

United eWay Instructions & Best Practices

United Way of Greater Milwaukee
6/2010



Help Desk Information

Donors may call needing help to navigate the donor site or help with usernames and passwords, etc.

To login as a donor:

<https://donor.united-e-way.org/>

Campaign Code: specific to your company

Username: usually a scheme (first initial+last name, email address, etc.)

Password: usually a scheme (last name and last 4 digits of SSN, employee id, etc.) Your campaign contact will have the campaign code and schemes for usernames and passwords available.

Passwords are case-sensitive.

The most common problems are as follows:

- I can ' t login
- I can ' t designate my gift
- I have a question about the United Way
- Help navigating the site

I can ' t login

There are two options to help donors that are having login issues. Reset the password or resend the current credentials.

Reset the password – use when your company has not provided email addresses

Resend the current credentials – easier and less frustrating for the donor

To change passwords or resend credentials you will need access to the eWay administrative site. The link is: <https://admin.united-e-way.org/> and login credentials of your own will need to be provided.

Request through your campaign contact or by writing to:

- Bryan Mueller at United Way (bmueller@unitedwaymilwaukee.org)
- Michele Kieweg at United Way (mkieweg@unitedwaymilwaukee.org)

We will verify your permissions through our contact at your company and then provide login details.

To change a password:

1. From the administrative site, click the +symbol next to campaigns.
2. Click the +symbol next to your campaign name
3. Click 'donors'
4. From the donor grid, search for the name of the employee whose password you wish to change.
5. The second icon from the left is the 'settings' icon, click it.
6. At the bottom of the screen click the 'view/edit company donor settings' link
7. Enter a new password and enter the same password in the confirm box
8. Click save/update.

Note: You cannot view a password, it is blocked from sight. You can change it to something mutually agreed upon.

To resend a password:

1. From the administrative site, click the +symbol next to campaigns.
2. Click the +symbol next to your campaign name
3. Click 'donors'
4. From the donor grid, search for the name of the employee whose password you wish to resend.
5. The 6th icon from the left (envelope icon) is the password resend button, click it.
6. Sample text is provided for you, but you are able to add text if desired.
7. Add a description, perhaps the donor's name and your name and click save & queue.
8. The email will be sent as soon as the queue is free (normally a minute or so). You will be redirected to the email system where you will be able to see the status. Once the email reads 'processed' it has been sent.

I can't designate my gift.

The United Way has a list of agencies that are funded or partners of United Way. Those agencies receive undesignated dollars as well as the designations of contributions made by your employees. Those agencies, as well as a list of agencies through Community Health Charities and popularly designated agencies are what appear in the 'Locate an Agency' panel on the United eWay website provided to you. The website is designed to exactly match our paper pledge form.

Commonly when an employee feels that they cannot work the designation panel, it's because they aren't seeing the agency they desire and that is not usually the case. It's because the agency does not match the criteria described above. Simply because it is not listed does not mean that it isn't eligible. If not found on the search, a donor can click the 'write-in' box on the designation page and enter the details of the agency that they wish to donate to. A description of the types of agencies that are eligible is shown on that page. The website will not stop a donor from entering the details of an ineligible agency, they are simply text boxes. Only the agency name is required, but any further information available helps to ensure that we are directing gifts appropriately.

What happens is that when the gifts are transferred to our fundraising system, eligibility is checked and if the proposed agency is not approved the donor will be contacted. They are offered the ability to cancel the gift or direct to an approved agency. They do not need to take further action unless contacted by United Way.

I have a question about the United Way.

Questions about the United Way should be directed in one of two manners:

1. To your company campaign contact who can call their fundraiser to find the answer to the question.
2. Directly to the United Way at (414) 263-8100. Calls will be routed based on the nature of the question.

Please work with your campaign contact to determine the preferred method for your company.

Help navigating the site.

To help you problem solve you can use the 'impersonate a donor' functionality to walk along the system with the donor.

1. From the administrative site, click the +symbol next to campaigns.
2. Click the +symbol next to your campaign name
3. Click 'donors'
4. From the donor grid, search for the name of the employee.
5. The last icon on the grid is the impersonate a donor icon, click it
6. A new browser will open and you will be logged in as the donor, able to see what they see.
7. Please remember to click logout upon completion of the support call and not just close the browser.