EMPLOYEE CAMPAIGN LEADER: E-PLEDGE ADMINISTRATOR GUIDE

Thank you for leading the United Way Workplace Giving Campaign at your organization! This is a guide for the e-Pledge Administrator Portal which you have access to as an Employee Campaign Leader. In this portal, you can generate reports, view the current status of your campaign and add a pledge on behalf of an employee. We are here to help make sure you have a smooth and successful campaign. Please contact Mindy.Wright@unitedwaywinecountry.org with any questions or concerns anytime during your campaign.

LOGGING INTO E-PLEDGE

Your User ID and Password will be sent to you via email prior to the start of your campaign. Login to e-Pledge at: https://donate.unitedwaywinecountry.org/Begin.jsp

ACCESSING THE E-PLEDGE ADMINISTRATOR PORTAL

To access the e-Pledge Administrator portal from the Employee Donor portal, click “E-Pledge Administrator” in the top right corner.

To switch back to your Employee Donor portal from your e-Pledge Administrator portal, click on the same button in the top right (it will say “Employee Donor”).
UPDATING THE EMPLOYEE DONOR HOMEPAGE MESSAGE

Click the “e-Pledge Customization” tab to update the home page title and message that employees will see when they log into e-Pledge.

By default, the title is “Welcome to <Your Organization>’s Workplace Giving Campaign!”. If you wish to update this, just delete the text and add your own.

We encourage you to add a personalized and engaging message to employees. It will be displayed below the default United Way message and donor instructions on the Employee Donor portal home page.

VIEWING CURRENT CAMPAIGN STATUS

Click the “Status Of Your Campaign” tab to view your current total pledged, number of employees at your company, number of employee donors, percentage of participation, and average gift.
ADDING AN EMPLOYEE PLEDGE

1. Click the “Add Employee Pledge” tab to add a pledge on behalf of an employee at your organization. Here, you can also update an existing pledge, updated an employee’s contact information, and more.
2. Search the employee’s name in the Employee Search box, then add perform your desired action by clicking on the appropriate icon.
   - If there are no records found, click the “add” button and input the employee’s information.
   - Once you add the employee, search for their name again to perform your desire action.

3. When adding or updating an employee’s pledge, make sure the message “Entering Pledge for <Employee Name>” with the appropriate employee’s name is displayed.
GENERATING REPORTS

1. Click on the “Reports” tab to access the 3 reports you can generate to see real-time statistics about your campaign. Select the report you’d like to generate and click the “submit” button. The Employee Pledge Status Report is particularly useful for seeing which employees have yet to pledge. You can send a targeted email outreach to just these employees throughout the campaign.

2. Click the “Refresh” button until the status column says “ready”. Then click on the name of the report to save and open your report.