



United Way of Marathon County

ePledge User Guide

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For questions regarding ePledge email the support contacts above or help@unitedwaymc.org.

Welcome

ePledge is a highly secure and proven online campaign management system that provides you with the capabilities to run a successful campaign.

This campaign management tool allows you to view your company's campaign from a dedicated, secure website, providing one central point for all campaign information.

Benefits of using ePledge

- 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 organization
- Secure and confidential

Responsibilities As Administrator

As administrator for your organization, you have the ability to manage many aspects of your campaign directly through the system. 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:

- Enter pledges for employees
- Change pledges for employees
- Delete pledges for employees
- Remove employees who have been terminated
- Run campaign reports
- Real-time reporting of campaign progress

Setting up Your ePledge Campaign

1. At least 2-3 weeks prior to your campaign go to [United Way of Marathon County \(unitedwaymc.org\)](http://unitedwaymc.org) to complete the ePledge set-up request form.
2. Check with your IT Department for approval for e-mails from United Way to be allowed through your security settings.
3. Provide United Way with a listing (excel or csv file) of all your employees as per the fields required below: *Required
 - *First Name
 - Middle Name
 - *Last Name
 - *Work e-mail Address
 - Home Address
 - Employee ID (this makes uploading to your payroll systems easier)
 - Gender
 - Birthday
 - *Work Location
 - Number of Pay Periods
4. Provide United Way with customized messaging for the kick-off and reminder e-mails.

After the Campaign

When your campaign closes, we will send a payroll file to your HR department.

Your company campaign manager should fill out the campaign report envelope with paper pledges, fully paid employees and special event money. Collect all the payments and put the money, campaign report and the cash report inside the campaign envelope you were provided.

If you are making a corporate gift, please fill out a corporate pledge card and place it in the envelope. Contact United Way to come collect your envelope or drop it off at the United Way Office located at 705 S. 24th Ave, Suite 400B, Wausau, WI.

Sample E-mail Messages:

Kick-off e-mail

Subject: UNITING TO THRIVE

Today is the beginning of your United Way campaign at **Company Name** and we are asking you to join us in lifting 10,000 community members to financial stability by 2033. Together, we can improve the lives of our family members, neighbors, and friends who are working hard every day but still struggling to pay the bills.

You might feel like it's impossible to tackle issues like access to childcare, hunger, or mental health, but your United Way gift can join others to solve those big challenges on a scale no single organization or individual can accomplish on their own.

This is your chance to live a life of purpose and compassion. This is your chance to lift others up here in **CITY/COMMUNITY**. UNITING TO THRIVE!

You will make a difference for thousands of people in our community with your gift—and a gift of \$52 or more will qualify you for the 2023 Sweepstakes!

What does United Way do? | [United Way of Marathon County \(unitedwaymc.org\)](https://unitedwaymc.org)

Campaign Dates: _____ to _____

How to Give: [link to epledge if applicable] or list here how to get a pledge form from your company. If your company offers a match, mention it here. You can also include information about your campaign goals.

You have the power to do good. United Way can amplify your impact.

Thank you,

[e-mail signature block from sender block] Sender options: Company CEO, Company Campaign Leader or UW

Reminder e-mail

Subject: Change Doesn't Happen Alone

We are already halfway through our United Way Workplace Giving Campaign! Thank you to all of you who have already submitted your pledge form (or made your pledge online); you understand how important it is to invest in our amazing community.

Your contribution will be invested in programs and services that meet the most pressing needs in our local community. For example, United Way funding provided childcare assistance to 109 families: relieving the financial strain on their households.

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

Our campaign will wrap up on [date]. If you haven't already, please complete your pledge form (or online pledge) and return it before then. We hope to announce our total campaign results by [date]. A gift of \$52 or more will qualify you for the 2023 Sweepstakes!

Thank you again for your attention to this important community investment. I am proud to say [company's name] is making a difference in our community!

[e-mail signature block from sender block] Sender options: Company CEO, Company Campaign Leader or UW

Closing e-mail

Subject: Time is running out!

Our United Way Workplace Giving Campaign ends on [Date]!

If you've been waiting to make your pledge when it counts the most ... that time is right now! There's just one day left to make your pledge. We set a goal to support this community and we know with your help we can make that happen.

Please consider donating today. Because change doesn't happen alone, to live better, we must UNITE TO THRIVE.

Together we can:

- Provide over 7,000 lbs of fresh produce to Senior Living Centers across Marathon County.
- Rake over 130 yards for the elderly and physically unable.
- Provide rent/mortgage assistance to 553 households.
- Give clothing to 740 children at no cost to the families.

Thank you for supporting our community through United Way of Marathon County. We appreciate your contribution.

[e-mail signature block from sender block] Sender options: Company CEO, Company Campaign Leader or UW

How to Access ePledge

There are two ways to enter the ePledge system:

1. Click on your personalized link in your ePledge e-mail.
2. Enter the following URL into your browser:
<https://www.secure.unitedwaymc.org/crm/Start.jsp>. Enter your User ID and Password.

ePledge Home Screen:

The home screen defaults to your personal donor page.

MAIN MENU

Personal link for pledging, viewing giving history and contact information.



WELCOME TO UNITED WAY'S ONLINE PLEDGE SITE

Your pledge will be designated to United Way of Marathon County unless you designate your gift to another United Way. United Way of Marathon County processes all pledges at no cost to your United Way.

Together we will fight for the Health, Education and Financial Stability of every person in every community. When YOU give to United Way, YOU change the community for the better. Support YOUR community by giving now.

[Go to Administrator Site](#)

GO TO ADMINISTRATOR SITE

Switches the donor to Administrator Menu.

Things you can do from this screen:

Ready to make your gift? Click **PLEDGE NOW** in the main menu.

Want to view last year's gift? Click **MY GIVING HISTORY** in the main menu.

Would you like to update your address? Click **MY CONTACT INFORMATION** in the main menu.

Ready to run campaign reports? Click **GO TO ADMINISTRATOR SITE** to switch to the Admin menu.

1. HOW TO MAKE A PLEDGE:

Click **PLEDGE NOW** in the top menu to start the pledge process.



WELCOME TO UNITED WAY'S ONLINE PLEDGE SITE

Your pledge will be designated to **United Way of Marathon County** unless you designate your gift to another United Way. United Way of Marathon County processes all pledges at no cost to your United Way.

Together we will fight for the Health, Education and Financial Stability of every person in every community. When **YOU** give to United Way, **YOU** change the community for the better. Support **YOUR** community by giving now.

[Go to Administrator Site](#)

2. PAYMENT:

Select your method of payment. "Credit Card", "Payroll Deduction" or "Sorry, I don't wish to give at this time".



Please select your pledge type.



Credit Card



Payroll Deduction



Sorry, I don't wish to give at this time.

NEXT

CANCEL

3. PLEDGE OPTIONS:

Credit Card:

Payroll Deduction:

4. VERIFICATION

This page includes checkboxes to be acknowledged for sign-up for United Way affinity groups, receive a confirmation e-mail, and remain anonymous (donors name will not be published in the Annual Report).



Select all that apply.

This is the e-mail address your confirmation will be sent to.

*WORK eMail

test@unitedwaymc.org

- Yes, I would like an acknowledgement from the designated agency or program.
- I wish to remain anonymous
- Send me an e-mail confirmation of this pledge
- I would like to join/remain a member of [Emerging Leaders](#) (\$100 min)
- I would like to join/remain a member of [Women United](#) (\$250 min)
- I would like to join/remain a member of [Retire United](#)
- NONE OF THESE APPLY TO ME

PREVIOUS

NEXT

CANCEL

5. VERIFICATION CONTINUED

A second verification page allows the donor to review and confirm their pledge details. The donor can go back to edit any details or click **Confirm** to complete their pledge.



Please review your pledge and Confirm

Pledge Type:	Payroll Deduction
Pay Periods Per Year:	26
Deduction Per Pay:	\$5.00
Total Current Pledge:	\$130.00

Designated to	Amount
Marathon County Early Years Coalition	\$50.00
Total Designated	\$50.00
Total Undesignated	\$80.00

- Yes, I would like an acknowledgement from the designated agency or program.
- Send me an e-mail confirmation of this pledge.

