United Way of Greater Greensboro ePledge e-Administration Tutorial

United Way of Greater Greensboro

Welcome to the ePledge e-Administration Tutorial.

As the Employee Campaign Manager for your organization's United Way campaign, please use this guide to the e-Administration section of ePledge. As the e-Administrator, you have the following options:

- View your campaign's overall status in real time
- Look up individuals to confirm a pledge was made
- Run reports

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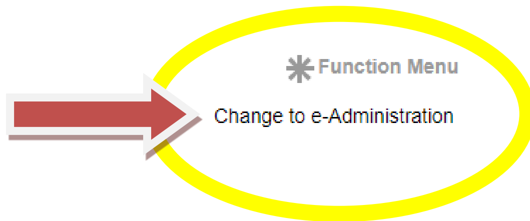
NOTE: Please refer to the Submitting a Pledge with ePledge Tutorial for any questions regarding how to make a pledge through the ePledge system.

CHANGING TO E-ADMINISTRATION

Log into the ePledge system as if you were pledging or via the email with your link from United Way (uwgg@unitedwaygso.org).

When you are setup as an e-Administrator you will have an option on the main menu to "Change to e-Administration". If you do not have this option and you are the organization's e-Administrator please contact United Way.

Click on the menu item "Change to e-Administration" on the right side of the screen to access the admin utilities. Only those with e-Administrator access will see this.



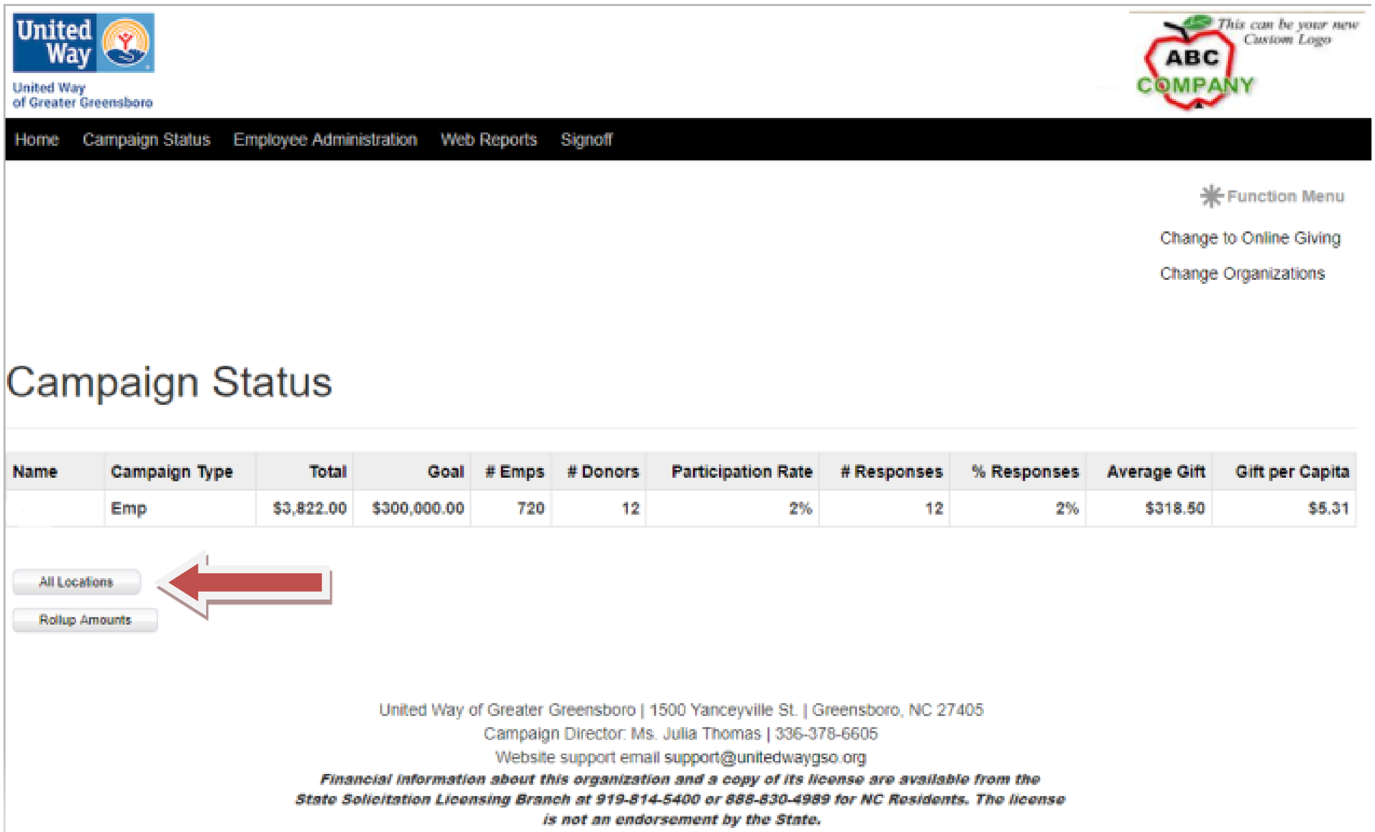
You should now see a screen that looks like this, with your company's logo:

