United eWay Instructions & Best Practices
United Way of Greater Milwaukee
3/2008

Payments and Receipts

If allowing cash and checks in your campaign, you may need to provide the donor with a receipt and/or keep track of the payments you have received. United eWay has functionality to help facilitate this process.

Note: accepting cash donations online is not recommended. If you choose to allow this option (primarily those campaigns that have a large cash program) then utilization of the Payments and Receipting functionality is crucial. It can be hard to reconcile the donors outstanding with those that have paid when a stack of cash is involved. Simply put – both the company and United Way must know which payments apply to which donors. Donors with payments outstanding are often times sent a bill directly. Obviously that is frustrating when they may have already paid and reconciliation documents were not provided.

Navigation:

1. Login to the administration site at: https://admin.unitedeway.org/ with the username and password provided.
2. Click the + symbol in the left hand tree next to "campaigns"
3. Click the + symbol next to your company's campaign name
4. Click on the word "payments"
5. All gifts will show as the default on this screen
    a. You can sort this table by clicking on the title of each column
    b. You can increase the size of the table by changing the default from "10" to any number up to "100". It sometimes is easier to look at more records at a time.
6. To filter the list further, place a checkmark at "By Payment Type"
7. Select payment types "cash" and/or "check" (move to the right) and click search
8. Find the donor name in the list
9. The first icon (green dollar bill) will show you the details of the pledge (if admin permissions exist – based on company preference)
10. The second icon (paper with pencil) is the payment and receipting function. Click this icon, for checks enter the check number and for cash and/or checks click on paid.
11. When complete, click Save & Print. A print dialogue box comes up to the screen. (If a receipt is not needed the dialogue box can be cancelled.)

The "Paid to UW" column may also be used by United Way to mark that the payment was received at the United Way from the company.

Reporting:

1. From the administration site at: https://admin.unitedeway.org/
2. Click the + symbol in the left hand tree next to "campaigns"
3. Click the + symbol next to your company's campaign name
4. Click the + symbol next to "Reporting"
5. Click on the word "reports"

6. Find the report “Outstanding cash and check payments”
7. Click the blue right arrow to generate the report
8. The report drops to the bottom of the screen and generates in a job queue. It will show the status of “queued(#)” “processing” and then “completed”.
9. When in completed status click the third icon (paper with magnifying glass) to bring the .pdf report to the screen.

This report will show only those that have not been previously marked as paid to make reconciliation easier.

New for 2008
If the pledge is received by cash or check, new functionality exists from the payments screen to email to the address on the donor’s record a receipt for their contribution. Simply click the email icon and the receipt will be queued and sent in the order the requests are received.