By clicking on the Confirm button below, you are electronically signing your pledge to donate. 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)

6. COMPLETED PLEDGE:

Upon submission, the donor will be directed to the confirmation page that they may print for their records. They will also receive a personalized thank you e-mail with the details of their pledge.



THANK YOU Test!

Please use the print and logoff buttons below.
A confirmation e-mail will be sent shortly.

Reference Number:	25651-1018427
Pledge Type:	Payroll Deduction
Pay Periods Per Year:	26
Deduction Per Pay:	\$5.00
Total Current Pledge:	\$130.00

Designated to	Amount
Marathon County Early Years Coalition	\$50.00
Total Designated	\$50.00
Total Undesignated	\$80.00

- Yes, I would like an acknowledgement from the designated agency or program.
- Send me an e-mail confirmation of this pledge.

- SIGNOFF**
- PRINT**

ADMINISTRATOR:

Monitor your company campaign, run reports, enter and update pledges.

ADMINISTRATOR MENU

Allows you to see campaign results and run reports for your team.



ADMINISTRATOR HOMEPAGE

Thank you for running your workplace campaign. From this screen you can check your campaign status and run reports.

[Check out our Campaign Resources Step 3: Learn More about United Way and request materials, speakers and reserve the Sweepstakes Vehicle for your campaign.](#)

For assistance using the administrator features email nczewinski@unitedwaymc.org.

[Go to Donor Pledge Site](#)

GO TO DONOR PLEDGE SITE

Switches you back to the DONOR Main Menu.

Things you can do from this screen:

CAMPAIGN STATUS: Allows you to see your company campaign progress (page 10).

NO RESPONSE: Allows you to run a report of those who have not yet pledged (page 11).
To view reports you must click on **VIEW REPORTS**.

TRANSACTION REPORT: See who has completed their pledge (page 12).
To view reports you must click on **VIEW REPORTS**.

VIEW REPORTS: Allows you to view the reports you have generated (page 13).

EMPLOYEE PLEDGE SEARCH: Enter, update and delete employee pledges (page 14).

Ready to return to your Donor menu? Click **GO TO DONOR PLEDGE SITE** at the bottom of the page to switch back to the donor site.

CAMPAIGN STATUS:

Allows you to see your company campaign progress.

Total dollars raised.

of Employees & # of Donors.

of Responses includes all donors and those who indicated NO GIFT.



Campaign Status

Name	Campaign Type	Total	# Emps	# Donors	Participation Rate	# Responses	
ABC Company	Empl	\$82,250.17	1862	744	40%	895	
ABC Company	Corp	\$25,000.00					
ABC Company	Special	\$7,575.00					

ALL LOCATIONS

If your company has multiple locations this box will appear. Click **ALL LOCATIONS** to display the company total.

NO RESPONSE:

Generate a report of individuals who have not yet pledged. To view this report you must click on **VIEW REPORTS**.

No Response Report

Organization

ABC Company
123 Park Ave
Wausau, WI 54401

ABC Company

Include Subsidiaries

Campaign Year

▶ Select (*All to include all report sort field types)

Include Employees with Expired or No Relationship

Show Counts/Max/Min/Avg

Show Employee ID

Show Pledge/Gift Amounts

Exclude employees with response within Parent/Subsidiary Tree

Transaction Source

Show Report Type

Description

▶ Select CSV report columns

← To run this report click **SUBMIT**.

Under "Show Report Type" choose whether you would like the report as a PDF or CSV file.

TRANSACTION REPORT:

Generate a report of individuals who have pledged. To view this report you must click on **VIEW REPORTS**.

Transaction Report

Organization

ABC Company
123 Park Ave
Wausau, WI 54401

ABC Company

Include Subsidiaries

Campaign Year

Campaigns

Transactions Created

From To

With Amounts

From To

▶ Select (*All to include all sort field types)

▶ Select (*All to include all report sort field types)

Include Employees with Expired or No Relationship

Include Batch Employee Gifts

Show Counts/Max/Min/Avg

Show Employee ID

Include DC Details

Employee Gifts

Transaction Source

Show Report Type

Description

▶ Select CSV report columns

Under "Show Report Type" choose whether you would like the report as a PDF or CSV file.

To run this report click **SUBMIT**.

