



INTRODUCTION TO INVESTMENT GUIDE (IGUIDE)

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Introduction

The Investment Guide (iGuide) is a database that stores information vital to participating in national campaigns. United Way basic information, Focus Areas, eligible and ineligible agencies, and even programs within those agencies are stored in iGuide by creating **profiles** of **core records**. All you need to provide is the information that follows your own designation policies. Using iGuide ensures that national campaign donors in your area are treated with the same experience you provide to your local donors. The technology behind the iGuide is provided via FrontStream applications/hardware, however, the data found in the iGuide is provided by United Ways. It is crucial that each local United Way maintain their local information. iGuide is used in conjunction with FrontStream's Campaign Management solution, which is the most efficient way to configure campaigns and provide donors with rich experiences.

What is a Core Record?

Each United Way and agency is only in the iGuide once. This *core record* contains only the most basic agency information and is not edited by the local United Ways. Each core record is assigned a 10-digit standard account code or sometimes called the "**catalog code**." This basic information is occasionally verified and reviewed by the FrontStream staff, utilizing Guidestar and the IRS database of agencies.

What is a Profile?

Because each entity (United Way, Focus Area, Agency, Program) is only in the iGuide once, – and assigned a 10 digit account code – each United Way is invited to create a "**profile**" for any agency they have a relationship with. Their profile allows for book numbers, eligibility, address, contacts, etc. specific to their UW and is shown to their potential donors. For example – Dallas and Nashville may have donors that give to the Boys & Girls Club – in the Nashville area. The Agency itself only exists once (the core record), but Dallas and Nashville have each created a profile of the agency with information specific to each of their locations (booking number, funded status, etc).

A profile is all of the pertinent information about your relationship to an agency. Your contact, preferred address, book number, description, etc. is affiliated to the agency, so when a donor sees your agency list, the information displayed is what you provided about that agency. More than one United Way can profile the same agency. Importing or manually adding your agencies is creating those profiles and assures your lists are correct.





When an agency is no longer desired in your list, you can archive the agency. That means you deactivate your profile to the agency, but leave it in the iGuide for one of the following reasons:

- 1. You have received payments in the past and your transaction history refers to the agency.
- 2. Another United Way may have a current profile.
- 3. You simply do not wish to delete history for an entity as a best practice.

Accessing iGuide

To access iGuide, go to http://iguide.truist.com and enter your United Way login information. Access to iGuide can also be accomplished on United Way Online:

- 1. Go to United Way Online, at <u>http://online.unitedway.org</u>.
- 2. Log in by entering your username and password.
 - a. **FIRST TIME USERS ONLY:** To register for United Way Online, click the "**Apply online now**" link. Once you have entered your information, your account must be approved by a United Way Worldwide associate. You will receive an email shortly after registering notifying you that your request has been received. Administrators will then assign the appropriate permissions, align you to the correct United Way, and send you an email confirming the approval of your request.



3. Select the *Member Services* tab, located in the top navigation bar.







4. Select the *iGuide* link, located at the top of the page.







5. Click the *iGuide* URL in the middle of the page. This link directs you to the iGuide, at https://iguide.truist.com.

United Way	Online			United Way
Resources & Tools	Learning & Conferencing	Member Services	Career	Connect
	Membership	Finance and Accountability iGuide	Truist United Way Information Store	
Inited eWay Investment GUDE Customer Service Improvement Conine Piedge Conine Piedge	INVESTME Home > UWW > Informa COMMUNICATION ARCH WHAT IS THE INVES The Investment Guide United Way basic inf you only provide the i area are treated with HOW DO I ACCESS 1 Get started with the s URL: https://guide du Cicking the Inits will: your account has be Note that the investm ACMS, your data will WHY SHOULD OUR I Simply stated: Down Populating your age in the dozens of regi Wireless, Delotte, a Regional and Nation	Atton Technology > United Way On IVES > United eWay TINEIT GUIDE (Guide)? de is your first step towards particip formation, focus areas, eligible ag information that follows your own or the same experience you provide THE IGUIDE? setup Wizard available at first login united-e-way.org send a request to the Investment G en approved. ent Guide has replaced the Agen atready be in the Investment Guide UNITED WAY USE IT? ors cannot give to your United Wa noles and impact areas once, and on al and impact areas once, and and Campaigns will not see your to use for a few. Again, al Campaigns will not see your to	Ine Information > Truist > TRUIST wating in national campaigns. IGuid encies and even programs within th tesignation policies – ensuring nat to your local donors. Suide team to setup your account. 1 cy Catalog Management System (Ale e, ay initiatives or partners if they de maintaining them naneually will allow an initiating options. If your United Way does not update cal giving options.	LIVE UNITED The Marketing > the can store each of the following: to se agencies. And what's best is ional campaign donors in your You will receive an email when CMS). If you previously used the proteknow about them. wingour Dhiled Way to be jular to the funded Bellowing in major misticom or 801-258-7888.

