

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 leadership
- Improving graduation rates

Special Instructions:

\$ **Improving People's Health**

- Connecting families to low or no-cost services
- Increasing children's enrollment in insurance plans

Special Instructions:

\$ **Promoting Financial Stability**

- Equipping working families who are struggling financially with tools to increase their income, create savings and gain financial independence
- Increasing financial literacy and education

Special Instructions:

\$ 0.00 Total

→ **Locate an Agency**

→ **Provide agency information**

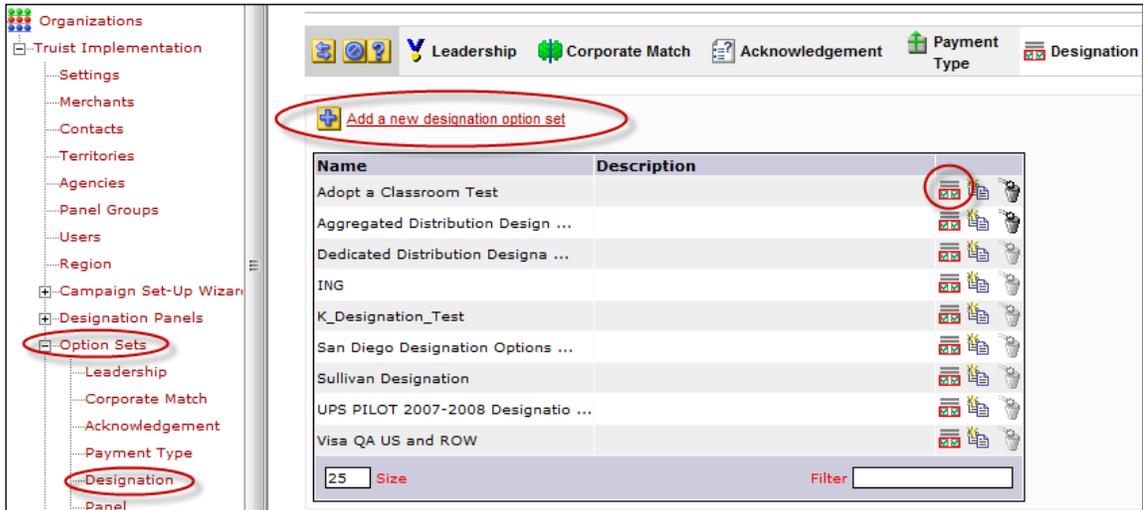
A new window will open with a list of non-profit organizations. Click the 'Select Agency' icon next to the organization name to add it to the list below or click on the name to learn more about it.

If you cannot find the agency you want using the 'Search National Database' or 'Locate an Agency' tools, enter the agency details here.

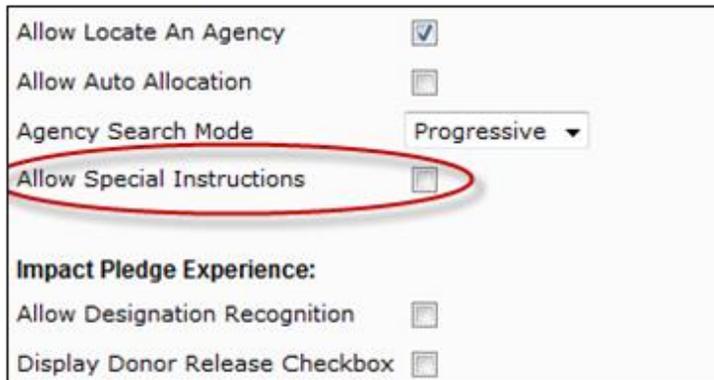
To enable Special Instructions take the following steps:

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

Special Instructions



3. Scroll down to the bottom of the page to the **Allow Special Instructions** field and check the box.



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

\$ <input type="text"/>	Helping Youth Achieve Their Potential <ul style="list-style-type: none">• Expanding youth involvement in community service and leadership• Improving graduation rates <input type="checkbox"/> Special Instructions:
\$ <input type="text"/>	Improving People's Health <ul style="list-style-type: none">• Connecting families to low or no-cost services• Increasing children's enrollment in insurance plans <input type="checkbox"/> Special Instructions:
\$ <input type="text"/>	Promoting Financial Stability <ul style="list-style-type: none">• Equipping working families who are struggling financially with tools to increase their income, create savings and gain financial independence• Increasing financial literacy and education <input type="checkbox"/> Special Instructions: <input type="text"/>
\$ 0.00	Total
→ Locate an Agency <p>A new window will open with a list of non-profit organizations. Click the 'Select Agency' icon next to the organization name to add it to the list below or click on the name to learn more about it.</p>	→ Provide agency information <p>If you cannot find the agency you want using the 'Search National Database' or 'Locate an Agency' tools, enter the agency details here.</p>