



# CAMPAIGN MANAGEMENT: IPE – HOW TO BUILD & ADMINISTER

Document Version 1.0  
August 20, 2013  
FrontStream



## Table of Contents

|   |           |
|---|-----------|
| <b>Introduction to IPE</b> .....                                  | <b>3</b>  |
| <b>IPE Specific Features and Limitations</b> .....                | <b>4</b>  |
| IPE Only Features .....   | 4         |
| IPE Functionality Limitations.....                                | 4         |
| <b>Setting-Up a Basic IPE Campaign</b> .....                      | <b>6</b>  |
| Set Agency Search Mode .....                                      | 6         |
| (Optional) Set the Minimum Designation Amount .....               | 8         |
| Configure IPE Compatible Payment Option Set .....                 | 10        |
| Make the Website IPE Compatible .....                             | 13        |
| Associate a “Blank” Primary Panel to the Campaign.....            | 15        |
| Creating a “Blank” Primary Panel .....                            | 16        |
| Associating the Blank Primary Panel to the Campaign .....         | 18        |
| <b>Configuring IPE Only Features</b> .....                        | <b>20</b> |
| Designation Level Acknowledgement & Recognition Options.....      | 21        |
| Designation Custom Questions.....                                 | 23        |
| Enhanced “Learn More” .....                                       | 28        |
| <b>Appendix A: IPE Donor Experience Screen Shots</b> .....        | <b>30</b> |
| Welcome / Home Page with Highlighted Charities .....              | 30        |
| Welcome / Home Page with Geo-Alignment .....                      | 30        |
| Welcome / Home Page with Blank Introductory Panel.....            | 31        |
| Pledge / Designation Level Details.....                           | 31        |
| Investment Cart.....  | 32        |
| Registration / Donor Details.....                                 | 32        |
| Pledge Review .....   | 33        |
| Thank You .....   | 33        |
| <b>Appendix B: What Makes a Skin IPE Compatible</b> .....         | <b>34</b> |
| <b>Appendix C: IPE Geographic Alignment Display Options</b> ..... | <b>35</b> |



## Introduction to IPE

As the name implies, the Impact Pledge Experience (IPE) puts the impact the donation will make front-and-center in the pledging experience. With IPE the donor is presented with the opportunity to review and learn more about your organization and the key initiatives, programs & designation options you wish to highlight as the initial step in the pledge process. This ensures donors understand the great work being done by your organization prior to making prior to making the critical decision indicating how much they want to give.

The IPE pledge flow is similar to the online shopping sites you are familiar with:

1. Review & learn more about charitable giving options / entities
2. Add desired entity to “investment cart”
3. Provide donation details for each entity (including payment type, gift amount and other designation level options if activated)
4. Review and/or provide contact information
5. Review donation details
6. Confirm donation

This is a reversal of the Standard Pledge Experience (SPE) which prompts the donor to provide payment information prior to reviewing the charitable giving options:

1. Choose payment method
2. Indicate total donation amount
3. Review charitable giving options / entities
4. Add desired entity to distribution list
5. Indicate amount of total gift to allocate to each selected entity
6. Review and/or provide contact & acknowledgement information
7. Review donation details
8. Confirm donation

Refer to ***Appendix A: IPE Donor Experience Screen Shots*** to see an example of IPE in action.



## IPE Specific Features and Limitations

### IPE Only Features

The IPE pledge flow allows for several designation level features that are unique to IPE. Some of these are modifications of functionality available at the pledge level in SPE, and others are only available with IPE.

| Feature                       | Description  |
|-------------------------------|--|
| Designation Recognition       | Allows the donor to make the gift “In Honor Of”, “In Memory Of” or “On Behalf Of”. This is unique to each agency designation. If selected, the donor can optionally put in the name and address of the person who should receive an acknowledgement letter.  |
| Special Instructions          | Allows the donor to record special instructions for the gift that would be passed on to a specific recipient agency.   |
| Release Donor Data            | Allows the donor to choose to share his/her contact information or remain anonymous for each specific recipient agency.  |
| Designation Custom Questions  | Designation Custom Questions allow your Organization to create up to three (3) custom questions that appear when a specific agency is added to a donor’s Investment Cart.  |
| Enhanced Organization Profile | Provides the ability to enhance the information visible to the donor when he/she clicks “Learn More”. Allows for the display of content such as goals, focus areas, statistics, and progress/results.<br><br><b>Note:</b> This enhanced profile data is pulled from the organization profile in iGuide, and is only available when iGuide organizations are used in the Designation Panel. |

Refer to **Section IV: Configuring IPE Only Features** for step-by-step instructions on how to configure and activate these features.

### IPE Functionality Limitations

Most features available in Standard Pledge Experience (SPE) are also available in IPE. However, due to the reversed pledging experience in IPE campaigns, some content options will not function in the same manner as they do in SPE. The following features of the Standard Pledge Experience are not supported in IPE campaigns:

| Feature               | Limitation  |
|-----------------------|---|
| Pledge Auto Renew     | Individual donor auto-renew is not available. However, continuous giving functionality does work in IPE allowing for pledges to carry-over / renew from one year to the next. |
| Designation Amount    | All designations are by dollar amount, designations by percentage are not available   |
| Negative Designations | Not available   |
| Auto Allocation       | Not available   |



| Feature                   | Limitation  |
|---------------------------|---|
| Recognition Programs      | Not available   |
| Primary Designation Panel | Primary Designation Panel is not used. Rather IPE utilizes the Introductory Designation Panel to present highlighted designation options to the donor on the Home Page and the Locate an Agency panel through the “Find Agencies” link. |
| Pledge Bars               | Not available   |
| Self Registering Donors   | Not available   |
| Public Campaign           | Not available   |
| Payment Options           | No Donation, Pay Pal, Payroll Add-ons, and Payroll Salary Ranges not available.   |
| Leadership Levels         | Leadership levels can be set, however, the “Leadership Upgrade Feature” (aka “Gift Lift”) is not available  |



## Setting-Up a Basic IPE Campaign


The basic steps for configuring an IPE campaign are similar to those for a standard pledge experience (SPE) campaign. In this document we will cover the unique configuration settings that control the IPE donor experience:

- A. In the **Designation Option Set**, set the **Agency Search Mode** to 'Progressive'
- B. (Optional) In the **Designation Option Set**, enter a **Minimum Donation Amount**, under the **Impact Pledge Experience** section.
- C. In the **Payment Type Option Set** activate only IPE compatible **Payment Types**
- D. In the associated **Website** set the **Website Type** to 'Impact Pledge Experience' and select a **Default Skin** that is IPE compatible
- E. For the campaign **Designation Panels** use a "Blank" **Primary Panel** and include options to be highlighted on the Welcome Page in the **Introductory Panel**.




Refer to the **SETTING UP A BASIC CAMPAIGN** document for step-by-step instructions on configuring a campaign.

