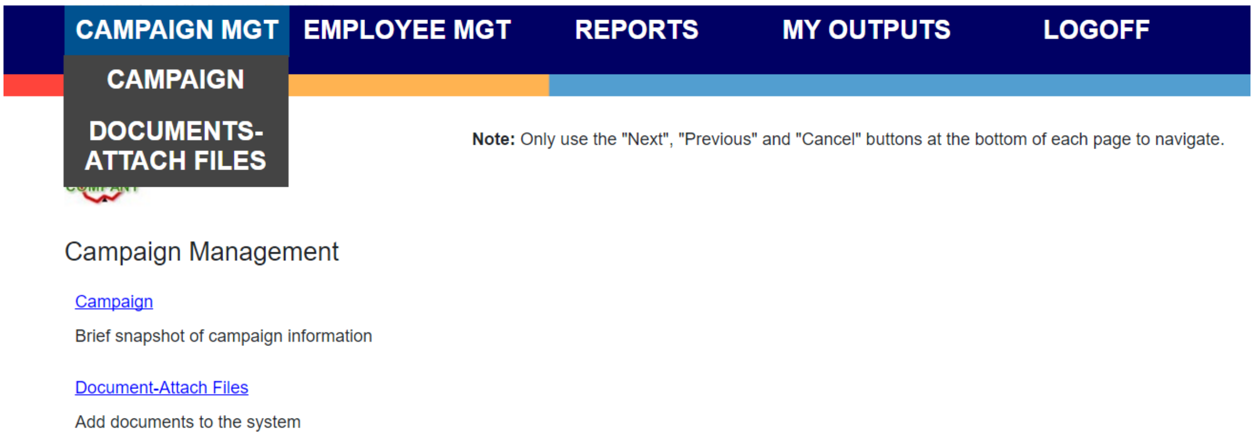
Using the ePledge Administrator Portal

Campaign Management:

The *CAMPAIGN MANAGEMENT* tab can provide a brief snapshot of campaign information (or view in the dashboard---see REPORTS), and also allows users to attach documents such as email messaging and updated logos to be used during their campaign.


CAMPAIGN MGT EMPLOYEE MGT REPORTS MY OUTPUTS LOGOFF

CAMPAIGN

DOCUMENTS-ATTACH FILES

Note: Only use the "Next", "Previous" and "Cancel" buttons at the bottom of each page to navigate.

Campaign Management

Campaign

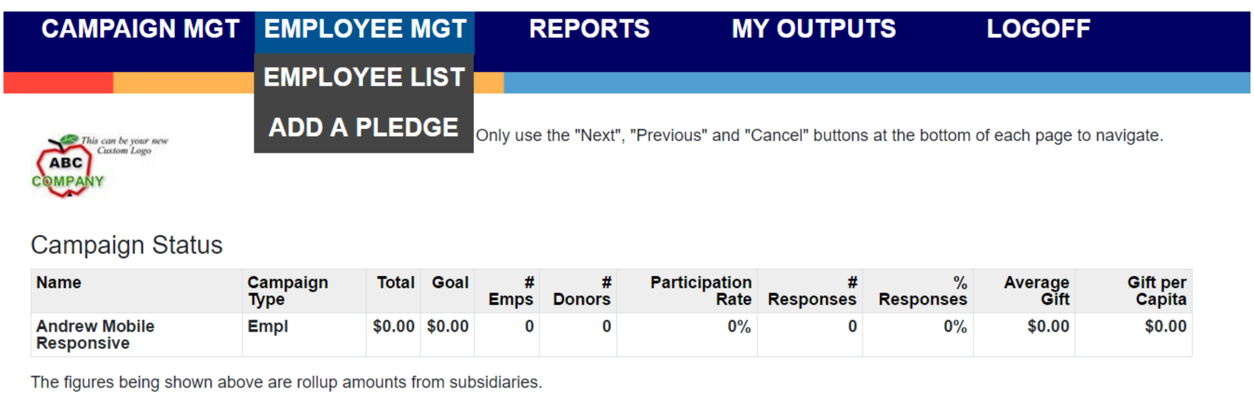
Brief snapshot of campaign information

Document-Attach Files

Add documents to the system

Employee Management:

Under the EMPLOYEE MGT tab, the *EMPLOYEE LIST* tab will allow you to search for an existing employee, and ADD employees. Please **DO NOT ADD new** employees here. Contact donor.services@unitedwaytoledo.org to add a new employee, as additional programming is required to properly set up an employee for ePledge.


CAMPAIGN MGT EMPLOYEE MGT REPORTS MY OUTPUTS LOGOFF

EMPLOYEE LIST

ADD A PLEDGE

Only use the "Next", "Previous" and "Cancel" buttons at the bottom of each page to navigate.

