frontstream WORKPLACE PHILANTHROPY

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:

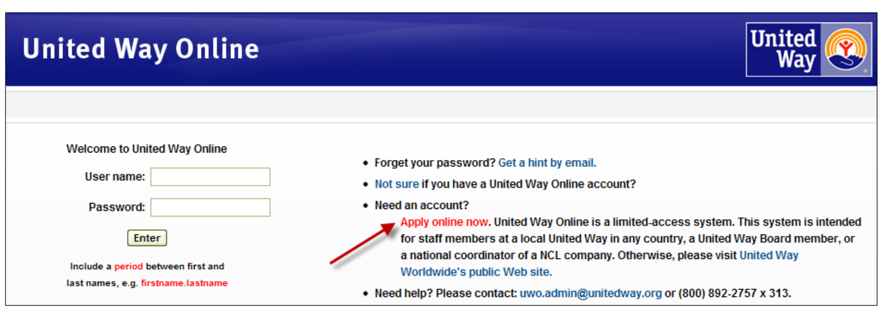
1. You have received payments in the past and your transaction history refers to the agency.
2. Another United Way may have a current profile.
3. You simply do not wish to delete history for an entity as a best practice.

Accessing iGuide

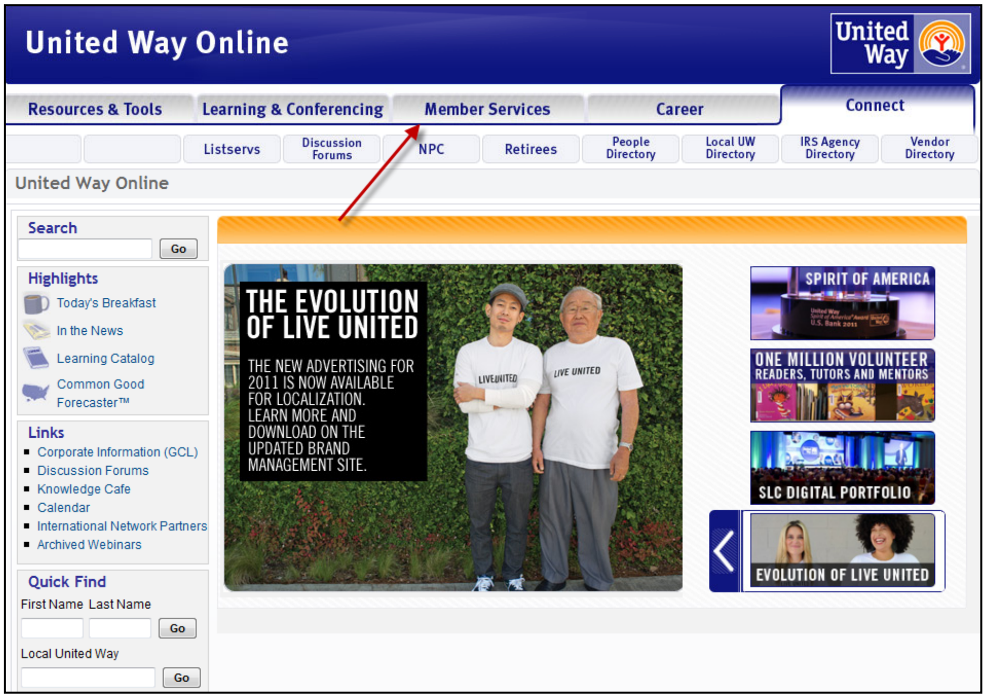
To access iGuide, go to http://iguide.truist.com and enter your United Way login information. Access to iGuide can also be accomplished on United Way Online:

1. Go to United Way Online, at http://online.unitedway.org.
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.

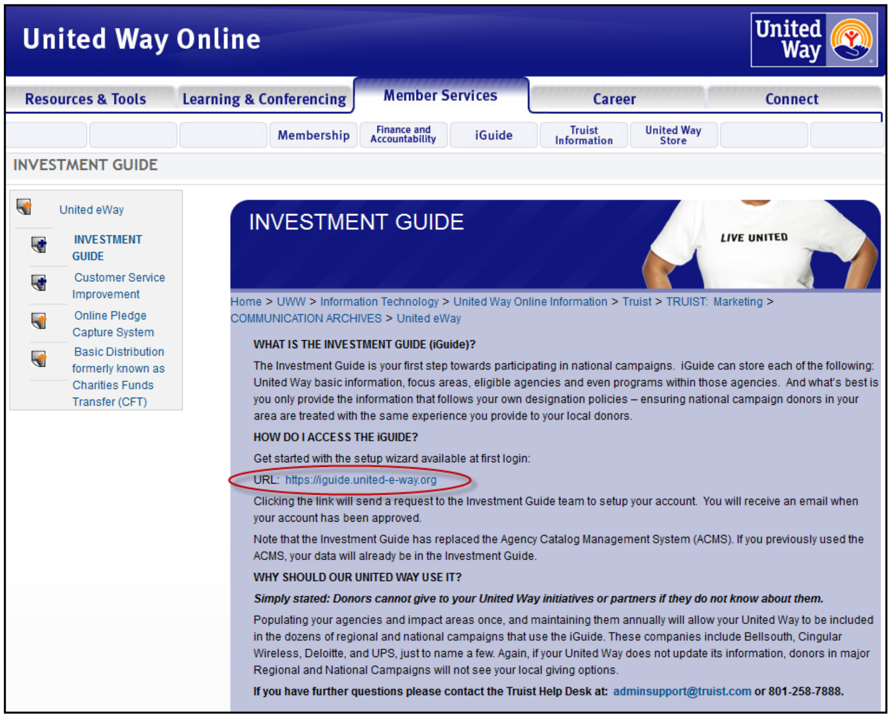


3. Select the ***Member Services*** tab, located in the top navigation bar.

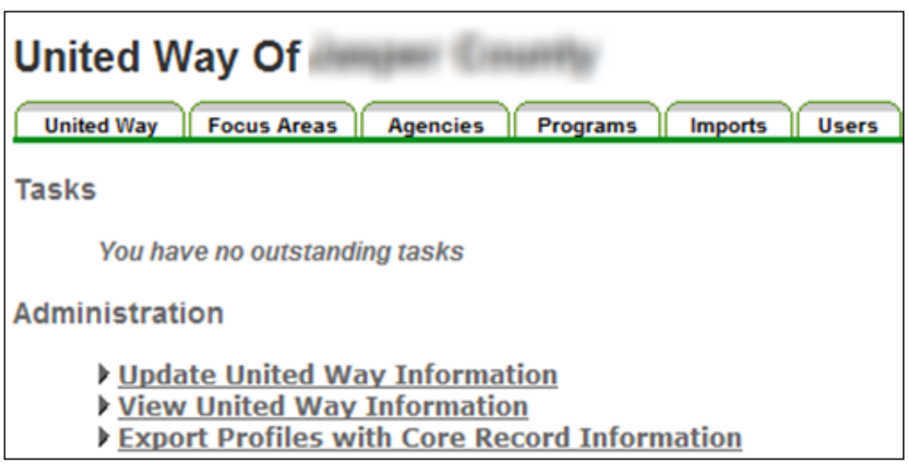


4. Select the *iGuide* link, located at the top of the page.

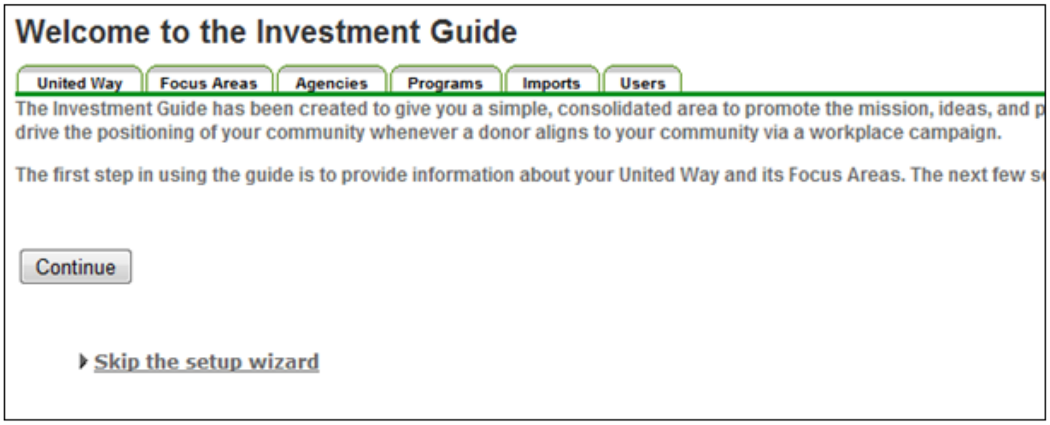
5. Click the ***iGuide*** URL in the middle of the page. This link directs you to the iGuide, at https://iguide.truist.com.