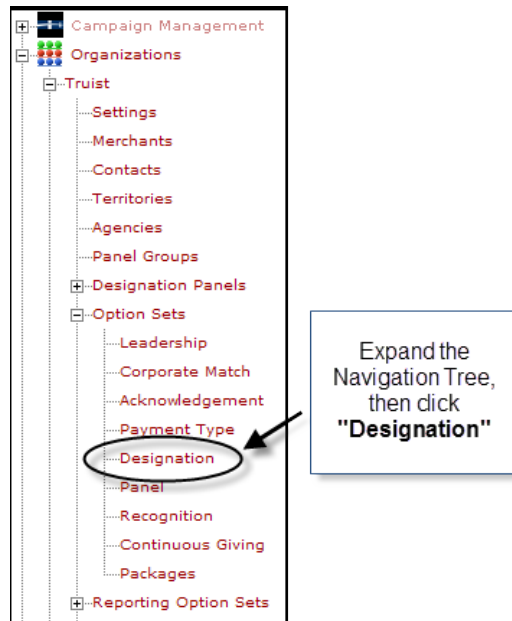
### Set Agency Search Mode


For IPE campaigns the "Agency Search Mode" must be set to 'Progressive'. The "Agency Search Mode" is set in the **Designation Option Set** that is configured at the

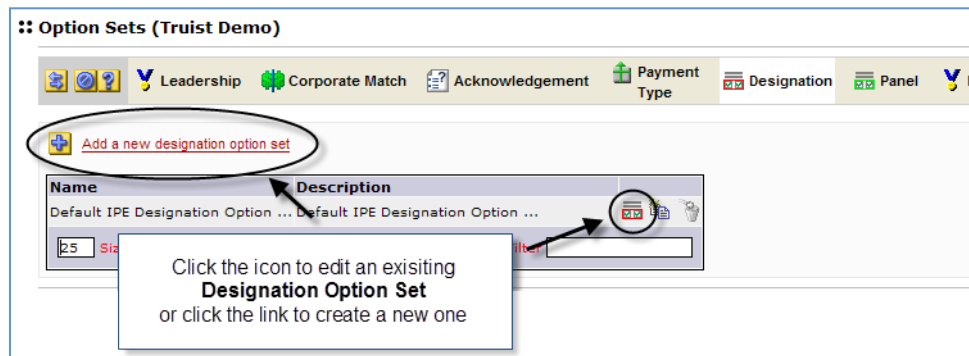
 **Organizations** level.

Below are instructions for locating and updating this field. Refer to the help documentation on **Designation Option Sets** and **Option Packages** for additional information on these features and how they impact the overall donor experience.

1. Click  **Organizations** in the navigation tree.
2. Click the  next to the Organization Name to expand the navigation tree.
3. Click the  next to **Option Sets** to expand the navigation tree further.
4. Click **Designation** to view the list of available Designation Option Sets.



5. If you wish to edit an existing option set, select the  icon next to the option set name. If one has not been created previously, click **“Add a new designation option set”**.



6. Set the **“Agency Search Mode”** to ‘Progressive’ (*Note:* This is the default setting when a new **Designation Option Set** is created).
7. Click **“Save / Update”** at the bottom of the page to record your setting.



**:: Option Sets (Truist)**

Leadership Corporate Match Acknowledgement Payment Type Designation

Name: Default IPE Designation Option Set \*

Description: Default IPE Designation Option Set

Maximum Designation Count: 8 [1-8] \*

Maximum Designation Percent: 100 [1-100] \*

Designation Option Amount Type: Dollars

Allow Negative Designation:

Allow Search IRS:

Allow Write In Agency:

Allow Locate An Agency:

Allow Auto Allocation:

Agency Search Mode: Progressive

**Impact Pledge Experience:**

Allow Designation Recognition:

Allow Special Instructions:

Allow Release Donor Data:

**Custom Fields:**

[Add a new custom field set](#)

Name: none

25 Size Filter

Save / Update Cancel / Return

Set "Agency Search Mode" to 'Progressive'

Click "Save / Update" to save your settings

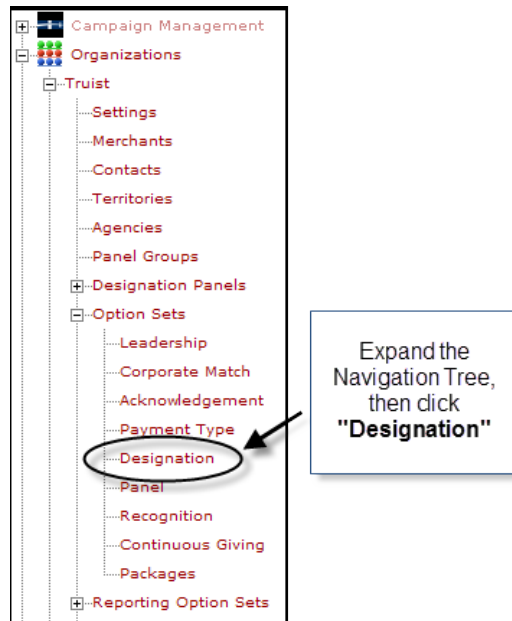
### (Optional) Set the Minimum Designation Amount


For IPE campaigns the **Minimum Designation Amount** cannot be set in the Campaign Settings, like in SPE and DPE campaigns. For IPE campaigns, the Minimum Designation Amount must be set in the **Designation Option Sets** at the **Organizations** level.

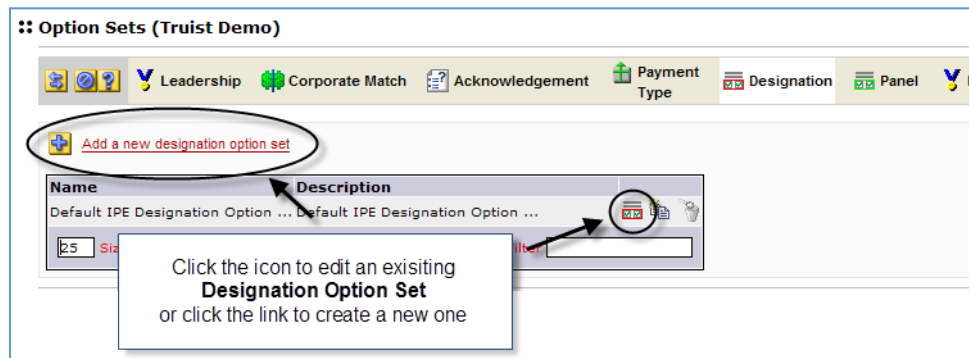
Below are instructions for locating and updating this field. Click **Organizations** in the navigation tree.

1. Click the next to the Organization Name to expand the navigation tree.
2. Click the next to **Option Sets** to expand the navigation tree further.
3. Click **Designation** to view the list of available Designation Option Sets.





4. If you wish to edit an existing option set, select the  icon next to the option set name. If one has not been created previously, click **“Add a new designation option set”**.




5. Set the **Impact Pledge Experience > Minimum Designation Amount** to any desired amount. Note that this amount will be set across all donation types (payroll, credit card, check, etc.)



| Leadership Corporate Match Acknowledgement Payment Type Designation |                                     |
|---|-------------------------------------|
| Name  | Training 2013 *                     |
| Description   | Training 2013                       |
| Maximum Designation Count   | 8 [1-8] *                           |
| Maximum Designation Percent   | 100 [1-100] *                       |
| Designation Option Amount Type                                      | Dollars                             |
| Allow Negative Designation  | <input checked="" type="checkbox"/> |
| Allow Search IRS  | <input type="checkbox"/>            |
| Allow Write In Agency   | <input type="checkbox"/>            |
| Allow Locate An Agency  | <input type="checkbox"/>            |
| Allow Auto Allocation   | <input checked="" type="checkbox"/> |
| Agency Search Mode  | Progressive                         |
| Allow Special Instructions  | <input checked="" type="checkbox"/> |
| <b>Impact Pledge Experience:</b>                                    |                                     |
| Allow Designation Recognition                                       | <input type="checkbox"/>            |
| Display Donor Release Checkbox                                      | <input type="checkbox"/>            |
| Minimum Designation Amount  | 10.00                               |

6. Click “Save / Update” at the bottom of the page to record your setting.


### Configure IPE Compatible Payment Option Set

The Payment Type options available to a donor are set in the **Payment Type Option Set** that is configured at the  **Organizations** level.