6. Upon clicking this link, you will be brought to your United Way's iGuide homepage.

United Way Of
United Way Focus Areas Agencies Programs Imports Users
Tasks
You have no outstanding tasks
Administration
 Update United Way Information View United Way Information Export Profiles with Core Record Information

7. If your United Way is new to iGuide and nobody has updated it or profiled any agencies, a wizard will appear to help guide you through the setup process. Follow the steps provided in the setup wizard.





Welcome to the Investment Guide
United Way Focus Areas Agencies Programs Imports Users
The Investment Guide has been created to give you a simple, consolidated area to promote the mission, ideas, and p drive the positioning of your community whenever a donor aligns to your community via a workplace campaign.
The first step in using the guide is to provide information about your United Way and its Focus Areas. The next few se
Continue
Skip the setup wizard

Add Your Agencies
United Way Focus Areas Agencies Programs Imports Users
Please add information to the guide on the agencies with which you work to deliver on your mission. This information national campaigns that support designations to promote United Way community partners through those campaigns
Upload agencies Upload later

Basic Information Complete

United Way Focus Areas Agencies Programs Imports Users

Thank you for provided the basic information needed to present your United Way to donors in online campaigns. We encourage experience for donors and volunteers when interacting with your United Way.

Please complete a detailed profile for each of your focus areas, including your results, news releases, and list of partners. Als

- Provide more information about Supporting Vulnerable and Aging Populations
- Provide more information about Promoting Self Sufficiency
- Provide more information about Building Vital and Safe Neighborhoods
- Provide more information about Strengthening and Supporting Families
- Provide more information about Helping Children and Youth Succeed
- Provide more information about Quality constructive care
 Provide more information about Maternal and infant well-being
 Provide more information about Maternal and infant well-being
- Provide more information about Maintaining and expanding self-sufficiency among working families
- Add or update your agency information
- Go to your United Way Overview





Updating your iGuide Information

It is important to regularly update your iGuide information because it ensures that donors are informed about your United Way initiatives or partners. Keeping iGuide up-to-date guarantees:

- Donors always have the most current description of your United Way's priorities and contact information
- Donors always receive communication from other United Ways conducting national campaigns
- Donors always know of upcoming campaign dates
- Reports and designation are always sent to the correct address

iGuide information can be in campaigns processed by FrontStream or in campaigns processed by another United Way. By updating iGuide information, national donors will be provided with the same experience as local donors.

Remember that United Way information is stored within profiles of core records.

- Core Record The core record is the basic information about each United Way or agency. Each United Way or agency has a single core record. All core records are assigned a unique tended account code, called the *Standard Account Code*. The Standard Account Code is locked once an agency is created. This ensures agencies are not duplicated when a new agency is added to the system.
- **Profile** Each United Way within the system is invited to create a profile. Profiles allow users to assign a booking number, billing address, contact information, and eligibility information specific to each United Way. The profile is what is seen by local donors.

Please note the following:

- You only have access to edit profiles that you have created in the iGuide.
- Never add a new agency by replacing another agency's profile information. If you would like to add a new agency, a new core record must be made. Replacing agency information in a profile will only update the profile and the core record will still contain the old information. For example, in the situation where an agency, Linda's After School Program, becomes an unfunded agency, and another agency, Amy's Tutoring Center, becomes a new agency, Linda's After School Program must be archived and a new core record must be created for Amy's Tutoring Center. If the information for Linda's After School Program is simply replaced with Amy's Tutoring Center, the core record will still contain Linda's After School Program's information and donations could still be paid out to Linda's After School Program.





Before updating iGuide, it is crucial you have the following information available to you:

- **Basic United Way information** Know the name, address, description, and contact information
- Focus Area information Know the name, description, eligibility, and category
- Agency List information Know the name, address, description, and eligibility

Once this information has been collected, take the following steps to update your United Way information in iGuide:

 From your United Way's iGuide homepage, click the "Update United Way Information" link.

Note: If this is not available, please contact your internal iGuide administrator to grant you access to edit your United Way's information.



2. Make appropriate changes in the fields provided.

Note: By entering your United Way's book code in the Primary Account Code field, your United Way will be searchable in other campaigns ran by FrontStream, which is advantageous for potentially increasing donation revenue. If this field is left blank, your United Way will only be found in local campaigns.





