United Way of Greater Toledo
1001 Madison Ave., Suite 100
Toledo, OH 43604
Tel: (419) 248-2424

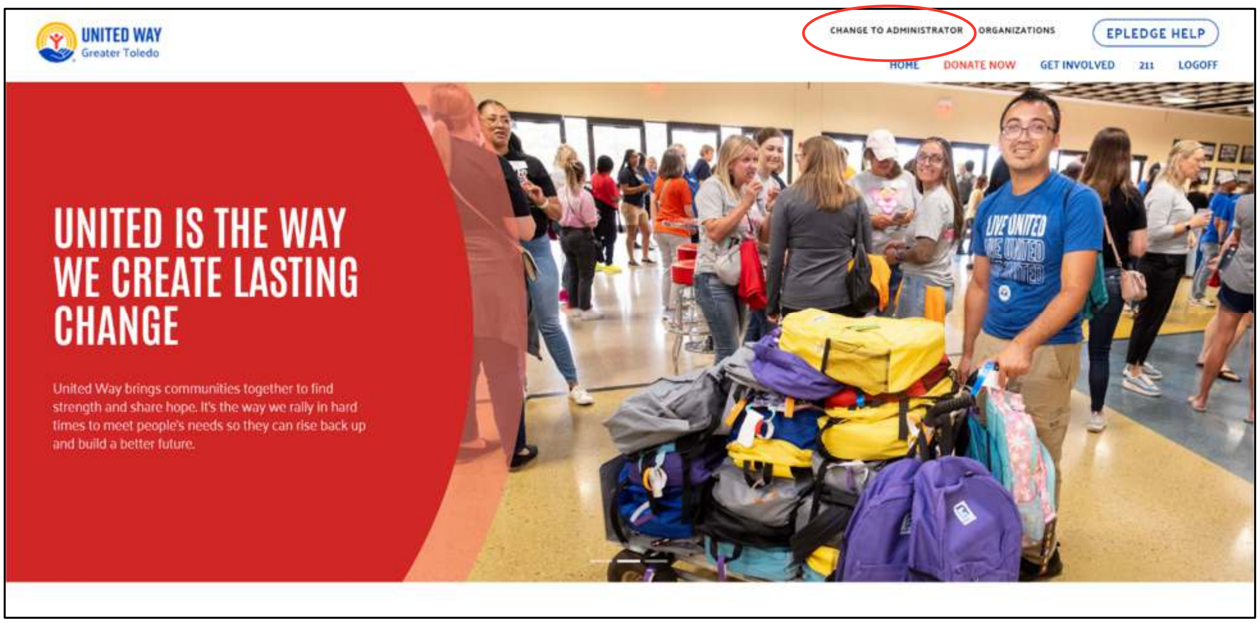
USING EPLEDGE AS AN ADMINISTRATOR

As an ePledge Administrator, you will be able to access a variety of information useful for your campaign. You will be able to quickly:

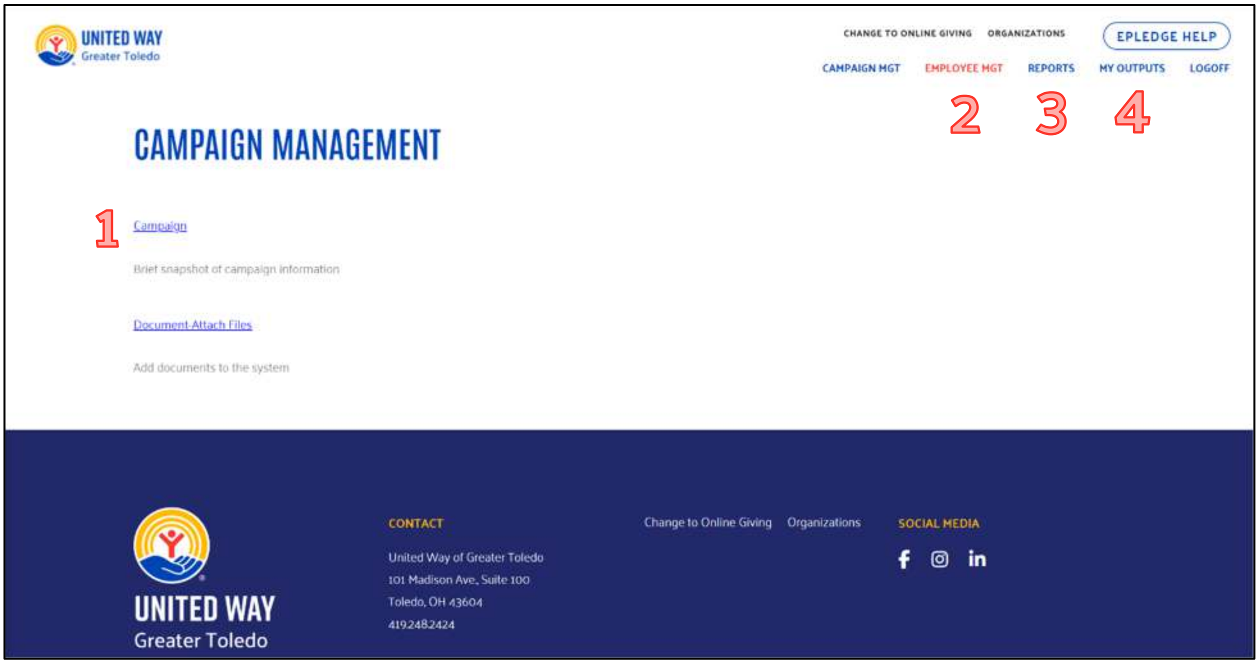
- See the general status of your campaign
- Run detailed reports that will give real time specific campaign information
- Search for specific donor information