Most payment types are compatible with IPE and are configured the same for IPE as for SPE campaigns, with the following exceptions:

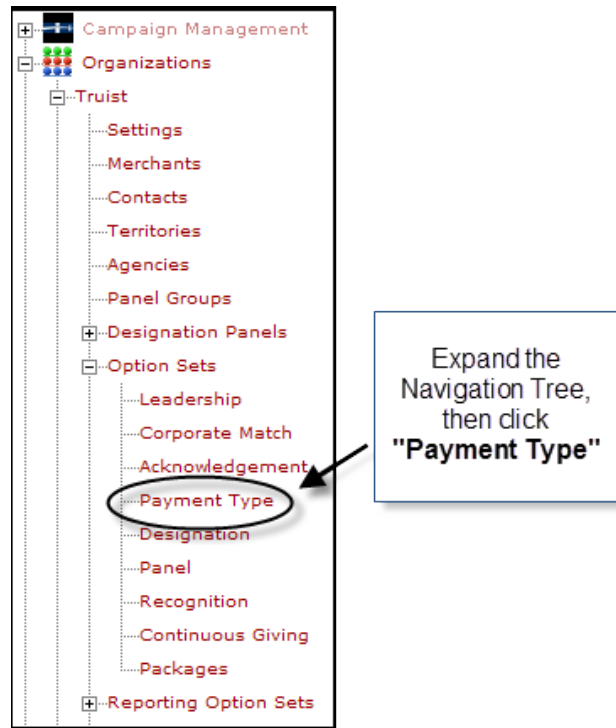
- Payroll – options are limited to ‘Per Pay Period’ and ‘One-time’
- No Donation – does not work in IPE
- Pay Pal – does not work in IPE
- Payroll Add-ons – does not work in IPE

Below are instructions for configuring IPE compatible payroll options. Refer to the help documentation on **Payroll Type Option Sets** and **Option Packages** for additional information on these features and how they impact the overall donor experience.

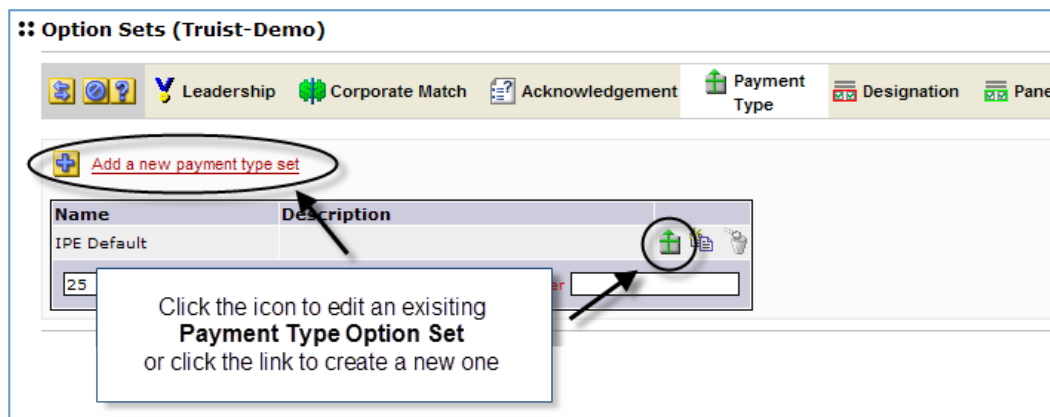
1. Click  **Organizations** in the navigation tree.



2. Click the next to the Organization Name to expand the navigation tree.
3. Click the next to **Option Sets** to expand the navigation tree further.
4. Click **Payment Type** to view the list of available Payment Type Option Sets.



5. If you wish to edit an existing option set, select the icon next to the option set name. If one has not been created previously, click "Add a new payment type option set".



6. Click "Add new payment type".



**:: Option Sets (Truist-Demo)**

Leadership Corporate Match Acknowledgement **Payment Type** Designation

**Payment Type Set**

Name: IPE Default \*

Description:

**Payment Types**

[Add a new payment type](#) Click to add a new payment type

| Type    | Min Amount | Active |
|---------|------------|--------|
| Check   |            | Yes    |
| 20 Size |            |        |

Add-Ons

7. Set the “**Payment Type**” to ‘Payroll’ (**Note:** This is the default setting when a new **Payment Type** is added).
8. Under the **Impact Pledge Experience** section click the box next to ‘Allow One-time Payments’ and/or ‘Allow Per-Pay-Period Payments’ to activate these options (**Note:** The items listed under the **Standard Pledge Experience** section are not compatible with IPE).
9. Click “**Save / Update**” at the bottom of the page.

**:: Option Sets (Truist-Demo)**

Leadership Corporate Match Acknowledgement **Payment Type** Designation

Language: English

Payment Type: Payroll Deduction Select 'Payroll Deduction' as the "Payment Type"

**General**

Minimum Donation Amount (\$):

Signature Question:

Signature Required:

**Standard Pledge Experience**

Donor May Input Missing Salary:

**Impact Pledge Experience**

Allow One-Time Payments:  Check the box to activate each IPE payroll type

Allow Per-Pay-Period Payments:

[Save / Update](#) [Cancel](#) Click "Save / Update" to save your settings



10. Click the “Traffic Light” icon next to ‘Payroll Deduction’ on the *Payment Types* list to activate the payroll payment type. **Note:** An active payment type will say “Yes” under the **Active** column next to the payment type, and the “Traffic Light” icon will appear ‘red’.
11. Click “Save / Update” at the bottom of the page to save your settings.

**Option Sets (Truist-Demo)**

Leadership Corporate Match Acknowledgement **Payment Type**

**Payment Type Set**

Name: IPE Default \*

Description:

**Payment Types**

+ Add a new payment type

| Type              | Min Amount | Active |             |
|-------------------|------------|--------|-------------|
| Check             |            | Yes    | ⊕ ⊖ ⬆ ⬇ ⬇ ⬇ |
| Payroll Deduction |            | No     | ⊕ ⊖ ⬆ ⬇ ⬇ ⬇ |

20 Size

Click the "Traffic Light" to activate the payment type

**Add-Ons**

+ Add a new payroll add-on

| Title | Question | Active |
|-------|----------|--------|
|       | none     |        |

25 Size

Click "Save / Update" to save your changes

⊕ Save / Update ⊖ Cancel / Return




### Make the Website IPE Compatible

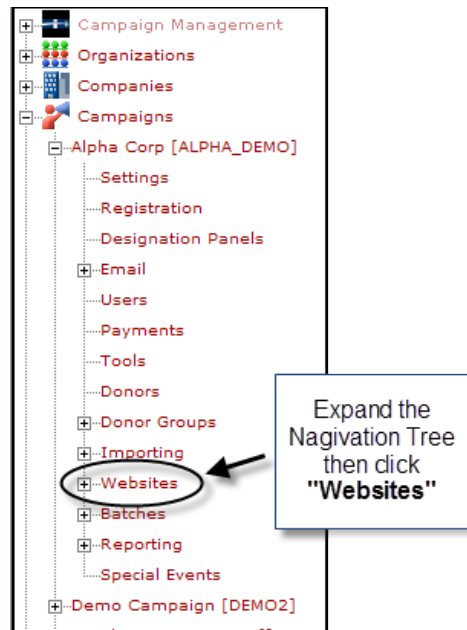
One of the key items that makes an IPE campaign an IPE campaign is establishing the **Website** as IPE. There are two settings that control that: the “*Website Type*” and the “*Default Skin*”. These are configured in the **Website Profile** located at the Campaigns level.


Below are instructions for making your website IPE compatible. Refer to the help documentation on **Website Configuration** for additional information on setting up campaign websites and how they impact the overall donor experience.

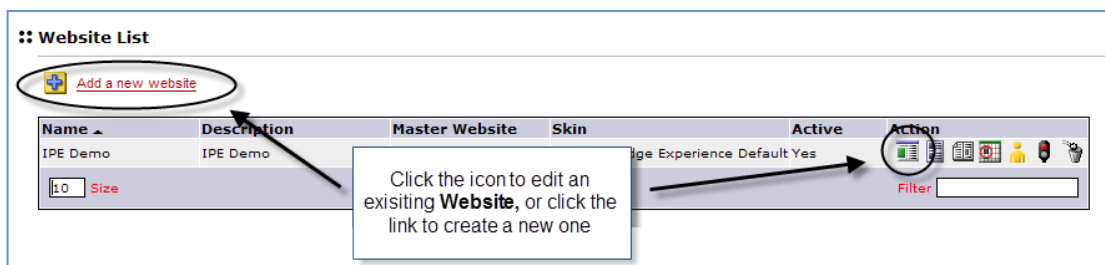


**Important Note:** Prior to setting up your website you will need to establish the associated **Campaign Profile**. Refer to the help documentation on **Setting up a Basic Campaign** for more information.

