISTORY MY PROFILE LOG OUT

CREATE BILLING SUBSCRIPTION

Reference Number 2016-11EmpBillMe

Billing Information

*First Name

*Last Name

*Address

*City

*Country

*State/Province

*Zip/Postal Code

*e-Mail

Payment Details

Payment Type

*Credit Card Type

*Credit Card Number

*Expiration Date

Items marked with an asterisk (*) are required

BACK CANCEL SUBMIT RESET

GIVE
ADVOCATE
VOLUNTEER

f t YouTube RSS

Role Menu
Change Organization
ePledge Admin

Only hit the "Submit" button once

Administrative Functions

Entering/Updating Existing Pledges

In order for e-Pledge to function optimally all of the pledges will need to be entered into the system. In the event that an employee opts to turn in a paper pledge card we would ask that you follow the steps below to make sure their pledge gets put into the system. Or you may mail them to your United Way representative and they can enter them for you.

In order to enter/update employee pledges, you will need to select "Reports" then "Pledge Entry" under the drop down options. This will open a page where you can search for a specific individual. Once you have searched for that individual you will see a page like the one displayed below.

You will need to select the dollar sign icon, which will allow you to make the pledge for the individual.

Once you select the icon you will be walked through a six step pledge process to enter the pledge. Those processes are covered on the following pages 9 - 16.

HOME CAMPAIGN STATUS REPORTS EMPLOYEES (ADD/DELETE) CAMPAIGN TOOLKIT LOG OUT

TRANSACTIONS LIST

United Way of South Mississippi, Inc. - Master
11975 Seaway Road, B170
Gulfport MS 39503
open all | close all

- United Way of South Mississippi, Inc. - Master
- Share Your Blessings (Coast Electric) - Program

Campaign Year: 2016

Search for employee: clarke

ADD EMPLOYEE

	Name	Pledge	Payment	Pledge Type Column	Payment Type	Received	e-Payment Verification	Employer Name	Employer Account
	Clarke, Ms. Le'Tesha	N/R	\$0.00	No Gift	No Gifts			United Way of South Mississippi, Inc.	18

Powered by Andar360 Fundraising Software from Helix (s16.02)

GIVE
ADVOCATE
VOLUNTEER

f t YouTube RSS

Role Menu
Change Organization
Donor (Workplace)

Note: Administrators can update any pledge that an administrator or employee of the company has entered. If the United Way has entered the original pledge then the United Way must be contacted to update the pledge.

Verify Cash/Check pledges

If an employee decides to pledge with a cash/check, the ECM and/or admin can verify that they received the cash/check on the same page that pledges can be entered/updated. If an employee is due to give cash or check, the transaction will look like below.

You will see a "checkbox" under the word **RECEIVED**. Once payment has been verified, please check that box. A United Way representative will contact they admin if not all pledges have been verified.

HOME
CAMPAIGN STATUS
REPORTS
EMPLOYEES (ADD/DELETE)
CAMPAIGN TOOLKIT
LOG OUT

TRANSACTIONS LIST

United Way of South Mississippi, Inc. - Master
 11975 Seaway Road, B170
 Gulfport MS 39503
[open all](#) | [close all](#)

- ☑ 📁 United Way of South Mississippi, Inc. - Master
 - 📁 Share Your Blessings (Coast Electric) - Program

Campaign Year	<input type="text" value="2016"/>
Search for employee	<input type="text" value="clarke"/>

ADD EMPLOYEE

	Name	Pledge	Payment	Pledge Type Column	Payment Type	Received	e-Payment Verification	Employer Name	Employer Account
	Clarke, Ms. Le'Tesha	\$5.00	\$5.00	Cash	Cash	<input type="checkbox"/>			United Way of South Mississippi, Inc. 18
	Clarke, Ms. Le'Tesha	N/R	\$0.00	No Gift	No Gifts				United Way of South Mississippi, Inc. 18

UPDATE

GIVE

ADVOCATE

VOLUNTEER

Role Menu

[Change Organization](#)

[Donor \(Workplace\)](#)

Sending Emails to Individuals

There is an option under "Reports" to send an email to the employees based on certain criteria (those you have responded, those you have not responded)

SEND E-MAIL

To employees

Organization

United Way of South Mississippi, Inc. - Master
11975 Seaway Road, B170
Gulfport MS 39503

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

- United Way of South Mississippi, Inc. - Master
- Share Your Blessings (Coast Electric) - Program

