

# How to get started 2006 Online Pledging Campaign



## Web Site Customization Needs

- **Gather employee & organizational data**

File specifications attached

- **Gather graphics** (file specifications attached)

Photos (i.e. CEO)

Logos

Audio/video

- **Determine content**

Website Title – appears before Welcome Message. (Default: Welcome %FirstName% %LastName%)

EXAMPLE: Welcome Joy Smith

Welcome Message – personalize your message to the donor. (HTML tags; max. 3000 characters)

Message from CEO or campaign coordinator or any other opening message you want, i.e., from an employee who has received services through an agency supported through the United Way Community Campaign (can be audio or video clip).

Contact Person – information needed to add to website.

Please provide name, title, phone, and e-mail address of the person you want listed on the web page. You may also add any specific instructions (max. 255 characters)

Pledge Thermometer – Optional; one, both or none.

Two styles are available. A pledge thermometer that shows exactly how much money has been raised for the campaign and/or how many donors have participated.

Matching Gift Page – (HTML; 3000 characters)

Donors can view information on your company’s matching gift program. (Default message or custom message available).

DEFAULT text reads: This program will match \_\_\_\_% of your donation, up to \$donation ceiling. (Company name) will donate up to a total of \$program ceiling for this program. The matching gift will go to community programs funded by your local United Way.

EXAMPLE of custom text: ABC Company's Leadership Challenge!

Take ABC Company's Leadership Challenge and your gift of \$1,000 or more will be matched dollar for dollar. That means your gift has double the impact. ABC Company will provide up to \$100,000 for the gift match.

Cash/Check Donation Instructions - personalize instructions to the donor.  
(No HTML; 1000 characters)

EXAMPLE: Please print two copies of the Gift Confirmation Sheet. Hand deliver CHECKS/CASH to your Company Chairperson along with a copy of the gift Confirmation sheet; ask for a receipt. Keep receipt with second copy of Confirmation Sheet for your files.

News and/or Events - Optional

You may add any company specific news items or campaign related events.

News (text)		Events (text)	
Title	(100 characters)	Title	(100 characters)
Summary	(no HTML; 255 characters)	Event Details	(HTML; 1500 characters)
Body	(HTML; 3000 characters)	Start Date	(mm/dd/yyyy)
Date	(mm/dd/yyyy)	Start Time	(hh:mm)
Expiration Date	(mm/dd/yyyy)	End Date	(mm/dd/yyyy)
		Expiration Date	(mm/dd/yyyy)

## Campaign Management

- Determine giving options, i.e., payroll periods, percent of pay, actual dollar amount, cash, check, etc.
- Develop series of reminder e-mails to be sent out periodically (maximum 1000 characters)
- Thank you text (maximum 1000 characters)

## Data Import Format Specification for Donor Records

Field #	Field Name	Data Type	Maximum Length	Required Field?
1	Donor Identifier	Text	50	Y
2	Username	Text	50	Y <sup>1</sup>
3	Password <sup>A</sup>	Text	15	Y <sup>1</sup>
4	Prefix	Text	8	N
5	Last Name	Text	50	Y
6	First Name	Text	50	Y
7	Middle Name	Text	50	N
8	Suffix	Text	4	N
9	Nickname	Text	50	N
10	Gender <sup>B</sup>	Text	1	N
11	Employee Number	Text	14	Y
12	Social Security Number	Numeric	9	N
13	Home Address Line 1	Text	100	N <sup>2</sup>
14	Home Address Line 2	Text	100	N <sup>2</sup>
15	Home City	Text	50	N <sup>2</sup>
16	Home State	Text	2	N <sup>2</sup>
17	Home Zip code	Numeric	5	N <sup>2</sup>
18	Home Zip code Ext	Numeric	4	N <sup>2</sup>
19	Home Phone	Numeric	10	N <sup>2</sup>
20	Home Email Address	Text	50	N
21	Work Address Line 1	Text	100	N <sup>3</sup>
22	Work Address Line 2	Text	100	N <sup>3</sup>
23	Work City	Text	50	N <sup>3</sup>
24	Work State	Text	2	N <sup>3</sup>
25	Work Zip code	Numeric	5	N <sup>3</sup>
26	Work Zip code Ext	Numeric	4	N <sup>3</sup>

