

# ePLEDGE USER GUIDE



United Way of Wayne  
and Holmes Counties

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# WELCOME TO ePLEDGE



Thank you for considering United Way's ePledge system. This internet and email-based tool is designed to make giving quick and easy.

ePledge significantly reduces, or even eliminates, the paper pledge forms that we traditionally use in the course of a United Way employee giving campaign, resulting in improved efficiency for all parties, reduced administrative time and costs, and more donor dollars to support our community.

What *is* ePledge? ePledge is an internet-based tool that allows donors to input their pledges and administrators to input corporate gifts and special event monies directly into the United Way database using a secure online interface. It also allows Campaign Ambassadors and their Campaign Team Members to generate a variety of real-time reports and monitor the progress of the campaign without having to wait on anyone to provide that information for them.

# BENEFITS OF USING ePLEDGE

What are the benefits of using ePledge?

- Reduces or eliminates the need for paper pledge forms.
- Maximizes efficiency of the Campaign Ambassador and his or her time.
- Centralizes campaign information in one shared database.
- Enables real-time reporting or the tracking of donors throughout the organization.
- Secure and confidential.

# SETTING UP YOUR ePLEDGE CAMPAIGN

## STEP 1: PREPARATION

At least 6-8 weeks prior to your campaign...

1. Pick an ePledge campaign type. There are two types of campaigns:

- **CUSTOM CAMPAIGN**

- With an Employee Data Driven Campaign, you provide United Way with a spreadsheet of the required data which enables United Way to compile and update records and send out the link to your customized campaign webpage.

- **STANDARD CAMPAIGN**

- With a Standard Campaign, your employees participate in a Self-Registration Campaign. United Way provides you with a personalized link for your organization's campaign website and you send out the link. This way you do not need to provide United Way with any employee data.

## STEP 2: SITE SETUP

At least 4-6 weeks prior to your campaign...

Please make sure that you send United Way an updated logo file, regardless of which campaign you choose.

If you choose a Custom ePledge Campaign, you will send United Way the full employee data file, as well as, copy you would like used in your campaign communication pieces. This includes the customized greeting message for your company's ePledge home page and the emails that contain your personalized links for your company. You should also provide the names of anyone at your organization who will be involved in testing the system prior to the campaign kick-off. We will upload the employee data, get the test user accounts ready, input the welcome message you would like to see on your company's home page, and import email text you'd like us to send to your employees.

If you select a Standard ePledge Campaign, United Way will provide the greeting message on your company's ePledge home page, copy for emails that you send out during campaign, and a link to your company's page. Employees who wish to give will add their own information during their giving process.

### STEP 3: DURING CAMPAIGN

Continue to host the special events that you would normally have each year.

Real-time reports will be available to help monitor the status of your campaign. You let us know if and when you would like reminders sent out to those who have not logged into the system.

If you provide email addresses, we email all employees with a personalized link to the ePledge system on the pre-determined campaign kick-off date. If data is not provided, we provide the Ambassador a link to include in the email that they send out to their employees.

We will answer any questions and resolve any issues in a timely manner.

If and when requested, we can generate a report of those employees who have not logged in and send them a reminder, repeating the process again at the end of the campaign.

## STEP 4: AFTER THE CAMPAIGN

Please inform us when you would like to close your campaign.

We close down your ePledge site. 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 will also send a payroll file to your HR/Payroll Department in an Excel .csv format.

Lastly, we hope to get another chance to meet with all of your key contacts to discuss the strengths and weaknesses of the ePledge campaign in order to prepare for next year.

## E-COMMUNITY SUPPORT

Our ePledge Support is your point of contact for any questions or concerns related to the electronic pledge process. You can contact United Way for ePledge Support:

**Phone:** 330-264-5576

**Contacts:** Carrolyn Salazar or Laura Newberry-Yokley

**Email:** [carrolyn@uwwh.org](mailto:carrolyn@uwwh.org) and [laura@uwwh.org](mailto:laura@uwwh.org)



# WHAT YOU CAN EXPECT FROM UNITED WAY

## PREPARATION

- Sample emails to help-create your kick-off and reminder messages to your employees.
- Sample greeting letter to appear on the ePledge home page.
- File specifications for the employee data file.
- ePledge screen shots with customization possibilities. Provided in this document.