Logging In

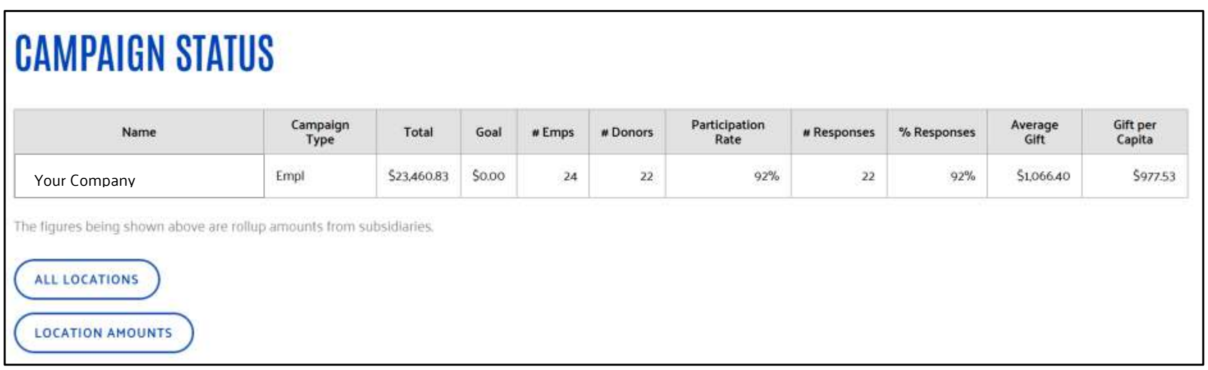
When you first log onto the site, you will automatically default to the *Donor* function. With this function, you can go through the pledge process and confirm your donation. When you want to perform your administrator functions, you must change your function to *Administrator* by selecting "Change to Administrator" at the top right corner of the screen.



Administrator Menu



1. Campaign - Clicking the "Campaign" link from the Administrator Homepage will provide a quick snapshot of your campaign (number of donors, campaign dollars, etc.)



CAMPAIGN STATUS

Name	Campaign Type	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita
Your Company	Empl	$23,460.83	$0.00	24	22	92%	22	92%	$1,066.40	$977.53

The figures being shown above are rollup amounts from subsidiaries.

ALL LOCATIONS

LOCATION AMOUNTS

2. Employee Management - This is for use in very specific situations. Work with your Development Officer if you have an employee that needs added. In most cases, UWGT Donor Services or our IT will manage any employee changes.

3. Reports - From the Reports tab, select one of the four most commonly used reports: Cash, Response, No Response & Transaction Reports. Reports run in the order they are submitted. Processing time depends on the number of reports. If there is any delay, your report will show as "Pending" until completed. After your report completes, ***outputs are accessible under the "My Outputs" tab.***

- **Cash Report** - List of donors giving by cash or check; can specify date range and other criteria.
- **Response Report** - This report will show all employees who have responded in the campaign, including those who have selected the "No Gift" transaction type (if applicable). You can choose whether to include pledge dollar amounts and whether to include non-respondents.
- **No Response Report** - This report will show all employees who have NOT responded at all. These are often employees that Campaign Managers might follow up with, to confirm whether they intend to give this year.
- **Transaction Report -** Summarizes results within the campaign; can specify date range and other criteria. Shows individual employees and their current year pledges, with total campaign dollars.