United Way Focus Areas Agen	ncies Programs Imports Users		
Investment Guide Information			
Name *	United Way of the National Capital Area		
Primary Account Code	18		
CFC Account Code 🥹			
Phone Number	Sample Use Only		
Fax Number	(202) 223-2648		
Email Address			
Website URL	พพพ แก่ไมะวิพองกร.ล.อาฐ		
EIN/Federal ID *	If no EIN/Federal ID, select reason	-	
Minimum Designation Amount 🕜			
Key Statistic 🕜			
[Hide help]			
Primary NTEE Code	Select NTEE Code		

3. When finished, click the "Okay" button to save changes.

Scription of your United Way *	
Format • Font • Size • B $I \ \underline{U}$ ARC × ₂ x ² \bowtie \bowtie $ M \ U_{B} \underline{II}$	0
唐 吾 君 〓	à l
orking in partnership with more than 950 community partners, we focus on Education, Income, and Health – the building block od quality of life. By doing this we enrich the lives of people throughout the National Capital Region.	is for a
Sa	ample Use Only
Okay Cancel	





Browsing the iGuide Catalog

Browse the catalog to find agencies and Focus Areas to add to your United Way's profile. Follow the steps provided to browse:

1. On your United Way's iGuide's homepage, select "**Browse Catalog**" from the dropdown menu located at the top of the page.

Note: If the "**Browse Catalog**" option is not available in the dropdown menu located in the upper-left corner of your United Way's iGuide homepage, please contact Customer Support, at (202) 903-2647 or at adminsupport@FrontStream.com.

inergenni il secondog	Welcome Browse Catalog
United Way Of	
Tasks	How does this look to my donors in online campaigns? Get Help
You have no outstanding tasks	
Administration	
 <u>Update United Way Information</u> <u>View United Way Information</u> <u>Export Profiles with Core Record Information</u> 	

2. Use the filters provided to search for a United Way, United Way Focus Area, Agency, Agency Program, or CFC Agency.

Investment Guide Catalog			
Filters			
Catalog Code			
Keywords			
Org Number			
Status	Select Status 💟		
State / Province			
Country			
United States			
Туре	United Way		
Active?			
Filter			





Investment Guide Catalog Filters			
Field	Description		
Catalog Code	This is a unique tended account code, known as the Standard		
	Account Code.		
Keywords	Words relevant to your United Way or Agency.		
Organization	This is the number assigned by United Way Worldwide for a		
Number	particular United Way (i.e. 37120F).		
Status	Funded – A Funded status is used to describe partner agencies		
	or funded agencies that are subject to your review and		
	marketed in your campaign materials as members of United		
	Way. Note: Funded Agencies are automatically considered		
	eligible as well.		
	<i>Eligible –</i> These are agencies that may appear in your		
	marketing materials as common designation options or agencies		
	that participate with federations that might be included in your		
	community campaign.		
	<i>Other</i> – These are agencies that your United Way might profile		
	in order to apply book numbers and agency codes to ease in		
	transfer to fundraising systems. Agencies marked as Other will		
	not be visible to donors with your funded or eligible agencies.		
State/Province	The state or province of the United Way or Agency.		
Country	The Country of the United Way or Agency.		
Туре	What are you searching for? Choose from United Way, United		
	Way Focus Area, Agency, Agency Program, or CFC Agency.		
Active?	Mark <i>Yes, No,</i> or <i>Either</i> .		

3. Once found, click the "Details" link, located to the right of desired result.

nvestment Gui	de Cata	alog		
Filters				
Catalog Code			Export	
Keywords			Record	<u> 5</u>
Org Number				
Status		Select Status 🔽		
State / Province		DC		
Country				
United States				
Туре		United Way		
Active?		⊙ Yes CNo CEither		
Filter				
esults: 1				
Catalog Code	Туре	Name		Location
		Sample Use Only		





4. From this page make appropriate changes, as needed.

Note: United Way Worldwide will set up new United Ways in the system before you begin.

Working with Focus Areas

Focus Areas, also known as Impact Areas or Service Areas, are groupings of agencies or programs with common community focuses or needs. Focus Areas educate donors about community priorities, or they solicit donations to groupings of agencies and programs.

The iGuide can store basic information about your Focus Area, as well as unlimited statistics, results, images, and links to programs. Deciding whether to store basic information or extended information is made by each United Way.

Adding a Focus Area

To add a Focus Area, take the following steps:

1. From your United Way's iGuide homepage click the *Focus Areas* tab.

United Way Focus Areas Agencies Programs Imports Users				
United Way Content	How does this look to my donors in online campaigns? <u>Get Help</u>			
Stories Modia	Focus Areas			
Fundraise	Add a focus area			
*Education				
<u>*Health</u>				
*Income				
Archive				

2. Then click the "Add a Focus Area" link.





Note: If this link is not available, please contact your internal iGuide administrator to grant you access.

United Way Focus Areas Agencies Programs Imports Users		
United Way Content	How does this look to my donors in online campaigns? <u>Get Help</u>	
<u>Stories</u> <u>Media</u>	Focus Areas	
Fundraise *Education	Add a focus area	
*Health		
<u>*Income</u>	× ×	
Archive		

3. Enter the appropriate information in the fields provided, and then click "**Okay**" to save the record. Focus Areas become active immediately after they are created in iGuide.