VIEW REPORTS:

View your generated reports.

Your reports will appear here.
Click on the name of the report to open it.

If the Status is not "Ready",
the report is still generating.



View Reports

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

REFRESH

<input type="checkbox"/>	Job Number	Job	Names	Date	#Pages	Size	Type	Status	Description
<input type="checkbox"/>	757573	No Response Report	ABC Company - Pledge No Response Report	06/18/2019 11:31:50 AM	1	5259	pdf	Ready	
<input type="checkbox"/>	757572	Transaction Report	ABC Company - Pledge Transaction Report	06/18/2019 11:31:40 AM	11	88411	pdf	Ready	

DELETE

CANCEL

To delete a report check the box to the left of the report. Then click the **DELETE** button.

SAMPLE REPORT:

The names of individuals on your report will appear in the **Employee Name** column.

Name of the report will appear at the top of each page.

ABC Company - Pledge Transaction Report

Employee Name	Employee ID	Reference Number Tran Type Security	Co-ordinator Created Date	Pledge	Payment	Balance
Employee 1 Individual	1	21976-906171 NoGift	11/28/2017	\$0.00	\$0.00	\$0.00
Employee 2 Individual	2	21976-906166 EmpPayroll	11/28/2017	\$20.00	\$0.00	\$20.00
Employee 3 Individual	3	21976-906167 EmpPayroll	11/28/2017	\$260.00	\$0.00	\$260.00
Employee 4 Individual	4	21976-906378 EmpPayroll	11/29/2017	\$52.00	\$0.00	\$52.00

EMPLOYEE PLEDGE SEARCH:

On this page, you can search for an employee's pledge, enter in paper pledges, update pledges, delete transactions, resend confirmation e-mails and add new employees. To enter in an employee pledge look up the employee using their Name or Employee ID in the search box.

Employee Pledge Search

ABC Company
123 Park Ave
Wausau, WI 54401

open all close all

ABC Company

Campaign Year: 2019

Search for employee: Name Employee ID

Tom Smith

Type in the Employee name or Employee ID then click the search icon to the right.

Add new employee.

Click on the **mail icon** to send a Confirmation e-mail to an Employee.

Click on the **\$** to add an employee pledge.

Click on the **X** to delete an employee.

Click on the **Pen and Paper Icon** to Update a Pledge.

Click on the **X** to Delete a Transaction.

Frequently Asked Questions

Will our information be shared?

No. Per our privacy policy (<https://www.unitedwaymc.org/privacy-policy>), we do not sell or share your company or donor information.

How will United Way use employee e-mail addresses once the campaign is over?

United Way will send a monthly e-newsletter to employees who donate to United Way. The e-mail newsletter informs donors how their donations are working year-round. The newsletter will not be sent to employees who do not donate to United Way.

What if someone loses or deletes their link?

Someone who loses or deletes their link or has difficulty signing in should contact ePledge Support at 715-298-5708 or eleal@unitedwaymc.org, for immediate assistance.

What if some employees have no e-mail address or easy access to the web site?

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. If employees do not have a work e-mail or want a different method of logging onto the pledge site, we can set up **User ID's** and **Password**. For example: The User ID could be the employee's first and last name and their password could be their employee ID.

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 the name, e-mail address and all other pertinent information to your United Way representative. The new employee will be set up and personalized link will be sent.

Can we use ePledge if we have multiple locations or a national campaign?

Yes. We will need more time for the set-up but talk to your United Way representative.

Can I enter special events or corporate gifts in ePledge?

No. ePledge is a portal for employee donations only. Instead, put these gifts, including any paper pledge cards, in a campaign report envelope. Call your United Way representative at 715-848-2927 to get a report envelope. Complete the front of the envelope and contact your United Way representative when it is ready to be picked up.

Does the employee's link expire after the campaign ends?

The campaign is finalized and turned off at your request. At that time, each employee's personalized link is expired.

How will paper pledges be handled after the ePledge site is turned off?

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

This is our first year to use ePledge. What are the best ways to promote this change to our employees?

It is important that you inform your employees that you are using ePledge. Take time at your employee campaign meetings to highlight the ePledge giving portal and explain what they can expect and how to use it.