Campaign Status

Name	Campaign Type	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita
Andrew Mobile Responsive	Empl	$0.00	$0.00	0	0	0%	0	0%	$0.00	$0.00

The figures being shown above are rollup amounts from subsidiaries.

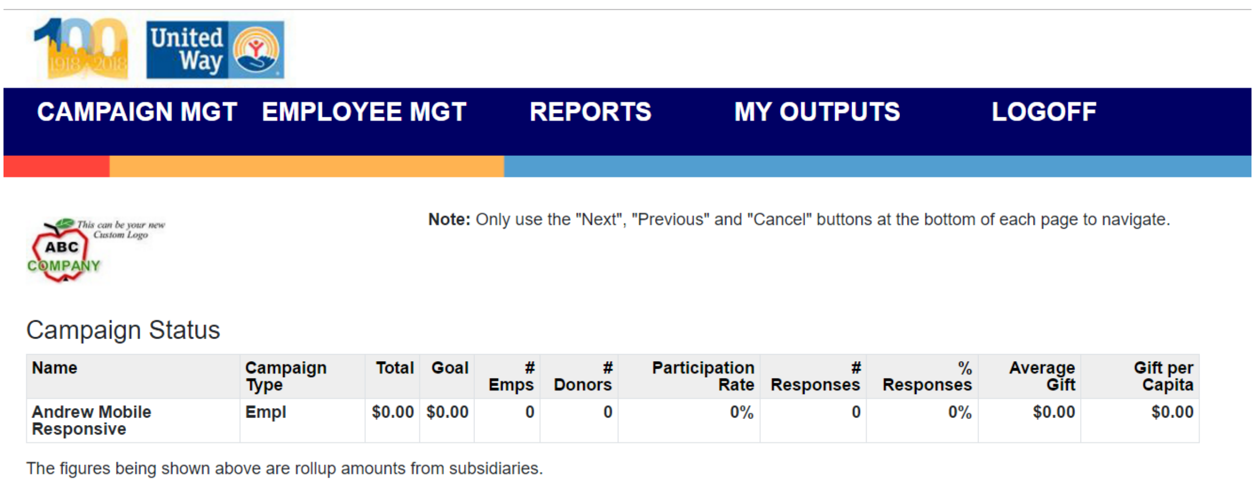
The *ADD A PLEDGE* tab can be used to SEARCH an individual record. If an employee is missing their confirmation email, and wants to know if their pledge was recorded, the campaign manager can use this tab to see the status of their pledge. Retrieve the individual's record here, and their pledge can be viewed to see if it has been completed, and resend their confirmation email if needed. If an employee needs assistance pledging, you could also enter a pledge for them as an administrator, or enter pledge cards from this tab.

E-Pledge Reports:

The Campaign Manager and RD will have access to all the ePledge reports.

1. **CASH REPORT:** Provides a list of all cash and check donors from the specified organization and identifies whether funds have been received by the company and/or fundraiser. Should be run by the CM on the last day of campaign in order to provide a check list of the cash and check payments to collect.
2. **NO RESPONSE REPORT:** Provides a list of individuals who have not yet donated at the organization. If you check the box “include amounts”, it will have the previous year’s gift in the report for anyone who gave last year and hasn’t renewed their pledge. It is a very quick way to get a list of outstanding donors, and identify outstanding Leadership donors.
3. **RESPONSE REPORT:** Provides a list of all donors
4. **TRANSACTION REPORT:** All transactions created for the account are recorded as a line entry on this report. Amounts are always displayed with the transaction data.