1. Click  **Campaigns** on the Navigation Tree to access the **Campaign List** (Note: This is the default page when you first log in to Campaign Manager).
2. Locate your campaign in the list, then click the  icon next to the campaign name.
3. From the campaign profile page, click the  icon to expand the Navigation Tree.
4. Click **Websites** to view a list of the associated campaign websites.

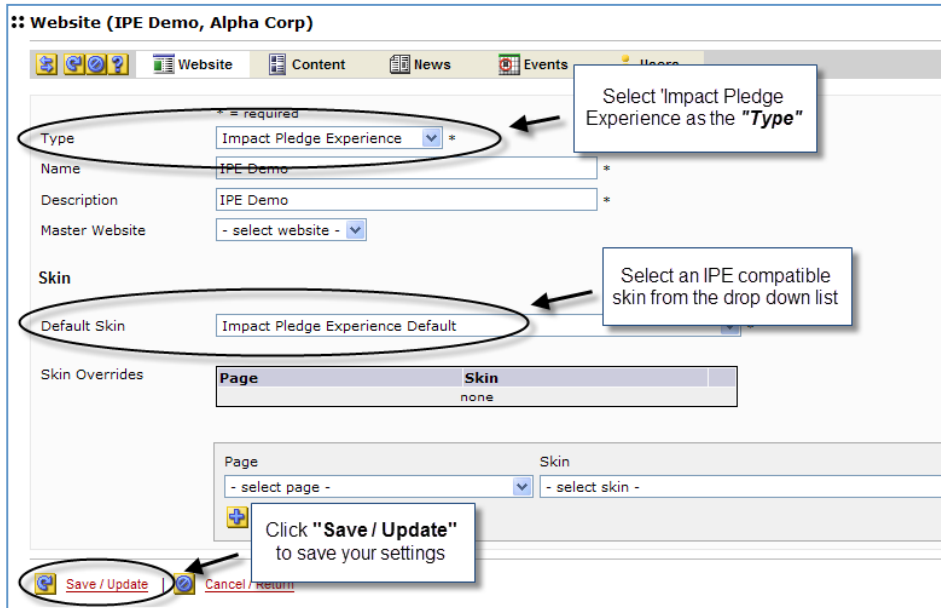


5. If you wish to edit an existing website, select the  icon next to the website name. If one has not been created previously, click **"Add a new website"**.





6. Set the **“Type”** to ‘Impact Pledge Experience’ (**Note:** The default setting is ‘Standard Pledge Experience’).
7. Select an IPE compatible skin as your **“Default Skin”**. Refer to Appendix B for information on what makes an IPE skin compatible.
8. Click **“Save / Update”** at the bottom of the page to save your settings.



**Website (IPE Demo, Alpha Corp)**

Website Content News Events Users

Type  \* Select 'Impact Pledge Experience as the "Type"'

Name  \*

Description  \*

Master Website

**Skin**

Default Skin  Select an IPE compatible skin from the drop down list



Skin Overrides

| Page | Skin |
|------|------|
|      | none |

Page  Skin

Click "Save / Update" to save your settings

### Associate a “Blank” Primary Panel to the Campaign

The IPE pledge flow does not utilize the Primary Panel. Rather the designation options that are highlighted on the donor site home page are pulled from the Introductory Panel. Therefore, you must associate a “blank” Primary Panel to your IPE campaign. **Designation Panels** are configured at the  **Organizations** level. Once created, they can be associated to multiple campaigns at the  **Campaigns** level.

Below are instructions for creating a “blank” Primary Panel and associating it to the campaign. Refer to the help documentation on **Designation Panels** for more information on designation panels and how they impact the overall donor experience.

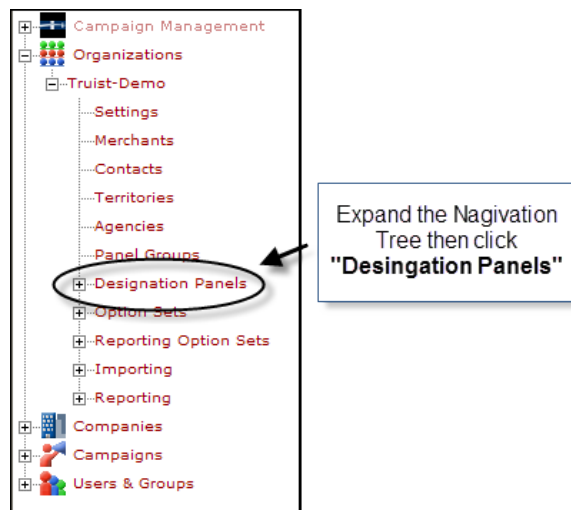
**Important Note:** Prior to associating your Primary Panel to the campaign you will need to establish the associated **Campaign Profile**. Refer to the help documentation on **Setting up a Basic Campaign** for more information.



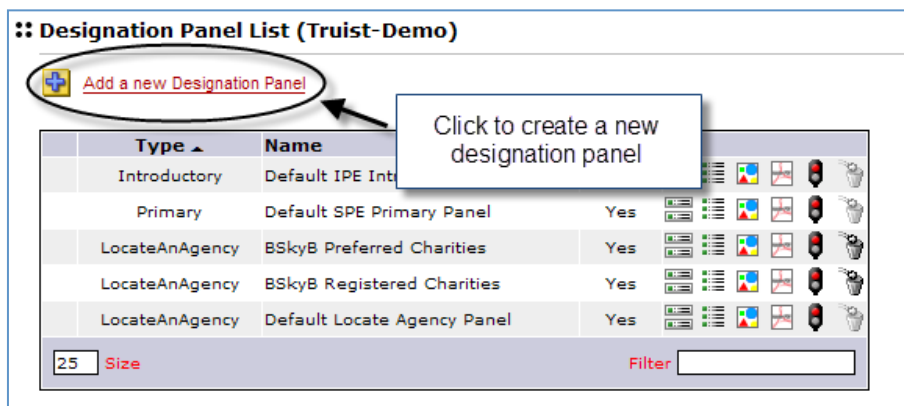
### Creating a “Blank” Primary Panel

**Note:** Skip this section if a “blank” primary panel already exists for your organization. This only needs to be done once per organization. Once created, it can be reused for all campaigns.

1. Click **Organizations** in the navigation tree.
2. Click the next to the Organization Name to expand the navigation tree.
3. Click **Designation Panels** to access the Designation Panels List.



4. Click “Add a new designation panel” to create a new designation panel.



5. Select ‘Primary Panel’ from the “Type” drop down list (**Note:** ‘Introductory Panel’ is the default).





6. Enter 'Blank Primary Panel' in the **"Name"** field. Optionally you may also enter a more detailed description in to the **"Description"** field.
7. Click "Save / Update" at the bottom of the page to create your blank panel.

The screenshot shows the 'Add Designation Panel' form. At the top, there are tabs for 'Panel', 'Items', and 'Images'. The 'Type' dropdown menu is set to 'Primary'. The 'Name' field contains the text 'Blank Primary Panel'. Below the 'Name' field is a 'Description' field and a 'Default Designation' dropdown set to '[ none ]'. There are checkboxes for 'By Location' and 'Public', and a 'Always profile by my Orga...' checkbox. At the bottom, there are two buttons: 'Save / Update' (circled) and 'Cancel / Return'. A search results window is open, showing a 'Search Results' section with 'select' and 'cancel' buttons. Callout boxes provide instructions: 'Select 'Primary' as the "Type"', 'Enter 'Blank Primary Panel' as the "Name"', and 'Click "Save / Update" to save your settings'.