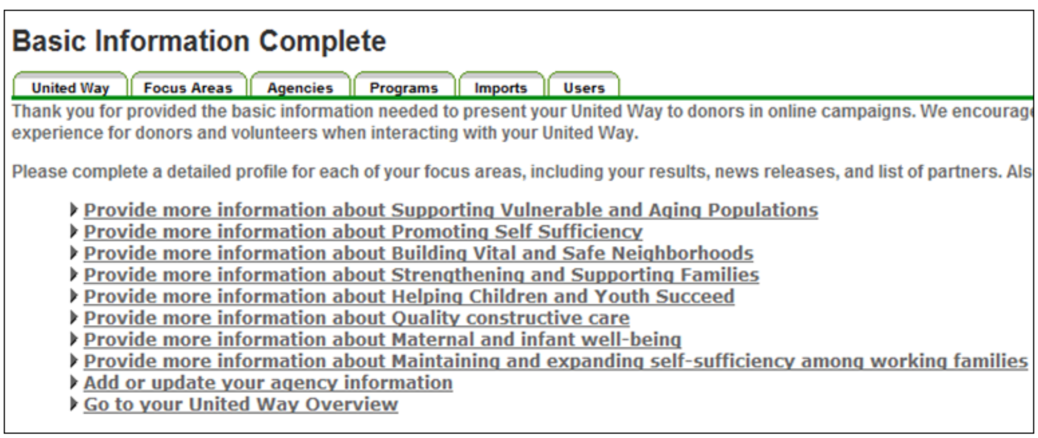
6. Upon clicking this link, you will be brought to your United Way's iGuide homepage.



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 s
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 informatio
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 encourag
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 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.

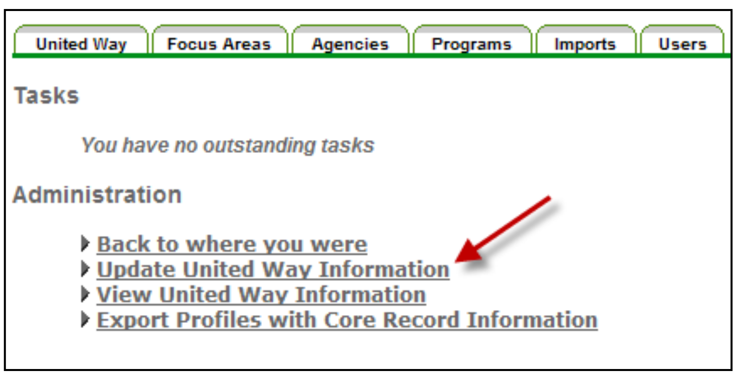
Before updating iGuide, it is crucial you have the following information available to you:

- 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:

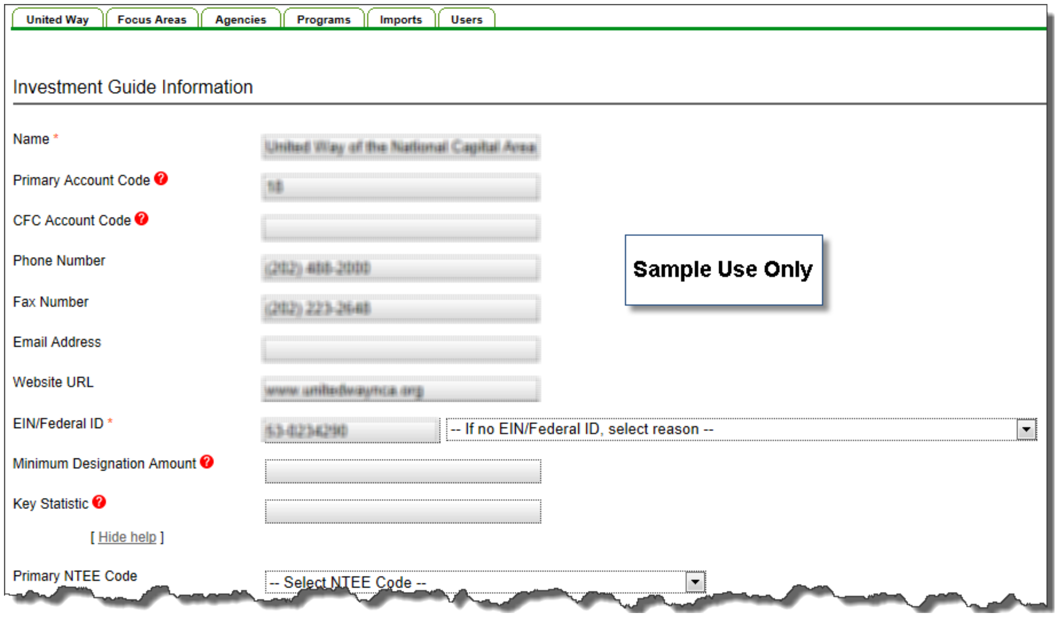
1. From your United Way's iGuide homepage, click the "Update United Way Information" link.

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

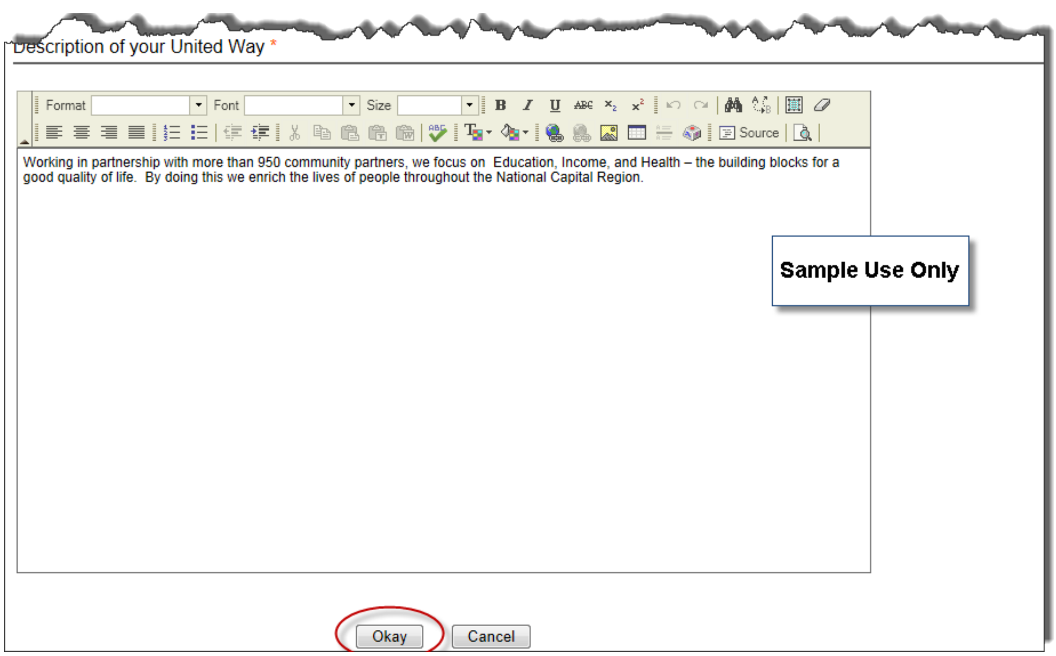
   

2. Make appropriate changes in the fields provided.

   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.



