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THANK YOU FOR SUPPORTING UNITED WAY!
YOUR RESPONSIBILITIES AS ADMINISTRATOR

As administrator for your organization, you have the ability to manage many aspects of your campaign directly through the system. The Relationship Manager assigned to your account will assist you in learning how to use the administrative functions to run your campaign. The system is easy to use and intuitive, so you can quickly learn how to do the following functions so that you can act independently.

The ePledge system provides the following capabilities for you to manage your campaign:

- Add or correct email addresses
- Correct the spelling of names or addresses
- Update additional employee information which you may have chosen to provide
- Send emails to individuals
- Send emails to groups of employees
- Enter pledges for employees
- Change pledges for employees
- Delete pledges for employees
- Remove employees who have been terminated or who are on Leave of Absence
- Run campaign results reports
- Track and document the status of cash and check donations for final close out of your campaign

Contact your campaign Relationship Manager or send an email to ecampaigns@uwcentralcarolinas.org if you need assistance with the following:

- Adding an Employee
- Correcting the employee count as shown on the Campaign Status Screen
- Amounts on the Campaign Status Screen do not coincide with report totals
- Data, e.g. pay periods, payroll start dates, last year gifts (if shown), appears to be incorrect

The following pages provide an explanation of the screens and icons that you will see when using the administrative functions.
NAVIGATING THE SYSTEM

- To back up or move forward from screen to screen, click on buttons.
- Never use the web arrows in the upper left hand corner. This will exit you from the system and lock your userid.

LOGGING IN

- There are two ways to enter the ePledge system:
  - Go to the link in your ePledge email and click Here OR
  - Enter the following URL into your browser: https://uwcc.upicsolutions.org/Begin.jsp
    Enter your userid and password.

- To access the Admin Site, click on link on the bottom right side of the screen.

  A summary of the current campaign status will appear, as shown below.

### Campaign Status

<table>
<thead>
<tr>
<th>Name</th>
<th>Campaign Type</th>
<th>Total</th>
<th>Goal</th>
<th># Emps</th>
<th># Donors</th>
<th>Participation Rate</th>
<th># Responses</th>
<th>% Responses</th>
<th>Average Gift</th>
<th>Gift per Capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>ePledge Template 1 Demo</td>
<td>Empl</td>
<td>$0.00</td>
<td>$0.00</td>
<td>0</td>
<td>0</td>
<td>0%</td>
<td>0</td>
<td>0%</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
FIND AN EMPLOYEE

- Select Employee Maintenance/Add Pledges from the menu options at the top of the screen.

The following will appear.

Employee Maintenance

[Filled in form]

Campaign Year: 2019

Search for employee:

- Enter either:
  - the first few letters of the donor’s name (last or first), OR
  - the employee ID

- Click on search button to the right.
- The individual or a list of individuals will appear.
EMPLOYEE MAINTENANCE ICONS

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Name</th>
<th>Pledge</th>
<th>Payment</th>
<th>Pledge Type</th>
<th>Payment Type</th>
<th>Received</th>
<th>e-Payment Verification</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
<td>&quot;Kendra, Mrs. Demo&quot;</td>
<td>$1,200.00</td>
<td>$0.00</td>
<td>Payroll Deduction</td>
<td><em>None</em></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All individuals will have four icons to the LEFT of their name:

- $ - enter pledge
- 💌 - send email
- 📚 - update employee
- ❌ - delete employee

Individuals will have three icons to the RIGHT of their name once they have pledged:

- 💌 - Resend Confirmation email
- 📚 - update transaction
- ❌ - delete transaction

ADD A PLEDGE

- Find the employee’s record as described on page 4.
- Click on the $ to the LEFT of the employee’s information to enter the pledge.
- The donor pledge screens appear. Enter the information provided by the donor on the series of screens provided.
- A confirmation email will be sent to the employee automatically when you confirm the transaction.
- Return to the “Employee Maintenance” screen. Display the employee’s record again to verify that the pledge has been entered correctly.