8. Click **"Designation Panels"** on the Navigation Tree.
9. Click the "Traffic Light" icon next to the panel name to activate the designation panel.  
**Note:** An active designation panel will say "Yes" under the **Active** column next to the panel name, and the "Traffic Light" icon will appear 'red'.



**:: Designation Panel List (Truist-Demo)**

[Add a new Designation Panel](#)

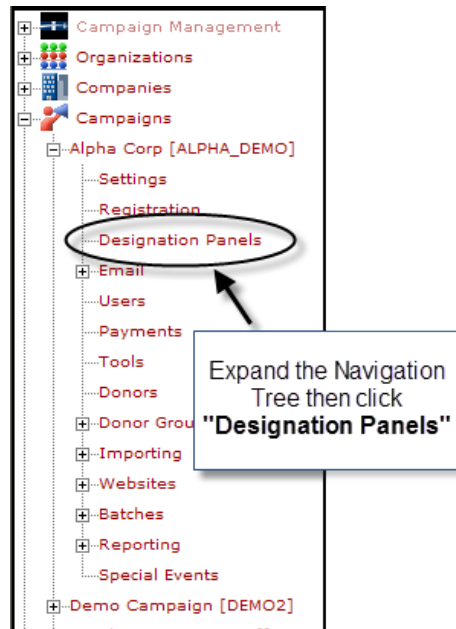
| Type           | Name                        | Active |  |
|----------------|-----------------------------|--------|--|
| Introductory   | Default IPE Intro Panel     | Yes    |  |
| Primary        | Blank Primary Panel         | No     |  |
| Primary        | Default SP                  |        |  |
| LocateAnAgency | BSkyB Pre                   |        |  |
| LocateAnAgency | BSkyB Reg                   |        |  |
| LocateAnAgency | Default Locate Agency Panel | Yes    |  |

25 Size Filter

*Click the "Traffic Light" to activate the designation panel*

### *Associating the Blank Primary Panel to the Campaign*

1. Click **Campaigns** on the Navigation Tree to access the **:: Campaign List**  
(**Note:** This is the default page when you first log in to Campaign Manager).
2. Locate your campaign in the list then click the icon next to the campaign name.
3. From the campaign profile page, click the icon to expand the Navigation Tree.
4. Click **Designation Panels** to access the designation settings page.



5. Select 'Blank Primary Panel' from the *"Primary Panel"* drop down list.

6. Click **"Save / Update"** to save your settings.

**Note:** If the designation panels for a particular Donor Group are different from the campaign settings, associate a "Blank" Primary Panel in the Donor Group settings. Refer to the support documentation on **Donor Groups** for detailed information on configuring Donor Groups.



**Campaign (Alpha Corp)**

Campaign Settings Registration Designation Panels Email Users Payment

**Panels**

Introductory Panel: Default IPE Intro Panel

Primary Panel: Blank Primary Panel

Locate An Agency Panel: Default Locate Agency Panel

**Panel Item Exceptions**

Search: Agencies

By Identification

By Location

search

**Search Results**

- [ A ] 124th Brownie Pack
- [ A ] 139th Blackford Scout Group
- [ A ] 13th Bebington (St. Barnabas) Scout Group
- [ A ] 145 Hallam Brownies
- [ A ] 145th Hallam Guides
- [ A ] 14th Canterbury Scout Group
- [ A ] 19th Devasbury Brownies
- [ A ] 1st Ardingly Scout Group
- [ A ] 1st Cambusnethan Boys Brigade Company
- [ A ] 1st Coates Brownies

**Inclusions**

Display Detail

**Search Results**

- [ A ] 124th Brownie Pack
- [ A ] 139th Blackford Scout Group
- [ A ] 13th Bebington (St. Barnabas) Scout Group
- [ A ] 145 Hallam Brownies
- [ A ] 145th Hallam Guides
- [ A ] 14th Canterbury Scout Group
- [ A ] 19th Devasbury Brownies
- [ A ] 1st Ardingly Scout Group
- [ A ] 1st Cambusnethan Boys Brigade Company
- [ A ] 1st Coates Brownies

**Exclusions**

Display Detail

Save / Update Cancel / Return

Click "Save / Update" to save your settings

## Configuring IPE Only Features

In addition to providing Organizations and the Companies they work with the ability to highlight selected donor agency designation options at the forefront of the donation process, IPE also offers several features unique to IPE that can be optionally configured to enhance the donor experience.

This section provides additional information about each of these features, as well as step-by-step instructions for activating each of them.

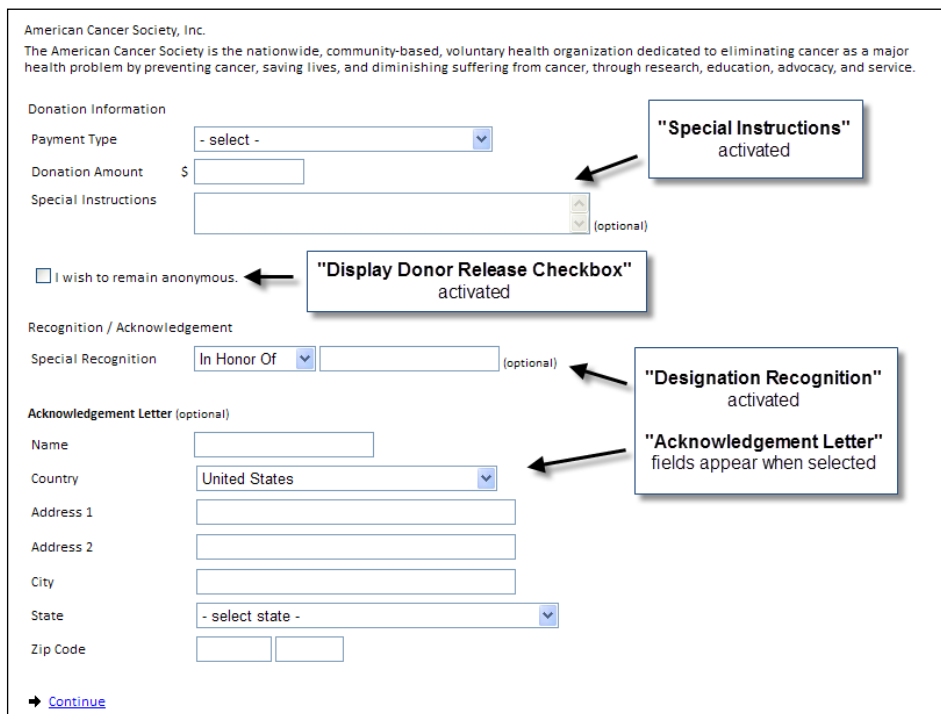


## Designation Level Acknowledgement & Recognition Options

IPE offers the ability for the donor to provide designation level acknowledgement and/or special recognition options. This allows the donor the flexibility to indicate he/she wants to give anonymously to one agency, while sharing donor details with another – all within the same donation transaction. Additionally a designation level “Special Instructions” field can be activated allowing the donor to provide additional information about their gift to the recipient agency (for example: specifying that funds designated to the Boys & Girls Club be allocated to the ‘Goals for Graduation Program’).

**Note:** The donor data entered into these fields are available via the Donor Designation Export. The *“Special Instructions”* are also available via the following Donation Export and Donation Flexport.

Below is a screenshot of the donor experience when these fields are activated.



American Cancer Society, Inc.  
The American Cancer Society is the nationwide, community-based, voluntary health organization dedicated to eliminating cancer as a major health problem by preventing cancer, saving lives, and diminishing suffering from cancer, through research, education, advocacy, and service.

Donation Information

Payment Type:

Donation Amount: \$

Special Instructions:  (optional)

I wish to remain anonymous.

