



AGENCY PORTAL

Client Instructions

AUGUST 2, 2024



Contents

- Purpose: 2
- Scope: 2
- Instructions: Updating Organization Profile and Contacts 3
 - 1. Step 1: Logging Into Portal..... 3
 - 2. Step 2: Homepage 3
 - 3. Step 3: Menu Options and Updating Profile or Adding a Contact 4
- Instructions: How to Obtain Your Reports..... 6
 - 1. Step 1: Logging Into Portal..... 6
 - 2. Step 2: Homepage 6
 - 3. Step 3: Menu Options and Creating Reports..... 6
 - 4. Step 4: Accessing Created Reports..... 6
- Instructions: How to Update your Organizations Banking Details..... 11
 - 1. Step 1: Logging Into Portal..... 11
 - 2. Step 2: Homepage 11
 - 3. Step 3: Menu Options and Updating Banking Information 11
- Version Log: 12
- Change Log: 12
- Appendix A: Login Details / Email Examples..... 133
- Appendix B: Payee by Organizations Report Details 155



Purpose:

In this document you will find step by step instructions for navigating and using the United Way of Greater Atlanta (UWGA) agency portal. This includes how to obtain your reports, what each of the reports contains, updating organization information, banking details and organization contacts.

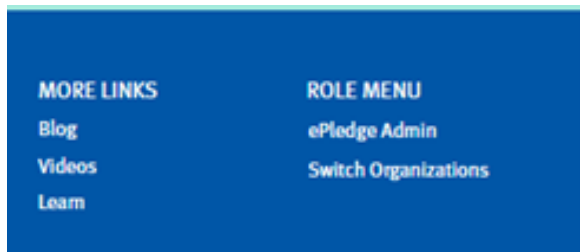
Please use this document as a guide, but if you do not find what you need or have trouble accessing your reports, then please feel free to e-mail donorsupport@unitedwayatlanta.org, and we will do everything that we can to help you.

Scope:

- Updating organization information.
- Updating your organization's banking details and providing a voided check.
- Updating your organization's contacts.
- Locating payment reports

If your organization has multiple programs/initiatives/locations, you will need to scroll to the bottom right corner of the page and click on Switch Organizations to view additional reports.

Please note if the donor is anonymous or if the payment is from a special event there will be no information on the report.



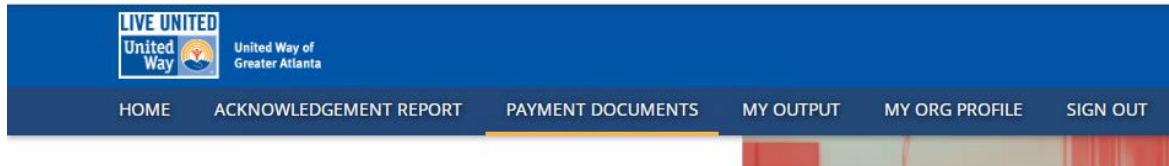
Instructions: Updating Organization Profile and Contacts

1. Step 1: Logging Into Portal

Login to the portal via [Agency Portal Site](#) or using the link and login credentials sent to you via email (see Appendix A for example emails)

2. Step 2: Homepage

On the Homepage, you will find options on the top menu:



- The following reports are available:
 - **The Acknowledgement Report** will tell you the donor's total pledge for the year and contact information.
- Under the Payments Documents menu:
 - **The Payee by Organization Report** will provide pledge details.
 - **The DCP Payee Remittance Report** will show administrative expenses and payments due (contact uwpayouts@unitedwayatlanta.org for more information.)

3. Step 3: Menu Options and Updating Profile or Adding a Contact

To update your organization's profile information, click on the Organization Profile menu link under "My Org Profile." You will see the screen where your organization information is populated.


Home > Organization Profile


Organization Profile

*Name	*Name 1 <input type="text"/>		
	Name 2 <input type="text"/>		
Home/Main Address	Address Line 1 <input type="text"/>		
	Address Line 2 <input type="text"/>		
	City <input type="text" value="Atlanta"/>	State <input style="border: 1px solid #ccc; border-radius: 4px; padding: 2px 5px; text-align: center;" type="text" value="Georgia"/> ▼	Zip Code <input type="text" value="30328"/>
	Country <input style="border: 1px solid #ccc; border-radius: 4px; padding: 2px 5px; text-align: center;" type="text" value="United States of America"/> ▼		

Finalize changes: After updating, click "Submit" to save and update our donor database.