CHANGE A PLEDGE

- Find the employee’s record as described on page 4.
- Click on 📚 to the RIGHT of the employee’s information to update the pledge.
- The donor pledge screens appear. Enter the information provided by the donor on the series of screens provided.
- A confirmation email will be sent to the employee automatically when you confirm the transaction.
- Return to the “Employee Maintenance” screen. Display the employee’s record again to verify that the pledge has been entered correctly.
DELETE A PLEDGE

- Find the employee’s record as described on page 4.
- Click on ✗ to the RIGHT of the employee’s information to delete a pledge.
- NOTE: This function only removes the information about the pledge for this individual. It does not remove the individual.
- Return to the “Employee Maintenance” screen. Display the employee’s record again to verify that the pledge has been deleted.

SEND AN EMAIL TO AN INDIVIDUAL

- Find the employee’s record as described on page 4.
- Click on the email icon to the LEFT of the employee’s information to send an email to that individual.
  The following pop up appears. NOTE: Emails to a group of individuals are sent via the menu item “SEND EMAIL”.

  uwcc.upicsolutions.org says
  Send an e-mail to this individual

- Click OK to bring up the email screen.
• EMAIL TEMPLATE:
  o If you want to resend a kick-off or reminder email, select the appropriate e-mail template. The sender’s email address will automatically fill in with pre-defined data. Leave all other information as shown and click send.
  o If you want to send a customized email, select *NONE as the e-mail template and enter your own subject and message.
• Click on send.
• Schedule Sending Screen comes up (see screen shot below).
• Add a description (ABC Company Resend – specify if it is Kick-off/Reminder/Confirmation) – this information must be filled in.
• Click on the “Submit” button as shown below.
### Schedule Sending

**Description**

- [x] Run Immediately
- [ ] Overnight
- [ ] One Time Only
- [ ] Every
  - [ ] Days
  - [ ] Last Day of Every Month

**Next date/time to run:**

- [ ] Immediate
- [ ] 00:00

**Last date to run:**

- [ ] Immediate
- [ ] 00:00

**Missed execution action:**

- [ ] Execute

**Further restrict to:**

<table>
<thead>
<tr>
<th>Days</th>
<th>Sun</th>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
<th>Sat</th>
</tr>
</thead>
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<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Weeks</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
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<tbody>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Months</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
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</thead>
<tbody>
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<td>#</td>
<td>#</td>
<td>#</td>
<td>#</td>
<td>#</td>
</tr>
</tbody>
</table>
SEND AN EMAIL TO A GROUP OF EMPLOYEES

- Select “Send e-Mail” from the menu options at the TOP of the screen. The following screen will appear.

NOTE: Emails to an individual are sent via the icon on the EMPLOYEE MAINTENANCE screen (see instructions on page 4).

The following screen will appear.

- INCLUDE SUBSIDIARIES: Click this box if appropriate. (This option may apply if your company has multiple locations that you’ve included in your United Way Campaign. Please contact your Relationship Manager if you have questions about the structure of your account).
- CAMPAIGN YEAR: Remains *Current Year
- SELECT: If you provided additional data in your census file for sorting reports, you will see this section. You may select *ALL or any value in the drop down box. Note: The values in the section have been customized for your campaign.
- SEND TO: Select target audience, respondents, non-respondents, or both.
• **EMAIL TEMPLATE:**
  - If you want to resend a kick-off or reminder email, select the appropriate e-mail template. The sender’s email address, subject, and message will automatically fill in with pre-defined data.
  - If you want to send a customized email, select *NONE as the e-mail template and enter your own subject and message.

- Click on send.
- Schedule Sending Screen comes up.
- Add a description (ABC Company Resend – specify if it is Kick-off/Reminder/Confirmation) – this information must be filled in.
- Click on the “Submit” button as shown below.
RESEND A CONFIRMATION EMAIL
- Find the employee’s record as described on page 4.
- Click on the RIGHT of the employee’s information to resend a confirmation email.
- The Schedule Sending Screen will not appear here.

NOTE: The confirmation email can serve as documentation of charitable donations.

