

UWGG ePledge campaign closing and envelope pick up procedures



EPLEDGE REPORTS:

Log into ePledge and click "Change to e-Administration". Click on Web Reports:

- a. Run and print the PDF "**Campaign End Report**".
- b. Run and print the PDF "**Cash Report**" (if you allowed cash/checks to be donated).
 - a. Collect all cash/checks and PAPER CLIP to the report.
 - b. If the donor printed their emailed receipt, collect a copy.
 - c. Double check that cash and checks balance. People in error mark cash for check or vice versa when making pledge.

NOTE: If your campaign only has online pledges (no cash, checks or paper pledges), run the Campaign End Report and email the PDF to your United Way account manager.

IF YOU ALSO HAVE PAPER PLEDGE FORMS:

- a. Original copies of the pledge forms must be returned to United Way. All paper pledge forms must be signed and dated.
- b. Direct Billing pledges: anyone who pledges with direct bill must include their home address with their pledge. Please verify that this was done.
- c. Complete the [Envelope Summary Report \(ESR\)](#) for all contents inside with envelope.
 - Mark the ESR Partial or Final (Partial if you are planning to submit another envelope later; Final if this is your last envelope to submit)

NOTES:

- DO NOT staple or tape cash/checks to paper pledge forms
- Checks must be made out to United Way of Greater Greensboro
- If you have multiple envelopes, submit an [Envelope Summary Report \(ESR\)](#) with each envelope
- Do not combine Special Event dollars and Employee Campaign Dollars in envelopes.

PUT ALL EMPLOYEE PLEDGES INTO THE REPORT ENVELOPE

If you need a report envelope, contact your United Way account manager.

- a. **Fill out the front of the envelope in its entirety:**
 - i. Total employee gifts
 - ii. Total corporate gift (if providing)
 - iii. Your signature
 - iv. Your contact information
- b. **Insert into the Campaign Envelope:**
 - i. Any paper pledges and the ESR
 - ii. The ePledge reports and any cash/checks
 - iii. Review the checklist to make sure everything listed is included in the envelope
- c. **SEAL the envelope**

***PLEASE NOTE:** We cannot accept envelopes without being signed and sealed!

PUT ALL SPECIAL EVENT MONEY INTO THE SPECIAL EVENT ENVELOPE:

- a. Separate all special event money between cash/coins and checks. Fill out a [Special Event Reconciliation Report](#) totaling the cash/coins and checks separately.
- b. Place into the reinforced special events envelope. Seal and fill out the front of the envelope, including the total amount on the top right corner.
- c. There should not be any pledge forms in the special events envelope.

Call/email your United Way contact to let them know you have an envelope ready for pick-up!