## SITE SET-UP

- Upload your data file (if you've chosen the Custom Campaign type).
- Upload your web customizations.

## TESTING & TRAINING

- Onsite training for your administrator and building/branch coordinators.

## DURING THE CAMPAIGN

- ePledge support between 8:30am and 4:30pm.
- Monitoring of the ePledge system for any issues.
- Assistance with ad hoc reporting as necessary.

## AFTER THE CAMPAIGN

- A payroll file will be available after the close of your campaign.

# WHAT UNITED WAY NEEDS FROM YOU

## PREPARATION

- Your completed ePledge company information form (The last page of this document).
- Any special report requests, or specific reports needed on a regular basis.
- Any incentive categories and/or special sort field parameters.

\*\*Please note that if circumstances change during your campaign and the end dates needs to be changed, we can accommodate. We request both start and end dates so we can plan accordingly.

## SITE SET-UP

- Upload your data file (if you've chosen the Custom Campaign route).
- Site customization requests.
- Text or language for kick-off of campaign, as well as, reminder email messages.
- Text for welcome letter to appear on the ePledge home page.
- List of test users (If you choose to do a test!)

## TESTING & TRAINING

- Test all screens, functions, and reports to verify they are working as expected.

## **DURING THE CAMPAIGN**

- Provide specific dates when you would like reminder emails sent.

## **AFTER THE CAMPAIGN**

- Provide required date and format for the payroll file.

# MAKING A DONATION

Below are screenshots and explanations of the donation process to help you better understand the system, as well as the end user experience. This guide will also assist you with questions that employees may have about how to donate using ePledge.

## STEP 1: GREETING PAGE

This is the first page that employees will see. This page is customized with a logo and message from your organization. Normally, the page layout includes your company logo and a welcome message from your Executive Sponsor or CEO. We can place photos or one of our videos on this page as well.



## STEP 2: MY PROFILE PAGE

Donors can enter their information on the “My Profile” page. Home addresses are required if donors would like a charitable tax receipt. On this page, sort fields appear and as do drop down lists. You will provide the list of items you wish to appear here to United Way of Wayne and Holmes Counties, and we will create this list based on your needs. These can later be used in the reporting tool that ePledge offers.

Examples: departments, locations, floors, etc.

