



INSTRUCTIONS FOR ACCESSING REPORTS

1. There are two reports agencies should run in relation to United Way of Southwestern Pennsylvania contributor choice payouts. Acknowledgment reports should be run on a standard schedule (we suggest monthly). These reports will show you the contact information for donors as well as the total amount of their pledges.
2. Payee reports should be run each time you receive a payment. These reports show you the details (by donor/company) of each payment.

Here are the steps for accessing your reports

3. Go to the website <https://doyouliveunited.org/crm/Start.jsp> Log in with the USER ID and password provided to you.

United Way of Southwestern Pennsylvania

Allegheny County Office e-Community Portal.

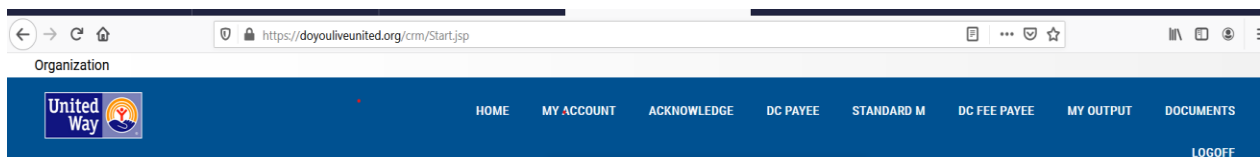
Welcome to the United Way of Allegheny County's Logon Page. From this page, volunteers, donors and agencies can access the site. If you have any questions please call (412)456-6824 or email ecomunity@uwac.org.
Thank you for your support.

User ID:

Password:

LOGIN

4. On the top menu bar you will see a number of options.



(continues on next page)



5. This example will show you how to run your Acknowledgment report. Click the word Acknowledge on the blue bar.

Acknowledgement to Agency Report

Agency Level Account

Millvale Community Library - Agency
213 Grant Avenue
Millvale PA 15209

open all | close all

Millvale Community Library - Agency

Campaign Year

Campaign Account

Show Report Type

6. You will need to select the appropriate campaign year for the report you would like to run and which campaign account (UA or UAN). If you need a report for the UN 2017 campaign, you would select the following options. We recommend running all reports in PDF format as it is easier to read /understand than the Excel reports. Click the submit button when you have selected the appropriate options.

Note: If you receive payments from multiple campaigns – you will need to run this report multiple times to capture all of your donors.

Campaign Year

Campaign Account

Show Report Type

7. After clicking the submit button, you will see the following message. Click the My Outputs link (in the blue bar at the top of the screen) to continue.

Acknowledgement to Agency Report

The report has been submitted successfully and will now be listed on the 'My Outputs' page. When the Status is 'Ready' you will be able to view this report. Please be patient as the report could take some time to be processed. Thank you for your patience.



8. On the My Outputs screen, you will see a list of the reports you have run over time. The most recent report should be at the top of the list. When the status of the report is “Ready” you can click the link (in the Report Link column) to download the report.

MY OUTPUTS

In order to download a report right click the link and save the report on your computer.

REFRESH

Show Outstanding

<input type="checkbox"/>	Job Number	Report Parameter	Report Link	Date Run
<input type="checkbox"/>	2428061	AcknToAgency - UWAC - UA/Animal Friends	Acknowledgements to Agencies - UWAC - UA (Animal Friends/Pet Assisted Therapy)	05/28/2020 01:28:23 PM

(click the **blue** link - shown in the Report Link column - to access your report)

9. You will follow a similar process for running your DC Payee report. The only difference is the DC Payee report will show you a list of specific payouts to choose from – instead of an entire campaign year. To access your DC Payee report you would click DC Payee in the blue bar at the top of the screen.

Payee By Organizations Report

Organization Account

United For Women - Agency
1250 Penn Avenue
c/o United Way of Southwestern PA
Pittsburgh PA 15222

open all | close all

United For Women - Agency

Select one of these payout definitions to print report:

- PAYOUT ON UA17 FOR COLLECTIONS THROUGH FEB 2018 - MIN \$500 (03/20/2018)
- PAYOUT ON UA17 FOR COLLECTIONS THROUGH JAN 31 2018 MIN \$500 (02/28/2018)
- PAYOUT ON UA17 FOR COLLECTIONS THROUGH DECEMBER 31 2017 MINIMUM \$100 (01/26/2018)
- PAYOUT ON UA17 FOR COLLECTIONS THROUGH NOV 30 2017 MINIMUM \$500 (12/21/2017)

Show Report Type

Acrobat (PDF) Format

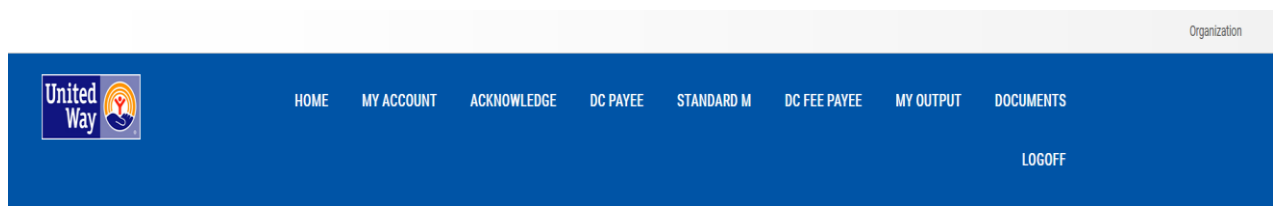
RollUp	<input type="checkbox"/>
Exclude all records with zero dollars	<input checked="" type="checkbox"/>

SUBMIT

10. Your payment notification email will tell you which campaign year and campaign your payment is for. For example, the choice selected above would run your report for the UA campaign, in the 2017 campaign year. Once you’ve made your selection and set the report type to PDF, click submit and go to the My Outputs page to download your report.



- 11. IF you are responsible for running reports for multiple organizations or programs, you will need to use the Organization link to switch between your agencies.**
- 12. At the bottom of the Home screen (accessed by clicking Home on the blue bar) you will see the word Organization, you may also access it from the top right corner. Click this link to access your organizations.**



- 13. Scroll down the page to choose the correct organization from the list and click the Change Organization button to switch. You can now access reports for the selected organization / program following the steps detailed above.**

Change Organization

Select organization

- Community Care
- Millvale Community Library
- United Way of Allegheny County

CHANGE ORGANIZATION

- 14. Please direct any questions - regarding your reports or use of the portal – to:
Email: agencyrelations@unitedwayswpa.org**