



UNITED WAY OF GREENVILLE COUNTY

**WE ARE
STRONGER UNITED**

2020 Ignite Portals

(formerly Workplace Giving Portals)

Campaign Coordinator's User Guide

Table of Contents

Prior to running your campaign electronically:

- Electronic Campaign Checklist Page 3

Understanding the Donor Experience:

- Email Templates Page 4
- Login Security and Privacy Page 5
- How to pledge Page 5-6
- How to designate Page 6-7
- How to opt out Page 8

The Campaign Coordinators Role:

- Accessing the Dashboard Page 9
- How to manually pledge for an employee Page 10
- Submit Cash/Check Payments to United Way

Reporting

Page 11-12

Electronic Campaign Checklist for Campaign Coordinators

3 weeks prior

- **Communicate your Kickoff Date to your United Way Staff Contact**
- **Submit Employee Roster in Excel Format**
This spreadsheet will be emailed to you to properly fill in the columns
****You must complete in format provided and complete below fields – this will ensure that the spreadsheet can be imported****
 - Employee ID (email address or employee ID; this must be unique to the individual)
 - First Name
 - Last Name
 - Username (usually email address)
 - Email Address
 - Default Pay Period (12,24, 36)
 - Home Address

2 weeks prior

- **Set a Campaign Goal**
Communicate Goal for the campaign to United Way staff so we can properly update the thermometer on the site.
- **Provide Company Logo – only applicable if setting up first time campaign or have a new logo**
A high quality official corporate logo
File Type- .png preferred file type .gif or .jpg accepted file types
Image Size- 40 pixels high x 330 pixels wide
- **Get approval of communication plan (if applicable) from CEO – submit back to UW Staff contact**
****These emails will be provided by the Relationship Manager****

1 week prior

- **Check your Email Server**
Please check with your IT Department that the following IP address is added to your existing WHITELIST. If this is not done the kickoff email may be blocked. **198.37.149.123**
****Users will now be required to set their unique password after verifying their email address. Please test prior to campaign kickoff****
- **Test Email Communication with United Way and walk through Workplace Giving site**

Understanding the Donor Experience

Email Templates

To ensure your experience as a Campaign Coordinator is successful, UWGC has prepared several email templates in advance for you and your company.

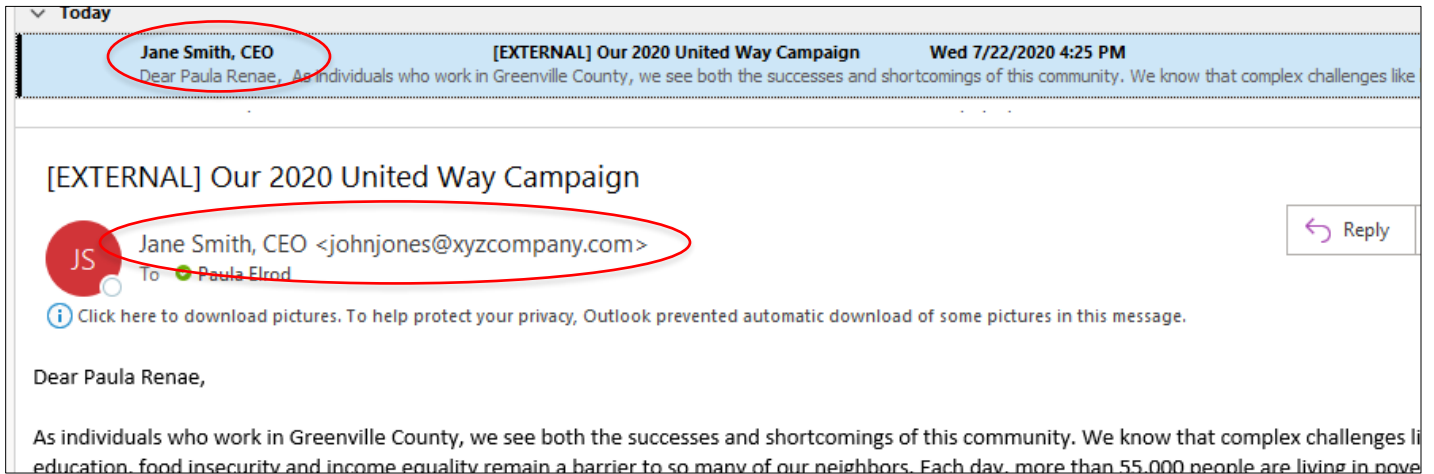
We have provided the following emails (your Relationship Manager at UWGC will provide to you – or you can access from the Toolkit on our website):