Include Subsidiaries	<input type="checkbox"/>
Campaign Year	*Current Year ▾
Transactions Created	From: Nov ▾ 03 ▾ 2015 ▾ To: Nov ▾ 03 ▾ 2016 ▾
With Amounts	From: -9999999999 To: 9999999999
Select (*All to include all sort field types)	Dept: *All ▾ Development Finance IT
Send To	
Respondents	<input type="checkbox"/>
Non-Respondents	<input type="checkbox"/>
Contact Rule Category	ePledge ▾
Compose	
e-Mail Template	*None ▾
Sender's eMail Address	"Le'Tesha Clarke" <lclarke@unitedwaysm.org>
Subject	
File ▾ Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾ Tools ▾	
Font Family ▾ Font Sizes ▾ Formats ▾ B I U = = = =	

GIVE
ADVOCATE
VOLUNTEER

Facebook Twitter YouTube RSS

Role Menu
Change Organization
Donor (Workplace)

Running e-Pledge Reports

Below you will find a list of reports that are available in the e-Pledge system. Please note, reports are submitted to the system and are executed in the order they were submitted. The time it takes you to receive a report depends on the number of reports that have been requested. If there is any delay because of other reports that are running your report will show as pending until the request can be completed.

Response Report

This report will show all employees who have responded in the campaign. Please be aware that this includes not only employees who have pledged, but also anyone who selected the *'I am unable to give this year'* transaction type. You can choose whether or not to include pledge amounts.

This report is also useful when you need to isolate people who gave in a specific time period, or gave a certain amount. (Leadership donors, raffles, etc.)

No Response Report

This report will show all employees who have not responded at all. These are employees who have yet to make a pledge or enter their choice not to give this year. Typically, these would be employees that coordinators might want to follow up with.

Cash Report

This report's purpose is to allow the administrator to track who contributed by cash or check and whether the payments have been collected. In order for the report to function appropriately the administrator must make sure to look every donor up who turns in their cash or check payment and select 'company received'.

At the end of the company campaign the administrator should run this report and collect the money from anyone who does not have the 'company received' box checked on the report.

Donor Choice Details Report

This report will provide a listing of each designation made by each employee at the company. Please note, this report only shows people who have made a designation to an agency or an Area of Need. It will not show donors who leave their pledges undesignated or designate to the Community Impact Fund.

Donor Choice Summary Report

This report provides a list of all agencies or organizations that have received designations by employees of the company and a single line total amount of those designations.

Transaction Report

This report gives all the pledge detail for the employees. This is the report that needs to be run for the payroll department at the end of the campaign.

Viewing Reports

The reports output can be viewed by going to the 'my reports' menu option.

Frequently Asked Questions

Q: What should we do if donors have trouble accessing the site?

A: You should contact your UW representative.

Q: What if all our employees don't have an e-mail address or easy access to the web?

A: Everyone can be set up for e-Pledge, regardless of whether they regularly use a computer at work. If there are large numbers of employees that absolutely do not have access, you may want to consider a mixed campaign where those without computer access can continue to submit paper pledge forms.

Q: What about employees hired after we send you the data file? Can they use e-pledge?

A: A new employee can be easily set up for e-Pledge at any time. Simply send the name, e-Mail address and all other pertinent information to your UW representative. The new employee will be set up and personalized link will be sent.

Q: How are paper pledge forms entered?

A: The system has the ability to allow company coordinators to enter paper pledge forms during the campaign; however, if there are a substantial amount of paper pledge forms we highly recommend you forward those to United Way for input.

Q: How are pledge forms/monies collected and sent to United Way?

A: Company coordinators should collect the pledge forms and monies from their assigned employees and turn them in to the Employee Campaign Manager (ECM). The ECM should make arrangements with UW representative for speedy transfer of materials.

Q: How will paper pledges be handled after the e-Pledge site is turned off?

A: Company coordinators should collect and forward all paper pledge forms to their UW representative as quickly as possible. All paper pledge forms will be entered into our processing system by United Way staff.

Q: What are the United Way's policies regarding donor information and privacy issues?

A: United Way's code of ethics guides employees and volunteers in their use of private, confidential information and requires that it be held in strict confidence. We use your information only for its intended business purpose - we do not sell or trade your information with other organizations. Our contracts with third-party service providers that help us with administration, data storage, mailing, printing, and other services have strict confidentiality and security provisions that require them to adhere to United Way's standards of privacy protection. We allow access to your information to auditors and other third parties only as mandated by regulatory requirements. The only other outside party privy to your information, limited only to name and address, is the ultimate recipient of any funds contributed by you via the donor choice program in order to allow the recipient agency to thank you for your gift. We ask if we may publish your name when you make a contribution. Our privacy promise extends online to our Internet website. Online donations are transmitted to a secured server using encryption technology.

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