



United Way- e Pledge User Guide (Donor)

Revised October 2015

Introduction

ePledge is a secure web based system that allows for online giving. A representative from your workplace campaign team will provide you with a link to your organization's personalized registration page (PURL).

Register for an account

Go to the link provided by your campaign team.

If you are a **returning ePledge user**:

- Determine which scenario applies.
- Follow the instructions.

If you are a **new ePledge user**:

- Type your workplace email in the appropriate field.
 - If your **email address is recognized** (you had provided it to us on a previous gift form) just type in the verification code and click "register".
 - A system generated email ("Registration Confirmation") will be sent to you. Click the link in the email to confirm your registration (this measure is a security precaution.)
 - A second system-generated email ("Registration Complete") will be sent with a link to set your personal password.
 - If your **email address is not recognized** you will be asked to provide some basic information and to create a password and password hint.
 - Then type in the verification code and click "register". You will then be logged into your account and receive a confirmation email.

Make a Donation

From the main menu at the top of the screen, select **Pledge Now**. Select the method through which you would like to make your donation.

Please select your pledge type.

- Payroll Deductions
- PayPal (One Time Payment Only) *
- One-Time Credit Card
- Monthly Credit Card

Enter Amount

Specify the amount you would like to give and your payment details. If you would like to designate all or part of your donation to our priority goals, or to a charity other than the United Way check the box at the bottom of the page specifying you wish to designate your donation.

Designations

Choose where you would like to direct your donation. Select from any combination of United Way and its priority goals, any other United Way or registered charity in Canada. If you wish to designate to multiple recipients the total at the top of the page will update automatically.

Search for other Canadian Registered Charities

Designations can be made to any registered charity in Canada. To conduct a search, enter the complete or partial name and/or registered charity number of the organization and click **Search**.


Enter the name or Charity number below then click the search button. You will then be prompted to enter your amount.

Registered Charity Name:
(keyword search)

Registered Charity Number:
(No spaces - ex. 987654321RR0001)

If designations have been made to the charity previously, the organization name will appear with an option to enter a designation amount.

1 Charitable Organizations Found - Listing organizations 1 - 1

Name	Designation Amount	
Canadian Charity	<input type="text" value="\$100.00"/>	

If the charity you were searching for could not be found in our database you can enter your donation under the **Manually Add a Registered Charity** section.

Add a registered charity

If the registered charity you were searching for could not be found in our database, it can be added by clicking the 'Enter Your Charity Manually' button below:

When adding a registered charity, the following fields will need to be completed;

- Name
- Registered charity number
- Charity address, city, province, postal code

**A link to the Canada Revenue Agency website is provided so that the information required can be cut and pasted.

After completing any designations and adding any registered charities, click **Next**. Additional options will appear on the following page. They include;

- Your name as you'd like it to appear in the Honour Roll (only applicable for donations of \$1200 or more designated towards United Way's Community Fund, Focus Areas. Programs and Targeted Community Investments).

- Option to not have your name published in the Honour Roll (only applicable for donations of \$1200 or more designated towards United Way's Community Fund, Focus Areas, Programs and Targeted Community Investments).
- Option to have your name and donation amount released to any registered charities you chose to support.
- Option to make your monthly credit card gift a perpetual pledge which United Way will automatically apply as your donation amount year over year.

Click **next** and you will be brought to the confirmation page. This page summarizes the details of your donation. Clicking **Confirm** submits your gift for processing. If any of the information is incorrect click on the back button at the bottom of the page to return and make corrections.

If you've chosen to give via one-time credit card, your card will be submitted for authorization. An electronic tax receipt will be issued via e mail immediately following approval of the charge.

Profile Management

You can make updates to personal information through the **My Profile** menu item. Changes can be made to name, email, address and phone number. Updates to your User ID and Password can also be made here.

My Profile

Please make any necessary changes to the information below and save your changes prior to leaving this page.

*Name	Prefix: <input type="text"/>	*First: <input type="text" value="John"/>	Middle: <input type="text"/>	*Last: <input type="text" value="Smith"/>	Suffix: <input type="text"/>
Gender:	<input type="text" value="Male/Homme"/>				
Birth Date:	<input type="text" value="N/A"/>	<input type="text" value="N/A"/>	<input type="text" value="1945"/>		
Name to be printed in Honour Roll examples: John and Jane Doe or Colonel John Doe:	Line 1:	Line 2:			
	<input type="text" value="Mr. and Mrs. Smith"/>		<input type="text"/>		
Work Email: <input checked="" type="radio"/> Preferred	<input type="text" value="jsmith@uw.com"/>				
Personal Email: <input type="radio"/> Preferred	<input type="text" value="johnny@uw.com"/>				
*Home Address <input checked="" type="radio"/> Preferred	*Address Line 1: <input type="text" value="123 Test St."/>				
	Address Line 2: <input type="text"/>				
	*City:	*Province/State:	*Postal code		
	<input type="text" value="Ottawa"/>	<input type="text" value="Ontario"/>	<input type="text" value="K1K 2C5"/>		
	*Country: <input type="text" value="Canada"/>				
Workplace Address: <input type="radio"/> Preferred	Address Line 1: <input type="text"/>				
	Address Line 2: <input type="text"/>				
	City:	Province/State:	Postal code		
	<input type="text"/>	<input type="text"/>	<input type="text"/>		
	Country: <input type="text" value="Canada"/>				
Home Phone <input checked="" type="radio"/> Preferred	Area:	Number:			
	<input type="text" value="0"/>	<input type="text" value="0"/>			
Work Phone <input type="radio"/> Preferred	Area:	Number:	Ext:		
	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>		

WARNING: If you delete the employer below you **MUST** go to the registration page (PURL) for your new employer to register your account as a new user under your new workplace. If you do not register your account under your employer you will not be able to pledge to your workplace campaign. If you do not have the link to the registration page for your new workplace please contact your campaign team to obtain the link.

Employer:	CC Ottawa Special Gifts
<input type="button" value="Expire Employee Relationship"/>	
Employee Id (*required for payroll deduction)	<input type="text"/>
User Id: (save your changes prior to clicking this link)	octestuser <input type="button" value="Update"/>
Password: (save your changes prior to clicking this link)	***** <input type="button" value="Update"/>

Note: If you have made changes to your profile, you must save these changes prior to selecting the links above to change your User Id or your Password.

Items above marked with an asterisk (*) are required.



Donation History

This menu item will bring you to a page through which you can view the details of any gifts made in the current or previous year.

Summary

Campaign Year	Pledge
2015	\$265.00


Recent Pledges

Date	Pledge Type	Pledge	
07/13/2015	One-Time Credit Card	\$5.00	
06/17/2015	Payroll Deductions	\$260.00	

Click here to display a more **detailed view** of recent donations. This option also allows for you to re-send yourself a detailed confirmation of your donation and copies of any tax receipts issued to you.

Update a Donation

You can also make changes to donations made in the current year and month. For example a gift made September 1st remains editable until September 30th end of day. Please note, changes to donations made by one-time credit card that involve updates to dollar amounts should be coordinated through your campaign coordinator and United Way. Also be aware that changing gift amounts when giving through payroll deduction that your pay office may need to be advised of the change.

To update a recent gift, under the **Recent Pledges** heading, click on the  icon next to the entry you wish to make a change to. Then select the **Update** button at the bottom of the page. The system will take you back through the gift you made and allow you to apply changes. Be sure to click the **confirm** button again to submit the changes. You will receive a confirmation email with your new confirmation number.

** Technical support can also be reached via e mail from a link available in the footer of any page on e Pledge.