United Way Focus Areas Ag <u>*Education</u> Narr <u>*Health</u> Cate <u>*Income</u> Prim <u>Archive</u> CFC Minit Key :	Igencies Programs Imports (me * tegory • * mary Account Code • C Account Code • Nimum Designation Amount • y Statistic •	Users
United Way Post Vest Page *Education Narr *Health Cate *Income Prim Archive Prim CFC Minin Key: Labor	me * tegory @,* mary Account Code @ C Account Code @ ilmum Designation Amount @ y Statistic @	Select Category V
Income Prim Archive Prim CFC Minii Key: Labor	me * tegory @_* mary Account Code @ C Account Code @ vimum Designation Amount @ y Statistic @	- Select Category V
*Health Cate *Income Prim Archive CFC Minii Key: Labo	tegory O.* mary Account Code O C Account Code O imum Designation Amount O y Statistic O bel O	- Select Category
Income Prim Archive Prim CFC Mini Key: Labo	wyor, e. mary Account Code @ C Account Code @ imum Designation Amount @ y Statistic @ bel @	- Select Category
Archive Prim	mary Account Code 🖗 C Account Code 🖗 nimum Designation Amount 🖗 y Statistic 🎱 bel ぞ	
CFC Minir Key Labo	C Account Code 🌒 nimum Designation Amount 🌒 y Statistic 🌒 bel 🎱	
Minir Key : Labe	nimum Designation Amount 🕑 y Statistic 🕑 bel 😯	
Key : Labe	y Statistic 🛛	
Labe	bel 🥹	
Des	scription *	Format ▼ Fort ▼ Stee ▼ B I I A Sta Sta <td< th=""></td<>
		Okav Cannel



Updating a Focus Area

- 1. From your United Way's iGuide homepage, click the *Focus Areas* tab.
- 2. Click on the Focus Area you wish to update.



3. Click "Update Focus Area Information."

Note: If this link is not available, please contact your internal iGuide administrator to grant you access.

4. Make appropriate changes, then click "**Okay**" to save changes.

Archiving a Focus Area

It is recommended to always **archive** Focus Areas, rather than deleting them. This allows you to remove the profile from a list, disabling its view from donors in campaigns, without deleting its history.

- 1. From your United Way's iGuide homepage, click the *Focus Areas* tab.
- 2. Select a Focus Area from the list.
- 3. Click "**Archive**," found on the left side panel and follow the prompted instructions that follow.

Note: If this link is not available, please contact your internal iGuide administrator to grant you access.





United Way Focus Areas Agenci	es Programs Imports Users
<u>United Way</u> <u>Content</u> <u>Stories</u> <u>Media</u> <u>Fundraise</u>	 How does this look to my donors in online campaigns? Get Help Focus Areas Add a focus area
211 Information & Referral Service	
<u>Community Care</u> Fund	
Crime And Drug Use	
Early Childhood Development	
Emergency and Crisis Services	
Financial Stability and Independence	
Homelessness	
<u>Volunteer</u> Hawaii/Gifts In Kind	
Archive	





Agencies

Agency Lists

Providing a list of agencies to potential donors is an important step towards ensuring a rich donor experience. United Ways that have previously participated in importing an Agency Catalog or Funded Agency Database can cut out one step of the process because most of the data needed is already in the system. New iGuide users are required to get their agencies online and, therefore, are required to either **add an agency** or **import agencies**.

Note: If the **"Browse Catalog**" option is not available in the dropdown menu located in the upper-left corner of the *Agencies* tab, please contact Customer Support, at (202) 903-2647 or at adminsupport@FrontStream.com.

Adding an Agency

To add an agency, take the following steps:

1. From your United Way's iGuide homepage, click the *Agencies* tab.



2. Click "Add an agency."

Note: If this link is not available, please contact your internal iGuide administer to grant you permissions to access the link.



Y	

Agencies		
United Way Focus Areas Agencies Programs	ImportsUsers	
Filters		
UW Account Code	 Import agencies Bulk erase agencies 	
Catalog Code	Bulk Activate Agencies Add an agency @	
Keywords	Export Records	
Туре	All Types	
Member Status	All 💟	
Archived?	⊖Yes	
Filter		

3. Enter the appropriate information in the fields provided.

Add Agency	
United Way Focus Areas Agencie	s Programs Imports Users
When you submit this form, if there is a	valiable, the information you provide will be verified to prevent duplicates in the investment Guide, this process may take between 4 to an existing agency already in the Investment Guide that resembles the information you provide, you may be prompted to confirm that the
Agency Name *	
Primary Account Code 🕗	
CFC Account Code 😶	
Status 😢	- Select Status -
*	
Scope 😢 *	Visible to Everybody
Eligible for Donations? 0.*	Yes C No
Phone Number	
Fax Number	
Email Address	
Website URL	
EIN/Federal ID *	If no EIN/Federal ID, select reason
Minimum Designation Amount 😶	
Label 🛛	
Primary NTEE Code	Select NTEE Code
Description	Format • Font • Size • B $I \ \underline{U}$ ABC $\times_2 x^2$ $(\sim) \simeq 44$ ζ_2^* $(effective definition of the sector \cdot$
	_ ■ = = = = = = = = = = = =