VIEWING YOUR CAMPAIGN'S STATUS

The "Campaign Status" screen will display summary information about your organization's campaign. It breaks down the campaign into a simple dashboard with total raised, number of donors, percent participation, average gift, and gift per capita. As pledges are entered in the ePledge system, you can view the status of your campaign in real time.

Note:

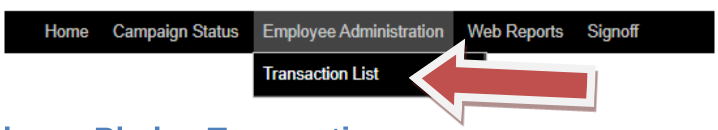
- If you have multiple locations within your campaign that each have a corresponding ePledge site, you can view the overall status by selected "Rollup Amounts" or toggle to see all locations and how each is doing individually using the "All Locations" button.
- This page will only display employee transactions entered through ePledge or paper pledges processed by United Way's Finance staff. It will not include special event money or paper pledges that have not yet been submitted to United Way or yet to be processed by United Way's finance staff.



Name	Campaign Type	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita
	Emp	$3,822.00	$300,000.00	720	12	2%	12	2%	$318.50	$5.31

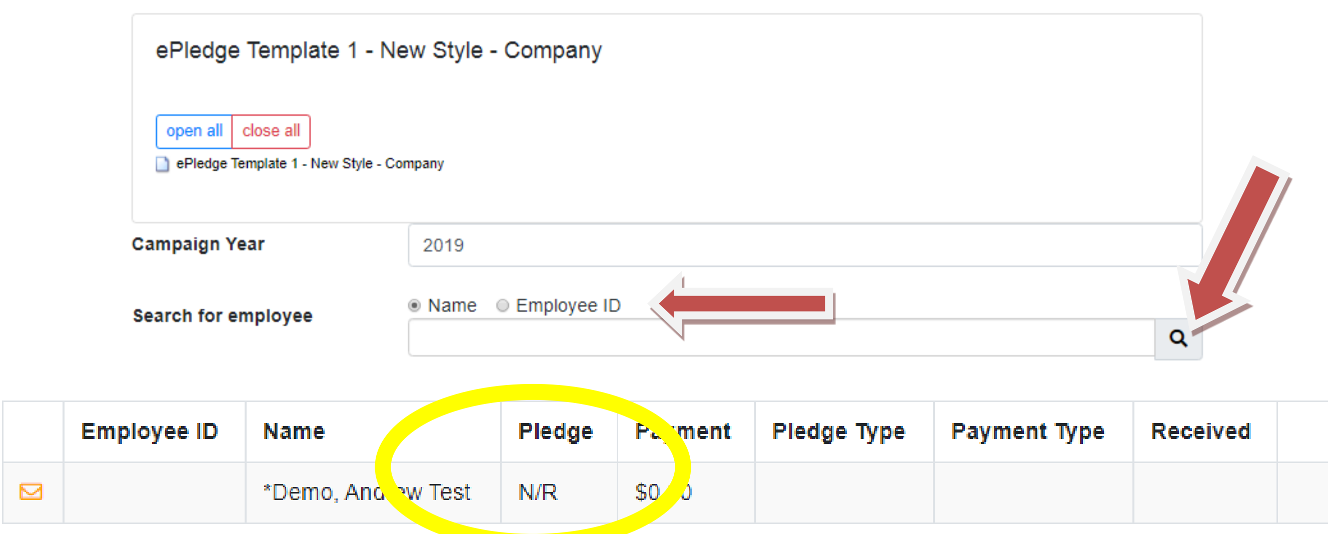
EMPLOYEE ADMINISTRATION / TRANSACTION LIST

Employee Administration allows you to view individual pledges and resend an email containing the pledge link. To get there, hover over “Employee Administration,” and then choose “Transaction List.”