- Kickoff Email (2 versions to choose from)
- Follow-up Reminder Email
- Last Chance Reminder Email
- Thank You Email

Each email will have a hyperlink to your unique company’s giving site – this enables the employee to give. We are providing the wording for you – all you need to do is tell us when to send your emails and who they should “appear” to come from. Our email system allows us to send on behalf of someone else and even have the reply emails go to a different person. To elaborate, consider this example:

Jane Smith is the CEO of XYZ Company
John Jones is the 2020 Campaign Coordinator for XYZ Company

John and Jane have decided their campaign kick off email should be delivered on July 22 at 4:25 pm because this is when their virtual campaign meeting will take place. Because Jane is the CEO she would like the email to go to all the employees from her – but she’s very busy and has asked that John take care of any responses and questions from their employees. Here is how it will look in an employee’s email inbox:



Understanding The Donor Experience

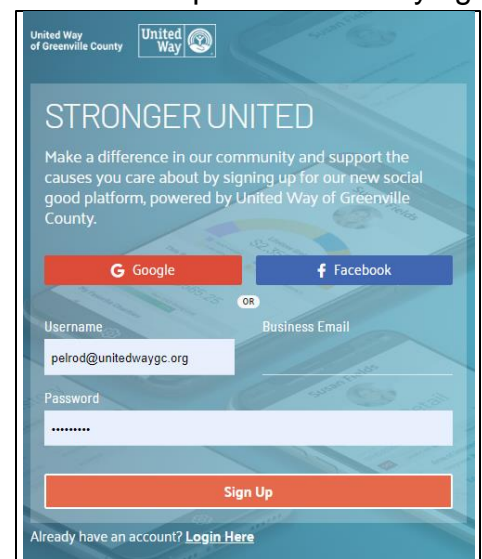
Login Security and Privacy

The privacy and security of donor information provided by companies and employees participating in online workplace campaigns are a top priority for United Way of Greenville County. It is paramount to ensure companies and employees trust their personal information is safe and secure.

Upon entering a workplace portal site, each employee must login. To ensure proper login security, we have upgraded security protocol and will support the following method of login credentials going forward:

Identity: This method is a secure identity provider that allows the user to create their own account profile like they would do with any other password-protected website. This method follows industry best practices by ensuring passwords meet certain strength requirements as well as verifying the user's email address associated with their account. This method also supports two-factor authentication if the user deems necessary. Once the user creates this account, they do not need to do it again in future campaign seasons. They can always use "Forgot Password" option to reset their password. Verifying the user's email address is a one-time occurrence—this year only.

A user will see the screen pictured at right to create their account and login to the Company Workplace Giving site.

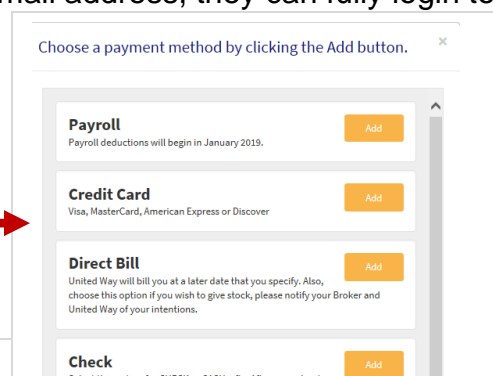


Understanding The Donor Experience

How to Pledge

After a user creates their profile and verifies their email address, they can fully login to the site. Instructions to pledge:

- Click the "Give Now" Button
- Choose your method of payment
- Go through the Pledging Process



- Choose your “Investment Options”
- Click Continue
- Choose your Recognition Categories
- Click Continue
- Review/Confirm/Complete your Donor Profile

Donor Profile

Work Email Address
Preferred Email

Profile Information

Prefix

First Name

Middle Name

Last Name

Suffix

Home Phone

Work Phone

Cell Phone

Home Email

Job Title

Gender

Ethnicity

PAULA RENAE United Way of Greenville County United Way HOME GIVE ABOUT OUR WORK 2020 V

1 2 INVESTMENTS 3 4 5

Investment Options

Select how to invest your contribution below

\$2,100.00

Sometimes we all need a hand. That's the United Way and we are STRONGER UNITED.

United Way of Greenville County

Education

Financial Stability

Vibrant & Equitable Communities

- Click Continue
- Review your gift and click “Finish” to complete your gift
- Once completed, the donor will receive a confirmation email.



Understanding The Donor Experience

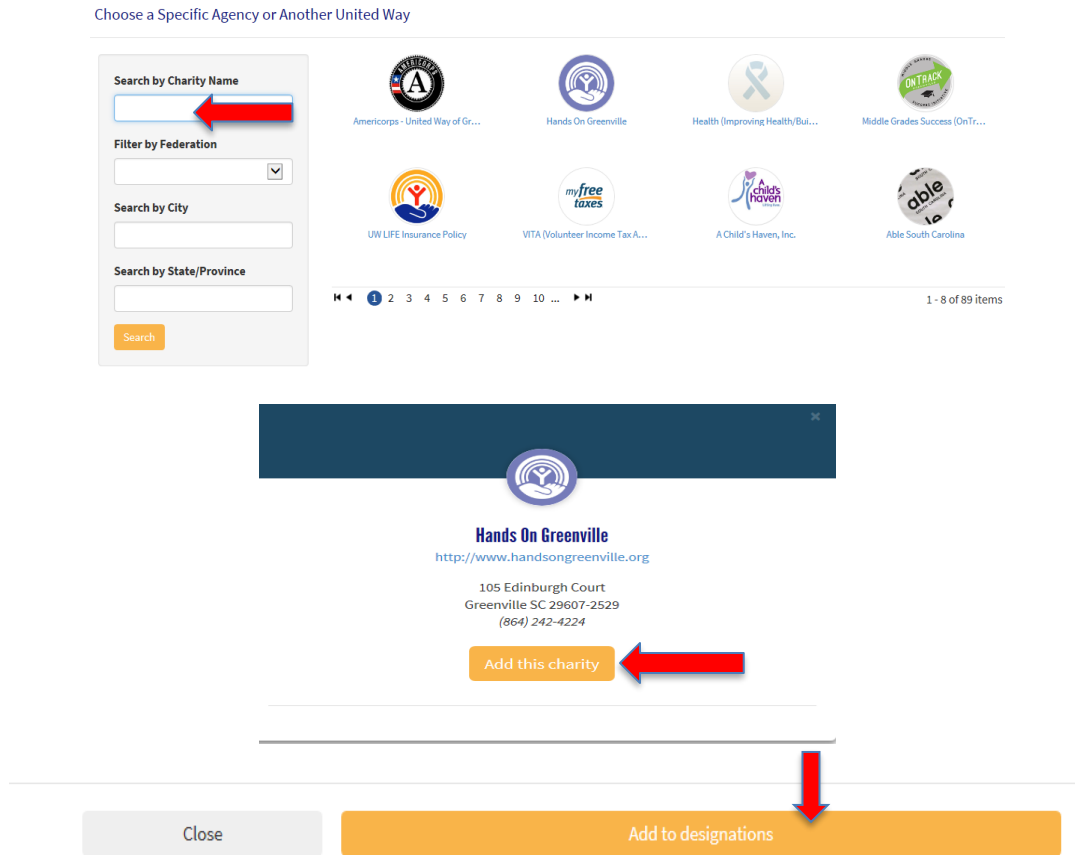
How to Designate

After you choose the amount you would like to give, you can decide where you want your gift to go. You can select United Way of Greenville County or one of the impact areas (Education, Financial Stability, Vibrant & Equitable Communities). If you are searching for a specific agency, select “Find a Charity”.