Primary Contact		
First name		
Last name		
Title	Select	
Phone		(including area code)
Email		ļ
Fax Number		(including area code)
Description		<
Preferred Contact Method	Select 🔽	
Street Line 1]
Street Line 2		
City		
Country	Country	v
Province or Region	Please select a Country first	
Postal Code		

Physical Address	
Street Line 1 *	
Street Line 2	
City *	
Country *	Country
Province or Region *	Please select a Country first
Postal Code *	





Pay To Address	
Street Line 1 *	
Street Line 2	
City *	
Country *	Country 🔽
Province or Region *	Please select a Country first
Postal Code *	
	Okay Cancel

	Require	d Add an Agency Fields
Req	Field	Description
*	Agency Name	This is the name the donor sees in an online
		campaign.
*	Primary Account Code	Your "book number" or code, which eases the
		process of transferring to Campaign
		Management
*	Status	<i>Funded</i> – A <i>Funded</i> status is used to describe
		partner agencies or funded agencies that are
		subject to your review and marketed in your
		campaign materials as members of United Way.
		Note: Funded Agencies are automatically
		considered eligible as well.
		<i>Eligible</i> – These are agencies that may appear
		in your marketing materials as common
		designation options or participate with
		federations that might be included in your
		community campaign.
		<i>Other</i> – These are agencies that your United
		Way might profile in order to apply book
		numbers and agency codes to ease in transfer to
		fundraising systems. Agencies marked as Other
		will not be visible to donors with your funded or
		eligible agencies.
*	Scope	Choose Private or Visible to Everybody. Visible to
		<i>Everybody</i> is the default.





	Required Add an Agency Fields	
Req	Field	Description
*	Eligible for Donations?	This will impact whether donors can see the
		agency from the list while they donate. In order
		for this to show up in Campaign Management,
		"Yes" must be selected.
*	EIN or Reason for	The EIN number is the federal number associated
	Unavailable	to every agency.
*	Physical Address	The street address. This is shown to donors
		online.
*	Pay to Address	If payment to Post Office Box is preferred, list
		here.

4. When finished, click "**Okay**" to save changes.

Note: Newly added agencies are initially in a *pending* status. After they pass through FrontStream's vetting process, the status will become *active*. Once *active*, they will be visible in Campaign Management. You may check back on the *Agencies* tab periodically to confirm the process is complete.

Importing Agencies

To import agencies, take the following steps:

1. From your United Way's iGuide homepage, click the *Agencies* tab.

United Way Focus Areas Agencies Programs Imports Users
Tasks
You have no outstanding tasks
Administration
 Update United Way Information View United Way Information Export Profiles with Core Record Information

2. Click "Import agencies."

Note: If this link is not available, please contact your internal iGuide administrator to grant you access to the link.



Agencies		
United Way Focus Areas Agencies Program	ns Imports Users	1
Filters		
UW Account Code Catalog Code Keywords		 Import agencies Bulk erase agencies Bulk Activate Agencies Add an agency Export Records
Туре	All Types 💽	
Member Status	All 💟	
Archived?	◯ Yes	
Filter		

a. Before uploading an import file, select the **File Specification** link to review requirements for your import.

pload Agency Import File							
this is your first time uploading data, please look at the file specification below to download a sample file to work with. Each file you upload MUST contain column headers named according to the specification of your only need to provide columns that are required and can provide the data in any column order that you choose. Please note that prior to your agencies becoming available, the information you provide will be efficiency or works.							
select File to Upload (csv, td, zip, or gz file extension) *							
Browse							
. Email Alert? 🔞							
Yes CNo							
Upload File							
Ate: Files larger than 10 MB or so must be zipped prior to uploading							
) File Specification							

- b. This page provides information on import file specifications and a sample import file. Please note that when updating an import file, it is important to ensure all related fields are also updated to reflect the changes made.
- c. When done, click the "Back to where you were" link.
- 3. Click the "**Browse**" button and select the file you wish to import. Accepted files include: csv., txt., or zip.
- 4. Mark *Email Alert*, which indicates that when the file completes, you will receive an email notification.
- 5. Then click the "Upload File" button.

Note: Similar to manually adding new agencies, these newly imported agencies are initially in a *pending* status. After they pass through FrontStream's vetting process, the status will become *active*. Once *active*, they will be visible in Campaign Management. You may check back on the *Agencies* tab periodically to confirm the process is complete.





Exporting Records

To export records, take the following steps:

1. From your United Way's iguide homepage, click the *Agencies* tab.

United Way Focus Areas Agencies Programs Imports Users							
Tasks							
You have no outstanding tasks							
Administration							
 Update United Way Information View United Way Information Export Profiles with Core Record Information 							

2. Click "Export Records."

Note: If this link is not available, please contact your internal iGuide administrator to grant you access to the link.