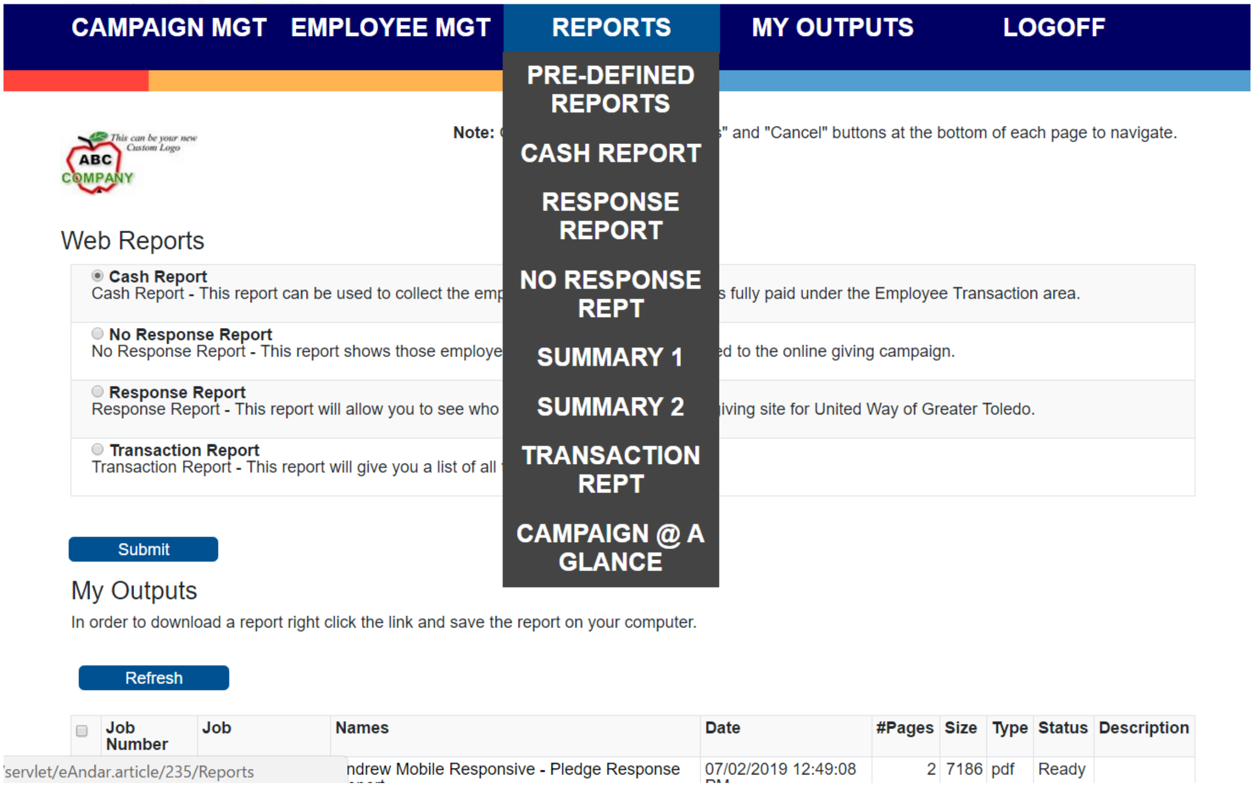
The Campaign Manager can access these reports from their ePledge account. Login to ePledge, then select the “Change to Administrator” option at the bottom left of the home page. The Administrator page displays a campaign status table with current statistics (screen shot below.)



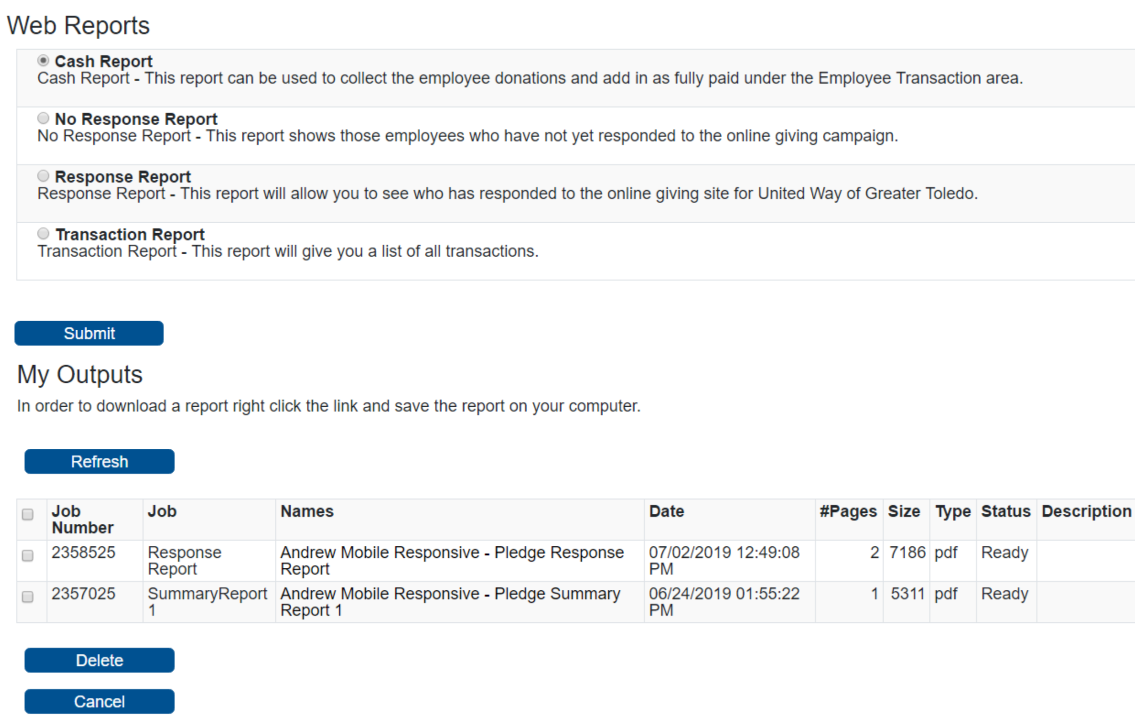
Name	Campaign Type	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita
Andrew Mobile Responsive	Empl	$0.00	$0.00	0	0	0%	0	0%	$0.00	$0.00

The figures being shown above are rollup amounts from subsidiaries.

Selecting the *REPORTS* tab on the Administrator portal will allow the CM to select the report type they wish to run from the dropdown menu. Once the report is complete, it will auto-load to the *MY OUTPUTS* tab. User must select *MY OUTPUTS* to view the report.



Selecting the first report option *PRE-DEFINED REPORTS* will allow the CM to run the four most common reports and view their results within the same screen, instead of toggling to *MY OUTPUTS.*



CAMPAIGN @ A GLANCE

New in 2016, *CAMPAIGN @ A GLANCE* is an easy to read *dashboard*, with the most requested campaign details all in one place. This is the perfect option for a CM to easily assess campaign progress. It provides a detailed, easy to read snapshot of campaign statistics. To view, select the last option under the reports tab (see below.) Then click on the company name (ie. “Andrew Mobile Response”) for local only campaigns or ‘Roll-up’ for campaigns with multiple locations.

Campaign At-A-Glance:

Andrew Mobile Responsive
This document will give you a complete picture of your campaign. You will see current totals, participation rates, leadership information and outstanding gift information.
Andrew Mobile Responsive (Roll-up)
This document will give you a complete picture of your campaign. You will see current totals, participation rates, leadership information and outstanding gift information. This version rolls up all Subsidiary accounts

Below is an example of the *CAMPAIGN @ A GLANCE* Dashboard:

1 of 1 Find | Next

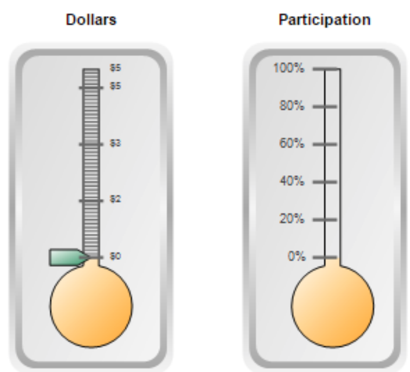
Andrew Mobile Responsive (4142618)

Campaign Dashboard (Non Rollup)

So far, your campaign has raised: $0.00

Campaign At-A-Glance

Today's Date	6/13/2017
Campaign Start Date	
Campaign End Date	
Emp Dollars raised to date	$0.00
Employees who have donated	0
Leader donors to date	0
Leader dollars to date	$0.00



Campaign Summary

Emp Dollar Goal	$0.00	Total Employees	0
Emp Goal Exceeded by	$0.00	Employees who have donated	0
Emp Dollars to date	$0.00	Participation rate	0 %
Special Event Dollars to date	$0.00	Employees who have decided	0
Corporate Dollars to date	$0.00	Decision rate	0 %
Other Dollars to date	$0.00	% of Deciders donating	0 %
TOTAL RAISED TO DATE	$0.00		
# Oustanding donors	0	Employees remaining	0
Outstanding Dollars	$0.00	% inc/dec on gifts in house	0 %
# First Time Donors	0	Average Gift	$0.00
First Time Dollars	$0.00	Corp Per Capita	$0.00

Leader Summary (Individual leadership level $1,000+ includes ADTs donors, does not include prospects)

Leader Donors to date	0	Last year leader donors	0
Leader Dollars to date	$0.00	Last year leader dollars	$0.00
Donation rate	0 %	Leaders who have decided	0
First time leader donors	0	Decision rate	0 %
First time leader dollars	$0.00	Leaders remaining	0
Undecided leader dollars	$0.00	Undecided leader donors	0

FAQ:

Q: How do I look at all gifts received? What type of gift are they? Were they designated to an agency and which one?
A: Run the **Transaction** report and include donor detail. This will allow you to view this information for everyone at the organization you run the report for.

Q: How do I view outstanding leadership givers?
A: Run **the No Response** report including amounts as a .csv file, and when you receive the output sort by last year's gift. Anyone that has a last year's gift of $1000 or more on that report is an outstanding leader.

Q: Can we track Special Events and Corporate gifts?
A: No. ePledge does not show Special Events or Corporate Gifts. It is strictly for tracking employee pledges.

Q: Is there a minimum gift required in order to use ePledge?
A: At this time, there is no minimum gift requirement.

Q: What is Quick pledge and why is it beneficial to our campaign?
A: Quick Pledge is a faster way to make a payroll gift through ePledge. With one click, a donor confirms their payroll gift at a percentage increase over last year's gift, or a set amount per pay period (for new donors). This one-click pledge secures a gift with a built-in increase for gifts designated to the United Way Community Fund.