4. My Outputs - After a report completes, outputs are accessible under the "My Outputs" tab. Most recent reports are listed at the top. Remember to save your report to your files if you wish to have access for future reference, as you will no longer have access once your company ePledge Campaign closes.

How to Run a Report

Hover your cursor over "Reports" and select the report that you would like to run. See below for common fields and selections for each report type.

RESPONSE REPORT

Organization

United Way of Greater Toledo Employees - Company
1001 Madison Ave Ste 100
Toledo, Ohio 43604

United Way of Greater Toledo Employees
United Way of Greater Toledo Retirees

Select whether you want to review a report from your entire agency (select top file) or a subsidiary, if applicable.

Include Subsidiaries

Campaign Year: *Current Year

Transactions Created: From Sep 12 2024 To Sep

With Amounts: From -9999999999 To 999

Typically, leave the defaults for "Campaign Year," "Transactions Created," "With Amounts" and both "Select" options.

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

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

> Sort

Include Employees with Expired or No Relationship

Show Counts/Max/Min/Avg

Do not count any Special Event transaction as response

Show Pledge/Gift Amounts

Show Job Title

Override Previous Year Gift in PDF output with the value from Employee Relationship

Show only Fair share giving

Include Non-respondents

Include employees with response within Parent/Subsidiary Tree

In the "Sort" section, select what you'd like the report to include. You can select whether include Pledge/Gift amounts, job titles, and non-respondents, amont others.

Transaction Source: Both

Typically, "Transaction Source" can be left to defaults.