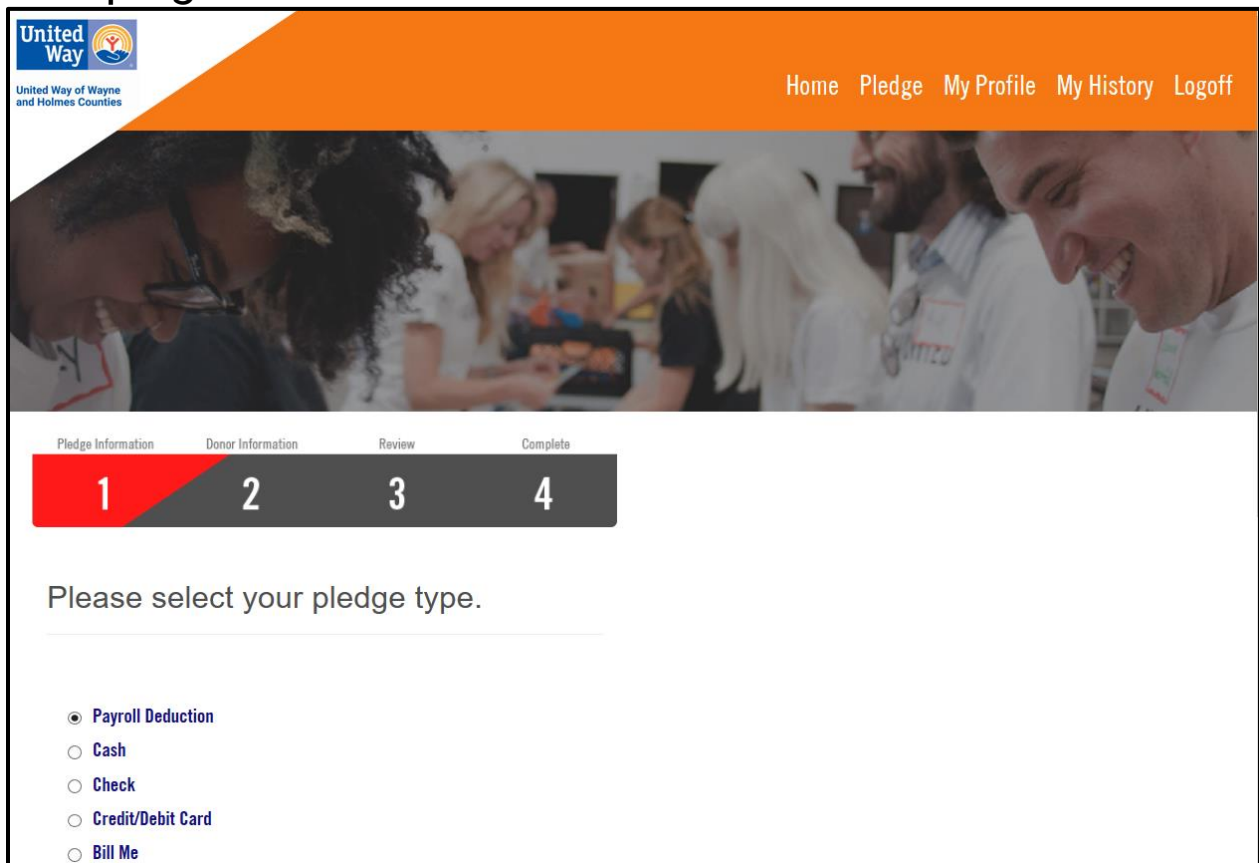


The screenshot displays the 'My Profile' page. At the top left is the United Way logo with the text 'United Way of Wayne and Holmes Counties'. The navigation bar includes 'Home', 'Pledge', 'My Profile' (highlighted with a yellow circle), 'My History', and 'Logoff'. Below the navigation bar is a banner image showing a group of people working together. The main content area is titled 'Profile' and contains the following form fields:

- \*Name**: A form with five input boxes: 'Ms.', 'Carrolyn', a color selection box, 'Salazar', and 'Suffix'.
- Gender**: A dropdown menu currently showing 'Female'.
- Main e-Mail**: A text input field containing 'carrolyn@uwwh.org'. Below it is a radio button labeled 'Preferred' which is selected.
- Individual Work e-Mail**: A text input field. Below it is a radio button labeled 'Preferred' which is unselected.
- \*Main Address**: Two text input fields, the first labeled '\*Address Line 1' and the second labeled 'Address Line 2'.

### STEP 3: SELECT PLEDGE TYPE

All campaigns have payroll and one-time and monthly credit card options. In addition, your organization may choose to accept cash or checks. If you decide to accept these alternate methods of payment, please discuss these options with you United Way contact. If you decide to accept cash or check, your users will be prompted to send the payment to a designated person within your organization who will collect and forward them to the Campaign Ambassador.



The screenshot shows a web interface for the United Way of Wayne and Holmes Counties. The top navigation bar is orange and contains the United Way logo on the left and links for Home, Pledge, My Profile, My History, and Logoff on the right. Below the navigation bar is a large image of a group of people smiling. Underneath the image is a progress indicator with four steps: 1 (Pledge Information), 2 (Donor Information), 3 (Review), and 4 (Complete). Step 1 is highlighted in red. Below the progress indicator, the text reads "Please select your pledge type." followed by a list of radio button options: Payroll Deduction (selected), Cash, Check, Credit/Debit Card, and Bill Me.