Viewing Individual Employee Pledge Transactions

- Search for someone by entering either the employee’s name or employee ID in the search box.
- Click on the magnifying glass icon and their name will show up. If it says N/R a pledge has not been recorded.



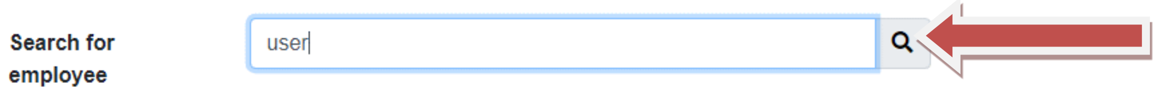
	Employee ID	Name	Pledge	Payment	Pledge Type	Payment Type	Received
		*Demo, Andrew Test	N/R	$0.00			

RESENDING AN EPLEDGE MESSAGE

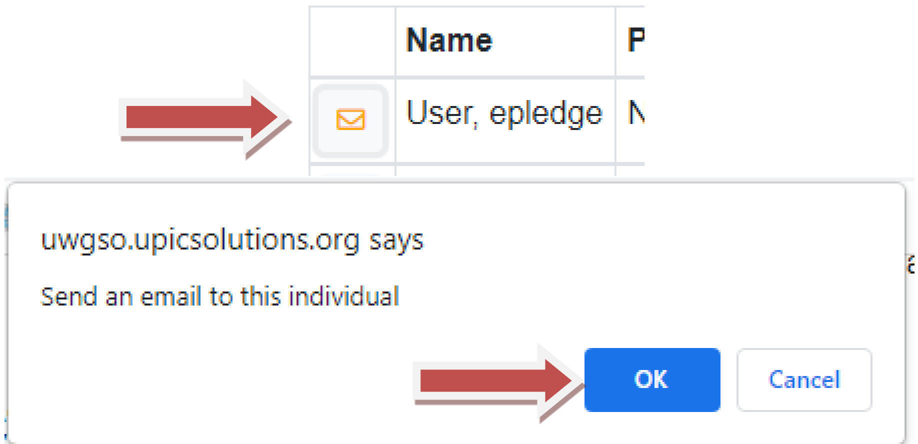
You can resend ePledge reminder messages through e-Administration. This is helpful when an investor needs to access their log-in link again.

To send an email message with the ePledge individual link, follow the steps below:

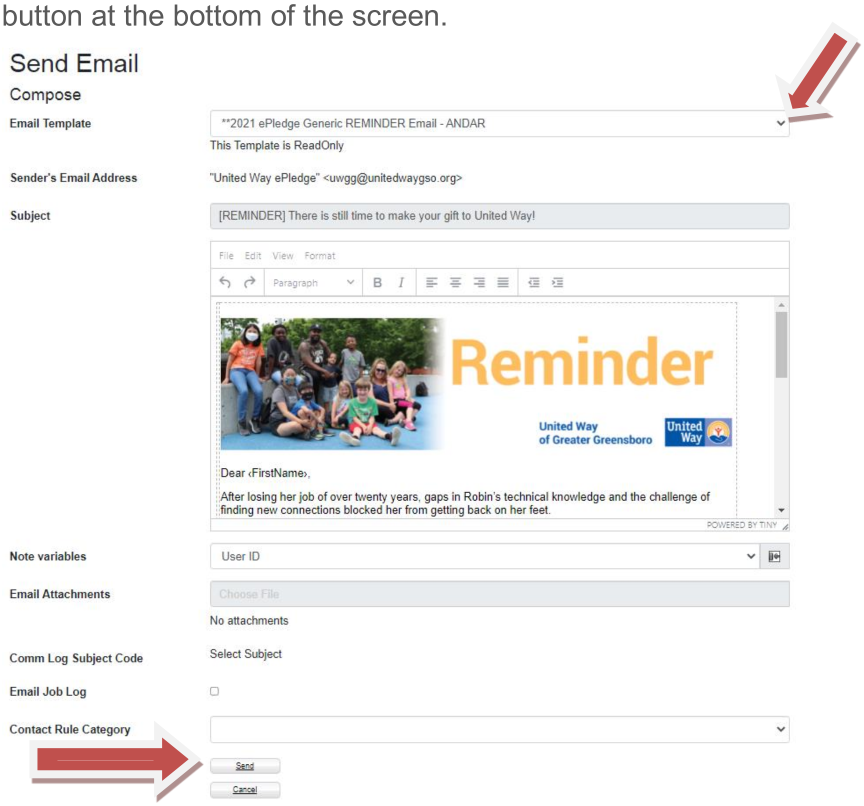
1. Search for the person by name or ID from the Employee Transaction list. Click the Magnifying Glass.