- 3. Choose a file type: *Download as Excel* or *Download as .csv*.
- 4. Use the spreadsheet to make changes to the data listed.
- 5. Save the spreadsheet in a .csv or .txt.
- 6. Using the Importing instructions above, import the record back into the system once changes have been made.

Updating an Agency Profile

Note: If important information, such as an agency's address or EIN requires changes, please archive the agency and create a new one with the updated information. Please see section on Adding Agencies for details.

1. From your United Way's iGuide homepage, click the *Agencies* tab.





United Way Focus Areas Agencies Programs Imports Users						
Tasks						
You have no outstanding tasks						
Administration						
 Update United Way Information View United Way Information Export Profiles with Core Record Information 						

- 2. Either conduct a filtered search or select the agency from the list at the bottom of the page to find the agency you wish to update.
- 3. Once found, click "Details."
- 4. Then click "Update Agency Information," located at the bottom of the page.

Note: If this link is not available, please contact your internal iGuide administrator to grant you access to the link.



5. Make appropriate changes and save.

Profiling Existing Agencies

To profile an existing agency, take the following steps:

- 1. Browse for agencies using the *Browse Catalog* option from the dropdown menu located at the top of your United Way's iGuide homepage.
- 2. Once you have found the agency you are looking for, click "Details."
- 3. Scroll to the bottom of the page and click "Profile this Entity."

Note: If this link is not available, please contact your internal iGuide administrator to grant you access to the link.





- <u>Back to where you were</u>
 <u>Profile This Entity</u>
 <u>View Profile Owners</u>
 <u>View Change Log</u>
 <u>Suggest Agency As Duplicate</u>
- 4. Fill in the appropriate information in the fields provided.

Profile Sample Use	• Only
Organization	United Way Worldwide
Catalog Code	8596744879
Agency Name *	
Primary Account Code 🕘 *	Sample
CFC Account Code 😶	Ose Only
Status 😢	Other
Eligible for Donations? 0	● Yes ◎ No
Minimum Designation Amount 🥝	
Label 🥝	
Primary Contact	
First name	
Last name	
Title	Select
Phone	(including area code)
Email	
Fax Number	(and discussed)

5. When complete, click the "Update Profile" button.





Archiving an Agency

It is recommended to always **archive** agencies, rather than deleting them. This allows you to remove the profile from a list, disabling its view from donors in campaigns, without deleting its history.

1. From your United Way's iGuide homepage, click the *Agencies* tab.

United Way Focus Areas Agencies Programs Imports Users					
Tasks					
You have no outstanding tasks					
Administration					
 Update United Way Information View United Way Information Export Profiles with Core Record Information 					

- 2. Either conduct a filtered search or select the agency from the list at the bottom of the page to find the agency you wish to update.
- 3. Once found, click "Details."
- 4. Scroll to the bottom of the page and click "Archive Agency."

Note: If this link is not available, please contact your internal iGuide administrator to grant you access to the link.



5. Enter the date you wish the agency to be archived. Click "**Save archive date**" when complete.

Note: If you want the listing to show as archived for today's date, select yesterday's date.



Archive Agency
United Way Focus Areas Agencies Programs Imports Users
Agency Archiving your agency will remove your agency information from all publicly visible websites, but will preserve the core record and catalog code of the agency in the Investment Gu
Programs Please confirm that you would like to archive A Woman's Choice.
Sub Agencies
Archive as of * August 💽 21 2011
Note: To archive immediately, use a date in the past
Save archive date Cancel

Alternatively, profiles can be archived by importing agencies via the *Agencies* tab. When creating your Agency Import file, mark the *Expiration* column of each agency with a date prior to the present date.

Programs Tab

The **Programs** tab contains Focus Areas and agencies. If you have an internal program at your United Way that you would like to appear in Campaign Management, we suggest you add the program as a **Focus Area**, instead of a program. Programs do **NOT** appear in Campaign Management.

View of a United Way without programs added to iGuide:







View of a United Way with programs added to iGuide:

Programs									
Index Way Excess Associate Programs Imports User									
Torgama are designation choices that belong to another agency in the Investment Guide. You will want to use programs whenever the address of the program is identical to the address of the program i									
Export Records Add program Import programs									
Results: 54 Keywords: Previous	Page: 2 of 3 v Go		Next						
Agency Name	Program Name	Account Code							
26 initial West of Matterpolition Resetution	Neighborhood Initiatives	5201	Details						
27 Initial Wey of Halfregallian Headarths	Family Resource Centers	5219	Details						
28 initial tree of their qualities treated to	Read to Succeed	3482	Details						
29 Initial Way of Baltingalitan Bachallin	OPTION A: INFLUENCE THE CONDITION OF ALL. Give To The United Way Community Action Fund	9999	<u>Details</u>						
30 Initial Wey of Halfragailties Headlards	Meeting Basic Needs	5202	Details						
31 initial Wey of Multisguillies Application	NEIGHBORHOODS	5268	Details						
32 initial West of Mellinguillian Teachardin	ECONOMIC STABILITY	5266	Details						
33 Holind Men of Malinguillian Headladha	EDUCATION	5267	Details						
34 initial line of Halingardian hashadla	HEALTH	5269	Details						
35 Hollind Mena Bullingford County	Strengthening Youth and Families	588	Details						
36 Indiad West Builtonflord County	Helping People in Crisis	586	Details						
37 Initial Way halforful County	Promoting Health and Healing	587	Details						
38 indiad when if the treater transfer	Investing in our Youth	3574	<u>Details</u>						