United Way  
United Way of Wayne  
and Holmes Counties

Home Pledge My Profile My History Logoff

Pledge Information Donor Information Review Complete

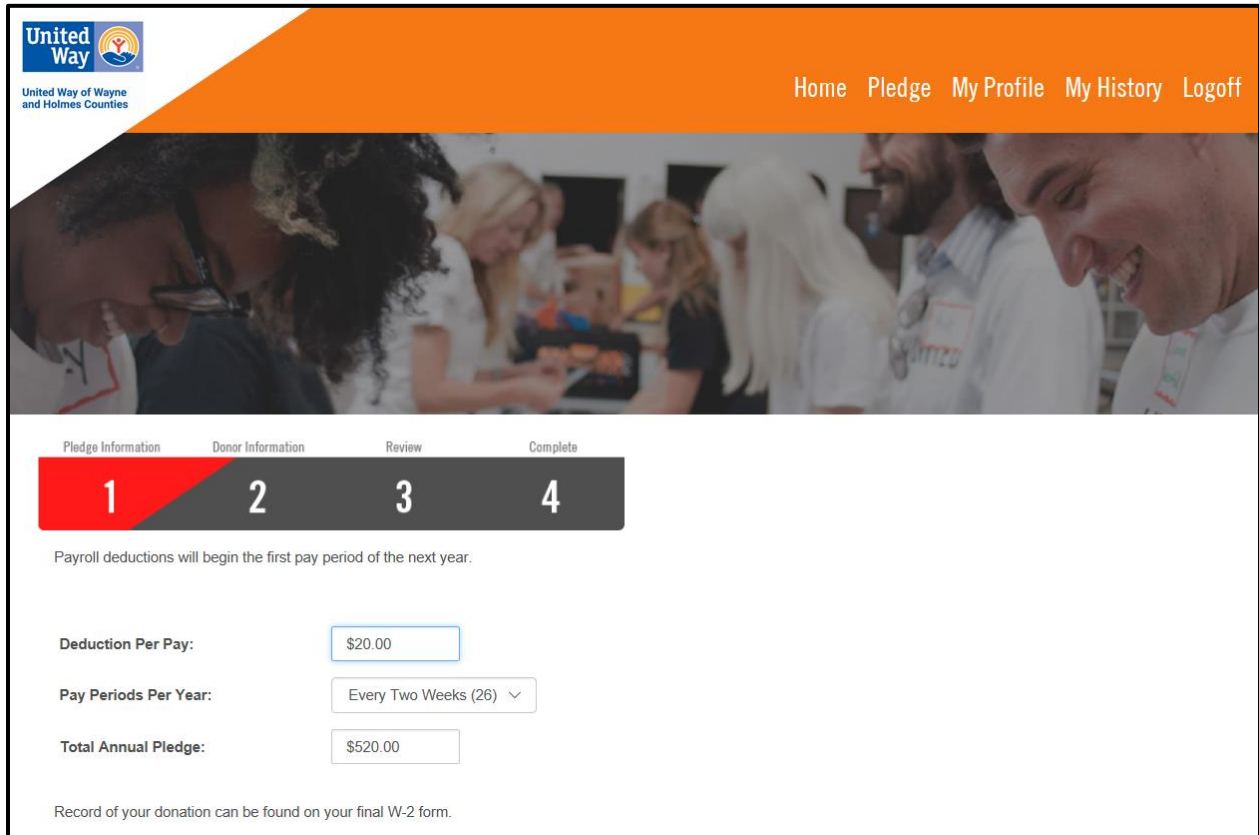
1 2 3 4

Please select your pledge type.

- Payroll Deduction
- Cash
- Check
- Credit/Debit Card
- Bill Me

## STEP 4: Credit Card Options

Credit card donors can choose from one-time or monthly pledge installments. Once donors hit next they will be directed to a secure Cybersource page where they were asked to enter their credit card information.



The screenshot shows the United Way website interface for a pledge form. The header includes the United Way logo and navigation links: Home, Pledge, My Profile, My History, and Logoff. Below the header is a photo of a group of people. The main content area features a progress bar with four steps: 1 (Pledge Information), 2 (Donor Information), 3 (Review), and 4 (Complete). Step 1 is currently active. Below the progress bar, a note states: "Payroll deductions will begin the first pay period of the next year." The form fields are as follows:

Deduction Per Pay:	<input type="text" value="\$20.00"/>
Pay Periods Per Year:	<input type="text" value="Every Two Weeks (26)"/>
Total Annual Pledge:	<input type="text" value="\$520.00"/>

Record of your donation can be found on your final W-2 form.

## STEP 5: ENTER PLEDGE AMOUNT PAGE

The number of pay periods that appear on this page can be pre-populated for each employee or it can be set up with a drop down menu which the employees can use to choose their own number of pay-periods as they go through the pledge process.

Pledge Information Donor Information Review Complete

1 2 3 4

Payroll deductions will begin the first pay period of the next year.