Click the Continue Button to advance to the next section. Your pledge is not yet recorded.



- Search for the agency in the Name field. Click the logo of the agency and click “add this charity”. Click “Add to designations”. If you do not see the agency you are looking for and you know it is eligible to receive designations, type “Write-In” in the name field. Click the “write-in” logo and fill out the required information, save the write in and click “Add to designations”.



- If you do not see the agency you are looking for and you know it is eligible to receive designations, type “Write-In” in the name field. Click the “write-in” logo and fill out the required information, save the write in and click “Add to designations”. You must designate a minimum of \$25 to external charities.

The search interface includes a 'Search by Charity Name' section with a text input field containing 'write-in' and a red arrow pointing to it. Below this is a 'Filter by Federation' dropdown menu. Further down are 'Search by City' and 'Search by State/Province' text input fields, followed by an orange 'Search' button. To the right of the search fields is a 'Write-In' icon and a pagination control showing '1'.

Selected Charities (If you cannot find an agency choose "Write-In" to add it)

The 'Charity Write-In' form contains several input fields: Name, Phone Number, Web Site URL, EIN, Street Address, City, State/Province, and Postal Code. At the bottom right of the form is an orange 'Save Write-In' button with a red arrow pointing to it, and a 'Close' button to its left.

- Click "Save Write-In". You will see the charity you listed. Click "add to designations"

This section shows two buttons: a grey 'Close' button on the left and an orange 'Add to designations' button on the right. A red arrow points to the 'Add to designations' button.

Understanding The Donor Experience

How to Opt Out

To "Opt Out" of the United Way campaign means the employee does not want to make a pledge to the current campaign. By doing so, that employee will not receive any future emails targeting non respondents. If, at anytime during the campaign the employee changes his or her mind, they can log back into the donor site and make a pledge. To Opt Out, follow these instructions:

- Click on "Click to Give Now"
- From the next screen, select "I am opting out"; and then confirm this is your intent

The payment method selection screen has a title 'Choose a payment method by clicking the Add button.' and a list of options: Payroll, Credit Card, Direct Bill, and Check. Each option has an orange 'Add' button. At the bottom of the screen is a grey button labeled 'I am opting out' with a red arrow pointing to it, and a 'Close' button to its right.

The Campaign Coordinator's Role

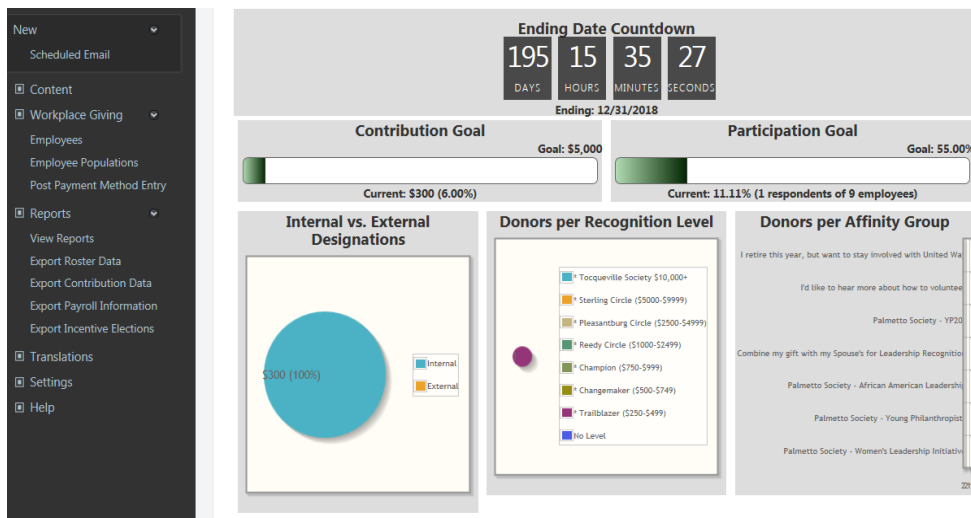
Accessing the Dashboard

As a Campaign Coordinator, you have access to see how your company is doing throughout the campaign.