Field #	Field Name	Data Type	Maximum Length	Required Field?
27	Work Phone	Numeric	10	N <sup>3</sup>
28	Work Email Address	Text	50	Y <sup>4</sup>
29	Mailing Address Preference <sup>c</sup>	Text	1	N
30	Annual Salary	Currency	10	N <sup>5</sup>
31	Hourly Pay Rate	Currency	10	N <sup>5</sup>
32	Paid Time Off Rate	Currency	10	N
33	Pay Period Code	Text	10	Y <sup>5</sup>
34	Company Level Code (Lowest Level Code)	Text	10	N <sup>6</sup>
35	Functional Hierarchy Code	Text	20	N
36	Coordinator Hierarchy Code	Text	20	N
37	Leadership Recognition Name	Text	65	N
38	Anonymous	Text	1	N
39	Spouse Name	Text	65	N
40	Spouse Employer	Text	65	N
41	Spouse Pledge Amount	Currency	10	N
42	Custom Field 1 Description <sup>D</sup>	Text	50	N
43	Custom Field 1 Value <sup>D</sup>	Text	50	N
44	Custom Field 2 Description <sup>D</sup>	Text	50	N
45	Custom Field 2 Value <sup>D</sup>	Text	50	N
46	Custom Field 3 Description <sup>D</sup>	Text	50	N
47	Custom Field 3 Value <sup>D</sup>	Text	50	N
48	Custom Field 4 Description <sup>D</sup>	Text	50	N
49	Custom Field 4 Value <sup>D</sup>	Text	50	N
50	Custom Field 5 Description <sup>D</sup>	Text	50	N
51	Custom Field 5 Value <sup>D</sup>	Text	50	N
52	Custom Field 6 Description <sup>D</sup>	Text	50	N
53	Custom Field 6 Value <sup>D</sup>	Text	50	N
54	Custom Field 7 Description <sup>D</sup>	Text	50	N

Field #	Field Name	Data Type	Maximum Length	Required Field?
55	Custom Field 7 Value <sup>D</sup>	Text	50	N
56	Custom Field 8 Description <sup>D</sup>	Text	50	N
57	Custom Field 8 Value <sup>D</sup>	Text	50	N
58	Custom Variable 1 <sup>E</sup>	Text	100	N
59	Custom Variable 2 <sup>E</sup>	Text	100	N
60	Custom Variable 3 <sup>E</sup>	Text	100	N
61	Custom Variable 4 <sup>E</sup>	Text	100	N
62	Custom Variable 5 <sup>E</sup>	Text	100	N
63	Custom Variable 6 <sup>E</sup>	Text	100	N
64	Custom Variable 7 <sup>E</sup>	Text	100	N
65	Custom Variable 8 <sup>E</sup>	Text	100	N
66	System Administrator User Name	Text	50	N
67	Coordinator Role Code	Text	20	N
68	Change Password Required At Next Login <sup>F</sup>	Text	1	N
69	Last Year's Total Annual Gift	Currency	10	N
70	Donation Ask Amount	Currency	10	N
71	Donation Edit Type <sup>G</sup>	Numeric	1	N
72	Donation Count Limit <sup>H</sup>	Numeric	2	N
73	Donor Group Name	Text	100	N
74	Coordinator Reporting Code	Text	20	N
75	Coordinator User Name <sup>I</sup>	Text	50	N

<sup>1</sup> If either username or password is provided both fields are required.

<sup>2</sup> If any of this group is provided, Home ZIP Code is required.

<sup>3</sup> If any of this group is provided, Work Zip Code is required.

<sup>4</sup> In order to take advantage of the e-mail feature within the United eWay system, this field must be populated. All email communication (including donation confirmation emails) are sent to this email address.

<sup>5</sup> Pay Period Code – Required if company offers Payroll Deduction as a giving option. This code relates to the number of annual pay periods. The Name or Salary Type is not nearly as important as the number of Annual Pay Periods. If Hourly Pay Rate or Annual Salary,

or Pay Time Off Rate are provided, Pay Period Code is required. If Hourly Pay Rate is provided, Annual Salary is also required.

Name	Code	Annual Pay Periods
Biweekly	26	26
Monthly	12	12
Semi-monthly	24	24
Weekly	52	52

<sup>6</sup> Company Level Code, is not required, however, if it is not used you wouldn't be able to run reports and have them sorted by company levels. You'd only be able to run reports by donor groups, all, gift types, etc.

<sup>A</sup> Due to security concerns within United-eWay, all passwords must conform to the following:

- Length must be between 6 and 15 characters
- Password must contain at least 1 character from 2 of the following 3 groups:
  1. Alpha (a-z and A-Z)
  2. Numeric (0-9)
  3. Special Characters (" ~ " ' " " # " " [ " " ^ " " & " " \* " " ( " " ) " " \_ " " - " " + " " = " " [ " " ] " " { " " } " " | " " \ " " : " " ; " " < " " > " " , " " . " " ? " " )

Basically, any character on the keyboard EXCEPT for the 'double quote' character and the 'percent' character

<sup>B</sup> Valid values for Gender are:

- M - Male
- F - Female
- N - Choose not to disclose
- Or no value provided

<sup>C</sup> Valid values for Mailing Address Preference are:

- 1 – Home
- 2 – Work

If not value is provided for Mailing Address Preference, a value of 2 (Work) will be used as a default

<sup>D</sup> Custom fields contain any values that you would like to "pass through" the system and are included on the "generic export". These values are not visible through the administrative or donor interface.

<sup>E</sup> Custom variables contain any values that you would like to present to the donor during the on-line donation process through the use of the variable replacement feature.

<sup>F</sup> Valid values for Change Password Required At Next Login are:

- Y
- N

If no value is provided for Change Password Required At Next Login, a value of N (No) will be used as a default

<sup>G</sup> Valid Values for Donation Edit Type are:

- 1 – Never
- 2 – Once
- 3 – Always

If no value for Donation Edit Type, a value of 1 (Never) will be used as a default

<sup>H</sup> Valid values for Donation Count Limit are 1 to 99. If this is left blank the value will default to 1.

<sup>I</sup> This field and functionality supported by this field will be removed during calendar year 2006.

## Other Notes

- The file format is "tab delimited", indicating that all fields need to be separated by a tab character.
- Field names may be included as the first row of the file; the first row of the file is optional.
- DO NOT include any formatting characters (for example, \$9.00 must be written as 9.00, social security number 888-88-8888 is written as 888888888).
- Fields are not required, unless specified in the Required Field column or in the footnotes.
- Donor Identifier must be unique for the specific campaign.
- Username must be unique for the specific campaign.
- Some fields that are listed as not required and are not provided, will produce some invalid reports, or create limitations to the donor during the donation process.

Updated 06/02/2006



## Data Import Format Specification for Company Level Records

Field #	Field Name	Data Type	Maximum Length	Required Field?
1	Company Level Code	Text	10	Y
2	Parent Company Level Code <sup>A</sup>	Text	10	N <sup>1</sup>
3	Company Level Name	Text	100	Y

<sup>1</sup> Required if the company level is not a "root" level within the company.

<sup>A</sup> The Parent Company Level Code is the Company Level Code of the company level "above" the current company level in the company's hierarchy. For example, if the "California" region with a code of "CA" is grouped under the "West" region with a code of "W", then the Parent Company Level Code for Company Level "CA" would be "W". If the Company Level is the "root" level within the company, then this value should be empty. The file must include the company levels in an appropriate order, i.e., a parent company level must appear in the file before any company level that uses it as a parent company level.

### Other Notes

- The file format is "tab delimited", indicating that all fields should be separated by a tab character.
- Field names may be included as the first row of the file, the first row of the file is optional.
- DO NOT include any formatting characters (for example, (999)555-1212 should be written as 9995551212).
- Fields are not required, unless specified in the Required Field column or in the footnotes.

## Image Specifications:

Image sizes are in pixels.  
.jpg or .gif file format  
Spaces are not allowed in file names

### Website Images Page:

Organization Logo	127w X 87h
Company Logo 1	85w X 56h
Company Logo 2	105w X 56h
Website Image 1	94w X 77h
Website Image 2	106w X 113h

### Welcome Message Page:

Associated Welcome Image	119w X 141h
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### Marketing Message Page:

Associated Marketing Image	82w X 82h
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### CEO Signature:

CEO Signature Image:	200w X 75h
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### Website Multimedia Page:

Multimedia Image 1	72w X 61h
Multimedia Image 2	72w X 61h

**Website Custom Pages 1-6:** 119w X 141h

## Multimedia file types: 5 MB max size

The following media file formats are accepted in United-eWay's Online Pledging System, they are viewed with the associated application.

.wma	Windows media audio
.wmv	Windows media video
.ra	Real Audio
.rm	real video
.pdf	adobe portable document
.mov	QuickTime movie
.wav	Wave audio
.mpg	video
.mp3	audio