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

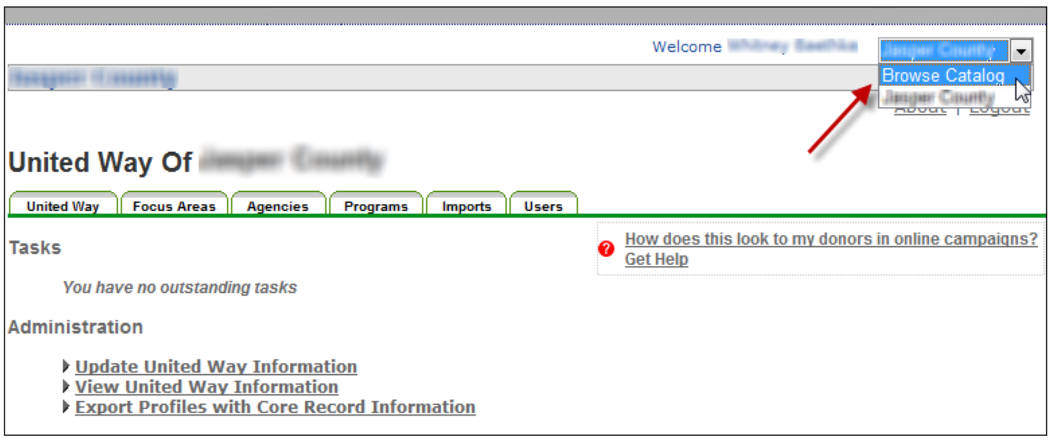


Browsing the iGuide Catalog

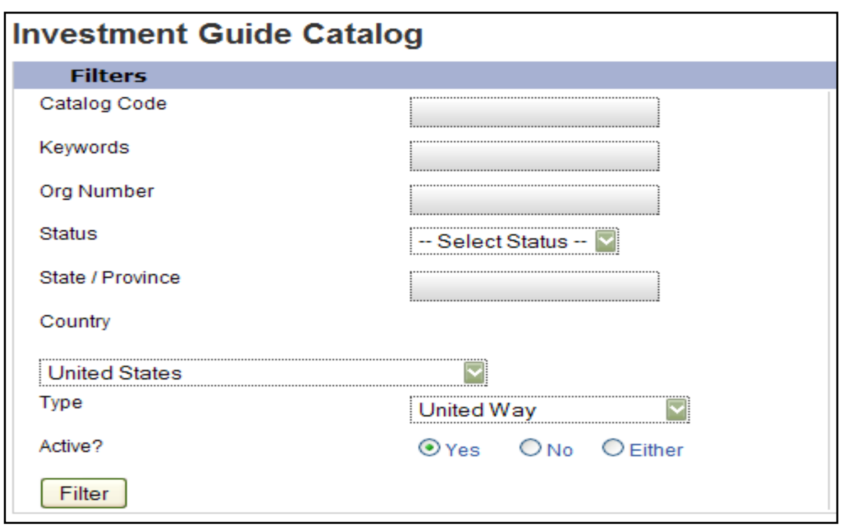
Browse the catalog to find agencies and Focus Areas to add to your United Way's profile. Follow the steps provided to browse:

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.

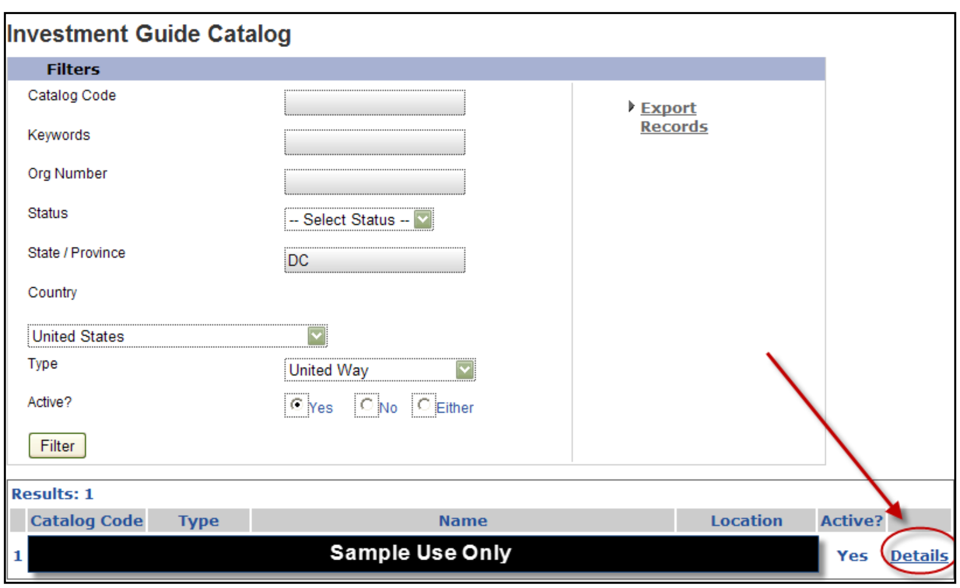


2. Use the filters provided to search for a United Way, United Way Focus Area, Agency, Agency Program, or CFC Agency.



Investment Guide Catalog Filters	
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 Number	This is the number assigned by United Way Worldwide for a 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. ***Eligible*** – 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. ***Other*** – 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.
Type	What are you searching for? Choose from *United Way, United Way Focus Area, Agency, Agency Program*, or *CFC Agency*.
Active?	Mark *Yes, No*, or *Either*.

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



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

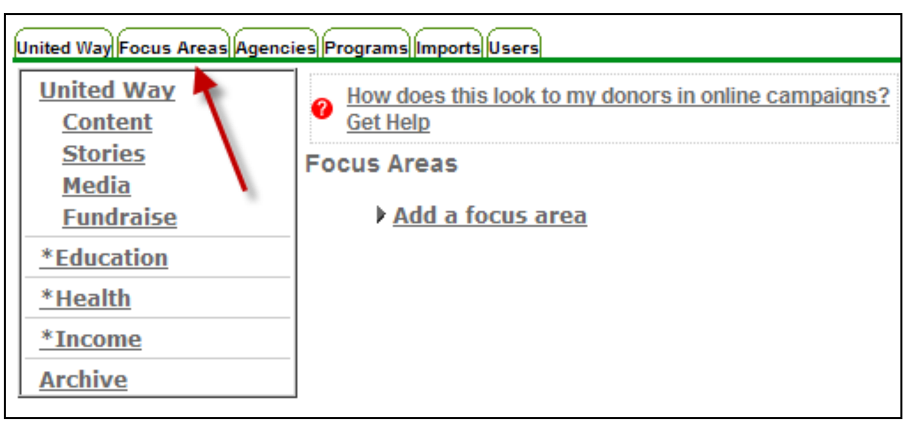
Focus Areas, also known as Impact Areas or Service Areas, are groupings of agencies or programs with common community focuses or needs. Focus Areas educate donors about community priorities, or they solicit donations to groupings of agencies and programs.