UPDATE EMPLOYEE DATA
- Find the employee’s record as described on page 4.
- Click on the LEFT of the employee’s information to update employee information, including name, home address, work email address, billing start date, payroll start date, and suggested gifts (as shown in the example below).
DELETE AN EMPLOYEE RECORD

NOTE: This function should be used only to remove individuals who you know have left the company. Do not use this function to delete a pledge transaction.

• Find the employee’s record as described on page 4.
• Click on the LEFT of the employee’s information to “delete” an employee record.

If you inadvertently delete an employee, the record is still in the system, but is not visible on your screen. Contact the Relationship Manager or send an email to ecampaigns@uwcentralcarolinas.org.

RECORD CHECK RECEIPTS

Administrators are responsible for collecting all pledges made via check. These receipts must be recorded in the ePledge system by doing the following:

• Click on Employee Maintenance from the menu options on the left of the screen.
• Locate and display the employee’s pledge.
• Confirm that the amount of the check matches the amount on the screen.
• If yes, single click on the ☑ under the heading “Received”. A ☑ will now appear in the box.
• If no, contact the donor to resolve the discrepancy.
REPORTS
There are five reports that are available for you to use as an additional resource to help keep track of your company’s campaign progress. The following information regarding reports gives a brief description on how to generate them. If you require additional assistance, please contact your Relationship Manager or send an email to ecampaigns@uwcentralcarolinas.org.

Cash Report

The Cash Report shows the donors who selected to give by check and the status of check pledges (if the check has been received or not). Include a hard copy of this report with the checks when submitting money over to your Relationship Manager or UWCC representative.

- Select “Reports” from the menu options on the TOP of the screen. Click on “CASH REPORT” button located under “Web Reports” and hit the “Submit” button to generate the report.
- The report will appear under the “My Outputs” section and will be listed by Job, Name, Date, # Pages, Size, Type, and Status.
- Select either the “PDF or csv” version. Click on the one you would like to view and your report will appear on the screen.
No Response Report

This report will show a list of all employees who have not entered a pledge or who have not selected the “NO THANKS” option.

- Select “Reports” from the menu options to the TOP of the screen. Click on “NON-RESPONDENTS REPORT” button located under “Web Reports” and hit the “Submit” button to generate the report.
- The report will appear under the “My Outputs” section and will be listed by Job, Name, Date, # Pages, Size, Type, and Status.
- Select either the “PDF or csv” version. Click on the one you would like to view and your report will appear on the screen.
Response Report

This report will show a list of all employees who have entered a pledge or who have selected the “NO THANKS” option.

- Select “Reports” from the menu options to the TOP of the screen. Click on “RESPONSE REPORT button located under “Web Reports” and hit the “Submit” button to generate the report.
- The report will appear under the “My Outputs” section and will be listed by Job, Name, Date, # Pages, Size, Type, and Status.
- Select either the “PDF or csv” version. Click on the one you would like to view and your report will appear on the screen.

Summary Report

This report provides a summary of campaign results.

- Select “Reports” from the menu options to the TOP of the screen. Click on “SUMMARY REPORT” button located under “Web Reports” and hit the “Submit” button to generate the report.
- The report will appear under the “My Outputs” section and will be listed by Job, Name, Date, # Pages, Size, Type, and Status.
- Select either the “PDF or csv” version. Click on the one you would like to view and your report will appear on the screen.
HR Report

This report will show a list of all employees who have entered a pledge or who have selected the “NO THANKS” option. The report will include $ amounts.

- Select “Reports” from the menu options to the TOP of the screen. Click on “HR REPORT” button located under “Web Reports” and hit the “Submit” button to generate the report.
- The report will appear under the “My Outputs” section and will be listed by Job, Name, Date, # Pages, Size, Type, and Status.
- Select either the “PDF or csv” version. Click on the one you would like to view and your report will appear on the screen.
MY OUTPUTS
When you submit a report for processing, it will appear on your “My Outputs” menu option at the Top of the screen. The report is available for viewing when the job status is READY. If the Status is not READY, you can refresh the screen by clicking [Refresh]. When the print job is completed, the status will change to READY.

Click on the report you wish to view.

