

## Online donations made easy. Start e-Pledge today!

e-Pledge is a web-based portal that supports your existing United Way Workplace Campaign. This portal allows employees to donate online, allowing you to decrease or even eliminate the need to distribute, collect, and process paper pledge forms. This secure online interface allows communication directly to your employees, and provides real-time donation tracking.

The e-Pledge online giving portal is easy to use, and assistance by your United Way staff will be available to you throughout your campaign.

### What are the benefits?

- Decreases or even eliminates the need for paper pledge forms, saving time, paper and the environment
- Increases accuracy and confidentiality of donor information
- Donor can view past giving, update their information and submit their pledge directly
- Online donations are processed automatically, with receipts for credit card gifts emailed directly to donor and a payroll report generated for Human Resources
- Can generate a report of employee gifts for incentive draws and status updates
- Targets reminder emails to those who have not responded yet

### What is required?

- Employee information 3 weeks prior to campaign kick-off including employee first name, last name, email address, employee type (employee or retiree), and ideally employee ID, and number of pay periods
- Internet access for employees
- Online portal training for your committee and e-Pledge Administrator
- Continued efforts in canvassing employees and sharing communication about the United Way and the e-Pledge tool as an option for pledging

### Our Commitment

- To work with you to ensure the smoothest possible implementation of online giving in your workplace
- To provide training and support to employees involved in administering the tool
- To maintain the confidentiality of all employee information shared with us

Workplace campaigns are integral to creating lasting community change and a community where everyone matters. For all of your dedication and support, *allow us to thank you by providing an innovative and easy campaign experience for you and your employees.*

For more information, please contact [ePledge@uwaywrc.ca](mailto:ePledge@uwaywrc.ca) or 519-888-6100 x253

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## e-Pledge Self-Registration Process

In most cases your workplace will automatically provide you with a login email to directly access your personal online giving page. However, some workplaces may prefer you self-register.

To self-register click on the link provided by your workplace. For example:  
<https://ecommunity.uwaywrc.ca/Companyxyz>

When accessing your organization's registration page, you will be required to:

- Enter in an email address.
- Enter in the verification code.
  - If United Way's system has found an account match based on the email you provided, you will not be required to provide anymore information.
  - If it did not find a match, you will be required to create an account.

### Staff Online Giving Login

Please enter your work email address.

If you previously given a gift connected to this email address, after hitting "Continue" you will be sent a registration confirmation email with a link to sign into your online giving account.

If we don't have a record of your email address, you will be asked to complete a simple registration form and click "Continue". You will be logged directly into your new account and you are ready to make a donation!

\* Individual Work Email

Items marked with an asterisk (\*) are required

Verification code



Enter code

### \*Please Note:

- For individuals creating a new account, once completed you will be directly logged into your online giving page. No further action is required.
- Individuals who already have an account, please continue reading the instructions.
- Upon clicking "Continue", you will then be taken to a page indicating an email has been sent to the email address you provided to confirm your identity.
- Email will come from [ePledge@uwaywrc.ca](mailto:ePledge@uwaywrc.ca) with the subject line "Registration Confirmation".
- Click "Confirm" to confirm your identity.
- You will then be taken to your personal online giving page.

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# e-Pledge Instructions

## Log In

Click the link in your login email and, if prompted, enter your User Id and password. Most workplaces use employee emails as User Id and employee identification numbers as passwords.

If you are self-registering, or did not receive a login email, visit your workplace self-registration link which will resemble the following: <https://ecomunity.uwaywrc.ca/CompanyXYZ>. Enter your work email and the verification code.

You may receive a confirmation of identity email if you have used this email address in the past. If you have never provided your email address before, you will immediately be logged into your new account.

## Pledge

Click on the “Pledge” menu option at the top of the page to begin your donation.

### 1. Select Pledge Type

- Select how you’d like to make your gift (Credit Card One-Time Gift, Credit Card Monthly Gift, Payroll Deduction, Cash, Cheque). Options may vary depending on your workplace.

### 2. Enter Pledge Amount

- Credit Card One-Time Gift – enter the Total Annual Gift Amount you wish to give.
- Credit Card Monthly Gift – enter the Total Annual Gift Amount you wish to give (your donation will be divided into 12 equal payments and will occur on the 15<sup>th</sup> of every month).
- Payroll Deduction – enter the Total Annual Pledge you wish to give. Select the proper number of pay periods if it is not automatically populated.
- Cash – enter the Total Annual Gift Amount you wish to give.
- Cheque – enter the Total Annual Gift Amount you wish to give, the date of the cheque and the cheque number.
- Do you wish to designate your donation (OPTIONAL)? (\$100 minimum). If no, please leave the box empty and click “Next” to proceed to pledge Verification page (refer to step 4).
- Click “Next”.

### 3. Designations (Optional)

Donors have the additional option to designate some or all of their donation to a Canadian charity outside the local United Way network of supported charitable agencies (Listed here:

<http://www.uwaywrc.ca/what-we-do/current-partners-investments/> . United Way network of agencies is in great need right here locally. Please consider keeping your donation 100% local.

Note: Designated gifts must be a minimum of \$100 and a \$12 administration fee will be deducted from each designated donation.

- Click "Write In".
- Fill in the amount you wish to designate.
- Enter in the Agency name.
- Enter in the city in which the Agency is located.
- Enter in the Canadian Registered Charitable Number.
- Click "Add".
- Repeat if you wish to make more than one designation (maximum 3).
- Click "Next".