Imports Tab

The *Imports* tab displays data such as the status of pending imports and of completed imports. Failed imports will display failed lines of data under the "Number Exceptions" column.

Your Import Status										
United Way Focus Areas Agencies Programs Imports Users										
						Import	ing Agencies and F	Programs		
		[Pending Com	pleted]							
 Import age Import pro Bulk erase 	Import agencies Import programs Bulk errose agencies									
Results: 9 Keywords:										
Uploaded By	Filename	Processing Start Date	Processing End Date	Number Exceptions	Number Warnings	Number Successful Records	Processing Errors			
1 Halborrow	iguide-primary-entity-iguide-63agency-upload-final-8-15- 11csv-i10476720492i.csv	2011-08-15	2011-08-15	0	0	1,045		<u>Details</u>		
2	iguide-primary-entity-iguide-63agency-upload-final-8-15- 11csv-i10476720462i.csv	2011-08-15	2011-08-15	0	0	1,045		<u>Details</u>		
3 Tailaille Basile	iguide-primary-entity-copy-of-atmanand-jaikarran-import- file-colaa-active-p-changes-0811112-i10476219850i.txt	2011-08-12	2011-08-12	0	0	1		<u>Details</u>		
4 Publisher Really	iguide-primary-entity-copy-of-atmanand-jaikarran-import- file-colaa-active-p-changes-0811112-i10476205603i.txt	2011-08-12	2011-08-12	0	0	63		<u>Details</u>		
5	iguide-primary-entity-iguide-63agency-upload-final-6-17- 11csv-i10474048574i.csv	2011-08-02	2011-08-02	0	0	1,045		<u>Details</u>		
6 *********	iguide-primary-entity-iguide-63agency-upload-final-6-17- 11csv-i10474045942i.csv	2011-08-02	2011-08-02	1	0	1,044		<u>Details</u>		
7 instituteren	iguide-primary-entity-iguide-63agency-upload-final-6-17- 11csv-i10466349500i.csv	2011-06-17	2011-06-17	16	0	1,031		<u>Details</u>		
8 Harma Tangilar	iguide-primary-entity-iguideagenciesfixed07- i10244855129i.txt	2007-07-17	2007-07-17	0	0	988		<u>Details</u>		
9 Harrison	iguide-bulk-delete-profile-delete-test-i10244152284i.txt	2007-07-09	2007-07-09	1	0	0		<u>Details</u>		

• **Pending imports** – When you click the "**Pending**" link under the *Imports* tab, you will see files that have not yet been processed. Please check back periodically for completion status.





- Completed imports: <u>Successful</u> When you click the "Completed" link under the *Imports* tab, files that show zero warnings and zero exceptions processed successfully. The page will also show the *Number Successful Lines* to the right of your import file name.
- Completed imports: <u>Failed</u> If you see *Number Warnings* to the right of your import file name, those data lines of your file likely processed successfully; however it is important that you review them, as there may have been a minor problem causing some of the data in your import file to not load. If you see *Number Exceptions*, it indicates that these lines did not process. Click the "Details" link to the right of the file in question. Then review the *Download errors* and the *Download rejected records* of files that were not 100% successful. You may either correct your original file then reimport it, or you may use the file downloaded by using the "Download rejected records" link to correct the remaining lines and re-import this partial file.