- Login to the donor site with your user credentials
- In the top right corner of the home page, click the down arrow and select the **Dashboard** link



- The Dashboard page gives you a summary of the overall campaign:

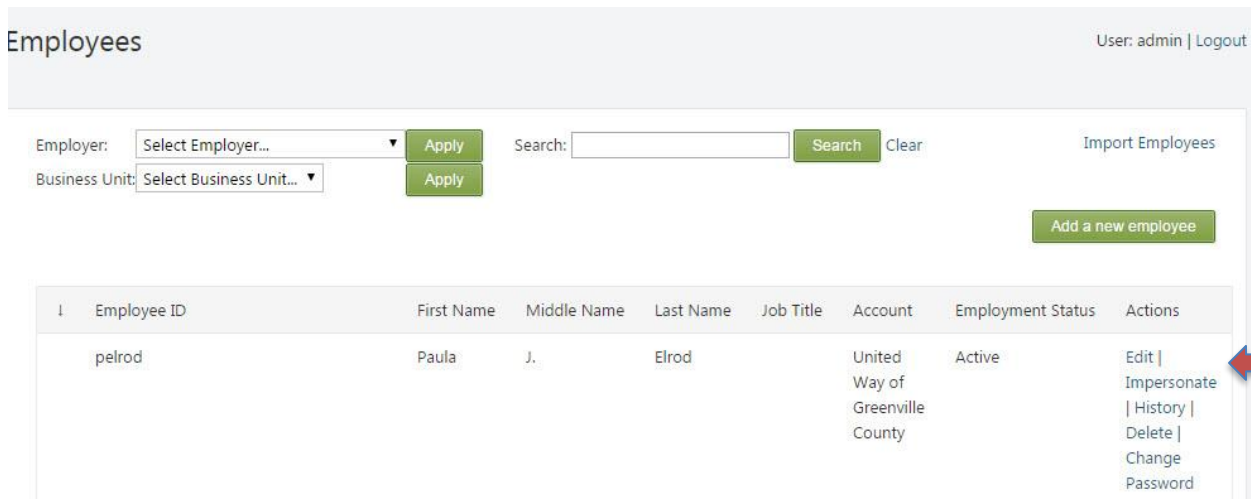
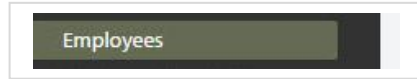


The Campaign Coordinator's Role

How to manually pledge for a donor

If you receive an email or if a donor tells you to enter their pledge for them, you will need to manually enter all pledges into the WGP. To do this:

- Login to the donor site and Access the Dashboard using YOUR credentials
- Click “Employees” on the left navigation bar
- Search for an employee and click “Impersonate”

A screenshot of a web application interface titled "Employees". At the top right, it says "User: admin | Logout". Below the title, there are search filters for "Employer:" and "Business Unit:" with dropdown menus and "Apply" buttons. A "Search:" field with a "Search" button and a "Clear" link is also present. An "Import Employees" link and an "Add a new employee" button are on the right. The main content is a table with columns: Employee ID, First Name, Middle Name, Last Name, Job Title, Account, Employment Status, and Actions. The first row shows an employee with ID "pelrod", First Name "Paula", Middle Name "J.", Last Name "Elrod", Job Title "United Way of Greenville County", and Employment Status "Active". The Actions column for this employee contains a list of links: "Edit | Impersonate | History | Delete | Change Password". A red arrow points to the "Impersonate" link.

- Complete the pledge process for the employee
- Ensure the pledge is complete by seeing the “Thank You” page.

