WE FIGHT FOR A STRONGER MIAMI

WE FIGHT FOR YOU

United Way of Miami-Dade

Welcome to ePledge. Let's get started!

First, we'll need a few things...

In order to get your ePledge site set up, provide us with your employees' information prior to your campaign kickoff. Use timeframes below as a guide

Six weeks prior to your campaign

Organize an Excel spreadsheet containing:

- Email address for each employee*
- Unique employee ID, not SSN*
- First, middle initial, last name of each employee*
- Employee birthday
- Gender for each employee

** indicates a required field*

Four weeks prior to your campaign

Submit the following:

- Website and email messages – select from our library of pre-crafted message options
- Photo of your CEO or other photo you would like to feature
- High resolution company logo (100 pixels high by 290 pixels wide in either .jpg or .gif format)

Two weeks prior to your campaign

- Review messaging and branding of your site and request any final changes
- Test functionality of site

One week prior to your campaign

- Changes are complete and your site is ready to launch

3-2-1 Launch!

From connecting with employees through email to tracking payments received, here go a few helpful tips to follow during your campaign:

Reminders

Select from a library of United Way of Miami-Dade pre-crafted e-mails and send reminder emails to your employees at your discretion. Please coordinate with United Way staff to ensure that they are distributed according to your specifications. The emails can appear to come from someone internal, and you can choose to send to all employees or to those employees who have not yet made a pledge.

Track progress

You can generate reports at any time that will allow you to see the status of the campaign. Also, when you receive a cash or check payment from an employee, use the ePledge site to mark that you received the payment. Using the site to track payments received will allow you to run a cash report at the end of the campaign identifying individuals who have not submitted their payments.

Provide technical support

As an administrator, you will have the ability to:

- Resend e-mails that have been lost or deleted
- Enter pledges for employees who either have no internet access or are uncomfortable using the ePledge site themselves
- Delete or adjust pledges for employees who want to change their donation
- Generate reports showing the current status of your campaign

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Welcome to ePledge. Let's get started! (CONTINUED)

United Way of Miami-Dade

Congratulations! You did it. Now what?

Record all pledges
If you received any pledge cards that were not already entered into the ePledge site, please enter them into the system.

Collect cash and checks
Generate a report using the ePledge reporting features. Use the report to identify individuals who have not turned in their payment. Collect all outstanding payments.

Special events
Collect any money from special events. This needs to be kept separate from any cash and check payments intended to pay for pledges because federal law dictates that we report these amounts differently for tax purposes.

Finalize
Run final reports and compare totals with cash/checks received. Contact your United Way development officer to arrange for pickup of cash/checks.

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