To update your organization's contacts or to add a contact click on the menu link "Organization Contacts." Click on the Add Contact button. Click the Add New Contact button. Please provide an email address, first and last name, and select Agency Contact in the "Contact Type" box. Then click Add.





Work Email

***Name**

Prefix: First: Middle:: Last: Suffix:

Home/Main Address

Address Line 1:

Address Line 2:

City: State: Zip Code:

Country:

Contact Type * <input type="text"/>	Effective Date <input type="text"/>	Expiry Date <input type="text"/>
---	---	--

The new contact is an employee of American Cancer Society - California

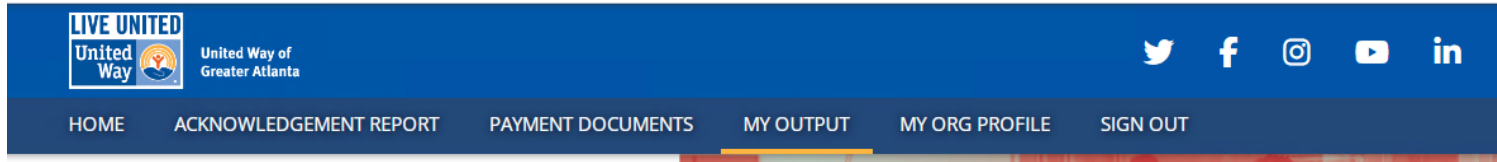
Instructions: How to Obtain Your Reports

1. Step 1: Logging Into Portal

Login to the portal via <https://epledge.unitedwayatlanta.org> or use the link and login credentials sent to you via email (see Appendix A for example emails)

2. Step 2: Homepage

On the Homepage, you will find options on the top menu:



3. Step 3: Menu Options and Creating Reports

To generate the Acknowledgement Report, click on the Acknowledgement Report option from the menu, you will see a screen with three options:

Year, Campaign Account & Show Report Type:

Campaign Year	2023
Campaign Account	
Show Report Type	Acrobat (PDF) Format

Year – Year corresponds with the *campaign year* for the donations. The campaign year is the year that the fundraising campaign takes place, and campaigns usually take place in the fall & winter. If you are receiving funds in 2024, they are more than likely from the 2023 campaign, and they could possibly be the final payments from the 2022 campaign.

Campaign Account – Campaign Account can be either “United Way” or “National,” and is relative to where the funds were raised. A United Way Campaign is a campaign representing donors in the Greater Atlanta region; a National Campaign includes donors from outside of Greater Atlanta. The website will only list the options that are available to you, so if you only see one, you only need that one; if you see both, you need to generate both reports.

Show Report Type – Show Report Type is how you would like the data output. CSV is a table in Excel format; PDF is a list in a PDF.

Finalize report and create: When you have chosen the options you want in your report, click “Submit.” Please click on the “My Output” page menu option. You are taken to the page where you can download the Acknowledgement Report.



My Outputs

American Cancer Society - California,
The reports listed below are currently available to you, but they will not remain here indefinitely.
It is therefore HIGHLY recommended that you save these reports on your own computer.
To do so, left click on the report name, and choose the option 'Save target as'.

Refresh


There are no reports available at this time.

Cancel


Payee by Organization Reports

On the Payment Documents page, you will see a list of available payouts reports – **depending on your configurations you will see one of the following two examples:**

Gryphon Place - Agency
 1190 South 9th St
 Kalamazoo, Michigan 49007



[open all](#) [close all](#)



-  Gryphon Place
 - 211/Hotline
 - Community Access and Screening Services
 - Critical Incident Stress Management
 - Dispute Resolution Services

File Name

Description

Effective Between And

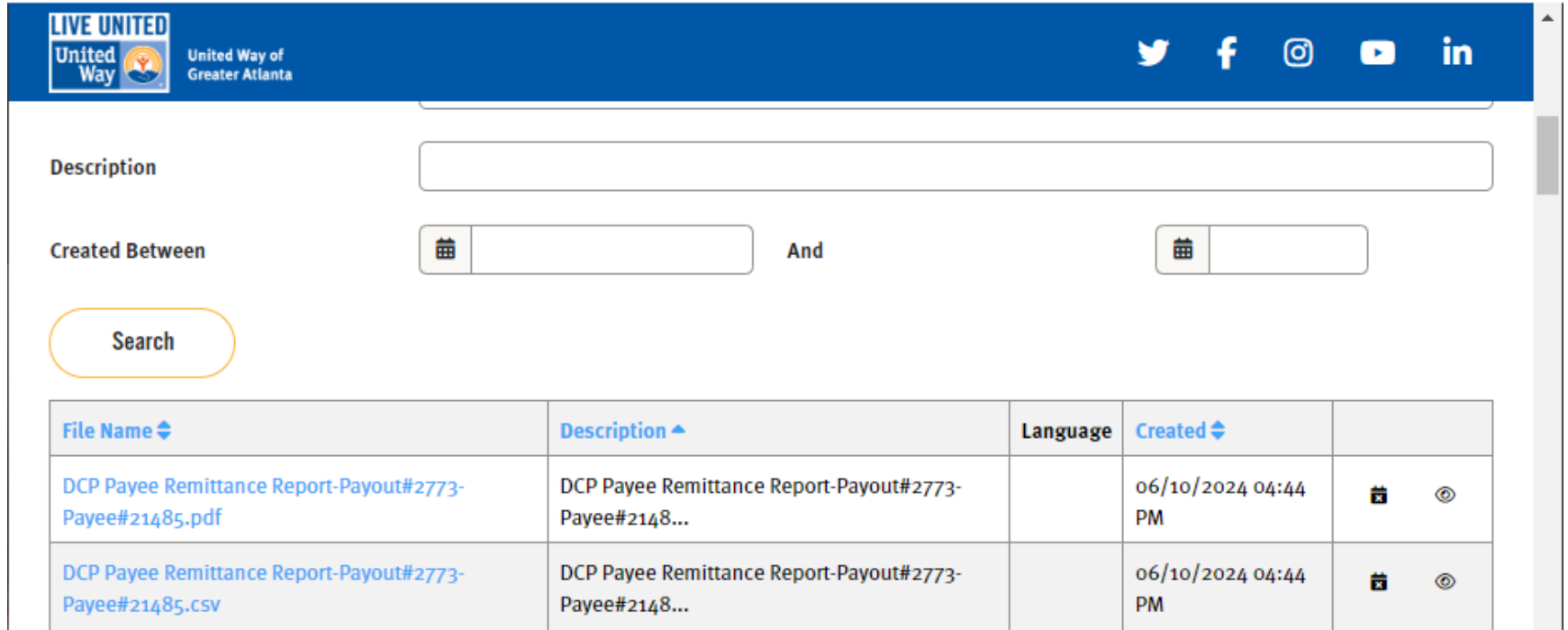
Created Between And

File Name	Description	Language	Effective	Expiry	Created	
DCP Payee Remittance Report-Payout#606-Payee#7179.pdf	2020 Cash Payout Local Campaign - DCP Payee Remitt...				03/13/2024 11:22 AM	 

The codes can change, but usually correspond with the following information:

- The first value listed is the year of the campaign that the check is being sent on behalf of.
- The month/date is the cutoff date for payments or when the payment was received – in the example above that was July 2020. So, if someone paid for their gift in full on 8/1/2020, they will not be included until the next payout.
- The date in parenthesis is the date of the check was created in the system (so usually it is close to or exactly the date on the check, depending on how long the process took).

EXAMPLE 2



The screenshot shows a search interface with the following elements:

- Header:** "LIVE UNITED United Way of Greater Atlanta" logo and social media icons for Twitter, Facebook, Instagram, YouTube, and LinkedIn.
- Search Form:** A "Description" text input field, a "Created Between" date range selector with two calendar icons and input boxes, and a "Search" button.
- Results Table:** A table with columns for File Name, Description, Language, and Created. It lists two files: "DCP Payee Remittance Report-Payout#2773-Payee#21485.pdf" and "DCP Payee Remittance Report-Payout#2773-Payee#21485.csv".