Deduction Per Pay: 0.00

Pay Periods Per Year: Every Two Weeks (26)  
One Time

Total Annual Pledge: 0.00

Record of your donation can be found on your final W-2 form.

NEXT PREVIOUS CANCEL



## STEP 5: ENTER DESIGNATIONS PAGE

Donors can choose unlimited designations with a minimum amount to each area.

The wonderful part about United Way of Wayne & Holmes Counties is that you choose where your money goes. Below, please enter your choices. If you would like United Way of Wayne & Holmes Counties to make the choice for you, leave this section blank.

Total Pledge	\$260.00
Total Designated	\$50.00
Total Undesignated	\$210.00

### How to Direct Your Dollars:

Name	Designation Amount
Health and Mental Health	<input type="text" value="\$10.00"/>
Holmes County	<input type="text" value="\$10.00"/>
Safety Net	<input type="text" value="\$10.00"/>
Workforce Development	<input type="text" value="\$10.00"/>
Youth Development	<input type="text" value="\$10.00"/>

Want to give to another United Way? Tell us where to send your gift:

## STEP 6: DONOR INFORMATION VERIFICATION PAGE

Donor's information populates one last time for verification purposes.

Pledge Information	Donor Information	Review	Complete
1	2	3	4

Please check your information below.

\* Individual Work e-Mail:

\*Main Address:

Address Line 2:

Items marked with an asterisk (\*) are required

I wish to Remain Anonymous

Send me an e-mail confirmation of this pledge

This gift is at least 1.5% of my annual income qualifying my gift as a leadership gift.

## STEP 7: PLEDGE CONFIRMATION PAGE

Donors can confirm their pledge on this page to verify the donation is the correct dollar amount. Once confirmed they will hit the confirm button to submit the pledge to United Way of Wayne and Holmes Counties.

Pledge Type:	Payroll Deduction
Pay Periods Per Year:	26
Deduction Per Pay:	\$10.00
Total Current Pledge:	\$260.00
Total Pledge Year To Date:	\$261.00

Designated to	Amount
Health and Mental Health	\$10.00
Holmes County	\$10.00
Safety Net	\$10.00
Workforce Development	\$10.00
Youth Development	\$10.00
Total Designated	\$50.00
Total Undesignated	\$210.00

**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!

**PREVIOUS**

Go back and change pledge information

**CANCEL**

Exit e-Pledge (no pledge will be recorded)

## STEP 8: EMAIL CONFIRMATION

When the donor hits confirm they will receive an automated email to confirm their pledge.

**United Way**

**GIVE. ADVOCATE. VOLUNTEER.**

Hello Carrolyn Salazar,

Thank you for your participation in online giving for United Way of Wayne & Holmes Counties's United Way Campaign.

This e-mail is a confirmation of your charitable ePledge. Your pledge and designation information are summarized below:

Pledge Reference Number: 13323/117349

Pledge Type	Payroll Deduction
Number of Deductions	1
Deduction Per Pay	\$5.00
Total Pledge	\$5.00

Again, thank you for your generous support of United Way of Wayne and Holmes Counties.

Change Starts Here!

**United Way**

**SOCIAL**

Powered by Andar/360 Fundraising Software from Helix

# FREQUENTLY ASKED QUESTIONS

**What should we do if donors have trouble accessing the site?** Call your United Way representative for assistance.

**Phone:** 330-264-5576

**Contacts:** Carrolyn Salazar or Laura Newberry-Yokley

**Email:** [carrolyn@uwwh.org](mailto:carrolyn@uwwh.org) and [laura@uwwh.org](mailto:laura@uwwh.org)

**What if all of our employees don't have an email address or easy access to the website?**

Everyone can be set up for ePledge, 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.

**What about employees hired after we send you the data file? Can they use ePledge?**

A new employee can be easily set up for ePledge at any time. Simply send their name, employee ID (if chosen), email address and all other pertinent information to your e-community support. The new employee will be set up and a personalized link will be sent.

**How are paper pledge forms entered?**

The ePledge system has the ability to allow Campaign Ambassadors to enter paper pledge forms during the campaign; however, if there are a substantial amount of

paper forms, we highly recommend you contact United Way of Wayne and Holmes Counties and arrange a drop off and those pledges will be processed internally by our staff.

