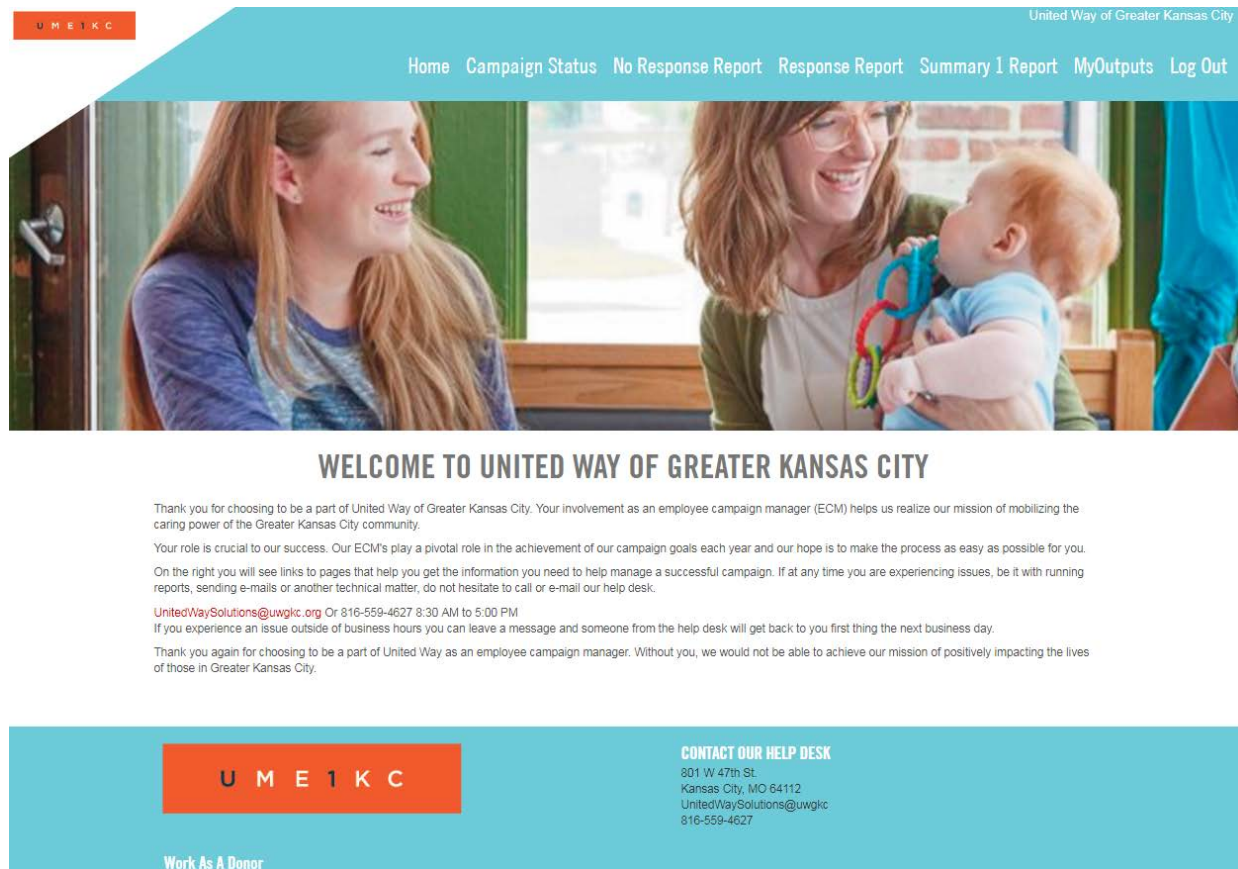
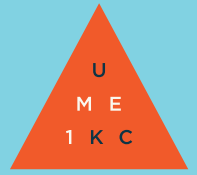


ECMs have administrative access to ePledge for the company’s campaign via a link titled “ePledge Administrator” on the bottom left of each page. Below is a screen shot of the administrative site’s Home Page. Links at the top of the Home Page provide access to view the campaign status and run reports. Reports are submitted to the system and executed in the order they were submitted. The reports may also be requested from the Help Desk at UnitedWaySolutions@uwgkc.org or 816-559-4627.



Sample page using messaging from United Way of Greater Kansas City’s 2017 Campaign



Campaign Status

Provides a real-time summary of the campaign, with total pledge amount and number of donors.

United Way of Greater Kansas City

Home Campaign Status No Response Report Response Report Summary 1 Report MyOutputs Log Out

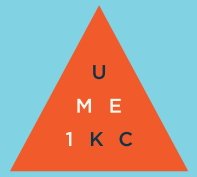
Campaign Status

Name	Campaign Type	Total	Goal	# Emps	# Donors	Participation Rate	# Responses	% Responses	Average Gift	Gift per Capita
ePledge Test Account	Emp	\$2,651.00	\$0.00	0	2	0%	2	0%	\$1,325.50	\$0.00

CONTACT OUR HELP DESK
801 W 47th St
Kansas City, MO 64112
UnitedWaySolutions@uwgkc
816-555-4827

Work As A Donor Additional Organizations

Sample page using messaging from United Way of Greater Kansas City's 2017 Campaign



No Response Report

This report details the company employees who have not responded this year with a pledge decision, yes or no. If last year's gift was loaded into the system, it is displayed. If the report is requested in spreadsheet (CSV) format, the data can then be sorted by last year's gift (largest to smallest) and used as a follow-up tool. Once a report is submitted, go to MyOutputs to view the report.