#### 4. Verification

- Verify your personal information.
- Select if you would like to receive your tax receipt via email.
- Select if you would like your gift to be recognized jointly with your partner's gift.
- Click "Next".

#### 5. Finished

- Review your donation and click "Confirm". If giving by credit card, you will be directed to a secure banking page. Please confirm your billing information, provide payment details and click "Submit".
- A confirmation email will be sent outlining your gift details.
- If you selected a cash or cheque donation, please print the confirmation email and submit it with your donation to your Canvasser.

### Log Off

Click Log Off along the upper menu to securely leave the system once your pledge is complete.

Note: Please use the e-Pledge system provided navigation buttons only. Do not use your computer browser's "back" button (top left) while completing your donation.

For more information, please contact [ePledge@uwaywrc.ca](mailto:ePledge@uwaywrc.ca) or 519-888-6100 x253

iamtheone.ca



@unitedwaywrc

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# e-Pledge Setup Agreement

Please provide the following information and consent for the setup of online giving as part of your United Way Workplace Campaign.

Contact Information	
Organization:	
Employee Campaign Manager:	Email:
E-Pledge Administrator:	Email:
E-Pledge Administrator:	Email:
HR/Payroll:	Email:
Training Dates	
e-Pledge Admin/Payroll Training:	Location:
Committee Training Date/Time:	Location:
Campaign Dates	
Campaign Launch:	Campaign End:
e-Pledge Launch Email:	e-Pledge End Email:
Reminder Email 1:	Reminder Email 2:

**Privacy Statement**

United Way Waterloo Region Communities is committed to protecting the privacy of your employees. The employee information provided for setting up online giving will be used to solicit your employees as part of your workplace campaign, acknowledge and recognize gifts, process and receipt donations and share information about United Way. An employee can unsubscribe at any time by clicking the unsubscribe button present on all of our communications. United Way does not sell or lease personal information.

**By agreeing to implement employee online giving as a part of your United Way Workplace Campaign, you consent to the use of employee information, as provided by your workplace, to solicit employees for your workplace campaign.**

- Names   
  Emails   
  Emp IDs   
  Pay Periods   
  Employee Type (Employee or Retiree)

\_\_\_\_\_  
Signature – I have the authority to bind the organization      Date

\_\_\_\_\_  
Name (Please Print)      Title

Please provide the following information to [ePledge@uwaywrc.ca](mailto:ePledge@uwaywrc.ca) *no less than 3 weeks before your campaign begins* to setup your e-Pledge website for your employees.

**Employee Data File** - A template of the file will be provided.

- e-Pledge Admin will upload through the "Documents" page.
- Will email it to [ePledge@uwaywrc.ca](mailto:ePledge@uwaywrc.ca)

**Company Logo** – to be displayed on e-Pledge landing page

- Yes – will send a jpg or png file, no larger than 400x400 pixels
- No

**Fundraising Goals** – have you set goals for the campaign?

- Financial - \$\_\_\_\_\_
- Participation - \_\_\_\_\_%

**Campaign Thermometer**

- Yes - Please display on Employee Home Page  
If yes, please specify the preferred thermometer type:
  - Dollars Raised
  - Percent of Goal
  - Percent of Participation
- No Thermometer, thanks

**Landing Page Message**

- We will provide customized messaging to add to United Way messaging
- Use only United Way messaging

**Email Messaging**

- We will provide customized messaging for each email
- Use generic United Way messaging

**Giving Options** – what options do you want available to employees? (Check all that apply)

- Payroll
- Credit Card
- Cash
- Cheque

**Pay Periods for Payroll Deduction** – please confirm with payroll department

- Fixed – payroll deductions will only be spread equally over the year. Number\_\_\_\_\_
- Flexible – employees can have deductions taken over a chosen number of periods.
- Other – only set number of payroll periods options available (eg. 1 and 26): \_\_\_\_\_

**Gift Auto-renewal** – the option for employees to give the same payroll donation year after year.

- Yes – confirm with your HR/Payroll Dept
- No

**Pledge Replication** – the option for employees to give the same gift as last year and/or increase by a chosen amount

- Yes
- No

**Retirees**

- Yes, retirees will be included in the employee data file (please identify clearly as retiree employee type)

## e-Pledge System Security

- System server – Held in a locked room on-site, only accessible by United Way Admin staff and log in only possible with Admin credentials
- Sonicwall firewall – “One of the most secure, sophisticated and widely deployed small business firewall platforms on the market today” with intrusion prevention, anti-malware, anti-spam, and content and URL filtering
- SSL Certificate – Renewed each July to ensure we have the most up-to-date security

## Workplace Technical Recommendations

To ensure the smoothest possible launch of your electronic campaign, the following pre-requisites are recommended for each desktop that will be using e-Pledge:

- Configure email server to Whitelist incoming email from [ePledge@uwaywrc.ca](mailto:ePledge@uwaywrc.ca)
- Java script enabled – version 6 or newer
- Session cookies allowed
- All users have their security set to the Internet Zone instead of Local Intranet
- Allow PDF attachments
- Minimum Internet browser requirement of Internet Explorer 8 or above, Firefox (current), and/or any other as needed
- IE browsers should have the Internet options/Advanced “Do not save encrypted pages to disk” unchecked so they can print PDFs

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