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

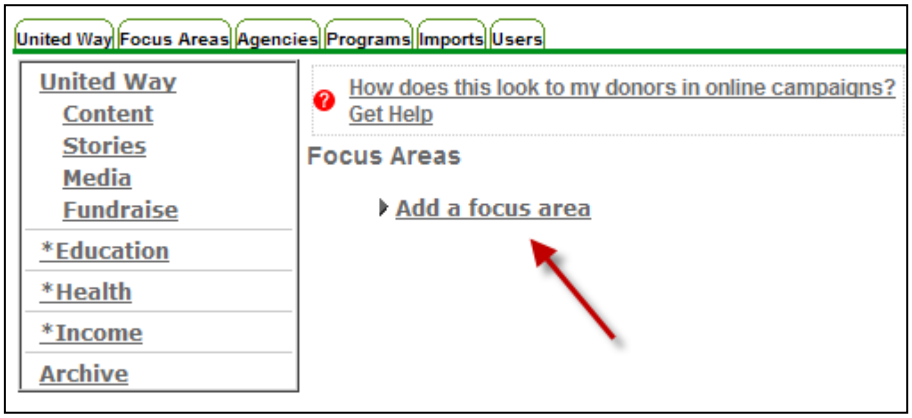
To add a Focus Area, take the following steps:

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

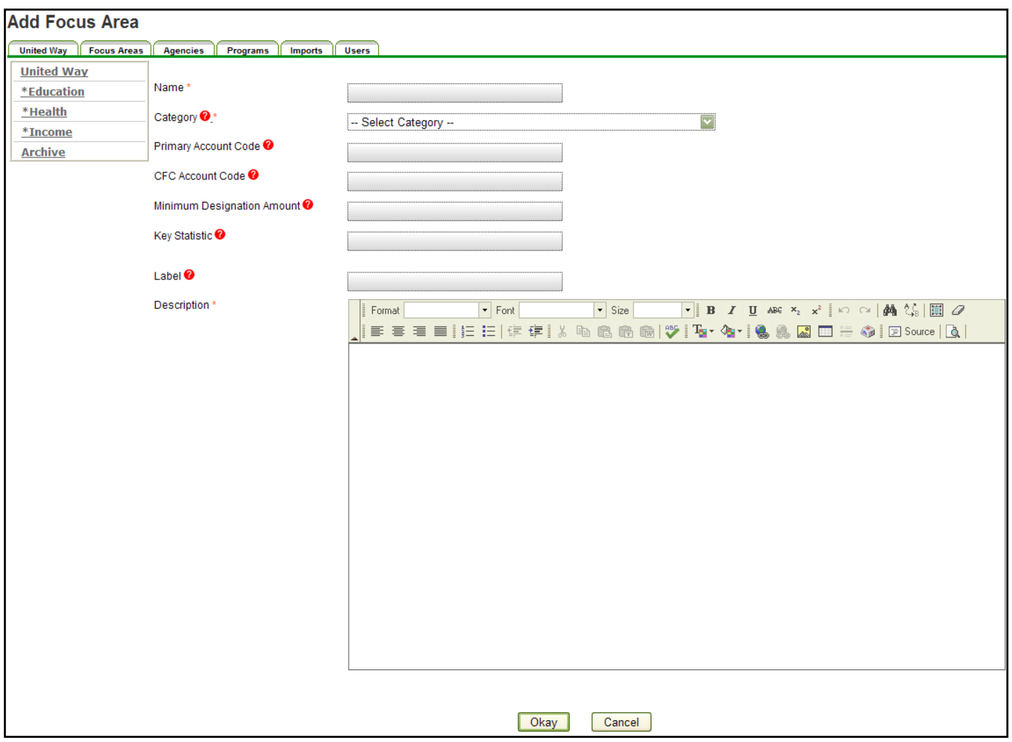


2. Then click the "**Add a Focus Area**" link.

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

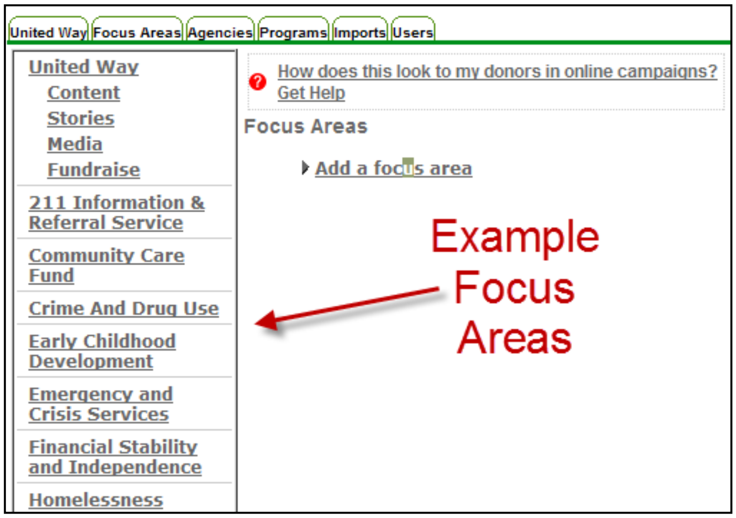


3. Enter the appropriate information in the fields provided, and then click "**Okay**" to save the record. Focus Areas become active immediately after they are created in iGuide.



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.

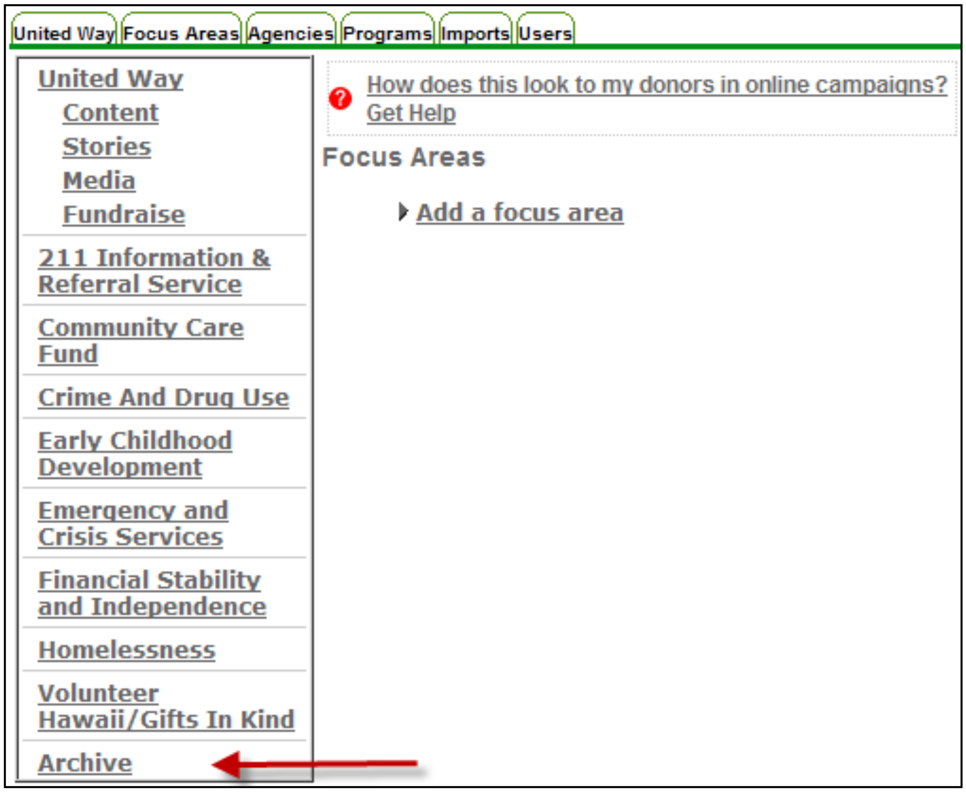
4. Make appropriate changes, then click "Okay" to save changes.