Show Report Type: Acrobat (PDF) Format

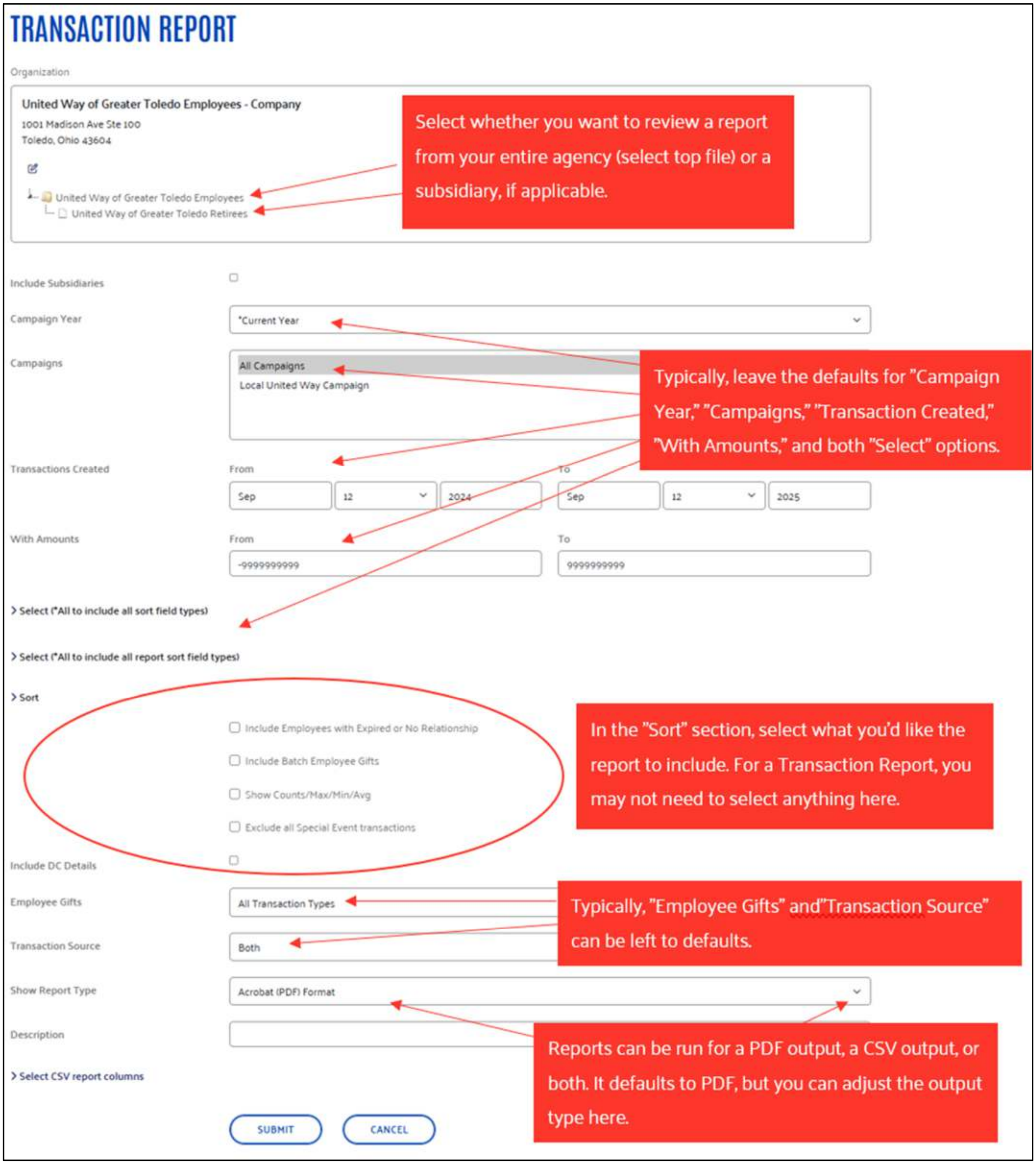
Description

> Select CSV report columns

SUBMIT CANCEL

Reports can be run for a PDF output, a CSV output, or both. It defaults to PDF, but you can adjust the output type here.


NO RESPONSE REPORT
Organization
United Way of Greater Toledo Employees - Company
1001 Madison Ave Ste 100
Toledo, Ohio 43604
United Way of Greater Toledo Employees
United Way of Greater Toledo Retirees
Select whether you want to review a report from your entire agency (select top file) or a subsidiary, if applicable.
Include Subsidiaries
Campaign Year
*Current Year
> Select (*All to include all sort field types)
> Select (*All to include all report sort field types)
Typically, leave the defaults for "Campaign Year," and both "Select" options.
> Sort
Include Employees with Expired or No Relationship
Show Counts/Max/Min/Avg
Do not count any Special Event transaction as response
In the "Sort" section, select what you'd like the report to include. For a No Response report, you may not need to select anything here.
Show Pledge/Gift Amounts
Show Employee User Defined Amounts (CSV report only)
Exclude employees with response within Parent/Subsidiary Tree
Transaction Source
Both
Typically, "Transaction Source" can be left to defaults.
Show Report Type
Acrobat (PDF) Format
Description
> Select CSV report columns
Reports can be run for a PDF output, a CSV output, or both. It defaults to PDF, but you can adjust the output type here.
SUBMIT
CANCEL


TRANSACTION REPORT
Organization
United Way of Greater Toledo Employees - Company
1001 Madison Ave Ste 100
Toledo, Ohio 43604
United Way of Greater Toledo Employees
United Way of Greater Toledo Retirees
Select whether you want to review a report from your entire agency (select top file) or a subsidiary, if applicable.
Include Subsidiaries
Campaign Year
*Current Year
Campaigns
All Campaigns
Local United Way Campaign
Typically, leave the defaults for "Campaign Year," "Campaigns," "Transaction Created," "With Amounts," and both "Select" options.
Transactions Created
From
Sep
12
2024
To
Sep
12
2025
With Amounts
From
-9999999999
To
9999999999
Select (*All to include all sort field types)
Select (*All to include all report sort field types)
Sort
Include Employees with Expired or No Relationship
Include Batch Employee Gifts
Show Counts/Max/Min/Avg
Exclude all Special Event transactions
In the "Sort" section, select what you'd like the report to include. For a Transaction Report, you may not need to select anything here.
Include DC Details
Employee Gifts
All Transaction Types
Transaction Source
Both
Typically, "Employee Gifts" and"Transaction Source" can be left to defaults.
Show Report Type
Acrobat (PDF) Format
Description
Select CSV report columns
Reports can be run for a PDF output, a CSV output, or both. It defaults to PDF, but you can adjust the output type here.
SUBMIT
CANCEL