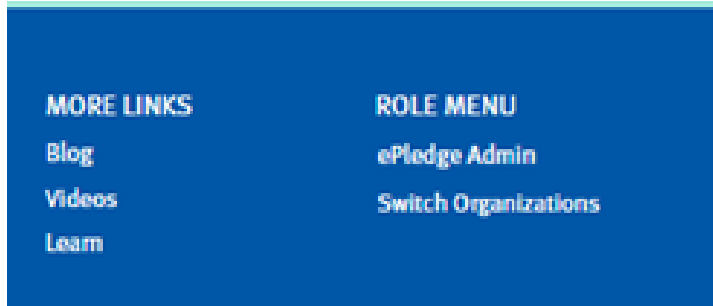
File Name	Description	Language	Created	
DCP Payee Remittance Report-Payout#2773-Payee#21485.pdf	DCP Payee Remittance Report-Payout#2773-Payee#2148...		06/10/2024 04:44 PM	
DCP Payee Remittance Report-Payout#2773-Payee#21485.csv	DCP Payee Remittance Report-Payout#2773-Payee#2148...		06/10/2024 04:44 PM	

Under the Payments Documents menu, the Payee by Organization Report contains the pledge information for each payment you receive. The DCP Payee Remittance Report will give you the financial details of each payment you receive.

Choose the report you want to obtain by clicking on the file name to download the report.

If your organization has multiple programs/initiatives/locations, you will need to scroll to the bottom right corner and click on Switch Organizations to view additional reports.

Please note if the donor is anonymous or if the payment is from a special event there will be no information on the report.



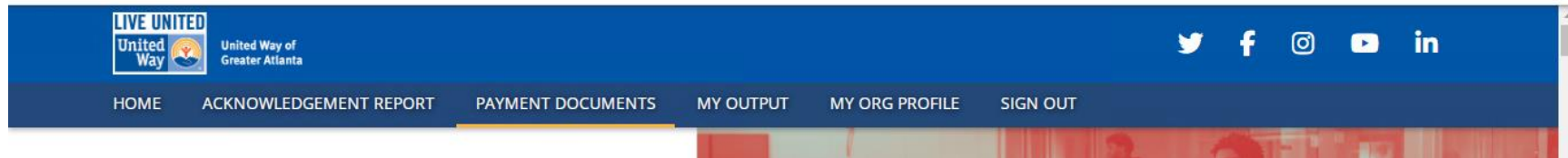
Instructions: How to Update your Organizations Banking Details

1. Step 1: Logging Into Portal

Login to the portal via <https://epledge.unitedwayatlanta.org> or using the link and login credentials sent to you via email (see Appendix A for example email)

2. Step 2: Homepage

On the Homepage you will find options on the top menu:



3. Step 3: Menu Options and Updating Banking Information

To update your organization's banking information, click on the menu link "My Org Profile," click "Bank Information."

Finalize and save changes: Enter the bank's information then click "Submit." The changes will update our donor database.

To Add ACH Documentation: Click on the menu link "My Org Profile," then click "Voided Check Upload." Click the Add button. Once chosen and the menu option clicked you will be taken to the screen to provide a brief description and attach the required documentation. Click Add. *The Organizations name must be on the document.*

VERSION LOG: 8/2/2024

CHANGE LOG: 8/2/2024

Appendix A: Login Details / Email Examples

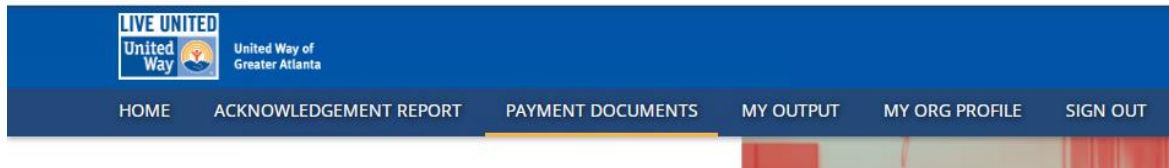
From: Donor Support
Sent: Tuesday, April 2, 2024 10:54 AM
To: John Smith <JohnSmith1234@yahoo.com>
Subject: RE: EFT payments

Hello,

You can log in and see the full financial details of any payment as they come in, as paid out by the United Way of Greater Atlanta. After you sign in with these credentials, you will be required to change your password.