1	Original Li Error Message
2	7 The physical_zip code is not valid ('37160-2067' does not look like a valid zip code to us (e.g. 02139)
3	23 The physical_zip code is not valid ('37160-2067' does not look like a valid zip code to us (e.g. 02139)
4	117 The physical_zip code is not valid ('37162-0122' does not look like a valid zip code to us (e.g. 02139)
5	132 The physical_zip code is not valid ('37129-2382' does not look like a valid zip code to us (e.g. 02139)
6	136 The physical_zip code is not valid ('37129-3503' does not look like a valid zip code to us (e.g. 02139)
7	210 The physical_zip code is not valid ('37129-3140' does not look like a valid zip code to us (e.g. 02139)
8	417 The physical_zip code is not valid (Please make sure your zip code consists of exactly 5 numbers (e.g. 02139)
9	510 The physical_zip code is not valid ('37116-0669' does not look like a valid zip code to us (e.g. 02139)
10	569 The payto_zip code is not valid ('37204-0347' does not look like a valid zip code to us (e.g. 02139)
11	578 The physical_zip code is not valid ('37127-7135' does not look like a valid zip code to us (e.g. 02139)
12	592 The physical_zip code is not valid ('37212-3403' does not look like a valid zip code to us (e.g. 02139)
13	775 The physical_zip code is not valid ('37129-3439' does not look like a valid zip code to us (e.g. 02139)
14	908 The physical_zip code is not valid ('42102-3330' does not look like a valid zip code to us (e.g. 02139)
15	913 The physical_zip code is not valid ('37111-7238' does not look like a valid zip code to us (e.g. 02139)
16	1039 The UW Account Code you provided, 3699, is a profile of the standard account code 6458381800. You cannot provide a differe
17	1039 The United Way Primary Account Code you entered, 3699, has already been assigned to the entity with catalog code 6458381

Download Errors appear in a list such a this





	W	Х	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
1	phone_nu	fax_numb	website_u	email_ado	active_p	physical_s	physical_s	physical_o	physical_s	physical_	physical_z	physical_
2					N	Agricultur	2105 Midla	Shelbyvill	TN	37160-206	7	us
3	(931) 684-	8635		weavere@	N	326 East D	epot Stree	Shelbyvill	TN	37160-206	7	
4	(931) 684-	4300		bedfordbu	N	PO Box 12	2	Shelbyvill	TN	37162-012	2	
5	(615) 890-	(615) 893-	3698		N	820 Jones	Blvd	Murfreest	TN	37129-238	2	us
6	(615) 893-	1680			N	211 Bridge	Avenue	Murfreest	TN	37129-350	в	us
7	(615) 898-	(615) 898-	1738		N	1453B Hop	be Way	Murfreest	TN	37129-314	D	us
8	(856) 589-	(856) 589-	6614		N	72 East Ho	lly Ave. Su	Pitman	NJ	8071		
9	(615) 859-	(615) 859-	http://ww	db@loveh	N	PO Box 66	9	Madison	TN	37116-066	Ð	
10	ty Non-Par	rtner Agen	cies		N	903 S. Cap	ital of Texa	Austin	ТХ	78746		us
11	(615) 893-	(615) 893-	2352		N	2552 Sout	Suite #100	Murfrees	TN	37127-713	5	us
12	e for Publi	ic Educatio	n		N	2400 Fairf	ax Avenue	Nashville	TN	37212-340	В	us
13	(615) 895-	(615) 890-	5922		N	1137 West	t Main Stre	Murfreest	TN	37129-343	Ð	us
14	(270) 843-	(270) 843-	www.uws	k.org	N	1110 Colle	P. O. Box	Bowling G	кү	2102-333	D	
15	(931) 473-	1515			N	PO Box 60	8	Mc Minnv	TN	37111-723	8	us
16	(615) 333-	(615) 385-	http://ww	Yolanda@	у	417 Welsh	wood Driv	Nashville	TM	37211		US



Import Status - iguide-primary-entity-iguide-63agency-upload-final-6-17-11csv-i10466349500i.csv								
United Way Focus Areas Agencies	Programs Imports Users							
Import Summary	nge loading this filo							
	ngs loading this me.							
Creation Date: June 17, 2011								
Processed Date:	June 17, 2011							
Email Addresses 😢 :	none							
Filename:	iguide-primary-entity-iguide-	63agency-upload-final-6-17-11csv-i104	l66349500i.csv					
Import Type:	iguide-primary-entity							
Total Lines in File 🛛 :	1047							
Number Lines Processed 🛛 :	1047		1					
Number of Exceptions:	16	Details of an imported file						
Number of Warnings:	0	(sample)						
Number of Successful Records: 1031								
Erase this data import Download errors Download rejected records								





Users Tab

The **Users** tab appears if you have been granted access to see or to change users. This tab displays current users and revoked users. This tab also has Permissions settings for each user, and if you have been granted the **Edit User** permission, you may modify the permissions for other users in your organization.

Users		
United Way Focus Areas Agencies Programs Imports Users		
Administration		
Add User		
Approved Users		
Results: 2		
Name	Email	
1 Heather Kinney	heather@wyomingcountyu.	Permissions Revoke
2 Jennifer Bernold	(bernold@truist.com	Permissions Revoke
Pending Users		
No users found		
Rejected Users		
Results: 1		
Name	Email	
1 Connie Pheilf Co	nnie@wyomingcountyun	<u>Approve</u>

Permissions

Use the Permissions page to grant or deny access to various pages and actions in iGuide to specific users.

Note: If the *Browse Catalog* dropdown in the upper right corner of your United Way's *Agencies* tab is not available, please contact Admin Tech support, as it is presently a permission accessed outside of the regular user permissions.