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

Agencies

Agency Lists

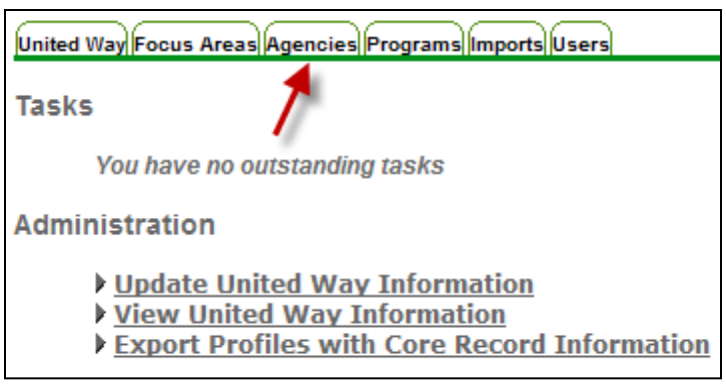
Providing a list of agencies to potential donors is an important step towards ensuring a rich donor experience. United Ways that have previously participated in importing an Agency Catalog or Funded Agency Database can cut out one step of the process because most of the data needed is already in the 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

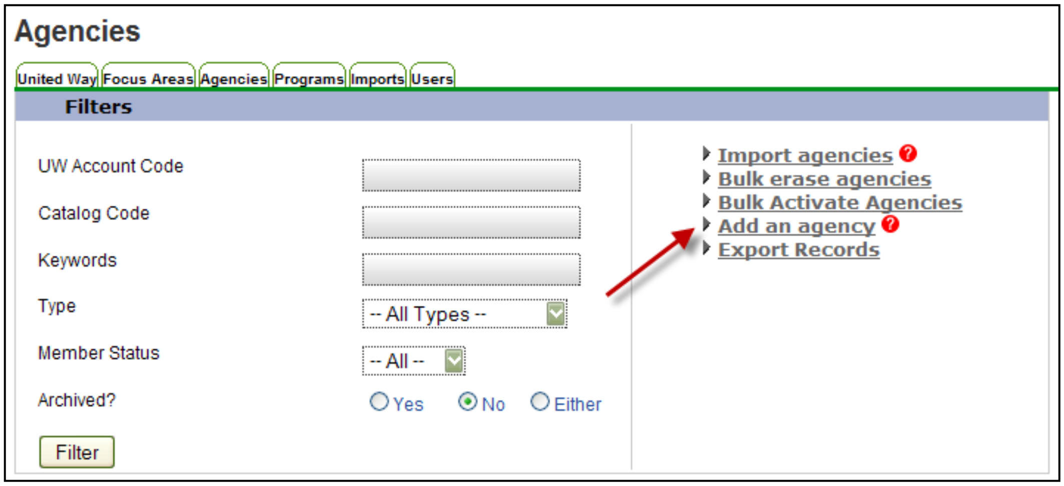
To add an agency, take the following steps:

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

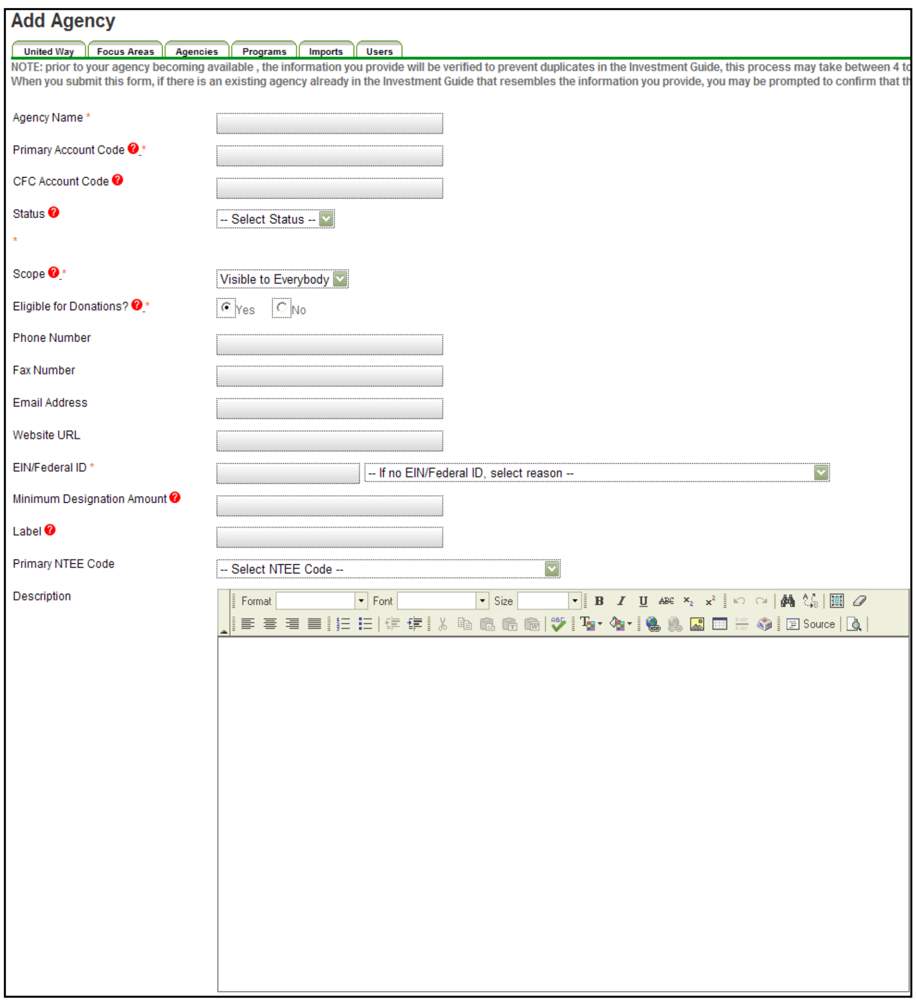


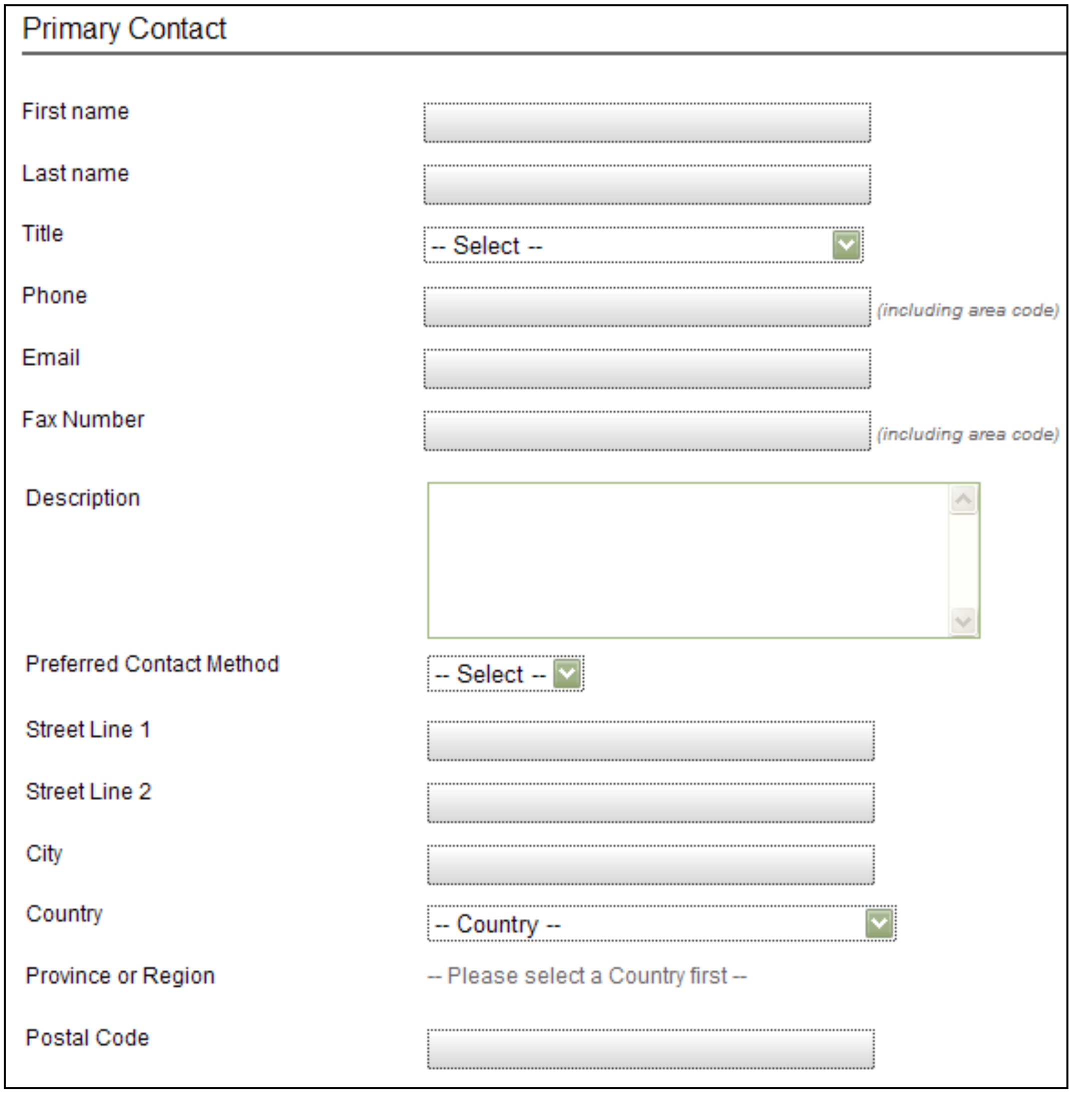
2. Click "**Add an agency**."