The Campaign Coordinator's Role

Submit Cash and Check Payments to United Way

If any of your employees choose to give through cash and/or check, they will be prompted to submit their payment to their campaign coordinator. When you are ready to submit any payments to United Way, you will need to follow these steps:

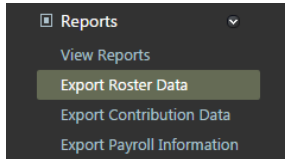
- Go to your Dashboard and click “View Reports”
- Run the “Check Payment” Report
- Compare the names on the report to those that have given you payment.
- If you have payment from an employee and do NOT see their pledge in the portal, follow the steps to manually enter the pledge for them
- Complete the Electronic Workplace Giving Cash and Check Payments Form and enclose the completed form and all payments in the Electronic Workplace Giving Report Envelope.

Reporting

Dashboard views show goal, \$ raised to date, # donors, designation information and affinity group stats.

Other reports and exports available through the dashboard:

- **Export Roster Data** – Previous year and current year \$'s, Non respondents and Incomplete pledges



- To access Reports, select “View Reports” from the left navigation bar. The Reports available for you to run are pictured below:

Portal reports: Click run for the report you want to view

Report Name	Description	Actions
Check Payment	Detail of Check Payment status by Employee	Run
Business Unit Summary	Summary of Business Unit Data by the selected level(s)	Run
Business Unit Summary with Response Status	Summary of Business Unit Data with Employee Response Status detail	Run
Designation Report	A summary report of giving by dollars by designation.	Run

Check Payment – (choose campaign period 2020)

Each employee who has submitted a cash or check pledge will appear on this report. This will help you manage who you need to receive payments from for these pledges.

Business Unit Summary – (choose campaign period 2020) By Business unit if applicable. Suggested giving amount, current year gift, previous year gift, if a new donor and incomplete contributions.

Business Unit Summary Report

Data As Of: 6/18/2018 3:19:01 PM

#Emp	Curr # Resp	Curr % Resp	Outstanding Givers	Prev Total Gift	Prev # Givers	Prev % Part	Prev Avg Gift	Prev Per Emp	\$ Change Diff	% Change Diff	Curr Total Gift	Curr #Givers	New Givers	Curr % Part	Curr Avg Gift
Totals															
9	0	0.0%	1	\$1,947.00	1	11.1%	\$1,947.00	\$216.33	(\$1,947.00)	-100.0%	\$0.00	0	0	0.0%	\$0.00

Business Unit Summary with Response Status – (choose campaign period 2020)

- Company Summary – Yes =summary, No= Summary by business unit (if applicable).
- Filter by respondents, non-respondents or ALL

Individual donor dollar amounts are not shown on this report. This is a great report to share with Campaign Committee members who are helping you follow up with employees who have not yet responded.

Business Unit Response No Response

Data As Of: 6/18/2018 2:37:46 PM

Organization Name: United Way of Greenville County

#Emp	Curr # Resp	Curr % Resp	Outstanding Givers	Prev Total Gift	Prev # Givers	Prev % Part	Prev Avg Gift	Prev Per Emp	\$ Change Diff	% Change Diff	Curr Total Gift	Curr #Givers	New Givers	Curr % Part	Curr Avg Gift
** No Business Units															
9	0	0.0%	1	\$1,947.00	1	11.1%	\$1,947.00	\$216.33	(\$1,947.00)	-100.0%	\$0.00	0	0	0.0%	\$0.00
Totals															
9	0	0.0%	1	\$1,947.00	1	11.1%	\$1,947.00	\$216.33	(\$1,947.00)	-100.0%	\$0.00	0	0	0.0%	\$0.00

Last Name	First Name	Middle	Business Unit 1	Business Unit 2	Business Unit 3	Email Address
LastName	NewDonor	M				plachica@unitedwaygc.org
LastName	PreviousDonor	M.				pelrod@unitedwaygc.org
TestLastName	Chris	M.				
TestLastName	Lee Anne	M.				
TestLastName	Meghan	M.				
TestLastName	Meredith	M.				
TestLastName	Mike	M.				
TestLastName	Nicole	M.				
Van De Voorde	Greg	M.				gvandevoorde@unitedwaygc.org