2. Click on the envelope icon  to the left of the name and click the OK button in the pop-up that displays.



3. Choose the "***2022 ePledge Generic REMINDER Email – Traditional" message from the drop down "Email Template" list
4. After you have selected your message it will populate the email text content.
5. Click the "Send" button at the bottom of the screen.



CAMPAIGN REPORTING

Here you can find what reports are available to run, how to run a report, and how to download it.

NOTE: You will see individual investor pledge amounts on some reports. All individual investor pledge amounts are CONFIDENTIAL. Please do not distribute an individual investor's pledge amount to anyone except that investor when upon request or when submitting final campaign data to United Way. When providing internal campaign updates, only refer to the overall total giving and number of investors per the Campaign Status page.

Reports You Can Run:

There are three reports that are formatted in a PDF and Excel (.csv) spreadsheet. They are:

- Campaign End Report (This report provides a listing of all transactions made through ePledge only in your campaign. You will submit this report to United Way when closing your campaign)
- Cash & Check Report (This report will tell you who made an ePledge via cash or check. Collect all cash/checks and PAPER CLIP to the report)
- No Response Report (This report will show employees that have not responded / made a pledge)
- Response Report (This report will show all employees who have made a pledge either on ePledge or via a paper pledge form)

Which reports to use and which format is most helpful:

Who has pledged?	Response Report (csv or pdf)
Who hasn't pledged?	No Response Report (csv or pdf)
Who owes you cash and checks?	Cash & Check Report (csv or pdf)
Pulling investors for a raffle based on pledge date?	Response Report (csv)
What to submit when the campaign is closed?	Campaign End Report (pdf)

How to Run a Report:

- Click on "Web Reports"
- Select the bullet beside the report you want to run.
- Click the "Submit" button
- Click "Refresh" for the report to display
- When the report is complete it will display under "My Outputs" with the status "Ready."
- Click on the Name of the hyperlinked document you wish to view.

NOTES:

- Past reports you have ran will stay in "My Outputs."
- You will have to run a new report to view updated information.

In order to download a report right click the link and save the report on your computer.

Refresh

	Job Number	Job	Names	Date	#Pages	Size	Type	Status	Description
	653811	ePledge Campaign End Report	ePledge Template 1 - New Style - Pledge Transaction Report	09/23/2019 05:27:43 PM	2	7149	pdf	Ready	
	653811	ePledge Campaign End Report	ePledge Template 1 - New Style - Pledge Transaction Report	09/23/2019 05:27:43 PM	0	2169	csv	Ready	

The report is live when it turns blue when you hover over the name

	Job Number	Job	Names	Date	#Pages	Size	Type	Status	Desc
	653811	ePledge Campaign End Report	ePledge Template 1 - New Style - Pledge Transaction Report	09/23/2019 05:27:43 PM	2	7149	pdf	Ready	
	653811	ePledge Campaign End Report	ePledge Template 1 - New Style - Pledge Transaction Report	09/23/2019 05:27:43 PM	0	2169	csv	Ready	

Downloading a Copy of the Report

- Right click on the report title link and select "Save Link As" and browse to your preferred folder to save the file.

-or-

- Open the hyperlinked title and save in desired folder.

END OF CAMPAIGN PROCESS (How to close your campaign)

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).
   - Collect all cash/checks and PAPER CLIP to the report.
   - If the investor printed their emailed receipt, collect a copy.
   - 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 you 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, an **Envelope Summary Report** **(ESR)** must be submitted with each envelope
- Do not combine Special Event dollars and 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!

Special Event Money:

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!