Recognition / Acknowledgement

Special Recognition:  (optional)

Acknowledgement Letter (optional)

Name:

Country:

Address 1:


Address 2:

City:


State:

Zip Code:



[Continue](#)

These designation level instruction fields are configured in the **Designation Option Set** that is configured at the  **Organizations** level.


Below are instructions for locating and activating these fields. Refer to the help documentation on **Designation Option Sets** and **Option Packages** for additional information on these features and how they impact the overall donor experience.

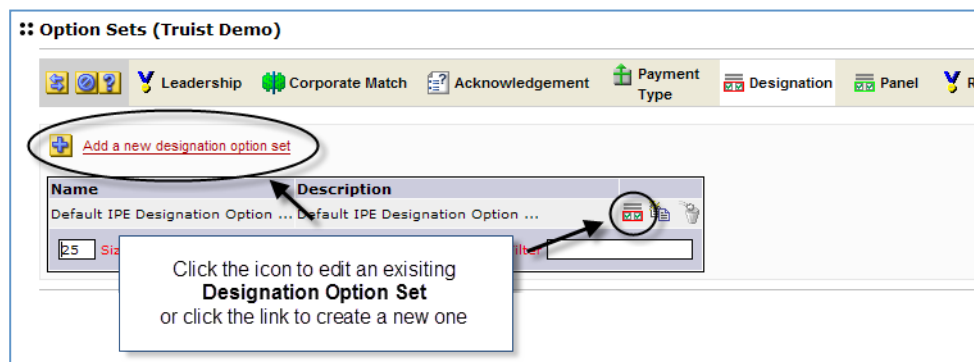
- i. Click  **Organizations** in the navigation tree.



- ii. Click the  next to the Organization Name to expand the navigation tree.
- iii. Click the  next to **Option Sets** to expand the navigation tree further.
- iv. Click **Designation** to view the list of available Designation Option Sets.



- v. If you wish to edit an existing option set, select the  icon next to the option set name. If one has not been created previously, click **“Add a new designation option set”**.



- vi. In the *Impact Pledge Experience* section of the **Designation Option Set** page, click the box(es) next to **“Allow Designation Recognition”**, **“Allow Special Instructions”** and/or **“Display Donor Release Checkbox”** as appropriate.



**Note:** If “*Display Donor Release Checkbox*” is active (checked), an additional “*Remain Anonymous By Default*” option will appear.

- vii. Click “**Save / Update**” at the bottom of the page to record your setting.

**Option Sets (Trust)**

Leadership Corporate Match Acknowledgement Payment Type Designation Par

Name: Default IPE Designation Option Set \*

Description: Default IPE Designation Option Set

Maximum Designation Count: 8 [1-8] \*

Maximum Designation Percent: 100 [1-100] \*

Designation Option Amount Type: Dollars

Allow Negative Designation:

Allow Search IRS:

Allow Write In Agency:

Allow Locate An Agency:

Allow Auto Allocation:

Agency Search Mode: Progressive

**Impact Pledge Experience:**

Allow Designation Recognition:

Allow Special Instructions:

Display Donor Release Checkbox:

Remain Anonymous By Default:

**Custom Fields:**

Add a new custom field set

Name: none

25 Size Filter

Click “**Save / Update**” to save your settings

Save / Update Cancel

### Designation Custom Questions

With IPE you can create up to three (3) custom questions that will appear on the pledge details page when a specified agency is added to a donor’s Investment Cart. This feature provides the flexibility to create multiple **Custom Field Sets** to which one or more charities can be associated – thus allowing for different questions to appear based upon the agency selected.

**Note:** The donor data entered into these custom fields are available via the Donor Designation Export and the Donation Flexport.

Below is a screenshot of the donor experience when these fields are activated.



Special Company Charity 2

Donation Information

Payment Type

Donation Amount \$

Special Instructions  (optional)

What made you want to give to this organization?  (optional)

Direct Funds to:  (optional)

I would like to release my name to the agency receiving my contribution.

Recognition / Acknowledgement




Special Recognition  (optional)

[Continue](#)

Sample  
Designation Custom  
Questions


The **Custom Field Sets** are configured in the **Designation Option Set** that is configured at the  **Organizations** level.

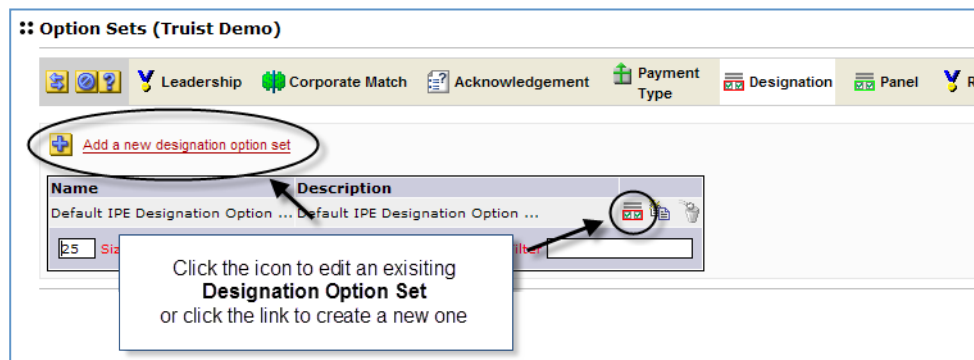
Below are instructions for configuring **Custom Field Sets**. Refer to the help documentation on **Designation Option Sets** and **Option Packages** for additional information on these features and how they impact the overall donor experience.

- viii. Click  **Organizations** in the navigation tree.
- ix. Click the  next to the Organization Name to expand the navigation tree.
- x. Click the  next to **Option Sets** to expand the navigation tree further.
- xi. Click **Designation** to view the list of available Designation Option Sets.





- xii. If you wish to edit an existing option set, select the  icon next to the option set name. If one has not been created previously, click **“Add a new designation option set”**.



- xiii. Click **“Add new custom field set”**.  
**Note:** If you created a new Designation Option Set in step 12, you will need to enter the basic option set details and click **“Save / Update”** before the **“Add new custom field set”** link will become active.



**Option Sets (Truist-Demo)**

Leadership Corporate Match Acknowledgement Payment Type Designation Pan

Name: Default IPE Designation Option Set \*

Description: Default IPE Designation Option Set

Maximum Designation Count: 8 [1-8] \*

Maximum Designation Percent: 100 [1-100] \*

Designation Option Amount Type: Dollars

Allow Negative Designation:

Allow Search IRS:

Allow Write In Agency:

Allow Locate An Agency:

Allow Auto Allocation:

Agency Search Mode: Progressive

**Impact Pledge Experience:**

Allow Designation Recognition:

Allow Special Instructions:

Allow Release Donor Data:

Checked By Default:

**Custom Fields:**

[Add a new custom field set](#) (Callout: Click to add a new Custom Field Set)

Name: none


25 Size Filter

Save / Update | Cancel / Return

- xiv. Enter the Custom Field Set details. **Note:** Those fields that are required in order to activate a custom field are noted with an asterisk (\*).

