

Dynamic Pledge Experience (DPE) & Standard Pledge Experience (SPE) Enhancement: Special Instructions

Version: June 2012

The **Special Instructions** feature is an optional functionality that allows coordinators to provide a free text form in a campaign that gives donors the ability to add additional information about where to direct their gifts within an organization. This functionality was previously only available in Impact Pledge Experience (IPE) campaigns, but has now been added to both Standard Pledge Experience (SPE) and Dynamic Pledge Experience (DPE) campaigns.

\$	Helping Youth Achieve Their Potential					
	 Expanding youth involvement in community service and Improving graduation rates 	l leadership				
	Special Instructions:					
\$	Improving People's Health					
	 Connecting families to low or no-cost services Increasing children's enrollment in insurance plans 					
\$	Promoting Financial Stability					
\mathcal{C}	Equipping working families who are struggling financially independence Increasing financial literacy and education Special Instructions:	y with tools to increase their income, create savings and gain financial				
+ 0.00	Tabl					
\$ 0.00	lotal					
➡ Locate an	Agency	Provide agency information				
A new window 'Select Agency or click on the	vill open with a list of non-profit organizations. Click the v' icon next to the organization name to add it to the list below a name to learn more about it.	If you cannot find the agency you want using the 'Search National Database' or 'Locate an Agency' tools, enter the agency details here.				

To enable Special Instructions take the following steps:

- 1. At the Organization level, open Option Sets > Designation.
- 2. Click the "Add a new designation option set" link or the View/Edit icon (2010).



Special Instructions

Organizations						
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Settings			•		туре	
Merchants						
Contacts		Add a new designation of				
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Designation		25 Size		Filter		
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3. Scroll down to the bottom of the page to the *Allow Special Instructions* field and check the box.

Allow Locate An Agency	\checkmark	
Allow Auto Allocation		
Agency Search Mode	Progressive -	
Allow Special Instructions		
Impact Pledge Experience		
Allew Designation Recognition		
Allow Designation Recognition	100	
Display Donor Release Checkbox		

4. During the pledge process, if Special Instructions are enabled, the donor will have the option to add special instructions to their distributions. Admin users can then review these instructions in OPPS by opening a donor's Donation Information.

Please Note: The Special Instructions field will hold up to 255 characters.



Special Instructions

