

CAMPAIGN DETAILS

AGENCY PORTAL





UNITED WAY AGENCY PORTAL

AGENCIES CAN PULL REPORTS
SHOWING THE NAMES AND GIFT
AMOUNT OF ALL BUT ANONYMOUS
DONORS

REPORTS CAN BE PULLED IN PDF OR
EXCEL FORMATS

INSTRUCTIONS FOR USING AGENCY
PORTAL EMAILED TO AGENCIES IN
FEBRUARY



UNITED WAY AGENCY PORTAL

A screenshot of a Mozilla Firefox browser window displaying the United Way Agency Portal login page. The browser's address bar shows the URL 'portal.unitedwayncfl.org/crm/Start.jsp'. The page has a dark blue header with the text 'LIVE UNITED' and the United Way logo on the left, and 'United Way of North Central Florida' on the right. The main content area is white and contains the text 'Welcome to the United Way Web Portal'. Below this text are two input fields: 'User ID:' and 'Password:'. Underneath the input fields are two buttons: 'Login' and 'Forgot My Password'. At the bottom of the page, there is a small text line: 'Powered by [Sage CRM from Sage Software Inc. \(e13.02\)](#)'. The Windows taskbar is visible at the bottom of the screenshot, showing various application icons and the system clock displaying '11:54 AM 6/9/2013'.

1. Log on at: <https://portal.unitedwayncfl.org>
2. Enter User ID and password sent to you via email.



To run an Acknowledgement Report:

The screenshot shows a web browser window with the URL <https://portal.unitedwayncfl.org/admin/AckToAg.jsp>. The page header includes the "LIVE UNITED" logo and the United Way logo. The main content area is titled "Acknowledgement to Agency Report" and contains the following elements:

- Agency Level Account:** A text box containing "ACORN Clinic (Alachua County Organization for Rural Needs, Inc.) - Agency" and "23320 North State Road 235, Brooker FL 32622". Below it are links for "open all" and "close all", and a button for "ACORN Clinic (Alachua County Organization for Rural Needs, Inc.) - Agency".
- Campaign Year:** A dropdown menu set to "2012".
- Campaign Account:** A dropdown menu set to "University Federated Campaign".
- Output Format:** A dropdown menu with options: "Both Acrobat and Spreadsheet", "Acrobat (PDF) Format", "Spreadsheet (CSV) Format", and "Both Acrobat and Spreadsheet".
- Buttons:** "Submit" and "Cancel".

At the bottom of the page, there is a "VERIFIED & SECURED" badge and a footer that reads "Powered by www.unitedwayncfl.org (613.02)".

1. Click "Acknowledgements" link
2. Choose campaign year, then campaign account (University Federation Campaign)
3. Choose output format from drop down list; click "Submit." The report will be sent to "My Outputs" page.

To run Payee by Organization Report:



A screenshot of a web browser displaying the 'Payee By Organizations Report' page. The browser's address bar shows the URL 'https://portal.unitedwayncfl.org/admin/DCPPayeeByOrg.jsp'. The page header includes the 'LIVE UNITED' logo and the 'United Way of North Central Florida' name. A left-hand navigation menu lists options like 'Home', 'Agency Forms', and 'Payee by Org'. The main content area is titled 'Payee By Organizations Report' and shows an 'Organization Account' section with details for 'ACORN Clinic (Alachua County Organization for Rural Needs, Inc.) - Agency'. Below this, there are radio buttons for selecting a payout definition, checkboxes for 'Print details for each employee', 'RollUp', and 'Exclude all records with zero dollars', and a dropdown menu for the report format. The page also features a 'Verified & Secured' badge and a footer indicating it is powered by 'e13.02'.

1. Click the “Payee by Org.”
2. Click on one of the payouts listed.
3. Select if you want employee details OR just the amounts rolled up by organization.
4. Check “Exclude records with zero dollars” to exclude non-donors.
5. Click “Submit.” Report will be sent to “My Outputs”



Retrieve documents under “Acknowledgement” or “Payee by Org”

LIVE UNITED **United Way of North Central Florida**

Home
Agency Forms
Acknowledgements
Payee by Org
My Outputs
Attachments
Banking Information
Contact us
Logout

My Outputs

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

<input type="checkbox"/>	Job	Name	Date	#Pages	Size	Type	Status
<input type="checkbox"/>	DCP Payee ByOrganization Report	DCP Payee Report By Organization United Way of North Central Florida	06/07/2013 02:19:38 PM	2	14173	PDF	Ready
<input type="checkbox"/>	DCP Payee ByOrganization Report	DCP Payee Report By Organization United Way of North Central Florida	06/07/2013 02:16:56 PM	2	11936	PDF	Ready
<input type="checkbox"/>	DCP Payee ByOrganization Report	DCP Payee Report By Organization United Way of North Central Florida	06/07/2013 02:14:49 PM	2	14202	PDF	Ready
<input type="checkbox"/>	AcknToAgency - University FeddeACORN Clinic (Acknowledgements to Agencies - University Federated Campaign (ACORN Clinic (Alachua County Organization for Rural Needs, Inc.))	06/07/2013 10:36:39 AM	14	41046	PDF	Ready

VERIFIED & SECURED
HEALTHY SECURITY

Powered by [United Way of North Central Florida](#) (s13.02)

1. Select the “My Outputs” link
2. If there is a Report in the “Name” column, double click the report name.
3. If a Report is not displayed, click the “Refresh” button until the document appears, then double click the report name.
4. To save a report, right click on the report and select “save link as.”

TO RECEIVE QUARTERLY FUNDS: Complete or update the 'Banking Information' form

A screenshot of a web browser displaying the 'Banking Information' form. The browser's address bar shows 'portal.unitedwayncfl.org/admin/BankInfo.jsp'. The page has a left sidebar with navigation links: Home, Acknowledgements, Agency Forms, Payee by Org, My Outputs, File Upload, Banking Information (highlighted), Contact us, and Logoff. The main content area is titled 'Banking Information' and shows the following details: 'United Way of North Central Florida - Master', '6031 NW 1st Place', 'Gainesville FL 32607-2025'. Below this is a tree view with 'United Way of North Central Florida - Master' expanded, showing 'Finale: Celebration Success - Event' and 'Leadership Reception 12/05/07 Hosted by the Godet's - Event'. The form fields include: *Name: [text box], *Transit Number: [text box], *Account Number: [text box], *Account Type: [text box], Address Line 1: [text box], Address Line 2: [text box], Address Line 3: [text box], Address Line 4: [text box], City: [text box], State: [dropdown menu], Zip Code: [text box], Country: [dropdown menu, set to 'United States'], Change Reason: [dropdown menu]. A note states '*Items marked with an asterisk (*) are required'. At the bottom are 'Save' and 'Undo' buttons. The Windows taskbar at the bottom shows the time as 9:50 AM on 6/6/2014.

1. Click on "Banking Information"
2. Complete the form and save



NEED HELP?

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