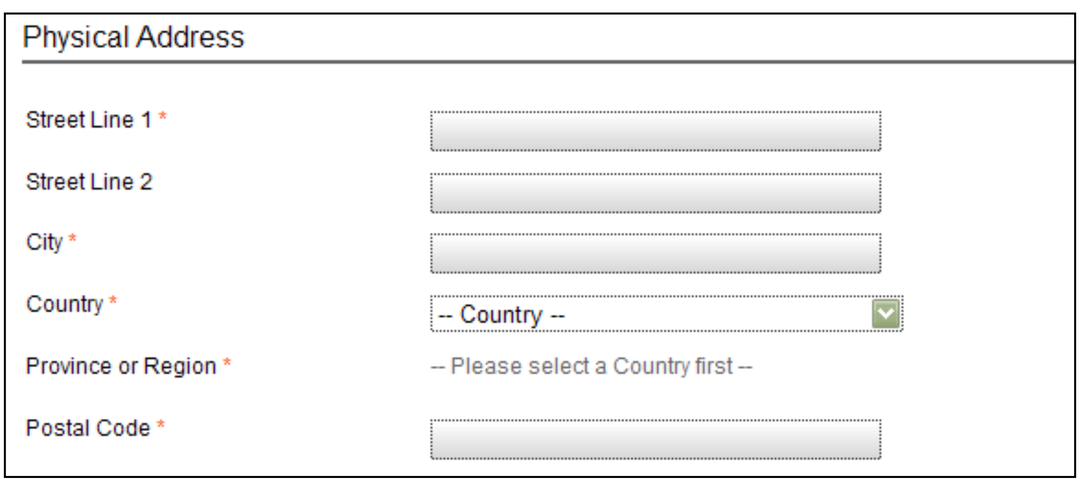
   Note: If this link is not available, please contact your internal iGuide administer to grant you permissions to access the link.



3. Enter the appropriate information in the fields provided.




Primary Contact
First name
Last name
Title
-- Select --
Phone
(including area code)
Email
Fax Number
(including area code)
Description
Preferred Contact Method
-- Select --
Street Line 1
Street Line 2
City
Country
-- Country --
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 *

Required *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	*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. *Eligible* – 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. *Other* – 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 Everybody* 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 Unavailable	The EIN number is the federal number associated 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.

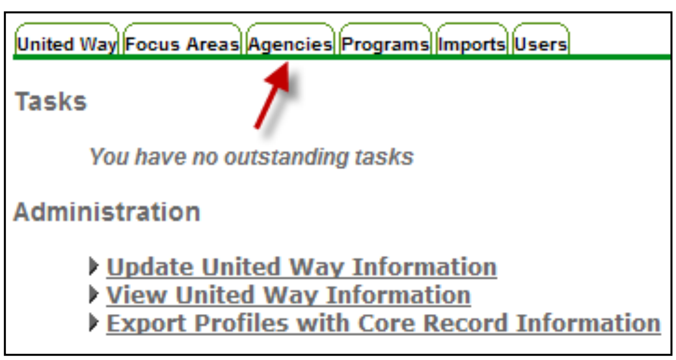
4. When finished, click "**Okay**" to save changes.

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

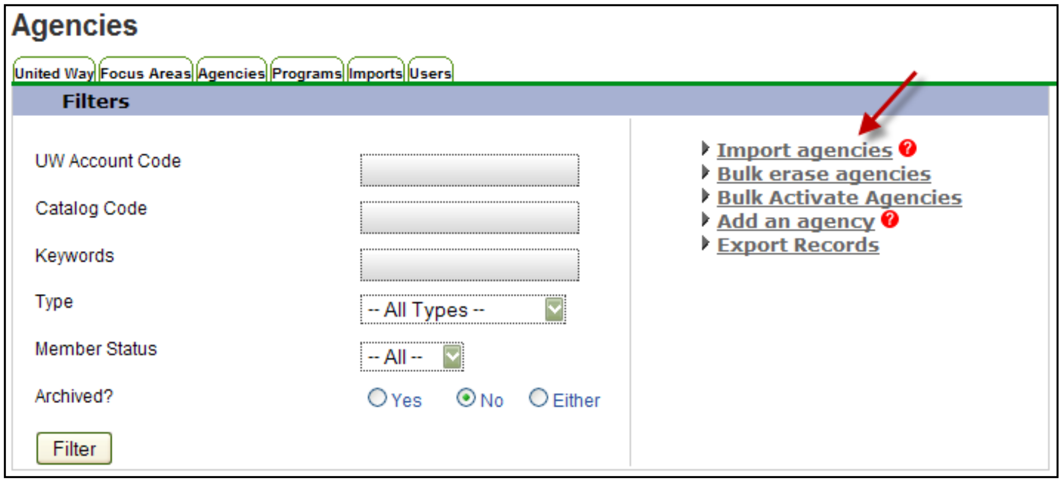
To import agencies, take the following steps:

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

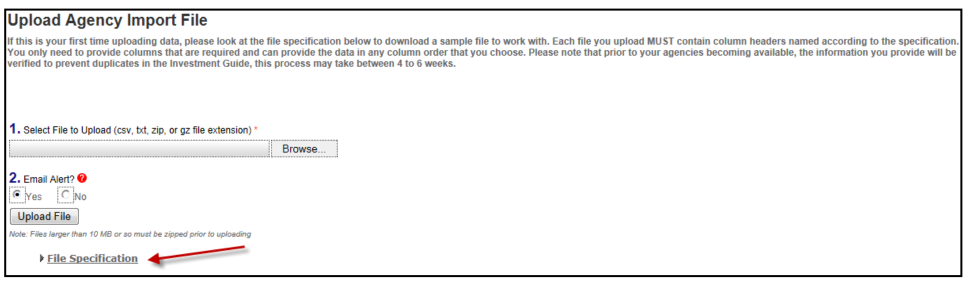


2. Click "**Import agencies**."

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



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



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.

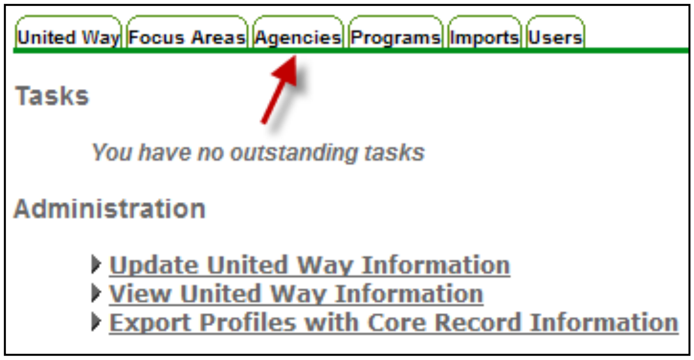
3. Click the "**Browse**" button and select the file you wish to import. Accepted files include: csv., txt., or zip.
4. Mark ***Email Alert***, which indicates that when the file completes, you will receive an email notification.
5. Then click the "**Upload File**" button.