| Custom Field Set Field Listing |                       |   |
|--------------------------------|-----------------------|---|
| Req                            | Field                 | Description   |
| *                              | Custom Field Set Name | This is the name that will be used to identify the <b>Custom Field Set</b> .  |
| *                              | Label                 | This is the field label that will be visible to the donor on the pledge details page.   |
| *                              | Field Type            | Denotes the field value. The available field types are Text (which allows the donor to enter freeform text) and List (which prompts the donor to select an option from a drop down list) – <i>select 'Text' or 'List' from the drop down list.</i><br><br><b>Note:</b> The default is 'Text'. |
|                                | Default Value         | If 'Text' is selected as the " <b>Field Type</b> ", this denotes the default value that will appear to the donor on the pledge details page.<br><br>If 'List' is selected as the " <b>Field Type</b> ", this denotes the  |



| Custom Field Set Field Listing |                     |  |
|--------------------------------|---------------------|--|
| Req                            | Field               | Description  |
|                                |                     | drop down choices that will appear to the donor on the pledge details page – <i>enter each choice on a separate line in the box provided.</i>  |
|                                | Validation          | Denotes what data validation, if any, will be done by the system on the data entered by the donor – <i>select 'None', 'Numeric', or 'Date' from the drop down list.</i><br><br><b>Note:</b> The default is 'None'.   |
| *                              | Active              | Denotes if this field is currently active – <i>check the box to activate.</i><br><br><b>Note:</b> The default is 'Inactive'.   |
|                                | Required            | Denotes if this field will be required – <i>check the box to require that the donor compete this field prior to completing the pledge.</i><br><br><b>Note:</b> The default is 'Optional'.  |
| *                              | Associated Agencies | Denotes which agency(ies) the custom fields should appear for - <i>follow the steps below to configure these:</i> <ul style="list-style-type: none"> <li>• Use the search area to locate the desired agency</li> <li>• Click to highlight the desired the agency(ies) in the <b>Search Results</b> box</li> <li>• Click the  button next to the highlighted agency(ies) to add it to the <b>Selected Agencies</b> box</li> </ul><br><b>Note:</b> If no agency is selected the Custom Field Set will be applied to all agencies. |

- xv. Click **“Save / Update”** at the bottom of the page to record your setting.



**:: Option Sets (Truist)**

Leadership Corporate Match Acknowledgement Payment Type Designation Panel Recognition Continuo

Custom Field Set **SAMPLE COMPLETED CUSTOM FIELD SET**

Custom Field Set Name: Special Co Charities

| Field | Label                           | Field Type | Default Value  | Validation | Active                              | Required                 |
|-------|---------------------------------|------------|--|------------|-------------------------------------|--------------------------|
| 1     | What made you want to give to t | Text       |  | None       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 2     | Direct funds to:                | List       | Adopted School<br>Employee Assistance<br>Disaster Preparedness | None       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 3     |                                 | Text       |  | None       | <input type="checkbox"/>            | <input type="checkbox"/> |

Associated Agencies:

Search Agencies

By Identification  
 By Location

search

| Search Results | Selected Agencies         |
|----------------|---------------------------|
|                | Special Company Charity 2 |

Click "Save / Update" to save your settings

Save / Update Cancel / Return

### Enhanced "Learn More"

When an IPE campaign's Designation Panels are configured to draw its designation options from the Investment Guide (iGuide) an enhanced "Learn More" option is available. Unlike the OPPS agencies database, the iGuide has the ability to store a tremendous amount of information, images and links on your Organization and Focus Areas. Any information stored in iGuide is then displayed to the donor when he/she clicks "Learn More".

**Note:** The enhanced "Learn More" content areas apply only to the Organization / United Way and its Focus Areas.

Below are screenshots showing the donor "Learn More" experience for an OPPS Agency verses an iGuide organization profile when these fields are activated.



### OPPS AGENCY LEARN MORE

← [Back](#) → [Add To Investment Cart](#)

American Cancer Society, Inc.

The American Cancer Society is the nationwide, community-based, voluntary health organization dedicated to eliminating cancer as a major health problem by preventing cancer, saving lives, and diminishing suffering from cancer, through research, education, advocacy, and service.

Address National Office, 250 Williams Street, NW, Atlanta, GA 30303  
 EIN 13-178849  
 ID A000244187  
 Acct. Code xxx-10050

### IGUIDE ORGANIZATION PROFILE LEARN MORE

|   |  |
|---|--|
| ← <a href="#">Back</a>  | → <a href="#">Add To Investment Cart</a> |
| <b>Overview</b>   | <b>Goals and Progress</b>                |
| <p><b>United Way Of Greater Milwaukee</b></p> <p><i>Your gift to United Way has a direct impact on lives right here in the Metro Milwaukee area. We help improve lives with the Community Impact Fund which supports programs conducted by our Program Delivery Partners.</i></p> <p>Address 225 West Vine Street, Milwaukee, WI 53212-<br/>                 ID 7574540076<br/>                 Acct. Code 007613</p>  |  |
| <ul style="list-style-type: none"> <li>• 100th Anniversary Challenge</li> <li>• Breaking The Cycle Of Poverty</li> <li>• Early Childhood Education</li> </ul>   |  |

|  |  |
|--|--|
| ← <a href="#">Back</a>   | → <a href="#">Add To Investment Cart</a> |
| <b>Overview</b>  | <b>Goals and Progress</b>                |
| <p><b>United Way Of Greater Milwaukee</b></p> <p><b>Help. It's The United Way.</b></p> <p>Nothing changes if nothing changes.</p> <p>In Greater Milwaukee, nearly one out of every three children lives in poverty. Our community is one of the most impoverished cities in the nation, and this poverty is cyclical, leaving generations of families without the essentials they need to survive. Without consistent meals and a safe place to call home, education suffers, and nearly half of our poor do not have a high school diploma. Without the proper education, jobs are hard to come by, leaving over 75,000 unemployed. When families are in distress the cycle of poverty continues.</p> <p>Our campaign goal for 2007 is \$42,000,000. Won't you consider a gift today?</p> |  |

Refer to the **iGuide Wiki** (<http://wiki.unitedeway.org>) for detailed instructions on setting up organization records and entering associated organization content in the iGuide. Additional support for configuring designation panels refer to the following support documentation on **Panel Groups** and **Designation Panels**.




## Appendix A: IPE Donor Experience Screen Shots

### Welcome / Home Page with Highlighted Charities

Logged in: Jenn Finder : [Logout](#)

*give as you earn*



|                      |
|----------------------|
| Home                 |
| View Investment Cart |
| Checkout             |
| Find Agencies        |
| Help / FAQs          |
| Leadership Levels    |
| My Account           |


**Welcome Jenn!**

At Northport Technologies we think of ourselves as a part of the community, and like any other good citizen, it's important for us to get involved in community action. Helping others live up to their fullest potential makes sense for our company any way you slice it. It's important to our customers, but it's also important to the people in the communities in which we live and work.

With that thought in mind, please give as much as you can, or as some people say, until it feels good.


**Below is a listing of our partner charities. You may choose to give to one of these organizations or you may elect to search for one of your favorites.**

**Special Company Charity 1**




[Add to Investment Cart](#) [Learn More](#)

**Special Company Charity 2**




[Add to Investment Cart](#) [Learn More](#)

powered by  **TRUIST**  
ATLANTA, GEORGIA

### Welcome / Home Page with Geo-Alignment

Logged in: Jenn Finder : [Logout](#)

*give as you earn*



|                      |
|----------------------|
| Home                 |
| View Investment Cart |
| Checkout             |
| Find Agencies        |
| Help / FAQs          |
| Giving History       |
| Dashboard            |
| My Account           |


**Welcome Jenn!**

At Northport Technologies we think of ourselves as a part of the community, and like any other good citizen, it's important for us to get involved in community action. Helping others live up to their fullest potential makes sense for our company any way you slice it. It's important to our customers, but it's also important to the people in the communities in which we live and work.

With that thought in mind, please give as much as you can, or as some people say, until it feels good.

---


**United Way of the National Capital Area**



A local health and human service organization providing resources to nonprofits corporate and individual donors and volunteers throughout the Greater Washington Metropolitan Region.