CLOSE OUT THE CAMPAIGN
To close out your campaign do the following:

- RECORD YOUR CHECK RECEIPTS
  - Ensure that all check receipts have been recorded as shown on page 7.
- RUN A CASH REPORT (see instructions under REPORTS section)
- PLACE THE CHECKS AND REPORT IN AN ENVELOPE
- Call or email your UWCC Campaign support representative to let them know your campaign is complete.
  - Either mail the checks in to “PO Box 890685, Charlotte NC 28289-0685” or make arrangements with your Relationship Manager to pick up the funds.
FAQs

• An employee accidentally exited the system by using the buttons and now the employee is locked out. How do I reactivate the employee’s access?
  o Contact the Relationship Manager assigned to your account.

• An employee’s name is misspelled. How can this be corrected?
  o The employee can correct the error by selecting MY PROFILE on the top menu option and then correcting the information, OR Contact the Relationship Manager assigned to your account.

• An employee did not receive a kickoff email. How do I resend this?
  o In the Employee Maintenance screen, find the record for the employee. Click on the icon, and verify that the email address is correct. If not, enter the correct email address.
  o Select the record for the employee again and resend the email using the icon on the LEFT.

• An employee would like to change how his pledge is made or how it is designated. How is this handled?
  o You can change any aspect of the pledge by selecting the individual’s record in the Employee Maintenance screen and clicking on the icon. Follow the pledging screens to make the appropriate change.
  o A new confirmation email will be sent automatically by the system once the change is confirmed and entered into the system.

• An employee forwarded his email to another, and that employee unknowingly pledged as the first person. What do I do?
  o In the Employee Maintenance screen, select the record for the first employee. Delete the transaction using the icon.
  o In the Employee Maintenance screen, select the record for the second employee. Send a new email to the second employee using the icon.
  o Notify both employees that the issue has been addressed and request that they both enter their pledges again using the email that was sent from the ecampaign address.

• An employee does not appear in the list when I try to find him. I’ve checked my spelling, so what do I do now?
  o Check the census file that you provided to UWCC. Is the employee listed there? If so, please contact your Relationship Manager.
  o If the employee is not on the census file but has worked at your company for a while, the employee’s record has been deactivated. Please contact your Relationship Manager.

• An employee does not know his userid or password, or these are not working. What do I do?
  o Contact the Relationship Manager assigned to your account.

• The sorting/selection fields for reporting do not appear as I expected. What do I do?
  o Contact the Relationship Manager assigned to your account.

• The employee count on the Campaign Status screen does not match the number of employees that appears on the reports. How do I correct this?
  o The number on the Campaign Status screen is maintained manually in the UWCC system. Contact the Relationship Manager assigned to your account.
• The $ goal on the Campaign Status screen is not correct. How do I correct this?
  o The number on the Campaign Status screen is maintained manually in the UWCC system. Contact the Relationship Manager assigned to your account.

• Why does the system require a mailing/email address? How will this be used?
  o The ePledge system will prompt the employee for a mailing address if any of the following occur:
    ➢ Designation to an agency and approval to share your name and address with the agency.
    ➢ Pledges of $250 or more made by any payment option (excluding payroll deduction); UWCC is required by IRS regulations to send a receipt to the donor.
    ➢ Selection of the direct bill option or marketable securities payment options.
  o United Way of Central Carolinas uses e-mail addresses only when we are confirming your pledge, sending you a pledge reminder if you asked to be billed or notifying the donor about United Way activities that we feel may be interesting and useful to the donor. E-mail addresses will not be made available to other organizations unless the donor selects the option to be acknowledged.

• When an employee clicks HERE in their kickoff email, they are prompted for a userid and password? I thought this was supposed to be automatic.
  o This is a problem with the setup of this individual’s account. Contact the Relationship Manager assigned to your account.

• A donor wants to designate a gift, but the agency or local United Way does not appear when searched for. How do I handle this?
  o The ePledge system is set up to include all United Way Partner agencies and any agency the company has requested to be added to the system. This practice is necessary to manage administrative overhead costs at UWCC. Please contact your Relationship Manager concerning your designation needs.