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.



2. Click "**Export Records**."

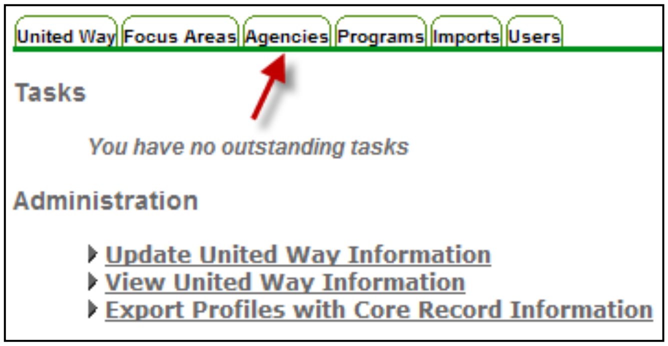
   Note: If this link is not available, please contact your internal iGuide administrator to grant you access to the link.

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.



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.

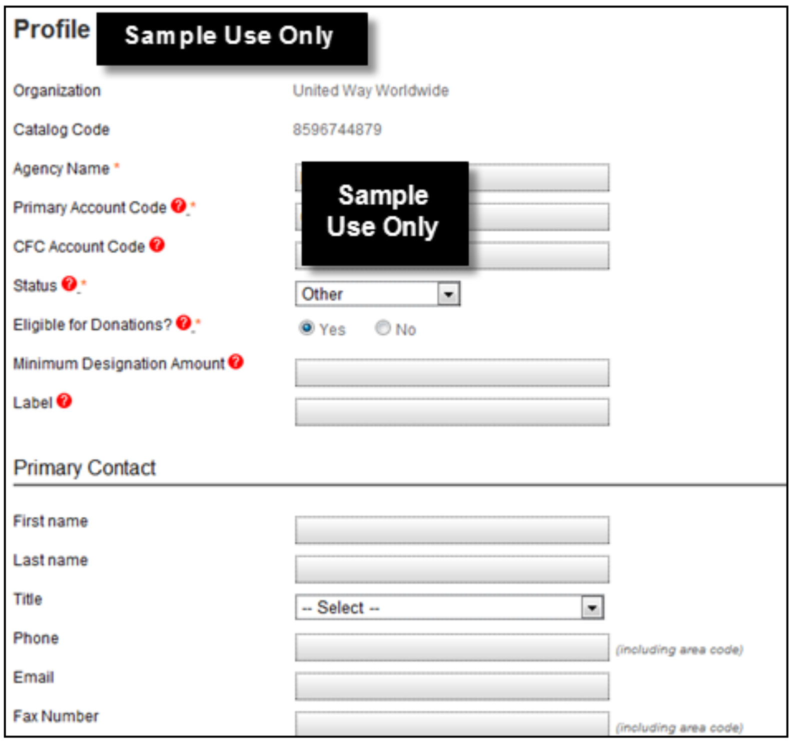
Profiling Existing Agencies

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.

4. Fill in the appropriate information in the fields provided.

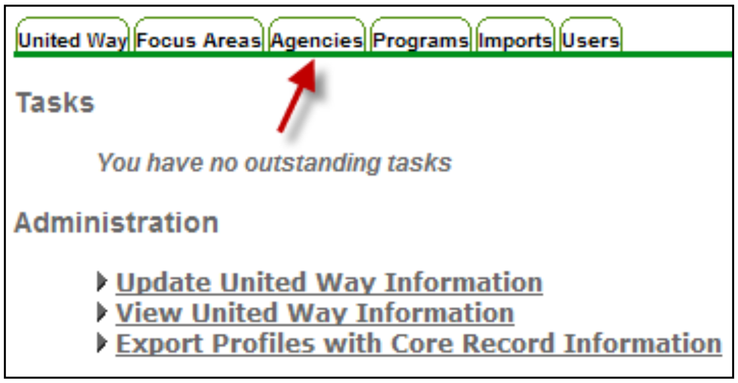


5. When complete, click the "**Update Profile**" button.

Archiving an Agency

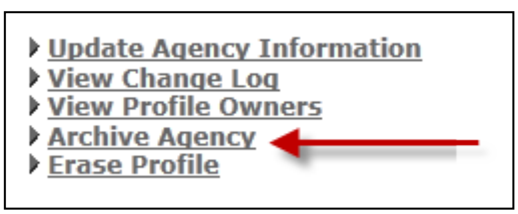
It is recommended to always **archive** agencies, rather than deleting them. This allows you to remove the profile from a list, disabling its view from donors in campaigns, without deleting its history.

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



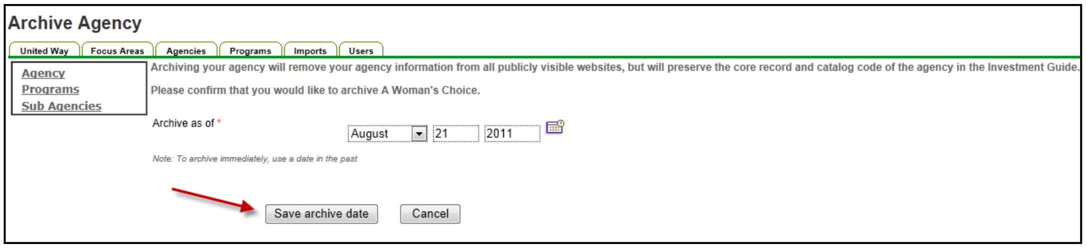
2. Either conduct a filtered search or select the agency from the list at the bottom of the page to find the agency you wish to update.
3. Once found, click "**Details.**"
4. Scroll to the bottom of the page and click "**Archive Agency**."

   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.

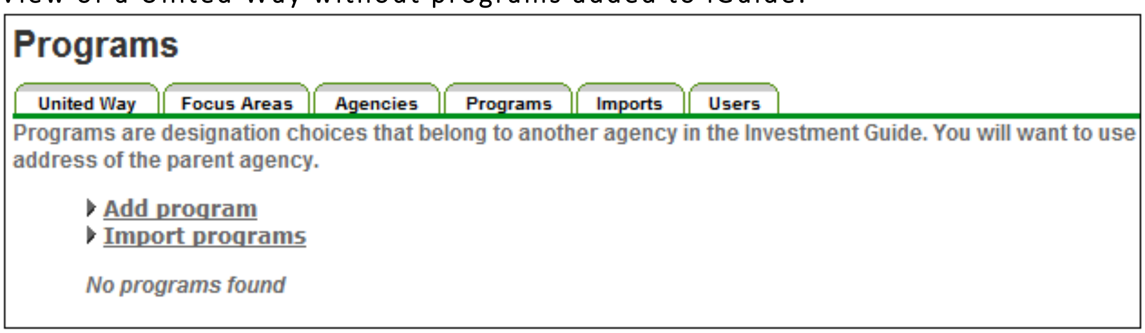


Alternatively, profiles can be archived by importing agencies via the ***Agencies*** tab. When creating your Agency Import file, mark the *Expiration* column of each agency with a date prior to the present date.

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

United Way | Focus Areas | Agencies | Programs | Imports | Users

Programs 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 parent agency.

