

DPE Enhancements August 2011

Version: August 2011

Since the June 2011 release of the **Dynamic Pledge Experience (DPE)**, TRUIST has implemented several new enhancements. DPE’s new functionalities include:

1. **Continuous Giving**
2. **Geo-Alignment**
3. **Leadership Upgrade Message**

Continuous Giving

Continuous Giving is now available for DPE. **Continuous Giving** allows all donors’ donations and designation distributions from a previous campaign to carry over to an existing campaign. The **DPE Continuous Giving** feature provides campaign administrators and users the option to configure a donor site that skips the homepage and directly populates the Continuous Giving page. After a donor selects the “**Give**” link, they are redirected to a page that allows them to modify, cancel, or increase their pledge. If a donor opts to modify or increase their gift, they will proceed with the normal pledging process, but if a donor chooses to leave their gift as is, they will be redirected to the pledge summary page.

LIVE UNITED

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Please carefully review your donation information below.

Pledge Summary

Based on last year's pledge, your new pledge has been created as shown below:

Payment Type	Payroll Deduction
Pledge	\$13.00
Payment Detail	\$0.50 x 26 pay periods = \$13.00
Total Annual Amount	\$13.00

Designations 100.00 % United Way of Laredo Inc.

Pledge Options

Continue with my pledge as shown

Increase my pledge as follows

I would like to increase my gift by the below amount.

1.00 %

10.00 %

%

Change my pledge and/or designations

I do not wish to contribute this year - cancel my pledge

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DPE Enhancements

Like in the Standard Pledge Experience (SPE), **Continuous Giving** is configured in the **Option Sets** section, at the **Organization level** of OPPS. It is then applied to an **Option Package** and associated to the most current campaign at the **Campaign level**. Using the carry over tool, all donor designation and giving information from the prior year's campaign can be carried over to the existing campaign.

Continuous Giving Set

Name: *

Description:

Show Welcome Page:

Auto Add Organization Designation Option:

Continuous Giving Confirmation Increase Options

[Add a new confirmation increase option](#)

Question	Amount Type	Increase Type	Active
Please increase my total annual gift by the percentage shown below:	Dollars	Percent	Yes
Please increase my per pay gift by the amount indicated below	Dollars Per Pay Period	Dollars Per Pay Period	Yes

Size

* Auto-renew is not currently supported in Impact Pledge Experience campaigns.

Allow Auto Renew:

Name: *

Description:

Options

Carry Over Actions

- Auto-confirm new donations
- Apply donor auto-renew increase
- Carry-over auto-renew election

Date Created Override:

Designation Action:

- Carry-over Designations
- Designate to Aligned/Managing Organization

Increase Allocation Action:

- Distribute to remaining designations
- Designate to Aligned/Managing Organization

Missing Designation Allocation Action:

- Distribute to remaining designations
- Designate to Aligned/Managing Organization

Filter

- By Donor Group
- By Donor
- By Donor Custom Fields
- By Payment Type
- By Donation Properties

DPE Enhancements

Geo-Alignment

The option to **Geo-Align** is available for DPE campaigns on the homepage of a donor site. If this feature is enabled for a campaign, box 2 in skins “DPE – Live United 2 Content Area,” “DPE - Live United 3 Content Area,” and “DPE - Live United 5 Content Area” will display your geo-aligned United Way or agency. Additionally, if enabled, campaigns can include **Custom Alignment**. This feature will display a link in the Introductory Panel to change the United Way or agency the donor is currently browsing, and based on the zip code entered, all United Ways or agencies in respective places will change for the donor.

The screenshot shows the 'LIVE UNITED' homepage. The header includes the 'LIVE UNITED' logo and the United Way logo. A navigation menu on the left lists: Home, Give Now, Giving History, My Account, Leadership Levels, Education, Income, Health, My United Way, and Dashboard. The main content area features a banner with the text 'WELCOME TO THE UNITED WAY CAMPAIGN' and 'OPEN YOUR HEART. LEND YOUR MUSCLE. FIND YOUR VOICE. JOIN THE MOVEMENT.' Below this is a photo of a group of people standing on a map of the United States. To the right, the 'MY UNITED WAY' section displays 'United Way of Metro Dallas' and provides information about the Community Care Fund. A red circle highlights the text 'Currently browsing United Way of Palm Beach County change'.

The screenshot shows the 'LIVE UNITED' homepage with the 'Geo-Alignment' feature enabled. The header is the same as in the previous screenshot. The navigation menu on the left lists: Home, Give, Giving History, Donor Account, Leadership Levels, Corporate Match, and Custom Page 1. The main content area features a banner with the text 'You are currently browsing United Way of Palm Beach County'. Below this is a section titled 'Browse Another United Way' with a search bar containing the zip code '33401' and a 'search' button. A dropdown menu shows 'select United Way of Palm Beach County'. The footer includes links for 'Home | Privacy Policy | Logout'.