### **How are pledge forms with checks and cash submitted to United Way of Wayne and Holmes Counties?**

Ambassadors should collect the paper pledge forms, along with the donation from the employees and turn them into United Way of Wayne and Holmes Counties in the Report Envelope. All paper pledge forms will be entered and processed by United Way of Wayne and Holmes Counties staff.

### **Will donors receive email communications from United Way of Wayne and Holmes Counties following the campaign?**

The email address is used only to send the individualized links at the beginning of the campaign, reminder emails, a confirmation email and a thank you email to donors at the completion of the campaign. Your email address is kept private and is not shared with third party vendors. We take your privacy seriously. If your employees choose to check the box that reads "I would like to hear how I am making an impact in our community" then they have given their consent for United Way of Wayne and Holmes Counties to communicate with them via email going forward.

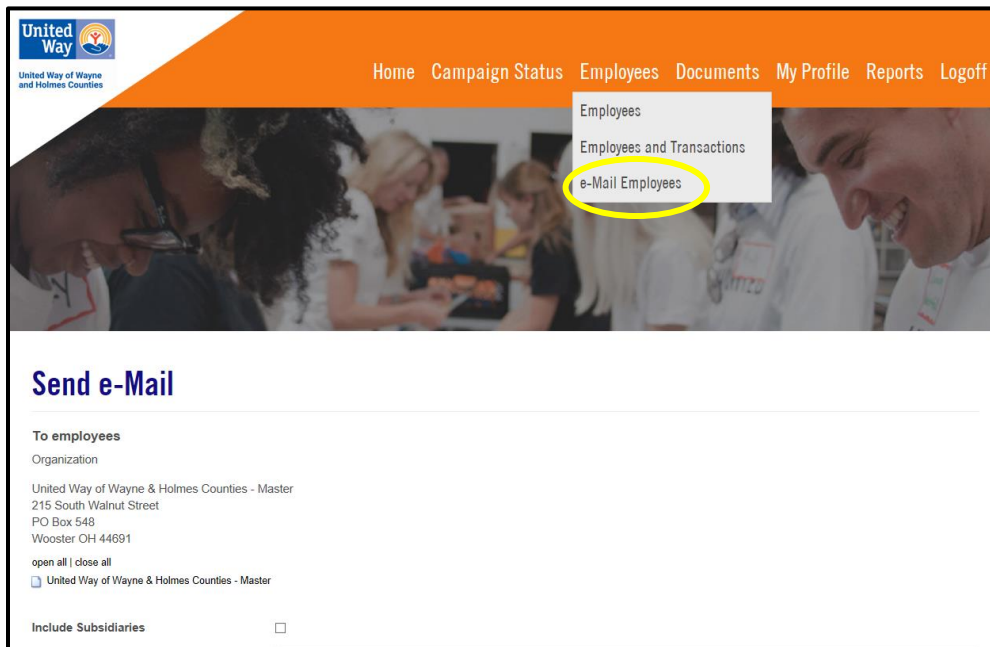
## THINGS TO REMEMBER...

- The timeline presented in this document should provide sufficient opportunity to complete the necessary training or testing, but you do not need to wait until the campaign is only a couple months away. If you want to get started earlier, we are ready to help.
- During the campaign, our ePledge support is available from 8:30 AM – 4:30 AM.
- Please be advised that during the campaign, we are often supporting multiple ePledge campaigns and there may be times when we cannot immediately answer your call. We will respond and resolve the issue as quickly as possible.

# TYPES OF ePLEDGE CAMPAIGNS

## 1. Self Registration Website

United Way of Wayne and Holmes Counties provides you with a personalized link for your organizations campaign website. With the self registration website, you send out the ePledge link to all of the employees. This way you do not need to provide United Way with any employee data.



If our database recognizes the individual work email address, it will confirm that it is in fact the correct person and proceed to the greeting page. If it is a new donor or we do not have their work email address recorded in our database, it will register



them as a new individual and they will need to fill out the profile information before being taken to the Home Page. After which the pages will be the same as for the employee data driven website.