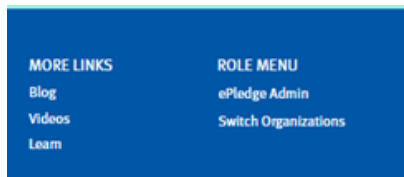
Website: <https://epledge.unitedwayatlanta.org/Agency>
 Username: JohnSmith1234@yahoo.com
 Temporary Password: **TkkoV3Ujk**

We are requesting all agencies move to electronic payments. Payments are sent out monthly; however, how often each payee receives distributions is based on how often we receive their donor's payments i.e. monthly or quarterly. Please click on the My Org Profile menu option to enter or verify your bank's information under the 'Banking Information' link and upload a voided check/deposit slip/bank letter under the 'Voided Check Upload' link.



The Acknowledgement Report gives you donor contact information if they provided it. Under the Payments Documents menu, the Payee by Organization Report contains the pledge information for each payment you receive. The DCP Payee Remittance Report will give you the financial details of each payment you receive.

If your organization has multiple programs/initiatives/locations, you will need to scroll to the bottom right corner and click on Switch Organizations to view additional reports. *Please note if the donor is selected to remain anonymous or if the payment is from a special event there will be no information on the report.*



I hope this helps. If you have any other questions or need anything else, please let us know.

Dear Finance Staff or Executive Director:

A contribution has been disbursed to through United Way of Greater Atlanta. EFT Payments have been made for re provided Banking Information, otherwise a check has or will be arriving shortly via USPS mail.

The Agency Portal is our improved, easy-to-use website where you'll find pledge reports and payment detail reports. encrypted with your organization's login credentials. To view your payment reports, please [click here](#) and proceed to Documents menu. (Previously submitted reports are found on the My Output menu.)

The encrypted link above will log you in automatically, but for future reference, below is your login information:

Your User ID is

Your Password is your five-digit zip code.

Appendix B: Payee by Organizations Report Details

The Payee by Organizations report is a report with details of what has been paid out by the donor.

The most important column to locate is the “Amt Due This Period” column because it will tell you exactly what dollar amounts correspond with what donors on the check:

Other columns contain very important values that correspond with the following.

The following columns represent projected amounts:

- **Total Designation** – The amount of money that the donor has pledged throughout the entire year.
- **Less Total Processing Fees** – The amount of money that will be held in total for processing fees.
- **Less Total Fundraising Expenses** – The amount of money that will be held in total for fundraising fees.
- **Less Total Uncollectible Pledges** – This represents pledges made but not received. United Way of Greater Atlanta pays your agency based on received dollars; therefore, this column will not apply.
- **Net Projected** – The amount of money an agency can plan to receive in total once the pledge is completely paid out.

The following columns summarize the actual payouts received by your agency:

- **Actual Received Dollars** – The amount of money that has been received by the United Way from the donor.
- **Less Current Process Expenses** – The amount of money held to date for processing expenses.
- **Less Current Fundraising Expenses** – The amount of money held to date for fundraising expenses. The annual amount of each of the fees is held from the first payouts, and the entirety of the gift is paid out in the subsequent disbursements.
- **Less Adjusted Amount** – This reflects voided checks that may or may not be reissued.
- **Less Direct Check** – When an agency other than the United Way pays the gift for the donor, it will be noted here. It does not reflect the amount itself that the processing agency has paid but reflects the portion of the pledge that the processing agency is responsible for paying. These agencies typically provide similar details with their checks. When these values appear in a report, the information should be used to note fundraising information, not the financial details of the donor’s payment.
- **Less Amount Paid Previously** – The amount of money that United Way has sent in previous checks.
- **Amount Due this Period** – The amount that corresponds exactly with the value of the check. Sometimes, checks have multiple line items, and in these cases, this column will correspond precisely with one of the line items.
- **% Paid to Date** – How much has been paid out to the donor. It is the “Amt Due this Period” column plus the “Less Amount Paid Previously” column, divided by Net Projected.