DPE Enhancements

This enhancement is provided as a **Skin Control**, via the **Skins level** of Campaign Management. This means that in order for this feature to function in your campaign, it will need to be added to your skin. Also note that 3 of the 4 default skins (“DPE – Live United 2 Content Area,” “DPE – Live United 3 Content Area,” and “DPE – Live United 5 Content Area”) already default to displaying the Geo-Aligned United Way in box 2 of the donor site.

Geo-Alignment will display in box 2 if “**Geo-Align**” is selected for your campaign’s **Introductory Panel**, under the **Campaign Designation Panels**.

Custom Alignment is activated by checking “**Donors may Custom Align**” under the **Campaign Settings**.

:: Campaign (Middleburg 2011 Campaign)

[Campaign](#)
[Settings](#)
[Registration](#)
[Designation Panels](#)
[Email](#)
[Users](#)
[Payments](#)

Settings

Start Date

End Date

Estimated Potential Donors

Estimated Online Respondents

Estimated Batch Respondents

Align Donors By

Option Package

Reporting Option Package

Company Option Package

Designation Match Election Option Set

Direct Match Request Option Set

Currency

Default Donor Group Florida Power & Light

Donors May Custom Align

Allow Donation Cancellation

Pledge Status

Donor Donation Count Limit

Donor Payroll Donation Count Limit

Minimum Donation For Designation

Leadership Upgrade Message

A **Leadership Upgrade** note for DPE is now available and behaves the same as it does in SPE. If enabled for a campaign, a Leadership Upgrade message will appear on the **Give** page of a donor site, if using a skin with content area 2 enabled.

AISHA ANDERSON IS LOGGED IN | [LOGOUT](#)

LIVE UNITED

[Home](#) [Give](#) [Find Agency](#) [CONTINUE](#)

[Select Payment Type](#) » [Payroll Deduction](#) » [Per Pay Period](#)

I would like to make a total annual gift of the following amount:

Annual Amount

\$1,000.00
 \$750.00
 \$500.00
 \$100.00
 \$ 30

You are \$20.00 from becoming a leadership level 1 giver. Would you consider increasing your gift?

Donation Distribution

I would like to invest my donation using:

Percentages of my donation
 Dollar amounts from my donation

% **United Way of Metropolitan Dallas Inc.**

By giving to the United Way Community Impact Fund, I make the biggest impact on our community's most pressing needs. My gift supports programs that make critical improvements in my community: preparing students to succeed after high school, enabling people to get out of poverty and stay out, and helping everyone make smart health choices and use health care efficiently.

DPE Enhancements

Leadership Levels are set up the same as before; by creating a **Leadership Level Set** in the **Organization’s Option Sets**, applying the **Leadership Level Set** to an **Option Package**, and then associating that **Option Package** to a **Campaign**.

:: Option Sets (Truist Demo Organization)

Leadership Level Set

Name: *

Description:

Amount Type:

Combined Recognition:

Request Recognition Name:

Request Anonymous Status:

Leadership Levels

[Add a new leadership level](#)

Name	Range	Tolerance	Upgrade	Active	
Leadership Level 1	\$50.00 - \$99.99	\$20.00	Enabled	Yes	
Leadership Level 2	\$100.00 and above	\$20.00	Enabled	Yes	

Size

[Save / Update](#) | [Cancel / Return](#)

:: Option Sets (Truist Demo Organization)

Code: *

Name: *

Description:

Leadership Level Set:

Corporate Match Set:

Acknowledgement Set:

Payment Type Set: *

Designation Option Set: *

Designation Panel Option Set: *

Recognition Program Set:

Continuous Giving Option Set:

Default:

DPE Enhancements

Please note that this enhancement has been added as a **Skin Control**, and therefore must be added to your **skin**, via the **Skins level in Campaign Management**, in order for it to show up in your campaign. Also note that the current 4 default skins already provide the Leadership Upgrade message.

:: Skin (DPE - Live United 5 Content Area)

Language: English

Name: 2 - Give

Default:

Template: - skin control - | - custom variables - [Preview](#)

```

6286dd44a045/grayline.gif">&nbsp;</td>
<td valign="top" align="left">
<table width="100%" align="center" bgcolor="#ffffff" border="0" cellpadding="10" cellspacing="0">
<tbody><tr>
<td align="right" id="continue">

<skin:ContinueButton id="Continue_Top" label=""/>
</td>
</tr>
</tbody>
</table>

<skin:ContentArea id="ErrorSummaryArea"/>

<skin:ContentArea id="PledgePaymentArea"/><br>
<skin:ContentArea id="IncentivesArea"/>
<skin:ContentArea id="PledgeDesignationArea"/>

<table width="100%" align="center" bgcolor="#ffffff" border="0" cellpadding="10" cellspacing="0">
<tbody><tr>
<td align="right" id="continue">

<skin:ContinueButton id="Continue_Bottom" label=""/>
</td>
</tr>
</tbody>
    
```