## **2. Employee Data Driven Website**

### **Data File Layout**

You need to send an employee data file to United Way of Wayne and Holmes Counties ePledge support specialist at least 4 weeks prior to the start of your campaign that conforms to the follow:

- The data should be sent as an Excel Spreadsheet
- First, Middle, Last Name fields MUST be separated into distinct columns.
- Data in the columns is case sensitive. Please use the appropriate capitalization.
- Any information (location, district, floor, employee ID that you would like to use to sort or filter your reports MUST be included in the original employee data file in distinct columns.
- Any fields that you need us to return in the payroll file to your HR Department MUST be included in your original employee data file.

- Minimum information required for ePledge campaign is: First Name, Last Name, and Email Address.

If you choose to provide United Way of Wayne and Holmes Counties with a spreadsheet of required data, we will send out an email on your chosen date with everyone's ***user ID*** and ***password***.

**User ID Options:** email, employee ID (must be provided by the organization in a data spreadsheet) Username or Random.

**Password Options:** Employee ID (must be provided by organization in data spreadsheet), User Name, Random *\*Password will be set to "reset at first login" so people can set their own password.*

***Please note that all email templates are completely customizable.***

# SAMPLE EMAIL MESSAGES

## Kick-Off Email

We are pleased to begin our United Way of Wayne and Holmes Counties Campaigns. <Organization Name> is proud of its strong relationship with United Way of Wayne and Holmes Counties and we look forward to another exciting and successful campaign.

As you know, United Way of Wayne and Holmes Counties does mission driven work in the areas we live in. Their mission is to mobilize resources and move people in our communities out of poverty. United Way of Wayne and Holmes Counties make sure your money stays here where it belongs. They know that change can happen and that it starts here.

Thank you in advance for your consideration and support, and know that every gift, no matter the size makes a difference in the communities that United Way serves. Remember that when you reach out a hand to one, you influence the condition of all, change starts here.

Please click here to give your gift online.

## Closing Email

There are only 2 days remaining for you to participate in our 2018 United Way Campaign. The deadline for online pledging is on <date and time>.

Remember that when you make a contribution to United Way of Wayne and Holmes Counties you are helping with their mission driven work of mobilizing resources to move local people out of poverty. Any amount helps your community make changes that start here at home to better the lives of your neighbors locally.

# SAMPLE WEB GREETING

Dear Fellow Employee,

We are pleased to begin our annual United Way of Wayne and Holmes Counties campaign. <Your Company> is a proud of its strong relationship with United Way and we look forward to an exciting and successful workplace campaign.

As you know, United Way of Wayne and Holmes Counties does mission driven work in the areas we live in. Their mission is to mobilize resources and move people in our communities out of poverty. United Way of Wayne and Holmes Counties make sure your money stays here where it belongs. They know that change can happen and that it starts here.

We thank you in advance for your consideration and support of this organization. We hope you will join us in making an investment in your community by supporting United Way of Wayne and Holmes Counties through this workplace campaign. Every gift, no matter the size makes a difference in the work they do. Remember, when you reach out a hand to one, you influence the condition of all-together **CHANGE STARTS HERE.**

Please consider a donation to United Way of Wayne and Holmes Counties and join <Company Name> in improving lives locally.



# ePledge Company Information Form

In preparation for your ePledge campaign, please complete this form and send it to your United Way Campaign Contact.

Organization Name: \_\_\_\_\_ Year: \_\_\_\_\_

Campaign Dates: \_\_\_\_\_ to \_\_\_\_\_

Test Site Dates: \_\_\_\_\_ to \_\_\_\_\_

Campaign Coordinator: \_\_\_\_\_ Email: \_\_\_\_\_ Phone: \_\_\_\_\_

IT Contact: \_\_\_\_\_ Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Payroll Contact: \_\_\_\_\_ Email: \_\_\_\_\_ Phone: \_\_\_\_\_

# of Pay Periods: \_\_\_\_\_ (If you have multiple pay period options, talk to your United Way Contact or write in below)

Payment Options:  Cash  Check  One-Time Credit Card  
 Monthly Credit Card  Payroll Deduction

Will an employee data file be sent to United Way of Wayne and Holmes Counties for Upload into ePledge? Yes No

Type of ePledge Campaign:  Standard (no data)  
 Customized (with employee data)

**Additional Requirements Include: (Please send these items to your United Way Campaign Contact)**

- Company Logo
- Sort Fields (required as options in your online pledge form)
- Welcome Page Message
- Email Message(s) for campaign kick-off.

