

e-Pledge Administrators FAQs

Browse these frequently asked questions for a successful e-Pledge campaign!



Friendly Reminders:

- Use Google Chrome or Microsoft Edge to access e-Pledge; Internet Explorer is not a compatible web browser.
- Please tell your employees to NOT forward e-Pledge emails to another employee.
- If you encounter a problem with e-Pledge, immediately notify your Corporate Engagement Manager (CEM) and provide screenshots.

Q: I forgot my Log-in ID or password, what should I do?

A: Click 'FORGOT USER ID OR PASSWORD' box on the sign in screen. Follow the prompts. An automated email will be sent to your email address. If the email does not arrive in your inbox, check your spam/junk folder. Should you still have trouble logging in, contact your CEM.

Q: What do I do if I get locked out of e-Pledge or if the screen gives me the error message, 'maximum login reached'?

A: Please email ecomunity@unitedway-york.org and copy your CEM with a description of your issue.

Q: How do I switch from "admin view" to "donor view"?

A: After logging into e-Pledge as Admin, on the very bottom right of the page, you will see 'SIGNOFF.' Above 'SIGNOFF' click 'EMPLOYEE DONOR' to access the donor profile. To switch back to Admin profile simply follow the same steps but click 'ADMINISTRATOR VIEW.'

Q: An employee wrote their pledge on a paper pledge form or verbally told me to keep their gift the same as last year. How do I manually enter their pledge on e-Pledge?

1. On your Admin profile, there is a link at the top of the page called 'EMPLOYEE GIFTS.' Once you click the link, a drop-down menu will appear. Select the second option: 'EMPLOYEE TRANSACTION SEARCH.'
2. In the middle of the page there will be a 'SEARCH FOR EMPLOYEE' box. Type the first or last name of the employee you need to enter the pledge for.

3. Once their name appears, the following icons will appear to the left of their name:



. By clicking the \$ symbol, you can add an employee's pledge and it will take you to a screen reading 'PLEASE SELECT YOUR PLEDGE TYPE'. Follow the prompts to complete a pledge transaction.

4. If the name of the employee you are looking for does not appear in the 'EMPLOYEE TRANSACTION SEARCH,' go to the top of the page and under 'EMPLOYEE GIFTS,' select 'EMPLOYEE SEARCH & ADD.' Click the blue box that reads 'ADD' and follow the prompts on the next screen to enter their employee and pledge information.

Q: Where do I go to download and print a payroll report?

1. On your Admin profile, there is a link at the top right of the site called 'REPORTS.'



When you click on 'REPORTS,' you will be directed to a new page where you can select your desired report by selecting the round circle next to the report you want to run (like so

Payroll Report) then click 'SUBMIT.' The page will automatically refresh (this is normal).

2. Once the screen refreshes, scroll below the 'SUBMIT' button and you will see a 'MY OUTPUTS' box and a chart which will show the name of the report you selected like so:

<input type="checkbox"/>	Job Number	Job	Names	Date	#Pages	Size	Type	Status	Description
<input checked="" type="checkbox"/>	117782	Payroll Report	United Way of York County - Pledge Transaction Report	05/07/2021 03:42:42 PM	0	0.0 KB	pdf	Writing	

3. Make sure to check the box to the left of the 'JOB NUMBER' and then click the blue box that reads 'REFRESH' which will change the status on the far right of the chart from 'WRITING' to 'READY.' Once the status reads 'READY,' your report will appear as a blue hyperlink.

4. To download the report right click the link and save the report to your computer.