No Response Report

Organization

ePledge Test Account - Company

open all | close all

ePledge Test Account - Company

Include Subsidiaries

Campaign Year

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

Sort

Include Employees with Expired or No Relationship

Show Counts/Max/Min/Avg

Show Employee ID

Show Pledge/Gift Amounts

Show Employee User Defined Amounts (CSV report only)

Exclude employees with response within Parent/Subsidiary Tree

Transaction Source

Show Report Type

Description

Select CSV report columns [Show](#)

Sample page using messaging from United Way of Greater Kansas City's 2017 Campaign



Response Report

This report details the current year and previous year total gift for each respondent. The data is sorted by donor name, with a grand total. This report lists all who made a pledge decision, including “no donation.” If this report is requested in spreadsheet (CSV) format, the report also details department, transaction date and time. This can be helpful when you need to isolate people who gave in a specific time period (e.g. raffles). Once a report is submitted, go to MyOutputs to view the report.

Response Report

Organization
ePledge Test Account - Company

open all | close all
 ePledge Test Account - Company

Include Subsidiaries

Campaign Year

Transactions Created

From

To

With Amounts

From

To

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

Sort

Include Employees with Expired or No Relationship

Show Counts/Max/Min/Avg

Show Employee ID

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

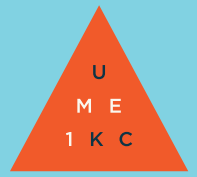
Include employees with response within Parent/Subsidiary Tree

Transaction Source

Show Report Type

Description

Select CSV report columns [Show](#)



Summary 1 Report

This report provides summary information for the campaign. If the “Show Prior Year Amount” box is checked, the report provides a comparison of this year’s campaign to last year’s campaign. Once a report is submitted, go to MyOutputs to view the report.

Summary Report 1

Organization
ePledge Test Account - Company

open all | close all
 ePledge Test Account - Company

Include Subsidiaries

Campaign Year

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

Sort

Include Employees with Expired or No Relationship

Show Counts/Max/Min/Avg

Get Number of Employees from the Population at Employee Info

Show Prior Year Amount

Exclude records with no response in the selected year

Show Report Type

Description

Select CSV report columns [Show](#)

Sample page using messaging from United Way of Greater Kansas City’s 2017 Campaign



My Outputs

After a report is requested, click MyOutputs to view the report. For the report you wish to view, verify the status = “Ready.” If not “Ready,” click Refresh until the Status = “Ready.” Click on the report you wish to view.

My Outputs

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

<input type="checkbox"/>	Names / Job / Description / Date	#Pages	Type	Size	Status
<input type="checkbox"/>	ePledge Test Account - Pledge No Response Report No Response Report 05/31/2017 12:35:38 PM	1	pdf	5397	Ready

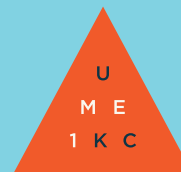
Sample page using messaging from United Way of Greater Kansas City's 2017 Campaign



ABC Company - Pledge No Response Report

Employee Name Sort Field 1/Sort Field 2/Sort Field 3/Sort Field 4/Sort Field 5	Employee ID	Co-ordinator	Prv. Yr. Gift
Vanessa	672919		\$260.00
Natalie	677918		\$1,800.00
Derric	671450		\$0.00
Jabria	668829		\$144.30
Paul	673182		\$0.00
Elizabeth	674855		\$676.00
Kegon	676187		\$156.00
Myra	618760		\$156.00
			\$15,993.16

*** This report can also be generated in Excel (CSV format) allowing you to sort the data to your own specifications.*

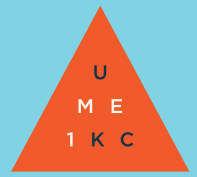


ePledge Toolkit : Administration Functions for ECMs

ABC Company - Pledge Response Report

Employee Name Employee ID Sort Field 1/Sort Field 2/Sort Field 3/Sort Field 4/Sort Field 5/Co-ordinator	Co-ordinator	Previous Year Total Gift	Current Year Total Gift	Gift in Date Range	Suggested Gift	Increase/ (Decrease)
Ramirez, Carlos Individual	623189	\$2,400.00	\$2,400.00	\$2,400.00	\$0.00	\$0.00
Williams, Lisa Individual	676216	\$144.00	\$192.00	\$192.00	\$0.00	\$48.00
Wilson, Thomas Individual	624801	\$900.00	\$1,200.00	\$1,200.00	\$0.00	\$300.00
Young, Steven Individual	631007	\$10,000.00	\$15,000.00	\$15,000.00	\$0.00	\$5,000.00
Zimmer, Dayana Individual	674551	\$0.00	\$78.00	\$78.00	\$0.00	\$78.00
Total Amounts		\$31,289.84	\$51,610.62	\$51,610.62	\$2,133.92	\$20,320.78

*** This report can also be generated in Excel (CSV format) allowing you to sort the data to your own specifications.*



ABC Company - Pledge Summary Report 1

Sort Field 1/Sort Field 2/Sort Field 3/Sort Field 4/Sort Field 5

2017 #Emps	2017 #Resp	2017 %Resp	\$	#Givers	%Part	----- 2016 -----		\$Change+/-	% Chg +/-	\$	#Givers	%Part	----- 2017 -----		Sug SGG#	Giving SGG\$	SGG Avg
						Avg Gift	Per Cap						Avg Gift	Per Cap			
Individual																	
632	285	45.1%	\$47,283.00	177	28.0%	\$267.14	\$74.81	\$4,327.62	9.2%	\$51,610.62	285	45.1%	\$181.09	\$81.66	138	\$37,035.86	\$268.38
Totals																	
632	285	45.1%	\$47,283.00	177	28.0%	\$267.14	\$74.81	\$4,327.62	9.2%	\$51,610.62	285	45.1%	\$181.09	\$81.66	138	\$37,035.86	\$268.38

The Previous Year %Part & Per Cap are calculated based on this year's # Employees. They do not necessarily equal the figures on last year's report.