[Add to Investment Cart](#) [Learn More](#)


Currently browsing **United Way of the National Capital Area**  
[change](#)

powered by  **TRUIST**  
ATLANTA, GEORGIA




## Welcome / Home Page with Blank Introductory Panel

Logged in: Jenn Finder : [Logout](#)



give as you earn

|   |  |
|---|--|
| <ul style="list-style-type: none"> <li>Home</li> <li>View Investment Cart</li> <li>Checkout</li> <li>Find Agencies</li> <li>Help / FAQs</li> <li>Giving History</li> <li>Dashboard</li> <li>My Account</li> </ul> | <p><b>Welcome Jenn!</b></p> <p>At Northport Technologies we think of ourselves as a part of the community, and like any other good citizen, it's important for us to get involved in community action. Helping others live up to their fullest potential makes sense for our company any way you slice it. It's important to our customers, but it's also important to the people in the communities in which we live and work.</p> <p>With that thought in mind, please give as much as you can, or as some people say, until it feels good.</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin: 10px auto;"> <input type="text" value="search agencies"/> </div> |
|---|--|




## Pledge / Designation Level Details

Logged in: Jenn Finder : [Logout](#)


give as you earn

|  |  |
|--|--|
| <ul style="list-style-type: none"> <li>Home</li> <li>View Investment Cart</li> <li>Checkout</li> <li>Find Agencies</li> <li>Help / FAQs</li> <li>Giving History</li> <li>My Account</li> </ul> | <p><b>Special Company Charity 1</b></p> <p><b>Donation Information</b></p> <p>Payment Type: <span style="border: 1px solid #ccc; padding: 2px;">- select -</span></p> <p>Donation Amount: <span style="border: 1px solid #ccc; padding: 2px;">\$</span></p> <p>Special Instructions: <span style="border: 1px solid #ccc; padding: 2px;"></span> (optional)</p> <p><input type="checkbox"/> I wish to remain anonymous.</p> <p><b>Recognition / Acknowledgement</b></p> <p>Special Recognition: <span style="border: 1px solid #ccc; padding: 2px;">None</span> (optional)</p> <p style="text-align: center;">➔ <a href="#">Continue</a></p> |
|--|--|





## Investment Cart

Logged in: Jenn Finder : [Logout](#)

*give as you earn*


Home  
View Investment Cart  
Checkout  
Find Agencies  
Help / FAQs  
Giving History  
My Account

### Your Investment Cart

Listed below are the organizations and programs you are considering supporting. If you would like to find more agencies please click "Continue browsing for other investment opportunities". If your list is complete please click "Checkout".

| Name   | Donation | Payment                                    |
|--|----------|--|
| <input type="checkbox"/> <b>Special Company Charity 1</b>  | \$260.00 | <input type="checkbox"/> Payroll Deduction |
| <input type="checkbox"/> <b>Boys &amp; Girls Clubs</b>   | \$260.00 | \$20.00 / pay period<br>\$520.00           |
| Special Recognition: In Honor Of Jordan Smith<br>Remain Anonymous: No<br><a href="#">← edit</a> <a href="#">× remove</a> |          | #10017174757                               |
| <input type="checkbox"/> Previous Investments  |          |  |

[→ Checkout](#)  
[→ Continue browsing for other choices](#)

powered by  TRUIST  
ATLANTA, GEORGIA

## Registration / Donor Details

Logged in: Jenn Finder : [Logout](#)

*give as you earn*

Home  
View Investment Cart  
Checkout  
Find Agencies  
Help / FAQs  
Giving History  
My Account

← Back Continue →

Please carefully review your information below. To make changes to your personal information, enter the information in the spaces provided and click the 'Continue' button to complete the process. To make changes to your contribution, click on the 'Back' button.

### Personal Information

First Name:   
 Last Name:   
 Preferred Mailing Address:  Home  Work

### Home Contact Information

E-mail Address:  (optional)  
 Phone Number 1:  (optional)  
 Phone Number 2:  (optional)  
 Fax Number:  (optional)

### Home Address

Country:    
 Address 1:  (optional)





## Pledge Review

Logged in: Jenn Finder : [Logout](#)

*give as you earn*

Home | View Investment Cart | Checkout | Find Agencies | Help / FAQs | Giving History | My Account

◀ Back Submit Contribution ▶

Please review your entire contribution below, using the "Edit" buttons to make any changes. If you are satisfied, please click "Submit Contribution" to complete this process. You will then have the opportunity to print your receipt.

**[Edit] Your Investments**

| Name   | Donation | Payment   |
|--|----------|---|
| <b>Special Company Charity 1</b>   | \$260.00 | Payroll Deduction<br>\$20.00 / pay period<br>\$520.00 |
| <input type="checkbox"/> Remain Anonymous No   |          | #10017174757  |
| <b>Boys &amp; Girls Clubs</b>  | \$260.00 |   |
| Special Recognition In Honor Of Jordan Smith<br><input type="checkbox"/> Remain Anonymous No |          |   |

Previous Investments

**[Edit] Personal Information**

Name: Jenn Finder  
 Home Address:   
 Home Phone:   
 Home Email:   
 Work Phone:   
 Work Email: jfinder@northporttech.com

◀ Back Submit Contribution ▶

powered by **TRUIST**  
Member, FDIC

## Thank You

Logged in: Jenn Finder : [Logout](#)

*give as you earn*

Home | View Investment Cart | Checkout | Find Agencies | Help / FAQs | Giving History | My Account

◀ Home Print pledge summary ↑ Logout ▶

**Thank You!**

Thank you for your participation in our Employee Giving Campaign and making the choice to support your favorite charities. One hundred percent of your gift goes to the charities you designated. Your generosity is critical to helping those in need.

A confirmation of your pledge will be sent via email.

◀ Home Print pledge summary ↑ Logout ▶

powered by **TRUIST**  
Member, FDIC



## Appendix B: What Makes a Skin IPE Compatible

The “ContentAreas” contained within the skin drive what features are displayed within a particular area of the website. While the area names are the same, the content contained within them is different for SPE and IPE. Therefore, it is critical that an IPE compatible skin is associated with the website for all IPE campaigns.

Below is an overview of the content areas and how they are utilized by IPE.

**ContentArea1** - Populates with the following areas

1. Introductory Designation Panel
2. Find an Agency Search options
3. View Investment Cart
4. Donation Details
5. Special Instructions and Recognition
6. Check Out
7. News details (when news and events link is selected)
8. Custom page as text details
9. Giving History details
10. Leadership Level Details page
11. Privacy Policy page
12. Contact Us Details

**ContentArea2** - Populates with the following areas

- Welcome Message
- Marketing Message
- Multimedia Files
- News and Event Calendar



## Appendix C: IPE Geographic Alignment Display Options

There are three approaches that may be used to display the custom geo-alignment prompt in IPE.

**Note:** The typical campaign settings necessary for geo-alignment still apply - "Donor May Custom Align" is active and at least one geo-aligned panel is associated to the campaign. Refer to the support documentation on Geo-Alignment for more detailed information on this feature.

### 1. Basic / Automatic support

The automatically aligned organization will appear in ContentArea1 of the skin. If custom alignment is active, then the following tag needs to be added to the IPE compatible skin: `<skin:contentarea id="GeoAlignment" />`

This will show a very basic statement of the current alignment with a "change" link that will take the donor to the "change alignment" page (Align.aspx). This option will only present the change option to the donor when the custom-alignment is active or when the donor naturally aligns to more than one United Way.

### 2. Custom Skin support

You may use the tag `<skin:variable name="AlignedOrganization">` to create a custom presentation of the currently aligned united way. This option should only be used when you want to unconditionally present the geo-alignment option as it will appear on all pages using this skin.

Below is sample code that can be used. The highlighted text can be changed as desired.

```
<skin:variable name="AlignedOrganization" condition="NotEmpty">
  <passtemplate>
    You are currently aligned to %AlignedOrganization%. If you would like to
    change this, <a
    href="Align.aspx">click here</a>
  </passtemplate>
</skin:variable>
```

### 3. Website content support

If you would like to only present the geo-alignment options at specific point in the pledge process, you may use the `%AlignedOrganization%` variable within website content to create a similar mechanism to the custom skin approach.

Below is sample code that can be used. The highlighted text can be changed as desired.



You are currently aligned to %AlignedOrganization%. If you would like to change this,  
<a href="Align.aspx">click here</a>

This option should only be used when you want to unconditionally present the geo-alignment option as it will appear for all donors.