Adding and Importing my Programs

- Export Records
- Add program
- Import programs

Results: 54
Keywords:

Previous | Page: 2 of 3 Go | Next

	Agency Name	Program Name	Account Code	
26	[illegible]	Neighborhood Initiatives	[illegible]	Details
27	[illegible]	Family Resource Centers	[illegible]	Details
28	[illegible]	Read to Succeed	[illegible]	Details
29	[illegible]	OPTION A: INFLUENCE THE CONDITION OF ALL. Give To The United Way Community Action Fund	[illegible]	Details
30	[illegible]	Meeting Basic Needs	[illegible]	Details
31	[illegible]	NEIGHBORHOODS	[illegible]	Details
32	[illegible]	ECONOMIC STABILITY	[illegible]	Details
33	[illegible]	EDUCATION	[illegible]	Details
34	[illegible]	HEALTH	[illegible]	Details
35	[illegible]	Strengthening Youth and Families	[illegible]	Details
36	[illegible]	Helping People in Crisis	[illegible]	Details
37	[illegible]	Promoting Health and Healing	[illegible]	Details
38	[illegible]	Investing in our Youth	[illegible]	Details

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

Importing Agencies and Programs

[Pending | Completed]

- Import agencies
- Import programs
- Bulk erase agencies

Results: 9
Keywords:

	Uploaded By	Filename	Processing Start Date	Processing End Date	Number Exceptions	Number Warnings	Number Successful Records	Processing Errors	
1	[illegible]	iguide-primary-entity-iguide-63agency-upload-final-8-15-11csv-i10476720492i.csv	2011-08-15	2011-08-15	0	0	1,045		Details
2	[illegible]	iguide-primary-entity-iguide-63agency-upload-final-8-15-11csv-i10476720462i.csv	2011-08-15	2011-08-15	0	0	1,045		Details
3	[illegible]	iguide-primary-entity-copy-of-atmanand-jaikarran-import-file-colaa-active-p-changes-081111--2-i10476219850i.txt	2011-08-12	2011-08-12	0	0	1		Details
4	[illegible]	iguide-primary-entity-copy-of-atmanand-jaikarran-import-file-colaa-active-p-changes-081111--2-i10476205603i.txt	2011-08-12	2011-08-12	0	0	63		Details
5	[illegible]	iguide-primary-entity-iguide-63agency-upload-final-6-17-11csv-i10474048574i.csv	2011-08-02	2011-08-02	0	0	1,045		Details
6	[illegible]	iguide-primary-entity-iguide-63agency-upload-final-6-17-11csv-i10474045942i.csv	2011-08-02	2011-08-02	1	0	1,044		Details
7	[illegible]	iguide-primary-entity-iguide-63agency-upload-final-6-17-11csv-i10466349500i.csv	2011-06-17	2011-06-17	16	0	1,031		Details
8	[illegible]	iguide-primary-entity-iguideagenciesfixed07-i10244855129i.txt	2007-07-17	2007-07-17	0	0	988		Details
9	[illegible]	iguide-bulk-delete-profile-delete-test-i10244152284i.txt	2007-07-09	2007-07-09	1	0	0		Details

- **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 re-import 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 L	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	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH
1	phone_nu	fax_numb	website_(	email_adc	active_p	physical_s	physical_s	physical_c	physical_s	physical_z	physical_z	physical_c
2					N	Agricultur	2105 Midl	Shelbyvill	TN	37160-2067		us
3	(931) 684-8635			weavere@	N	326 East Depot Stree		Shelbyvill	TN	37160-2067		
4	(931) 684-4300			bedfordb	N	PO Box 122		Shelbyvill	TN	37162-0122		
5	(615) 890-	(615) 893-3698			N	820 Jones Blvd		Murfreest	TN	37129-2382		us
6	(615) 893-1680				N	211 Bridge Avenue		Murfreest	TN	37129-3503		us
7	(615) 898-	(615) 898-1738			N	1453B Hope Way		Murfreest	TN	37129-3140		us
8	(856) 589-	(856) 589-6614			N	72 East Holly Ave. Su		Pitman	NJ	8071		
9	(615) 859-	(615) 859-	http://ww	db@loveh	N	PO Box 669		Madison	TN	37116-0669		
10	ty Non-Partner Agencies				N	903 S. Capital of Texa		Austin	TX	78746		us
11	(615) 893-	(615) 893-2352			N	2552 Sout	Suite #100	Murfreest	TN	37127-7135		us
12	e for Public Education				N	2400 Fairfax Avenue		Nashville	TN	37212-3403		us
13	(615) 895-	(615) 890-5922			N	1137 West Main Stre		Murfreest	TN	37129-3439		us
14	(270) 843-	(270) 843-	www.uwsk.org		N	1110 Colle	P. O. Box :	Bowling G	KY	2102-3330		
15	(931) 473-1515				N	PO Box 608		Mc Minnv	TN	37111-7238		us
16	(615) 333-	(615) 385-	http://ww	Yolanda@	y	417 Welshwood Driv		Nashville	TN	37211		US

Download Rejected Records displays data from the exception records

Import Status - iguide-primary-entity-iguide-63agency-upload-final-6-17-11csv-i10466349500i.csv

United Way | Focus Areas | Agencies | Programs | Imports | Users

Import Summary

There were 16 errors and/or warnings loading this file.

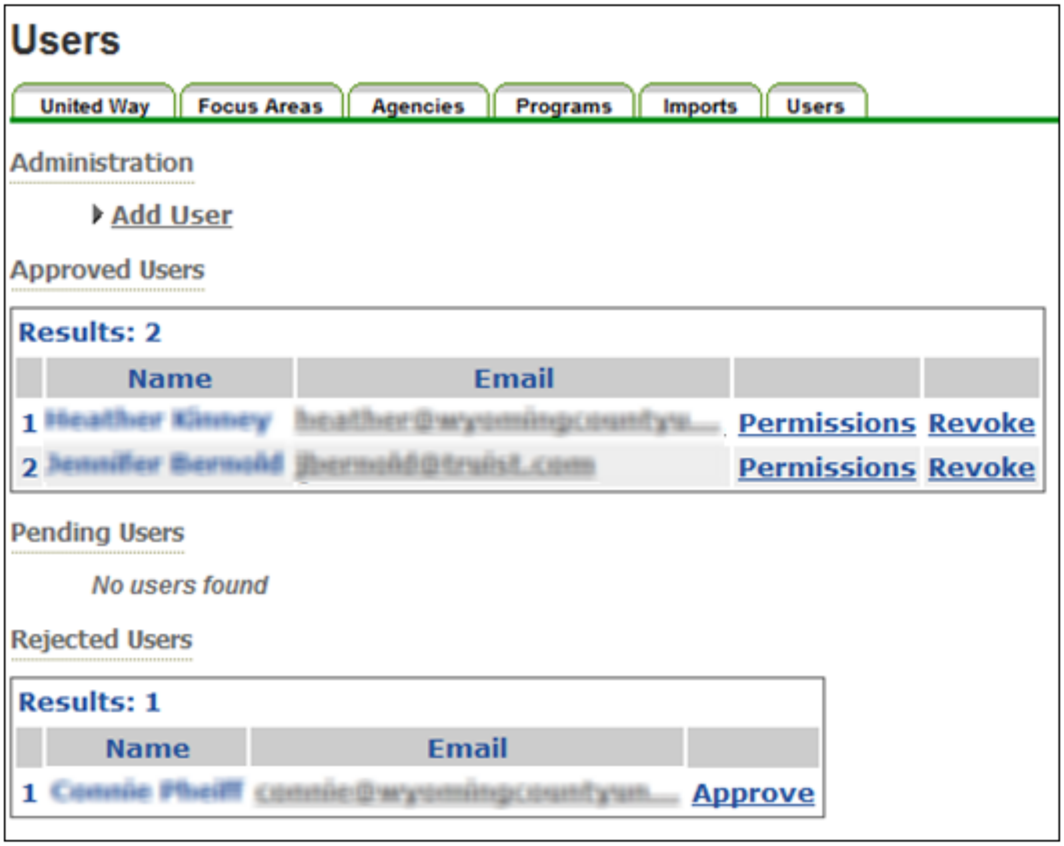
Creation Date:	June 17, 2011
Processed Date:	June 17, 2011
Email Addresses:	*none*
Filename:	iguide-primary-entity-iguide-63agency-upload-final-6-17-11csv-i10466349500i.csv
Import Type:	iguide-primary-entity
Total Lines in File:	1047
Number Lines Processed:	1047
Number of Exceptions:	16
Number of Warnings:	0
Number of Successful Records:	1031

- Erase this data import
- Download errors
- Download rejected records

Details of an imported file (sample)

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.



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.