



UNITED PERFORMING ARTS FUND

Online Employee Giving Site Setup Request Form

This form must be completed in order for your company online employee giving site to be set-up. Should you have any questions while completing this form please contact your UPAF staff member.

COMPANY NAME: _____

COMPANY EMPLOYEE GIVING COORDINATOR: _____

COMPANY ONLINE GIVING CONTACT (if different than coordinator): _____

PHONE: _____

EMAIL: _____

1. Format required for company logo is listed below. Please e-mail to jjackson@upaf.org.

*For use on the pages employees see when logged into the online giving system)
File must be in a web-compatible format: JPEG, GIF, or BMP*

2. Format required for company data file is listed below. Please e-mail to jjackson@upaf.org.

Employee data file in an Excel or CSV format. The following information is required.

Employee last name

Employee first name

Username

Password

Payroll frequency (*bimonthly, biweekly, weekly*)

Employee e-mail address (UPAF will not use e-mail addresses without permission)

The employee file **can** also include the following fields to be included in the exported file from the admin site:

Employee ID

Department

Division

Location

3. Campaign Start date (the site will be available at midnight on this date): _____

4. Campaign End date (the site will close at midnight on this date): _____

5. Who should be provided administrative access? _____

6. Would you like to have the progress thermometer showing on your site? **Yes No (circle one)**

7. If so, would you like it to show progress towards a dollar goal or a % participation goal? **Dollar Participation (circle one)**

8. Please provide that goal value. _____

9. Would you like any specific information to be included on the login page? **Yes No (circle one)**

If so, please include that verbiage here. (Examples include: login instructions, other information about the campaign, etc)

10. Would you like users to be prompted to change their password on their first login? **Yes No (circle one)**

11. Would you like to have a company specific greeting letter? **Yes No (circle one)**

(For use on the first screen after login. Typically signed by CEO)

Please send this letter in MSWord format. Also please include an electronic signature file and additional picture if desired.

If so, please send via e-mail to jjackson@upaf.org.

12. Each user must be assigned a unique username. What is the format of your username?

Please note: Because usernames are required to be unique across the entire system, the format must include the company name in either full or abbreviated form. Usernames cannot contain spaces.

Format options include:

- Company e-mail address (UPAF preferred)
- first initial of first name with full last name @ company name (example: *jdoe@abccompany*)
- Employee ID @ company name (example: *12345@abccompany*)

13. Each user must be assigned a password. This is not required to be unique for each user. What is the format of your password? (examples: same as username, part of name plus part of SS#, birthdate)

14. What payment/pledge options will you make available to your employees (check all that apply):

— Payroll deduction (over a full payroll year)

Date on which the payroll deductions will begin to be deducted from employee checks: _____

— Payroll deduction (one time)

— Check

Name of person at the company to whom check donations should be routed (*information included on the confirmation page for a check donation*)

— Credit card

— Direct Billing from UPAF (must be \$10 minimum)

— No Contribute Option

Any additional information: