frontstream WORKPLACE PHILANTHROPY

New Administrator Guide to Campaign Management

Document Version 2.1
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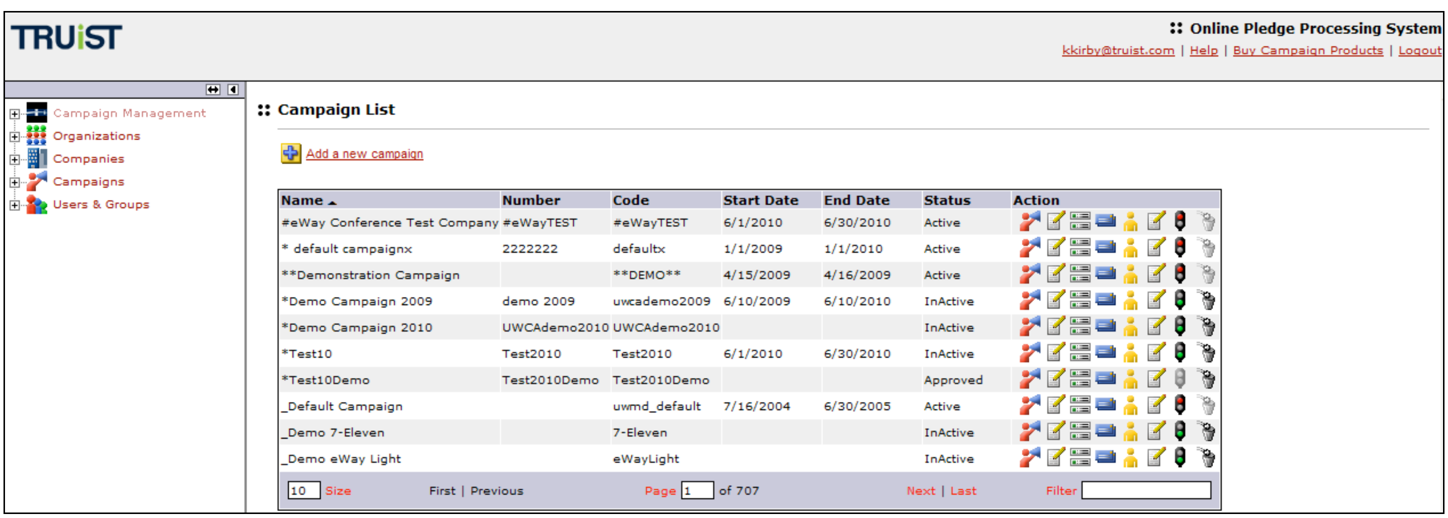
Before Setting up a Campaign

Figure out the scope of the campaign – It is important to ask questions before starting a campaign. Doing so will help define the structure of the campaign on the mechanical side (Campaign Management). Before starting a campaign, administrative users should ask themselves questions such as:

- Who do I want to include in the campaign?
- What do I want the campaign to look like?
- How long will this campaign be?
- Is this for a small group of people or for a large company?
- How do I want donors to access the Donor Site? Via email? Via Single Sign-On?
- How do I want to set up and group my donors?
- Are there any business rules I need to consider before beginning the campaign?
- Does everyone involved in this campaign have a clear understanding of what we want?
- Who do I want from my team to have access to the admin side of the campaign?

What is Campaign Management?

Campaign Management is a robust ePledging solution that provides many configurable options. These options allow administrators to create a customized donor experience within a particular campaign, company, or donor group.



Name	Number	Code	Start Date	End Date	Status	Action
#eWay Conference Test Company	#eWayTEST	#eWayTEST	6/1/2010	6/30/2010	Active	
* default campaignx	2222222	defaultx	1/1/2009	1/1/2010	Active	
**Demonstration Campaign		**DEMO**	4/15/2009	4/16/2009	Active	
*Demo Campaign 2009	demo 2009	uwcademo2009	6/10/2009	6/10/2010	InActive	
*Demo Campaign 2010	UWCAdemo2010	UWCAdemo2010			InActive	
*Test10	Test2010	Test2010	6/1/2010	6/30/2010	InActive	
*Test10Demo	Test2010Demo	Test2010Demo			Approved	
_Default Campaign		uwmd_default	7/16/2004	6/30/2005	Active	
_Demo 7-Eleven		7-Eleven			InActive	
_Demo eWay Light		eWayLight			InActive	

Basic Structure of Campaign Management

Campaign Management is comprised of three main levels: Organizations, Companies and Campaigns. The levels take the form of a tree and can be expanded or collapsed by clicking or . Once configured, each of these levels determine the settings and options available on the **Donor Site**.

Donor Site

A Donor Site is a site where a typical donor experiences a campaign. All Donor Sites are configured in Campaign Management to personalize and customize each donor's experience. Everything configured in Campaign Management is applied to this site.

Minimum Requirements to Donate:

- **Donor ID –** This is code used to identify the donor in the system. Usually it is beneficial to have the Donor ID tie in with the company's payroll system, so this file is easily recognized with the employee's payroll file.
- Donor's first and last name
- Donor's username and password

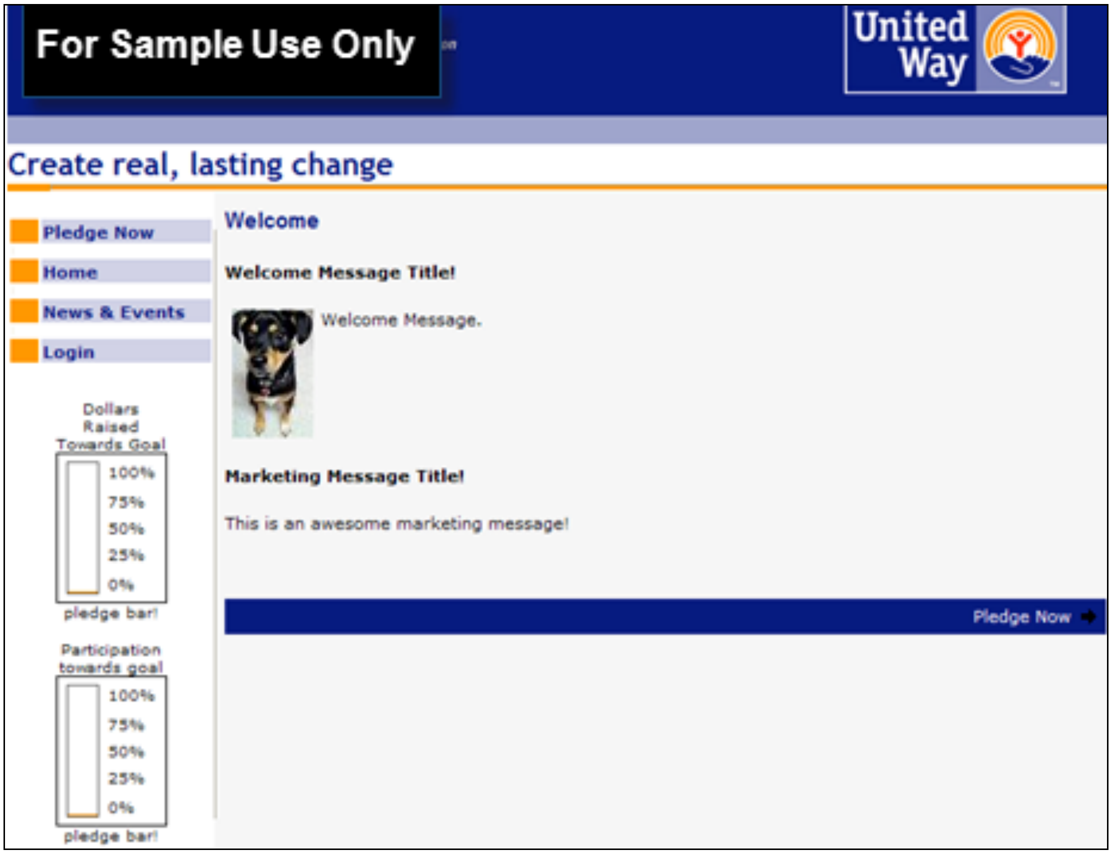
Minimum Requirements to Access the Donor Site:

- **Campaign Code –** This code is used to identify a specific company's campaign and is determined by the company that creates the campaign
- Donor's username and password

Donor Site Access Options:

- Donors can be directed to the Donor Site, where they are required to enter the Campaign Code, their username, and their password
- An email can be sent to potential donors with a personalized link that directs them to the Donor Site. Then from the Donor Site, the donor is only responsible for entering their password.
- **Single Sign-on –** With Single Sign-on, employees log into a corporate Intranet site. The Intranet site manages employee access credentials, and when an employee asks to connect to any other secure

application, the Intranet site presents their credentials to that application. The username and password work behind the scenes, without employees having to log in again to another site. Instead, employees are automatically authorized and secure for access.



Note: Donor Site colors schemes and skins are configured at the Campaigns Level, under Websites.

The Dashboard

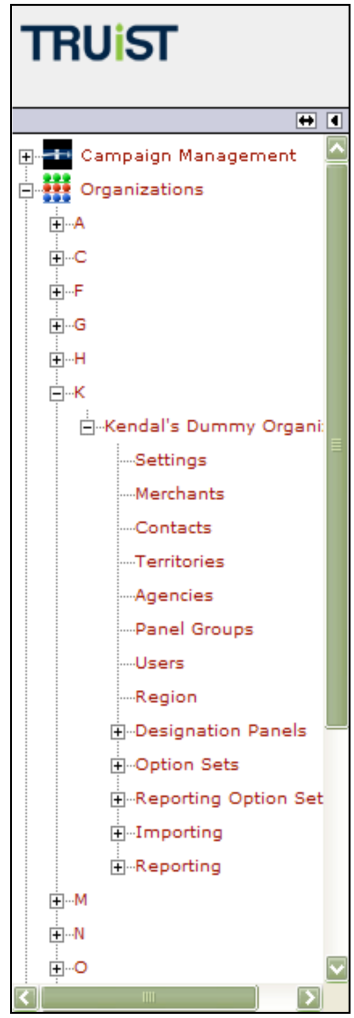
The Dashboard is an optional tool available on the Donor Site that gives campaign coordinators the ability to easily access campaign statistics, generate reports/exports, and to communicate with donors or Donor Groups during a campaign initiative. Utilizing the Dashboard results in an increase in participation and greater campaign success.

Dashboard functionalities include:

- Streamlined coordinator access to track campaign results – no need for a separate administrator login
- A decrease in the number of people requiring access to Campaign Management
- Simplified training for Campaign Coordinators by limiting the access to administrative functions
- The ability for coordinators to track campaign progress in real-time – 24/7/365
- Employee engagement through the use of targeted email

- A reduced number of files required by the client to set up the campaign, because coordinator access and security roles are assigned through the donor import file

Note: For more information on configuring the Dashboard, see further documentation, *Dashboard Configuration*.



Organization Level

The ⊞ Organizations level (also known as the United Way level) is the top level of Campaign Management. Once this level is set up, users may never need to make adjustments it again. At the ⊞ Organizations level, users configure organization-based options, such as payment types, Designation Panels, etc.

The ⊞ Organizations level consists of:

- **Settings**
- **Merchants**
- **Contacts**
- **Territories**
- **Agencies**
- **Panel Groups**
- **Users**
- **Region**
- **Destination Panels**
- **Option Sets**
- **Importing**
- **Reporting**

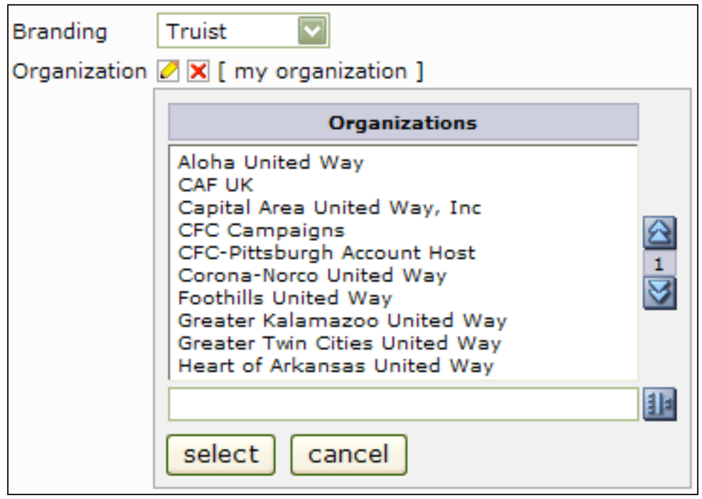
The ⊞ Organizations level is structured in the form of a tree and each level within ⊞ Organizations can be expand or collapsed, as marked with the ⊞ (plus sign) or ⊟ (negative sign), to view or hide more levels.

Settings, Merchants, Contacts, Territories, Agencies, Panel Groups, Users, and Region can also be accessed on the top navigation bar, once the Organization level is opened.

Settings

Settings is where the very basic organization settings are configured. From this level, select TRUiST or United Way branding and then choose an organization from the list provided or use the search functionality by typing the name of the organization in the box provided. *My Organization* can also be selected.

When complete, always click Save / Update on every page of every level to save work.



Merchant

Credit card processing data is configured at the Merchant level. **To allow donors the use of credit cards, a merchant account must be set up.** Please note that as of January, 2011 FrontStream no longer stores credit card information, as storing credit card information is not PCI compliant.

To configure/test a merchant account, please refer to merchant account documentation.

To Add a New Merchant Account

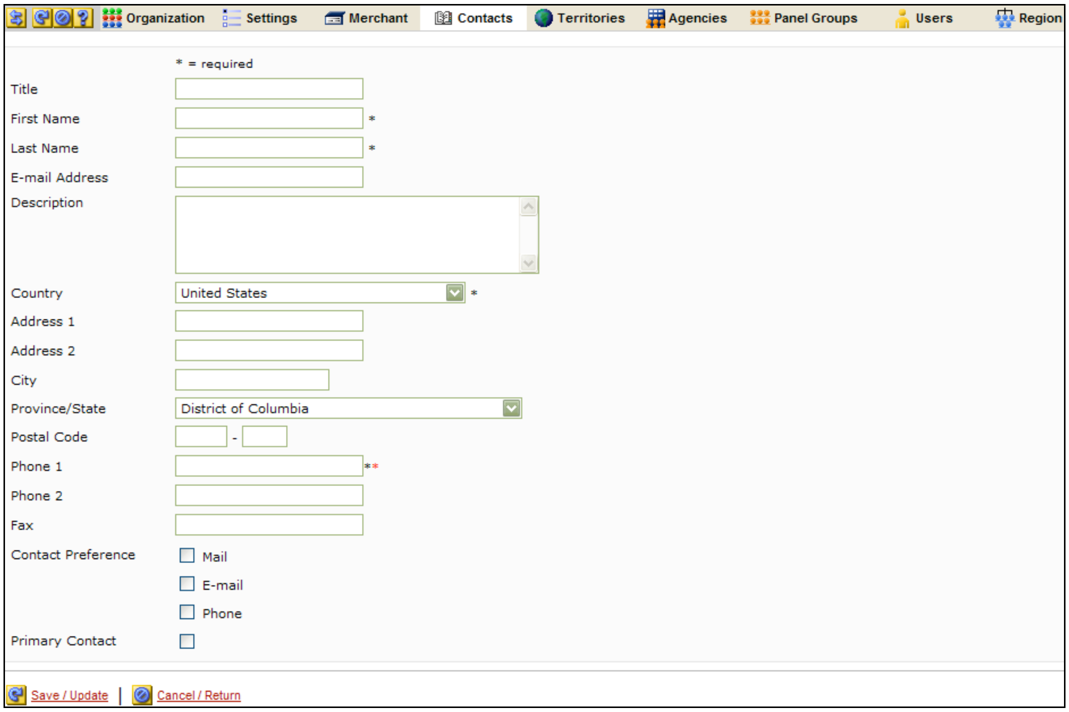
1. Click Add a new merchant account
2. Fill in the appropriate information in the fields provided to define the merchant account
3. Click Save / Update

Contacts

All organizations are required to have a primary contact.

To Add a New Contact

1. Click Add a new contact
2. Fill in the appropriate information in the fields provided to define the contact



Note: If an organization has several contacts, there is an option to mark a specific individual as the *Primary Contact*. It is the last option seen on the page (see above).

3. When complete, click Save / Update

Territories

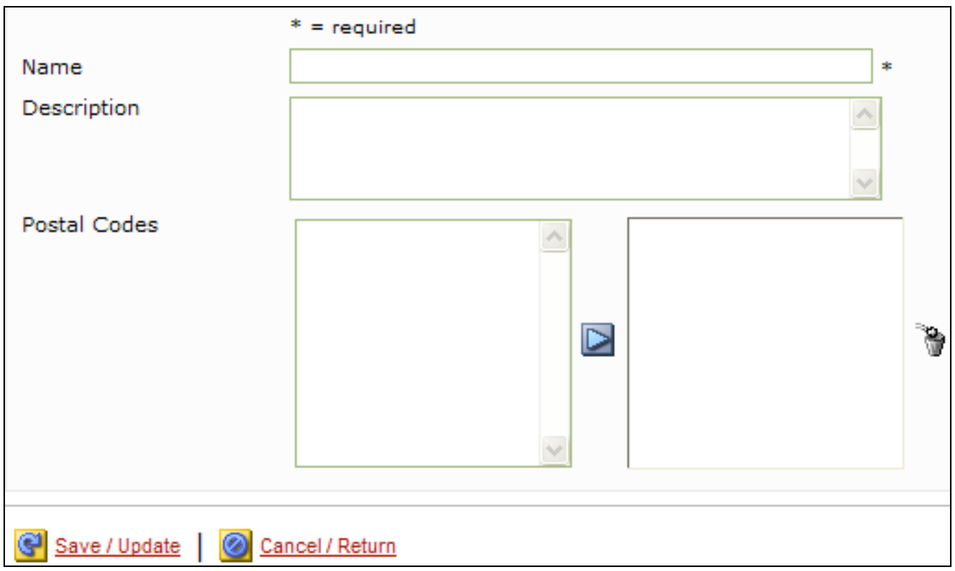
Territories are used for Territory Aligned Campaigns. From Territories, administrators configure the zip code range for potential donors. This allows administrators to choose territories in which their Donor Groups can give to. Because Territories are at the Organizations level, they are set up once and can be utilized for several campaigns.

Associating a Territory to a Donor Group insures that potential donors, who are not associated with a Donor Group will still be presented with the correct giving options for their area. When a donor logs into the system, the system will check to see if the donor is associated with a Donor Group. If no Donor Group association is found, the system will look at either the donor's home or work zip code in their donor profile (depending on how the campaign is aligned in the campaign settings). If a zip code match is found in a Donor Group, the corresponding gift options (designation settings, leadership levels and corporate matches) will be presented to the donor during the pledge process. If a match is found in multiple Donor Groups, the donor will be presented with a list of matching Donor Groups to choose from. If the system cannot find a zip code match and the donor is not associated with a Donor Group, the donor will be presented with the default Donor Group, indicated on the campaign settings page.

Note: Geographical Alignment has lessened the use of this option. In Geographically Aligned campaigns the system looks at the donor's zip code (either home or work, depending on zip code alignment set on the campaign settings page) and aligns the donor to the appropriate United Way market area, utilizing the Gift Link file. If the donor's zip code falls into two or more United Way market areas, the donor will have the ability to choose the United Way they wish to designate to. In addition, the campaign coordinator has the ability to allow the donor to choose different market areas, utilizing the Donors May Custom Align functionality.

To Add a Territory

1. Click Add a new territory
2. Fill in the appropriate information in the fields provided



3. Click Save / Update

Agencies

The Agencies level is where agencies are added to the system. Local campaigns tend to add agencies manually and further configure their agencies at the Designation Panels level. United Ways can also manually add agencies, but usually only do so for smaller, more simplistic campaigns. United Ways running national campaigns typically use the iGuide, which provides filtering options. Choosing to use iGuide allows administrators to develop campaigns that pull agencies from the iGuide database, in addition (if so desired) to pulling agencies manually added to Campaign Management.

What is the iGuide?

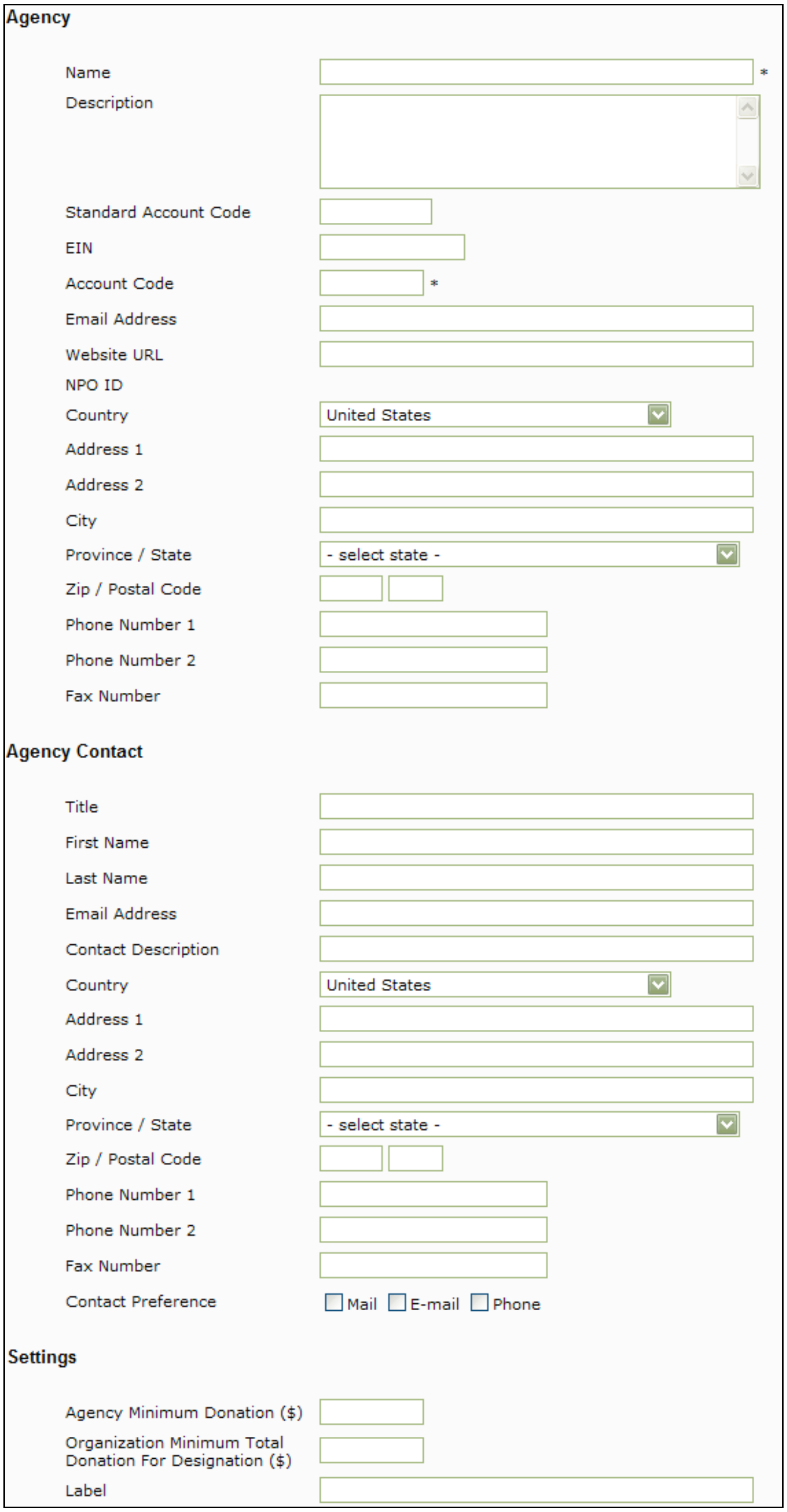
The Investment Guide (iGuide) is a database that stores information vital to participating in national campaigns. iGuide can store United Way basic information, focus areas, eligible and ineligible agencies, and even programs within those agencies. The only required information is that which follows a company's designation policies. The iGuide is used in conjunction with United eWay Campaign Management solution, which is the most efficient way to configure campaigns and provide donors with rich experiences.

For more information on the iGuide, please refer to further documentation, *Introduction to Investment Guide (iGuide)*.

To Add Agencies

1. Click Add a new agency
2. Fill in the appropriate information in fields provided to define the agency

Add a new Agency Fields		
Req	**Field**	**Description**
Agency		
*	Name	This name will be used to identify the agency.
	Description	Can be the same as the name or can be used to provide additional details.
	Standard Account Code	This is related to iGuide.
	EIN	If available, please provide.
*	Account Code	It is best to use a code already in the organization's system to keep information consistent.
	Email Address	This is the email address for contacting the agency.
	Website URL	This is the website of the agency.
	Country	Country – *Select the country in which the campaign will run from the dropdown list.*
	Address 1	Address – *Informational only*
	Address 2	Address – *Informational only*
	City	City – *Informational only*
	Province/State	State – *Select the country in which the campaign will run from the dropdown list.*
	Postal Code	Zip Code – *Informational only*
	Phone 1	Primary Phone – *Informational only*
	Phone 2	Secondary Phone – *Informational only*
	Fax	Fax – *Informational only*
Agency Contact		This is the contact information for an individual from the agency.
Settings		
	Agency Minimum Donation ($)	The minimum donation a donor is required to give to an agency.
	Organization Minimum Total Donation For Designation ($)	The minimum amount an organization is required to donate for their Designation. **Note:** Most people do not use this option.



Agency

Name	*
Description	
Standard Account Code	
EIN	
Account Code	*
Email Address	
Website URL	
NPO ID	
Country	United States
Address 1	
Address 2	
City	
Province / State	- select state -
Zip / Postal Code	
Phone Number 1	
Phone Number 2	
Fax Number	

Agency Contact

Title	
First Name	
Last Name	
Email Address	
Contact Description	
Country	United States
Address 1	
Address 2	
City	
Province / State	- select state -
Zip / Postal Code	
Phone Number 1	
Phone Number 2	
Fax Number	
Contact Preference	Mail E-mail Phone

Settings

Agency Minimum Donation ($)	
Organization Minimum Total Donation For Designation ($)	
Label	

3. When complete, click Save / Update

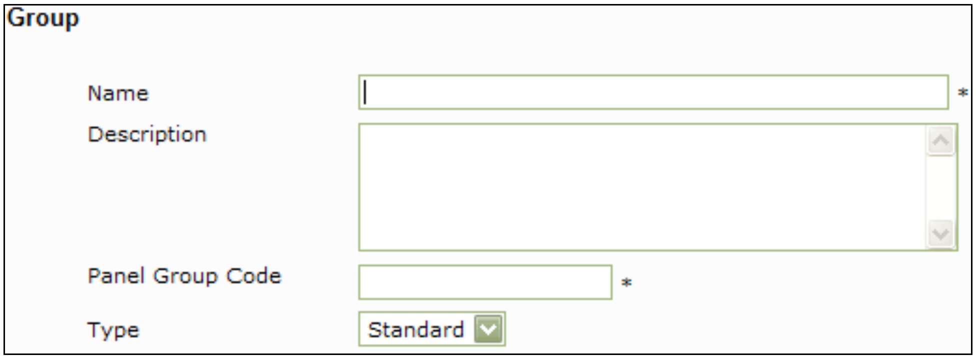
Panel Groups

Panel Groups group like designation entities together, providing the group of agencies with an overall name and description on the Locate an Agency and/or on the Primary Designation Panels, from the Donor Site. Agencies can be added to Panel Groups either by selecting agencies added at the Agencies level or by pulling from the iGuide.

To Add a Panel Group

1. Click Add a new panel group
2. Fill in the appropriate information in the fields provided

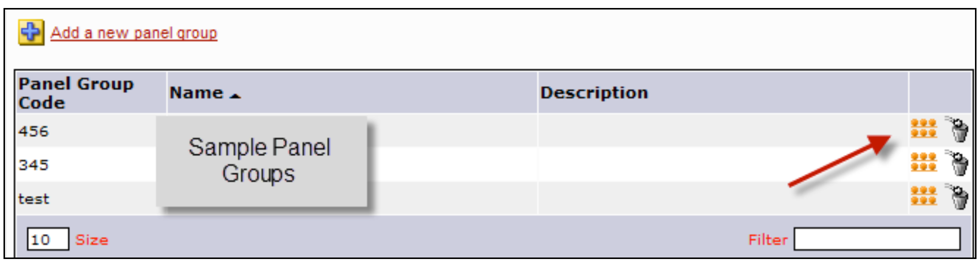
Add a Panel Group Fields		
Req	**Field**	**Description**
Group		
*	Name	This name will be used to identify the Panel Group.
	Description	Can be the same as the name or can be used to provide additional details.
	Panel Group Code	A code created to correspond to the Panel Group
	Type	***Dynamic –*** Campaign administrators select desired criteria and information is automatically pulled from iGuide. If something changes in iGuide, it will also change here. ***Standard –*** Traditional panel group that allows administrators to manually pick and choose the designation entities to add to the panel group. ***CFC –*** Specific list of agencies that is offered to employees. This is grouped by a different set of agencies and is designed specifically for CFC campaigns.



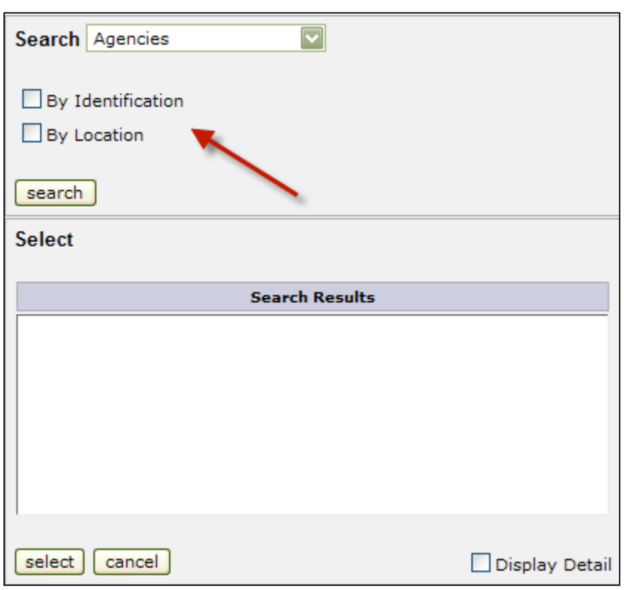
3. Click Save / Update

If Standard Panel Group Type is used, continue on to Step 4
If Dynamic Panel Group Type is used, skip to Step 7

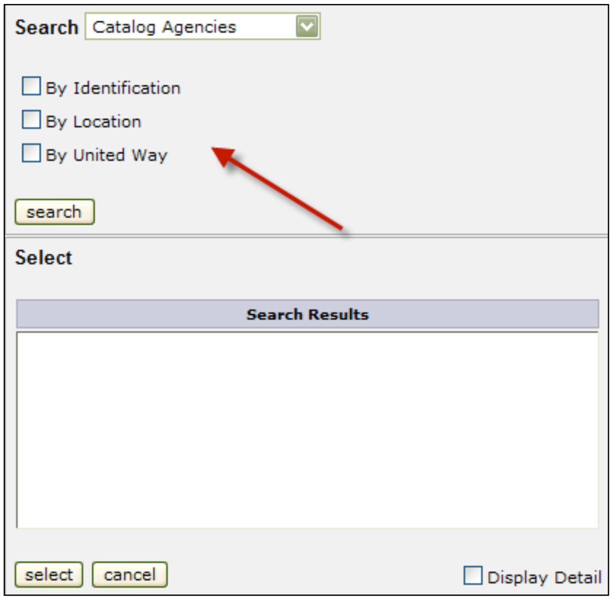
4. Click



5. Click Add a new item or Bulk add new items
6. Search by Agencies or by any of the items in the Catalog. United Ways typically search by the Catalog.



If searching by a Catalog option, the system pulls agencies from the iGuide. The search can be filtered by checking *By Identification*, *By Location*, or *By United Way*.



If searching by Agencies, the system will pull the manually added agencies configured at the Agencies level. The search can be filtered by checking *By Identification* or *By Location.*

7. Select from the generated search results below
8. When complete, click Save / Update

Users

From the Users level, administrators have the capability to affiliate users to different levels of the campaign. At the Organizations level, users are associated to various organization settings.

Designation Panels

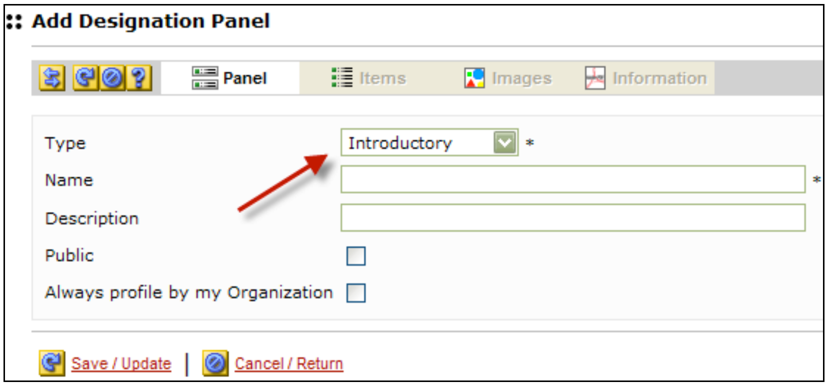
Designation Panels control the donation designation options **displayed** to the donor during the pledge process. Designation Panels are set up at the Organizations level and are refined at the Campaigns level to personalize and provide different options for specific campaigns and Donor Groups.

At the Organizations level of Campaign Management, there are three types of Designation Panels to choose from:

- ***Introductory –*** Introductory Panels are the first thing a donor sees on a Donor Site. Introductory Panels contain one or more designation options that will be made available to the donor during the pledge process.
- ***Primary –*** Primary Panels are the secondary information donors see on the Donor Site. Primary Panels draw attention to Impact or Focus Areas.
- ***Locate an Agency –*** Locate an Agency Panels leave the searching up to the donor.

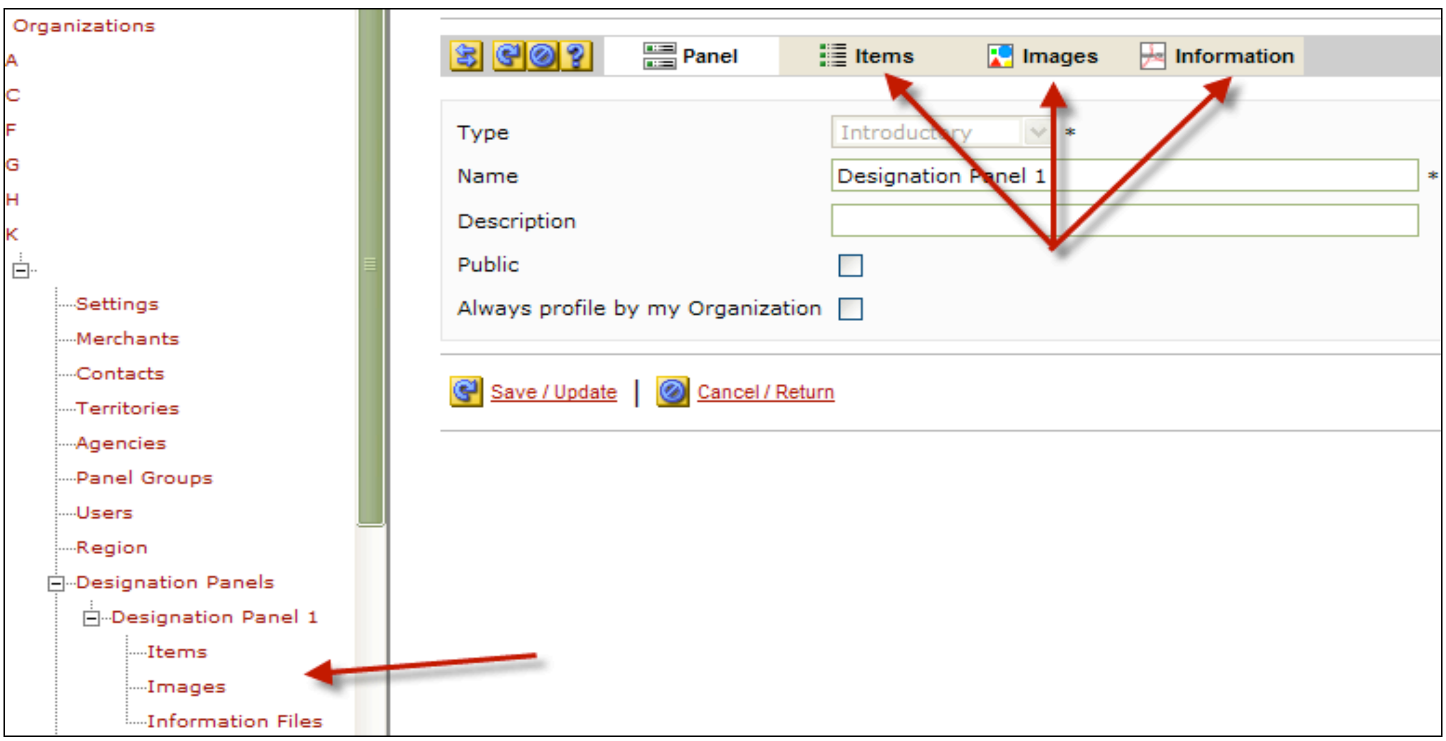
To Add a New Designation Panel

1. Click Add a new Designation Panel
2. Choose a Designation Type from the dropdown menu: *Introductory*, *Primary*, or *Locate an Agency* (see details above).



3. Choose a name
4. Check *Public* to enable the option to display Designation Panels to donors in Geographically Aligned Campaigns, when a donor's zip code is mapped to the United Way's area, according to GiftLink.
5. Click Save / Update

After a Designation Panel is created, drill through the tabs or down the tree to add Items, Images, or Information.



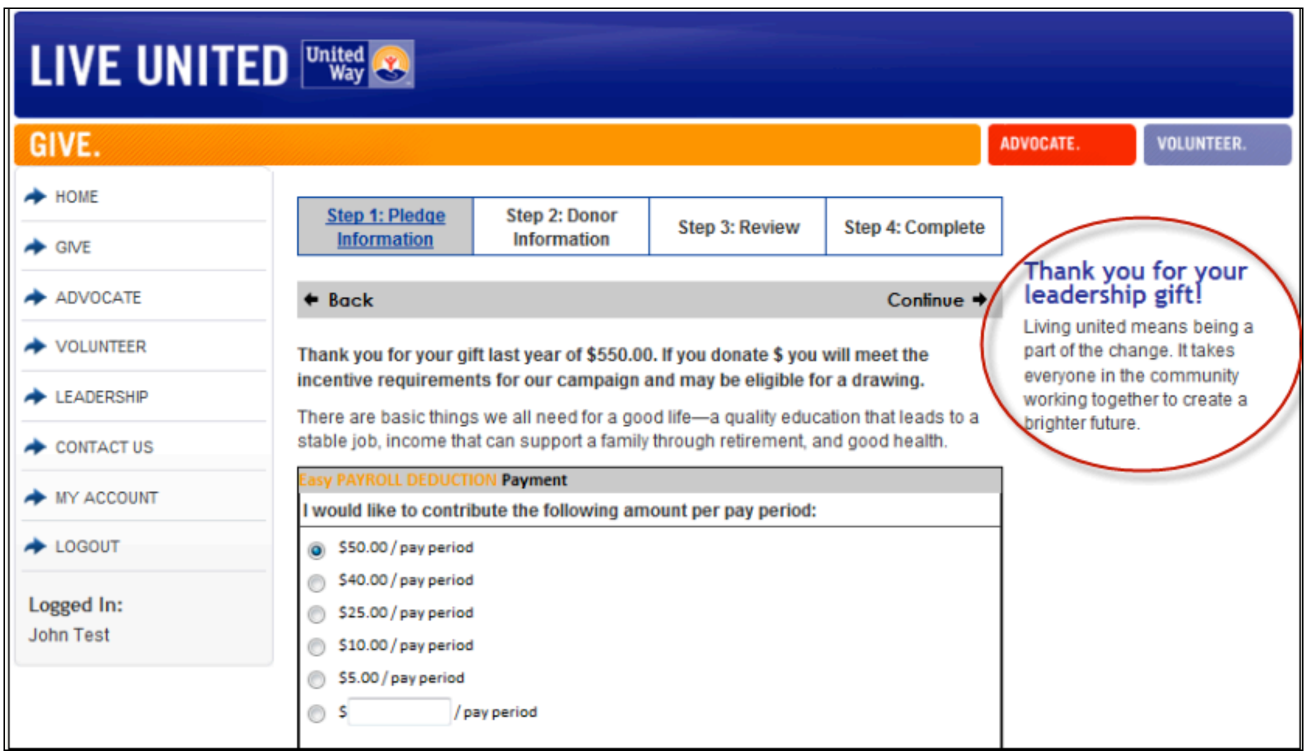
Note: Designation Panels at the Organizations level are often confused with Designation and Panel Option Sets. Note that Designation Panels at the Organization level define which charities are available for use in company campaigns associated with this Organization. Under Option Sets, *Designation* defines the rules around designations for a specific campaign; *Panel* defines how charities are displayed on the Introductory, Primary, and Locate An Agency panels (see below for details).

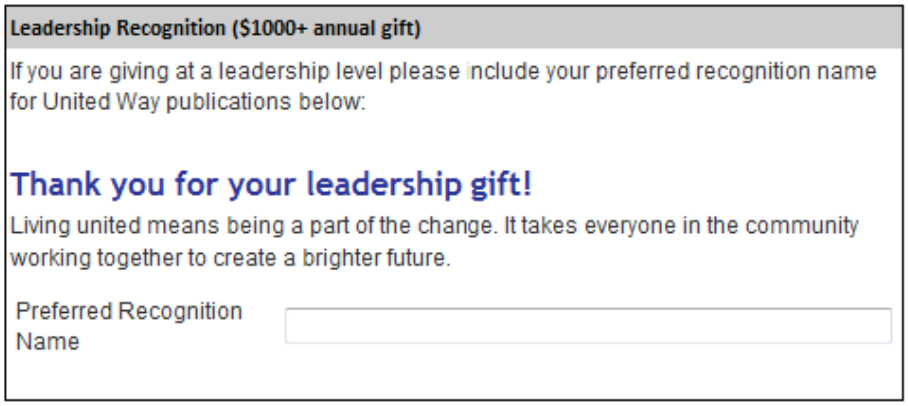
Option Sets

Option Sets are a composite package that is tied into a campaign or Donor Group to guide donors through the pledging process. Option Sets pull all the pieces together and can be used over and over for multiple campaigns. Once configured, Option Sets are bundled at the Packages level into an Option Package and are associated to a campaign, Donor Group, and batch.

Leadership

The Leadership level is where administrators can establish multiple donor thresholds (known as Leadership Levels) unique to each option set. Each Leadership level can include a customizable leadership confirmation message that displays automatically in the right panel of the Donor Site when a donor enters a pledge amount that meets or exceeds a Leadership level. In addition, an optional upgrade message can be enabled, which encourages donors to reach for the next leadership level by prompting them to give a specified amount in addition to their original pledge.




Leadership Recognition ($1000+ annual gift)

If you are giving at a leadership level please include your preferred recognition name for United Way publications below:

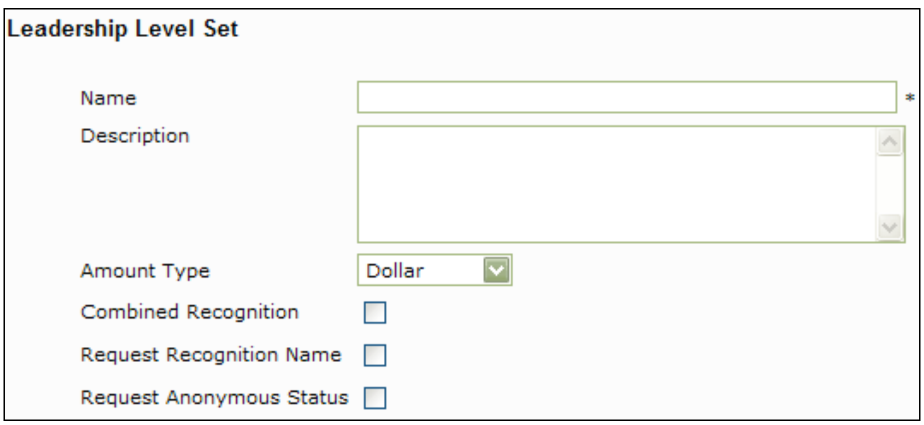
Thank you for your leadership gift!

Living united means being a part of the change. It takes everyone in the community working together to create a brighter future.

Preferred Recognition Name

To Add a Leadership Level:

1. First add a new Leadership Level Set. Click Add a new leadership level set
2. Fill in the appropriate information in the fields provided


Leadership Level Set

Name *

Description

Amount Type: Dollar

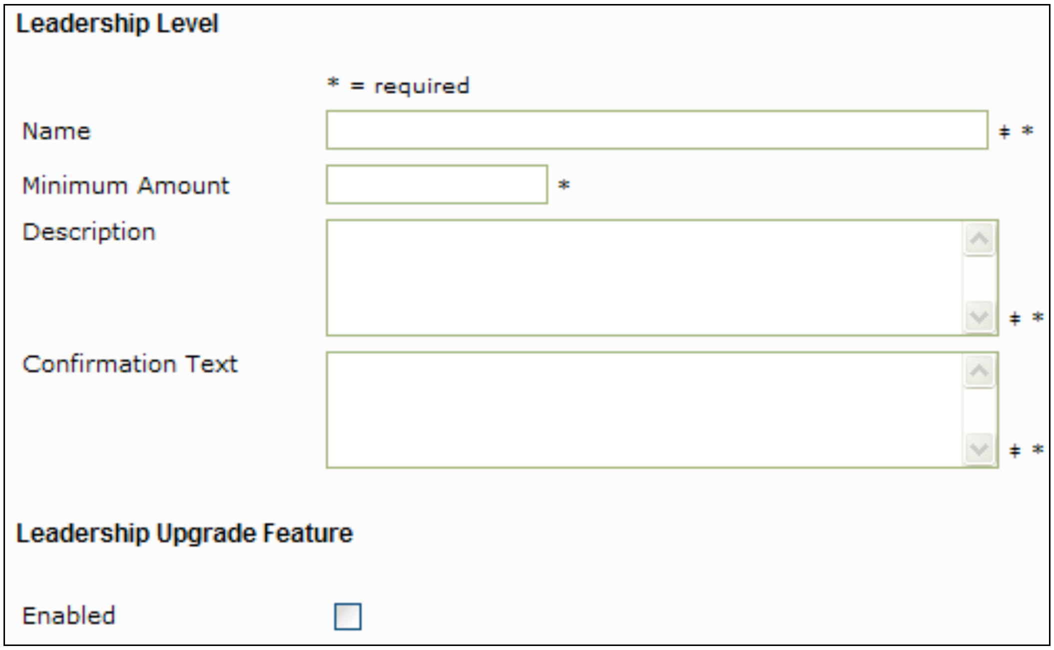
Combined Recognition

Request Recognition Name

Request Anonymous Status

3. Click Save / Update
4. From the new Leadership level set, click Add a new leadership level
5. Fill in the appropriate information in the fields provided

Add a Leadership Level Fields		
Req	**Field**	**Description**
Leadership Level		
*	Name	This name will be used to identify the Leadership level
*	Minimum Amount	The minimum amount a donor is required to contribute to qualify for this Leadership level.
*	Description	Can be the same as the name or can be used to provide additional details.
*	Confirmation Text	A confirmation note the donor receives after he/she reaches this Leadership level.
Leadership Upgrade Feature		
	Leadership Upgrade Feature	Check this to enable the ability to enter a message that encourages the donor to give more. An example might be "You are only $10 away from reaching the ____ level!"



6. Click Save / Update

Corporate Match

A Corporate Match offers companies the opportunity to match the amount a donor donates.

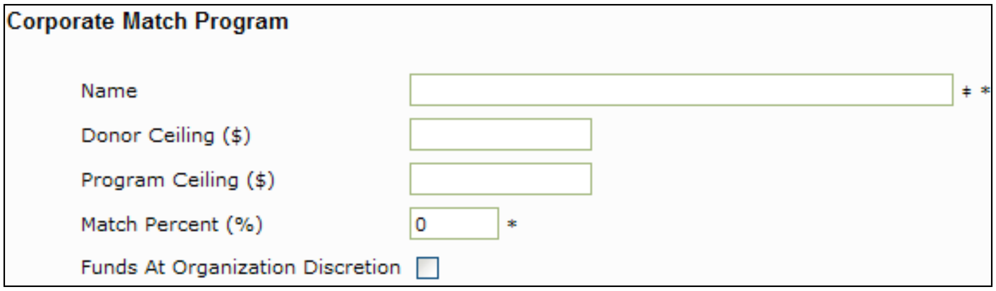
Note: Match dollars do not show up in report totals.

To Add a Corporate Match Program:

1. First add a new Corporate Match Set. Click Add a new corporate match set
2. Enter a name and description
3. Click Save / Update
4. From the new Corporate Match Set, click Add a new corporate match program
5. Fill in the appropriate information in the fields provided to define the match program

Add a Corporate Match Program Fields		
Req	**Field**	**Description**
Corporate Match Program		
*	Name	This name will be used to identify the Corporate Match Program.
	Donor Ceiling ($)	The highest amount of money the company will match for an individual donor.
	Program Ceiling ($)	The highest amount of money the company will match for the entire campaign.

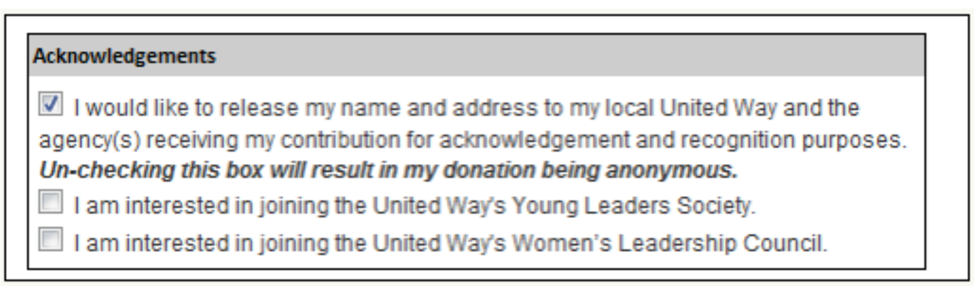
Add a Corporate Match Program Fields		
Req	**Field**	**Description**
*	Match Percent ($)	The percentage of an amount the company will match.



6. Click Save / Update

Acknowledgement

The Acknowledgement level offers the ability to ask the donor Acknowledgement questions at the end of the pledging process. Each Donor Group can have a set of customized Acknowledgement questions by associating a unique option package to the Donor Group.



To Add an Acknowledgement Question Set:

1. Click Add a new acknowledgement question set
2. Enter a name and description
3. Click Save / Update
4. From the new Acknowledgement Question Set, questions can be added or removed.

To arrange the question order, use the blue arrows, which move questions up or down the list.

Default Acknowledgement Questions	
System Question #1	I would like to receive an acknowledgement from _(your organization)_ confirming my contribution
System Question #2	I would like to release my name to the agency(ies) receiving my contribution
System Question #3	I would like to receive future emails from your Organization

Default Acknowledgement Questions	
System Question #1	Enter a question in such a format that it will only accept a yes or no answer.
System Question #2	Enter a question in such a format that it will only accept a yes or no answer.
System Question #3	Enter a question in such a format that it will only accept a yes or no answer.
System Question #4	Enter a question in such a format that it will only accept a yes or no answer.

5. When complete, click Save / Update

Payment Type

The **Payment Type** level contains a list of payments in the system that, if selected, can be configured for a campaign. Create as many Payment Types as desired. Administrators can create multiple Payment Type Sets, which can then be applied to specific Campaigns and Donor Groups.

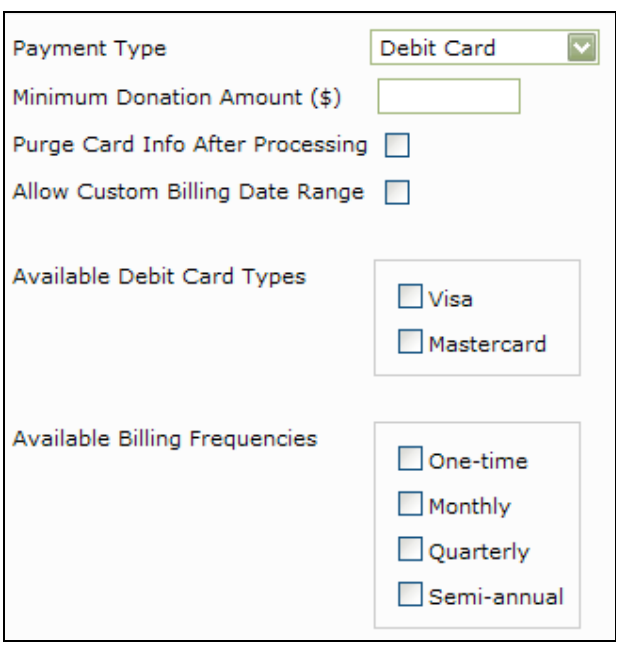
Payment Types Fields		
Payment Type	**Field**	**Description**
Payroll Deduction		Payment is received via payroll deductions. **Note:** If a Payroll Type with a Salary Range greater than $1 is created, only donors with salary information in the system will be able to view the payroll questions. Payroll questions within the Salary Range "N/A" will need to be set up in order for donors without salary information in the system to view payroll options.
	Minimum Donation Amount ($)	The minimum amount a donor is required to contribute. Leave blank if no minimum is required.
	Signature Question	Text that certifies the donor's approval of the contribution.
	Signature Required	Check to require the donor to use an electronic signature.
Standard Pledge Experience		Donor accesses the Donor Site, chooses a pledge type, amount to give, designations, and then checks out.

Payment Types Fields		
Payment Type	**Field**	**Description**
		On the back end, administrators choose questions based on the donor's salary level.
	Donor May Input Missing Salary	Check to allow donors to input missing salary information if salary information is not provided in the donor import.
	Salary Ranges	Contain unique sets of payroll ask questions. The system displays a set of payroll ask questions based on the amount and values of salary information contained in the donor record. This provides the ability to ask a different set of payroll ask questions for different salary level/ranges. This functionality can be utilized to provide different default values for different income levels of the employees.
Dynamic/Impact Pledge Experience		***DPE*** – Provides a new donor interface that integrates a new level of customization in Campaign Management. DPE can be configured to provide a **Pledge Driven** or **Designation Driven** experience for the employees of a campaign. Additionally, DPE enables United Ways to effectively communicate their initiatives to their users. ***IPE –*** Reverses the traditional online campaign experience and provides both high level and in-depth information about United Ways, and their priorities, images, goals and results. Donor accesses the Donor Site, selects an agency, selects a payment type, selects an amount, and then checks out.
	Allow One-Time Payments	Check to enable donors to make one-time payments.
	Allow Per-Pay-Period Payments	Check to enable donors to make payments per pay-period.
Cash		Payment is received in cash.
	Minimum Donation Amount ($)	The minimum amount a donor is required to contribute. Leave blank if no minimum is required.
Credit Card or Debit Card		Payment is received via donor's credit or debit card. A Merchant Account must be set up and aligned to the campaign; otherwise this option will not be visible to the donor.
	Question Text	A customized question regarding payments made with a credit or debit card.
	Minimum Donation Amount ($)	The minimum amount a donor is required contribute. Leave blank if no minimum is required.
	Purge Card Info After Processing	FrontStream no longer stores credit card information as of Jan. 1, 2011.
	Allow Customer Billing Date Range	Check to allow the donor to create a custom billing range.
	Available Credit Card Types	Check one or more of the following credit card types: *Visa*, *MasterCard*, *American Express*, *Discover*, or *Diners Club*.
	Available Billing Frequencies	Check one or more of the following billing frequencies: *One-time*, *Monthly*, *Quarterly*, or *Semi-annual*.
	Question Type	Select the desired format for the question: *Text Box* or *Multiple Choice*.
Electronic Check		Payment is received via an electronic check.
	Minimum Donation Amount ($)	The minimum amount a donor is required to contribute. Leave blank if no minimum is required.
	Available Billing Frequencies	This is an option to have the donor billed one-time or on a monthly basis.

Payment Types Fields		
Payment Type	**Field**	**Description**
Check		Payment is received via check.
	Minimum Donation Amount ($)	The minimum amount a donor is required to contribute. Leave blank if no minimum is required.
Direct Bill		A bill is sent to the donor after pledge is made.
	Minimum Donation Amount ($)	The minimum amount a donor is required contribute. Leave blank if no minimum is required.
	Available Billing Frequencies	Check the desired billing frequency: *One-time*, *Monthly*, *Quarterly*, or *Semi-annual*.
No Donation		If offered, gives donors the opportunity to participate in the campaign without giving, which is sometimes beneficial to company participation goals.
PayPal		Payment received via the donor's PayPal account. **Note:** Organizations or companies must also have a Pay Pal account set up to use Pay Pal.
	Minimum Donation Amount ($)	The minimum amount a donor is required to contribute. Leave blank if no minimum is required.

To Add a Payment Type Set:

1. Click Add a new payment type set
2. Give the Payment Type Set a name and description
3. Click Save / Update
4. Once the Payment Type Set has been created and saved, the system will generate a Payment Types section. Click Add a new payment type
5. Select a Payment Type (see table above for details) and enter the appropriate information



6. Click Save / Update. To add more Payment Types to the Payment Type Set, repeat steps 4-6.

Designation

Configurations done at the Designation level affect designation options on the Primary Designation Panel for online donors and designation options for batch donors.

To Add a Designation Option Set:

1. Click Add a new designation option set
2. Fill in the appropriate information in the fields provided

Add a Designation Option Set Fields		
Req	**Field**	**Description**
*	Name	This name will be used to identify the Designation Option Set.
	Description	Can be the same as the name or can be used to provide additional details.
*	Maximum Designation Count	Defaults to 8 designation options (the maximum allowed in the Campaign Management solution). Controls the number of designation entities a donor may make. Applies to online donors and batch donations.
*	Maximum Designation Percent	Defaults to 100. Controls the percentage of a donor's total annual gift that they can designate, other than the default designation account. Applies to online donors and batch donations.
	Designation Option Amount Type	Can choose *dollars*, *percent*, or *either*.
	Allow Negative Designation	This allows donors the ability to deny gifts to certain agencies in the campaign.
	Allow Search IRS	Allows donors to search the IRS database, which provides information on agencies that are 501 C 3 compliant.
	Allow Write-In Agency	If checked, a box will open and the campaign administrator has the ability to select options available and required to the donor on the Donor Site. See below for more detail on Allow Write-in Agency.
	Allow Locate an Agency	Allows donors to search for agencies.
	Allow Auto Allocation	Enables donors' undesignated pledge to default automatically to the default designation account established for the associated Primary Designation Panel. When activated, the Auto Allocation feature will be presented to the donor at the bottom of the Primary Designation Panel, accompanied by customizable text and a pre-populated designation amount, set to 100%. The donor simply designates to agencies of his/her choice and the Auto Allocation designation amount will adjust accordingly.
	Agency Search Mode	***Progressive*** – When a Designation Option Set allows donors to search the National IRS database and/or Write-in an Agency, in addition to searching the Locate an Agency panel, the multiple agency options may overwhelm donors. Progressive Search merges the Locate an Agency, IRS (National) database search, and Write-In option into a single natural flow on the donor site. ***Standard*** – Provides a standard search function to the donor. Standard Search allows donors to search the National IRS database, the Locate an Agency panel, and/or Write-in an Agency.
	Impact Pledge Experience	Reverses the traditional online campaign experience and provides both high level and in-depth information about United Ways, and their priorities, images, goals and results. Donor accesses the Donor Site, selects an agency, selects a payment type, selects an amount, and then checks out.

Name	*
Description	
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	☐

Allow Write-in Agency

Write-in Designations allow donors to designate to a specific agency that has not been displayed as a designation option. Allow Write-in Agency applies to online donors and batch donations.

When Allow Write-in Agency is activated, a link will appear on the donor's Primary Designation Panel and when selected by the donor, the page will expand for entering the Write-in Agency information.

In Campaign Management, administrators can select what information donors are able and/or required to provide.

Allow Write In Agency ☑

Write In Agency Field	Active	Required	Custom Label
Agency Name	yes	yes	
Country	☑	☐	
Address 1	☑	☑	
Address 2	☑	☐	
City	☑	☑	
State	☑	☑	
Postal Code	☑	☑	
Contact Name	☑	☐	
Phone Number	☑	☑	
EIN	☑	☐	
Email Address	☑	☐	

3. Click Save / Update

Note: Designation and Panel Option Sets are often confused with Designation Panels at the Organizations level. Note that Designation Panels at the Organization level define which charities are available for use in company campaigns associated with this organization. Under Option Sets, *Designation* defines the rules around designations for a specific campaign; *Panel* defines how charities are displayed on the Introductory, Primary, and Locate An Agency panels.

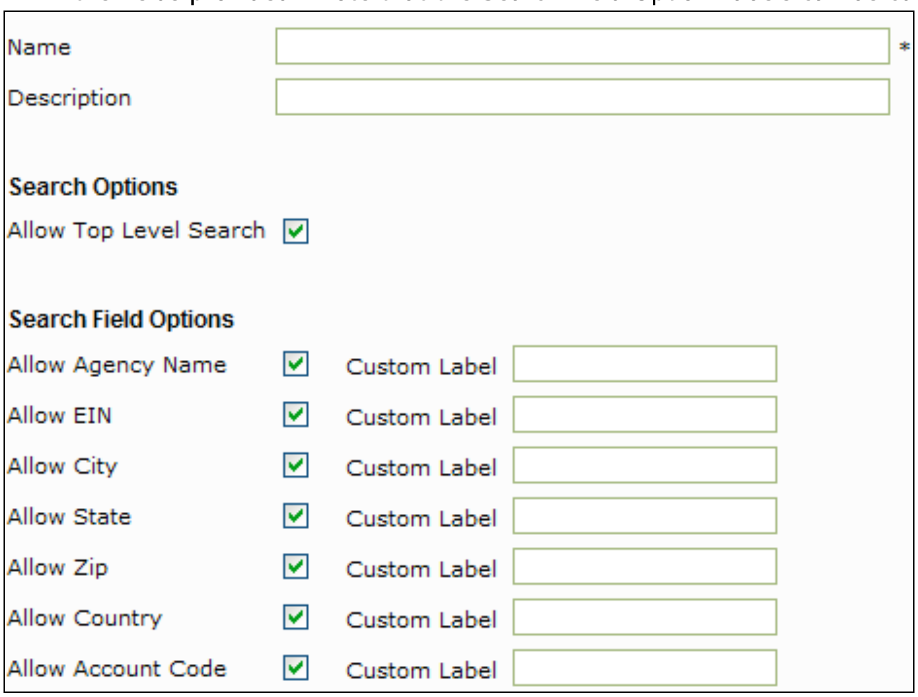
Panel

For each type of Designation Panel, business rules are set that determine the maximum item count and type of designation entity allowed on the Designation Panel. These business rules are configured in Panel Option Sets. Once created, the Panel Option Set is bundled into an Option Package and is then associated to a campaign, Donor Group, and batch.

Note: Panel Option Sets are not available when utilizing the Impact Pledge Experience (IPE).

To Add a Designation Panel Option Set:

1. Click Add a new designation panel option set
2. Fill in the fields provided. Note that the Search Field Option Labels can be customized.



3. Click Save / Update
4. Then Designation Panel Options for each Panel type will appear below. By clicking , these options can be edited.

Designation Panel Options

Designation Panel Type
Introductory
Primary
LocateAnAgency

Introductory Panel

Introductory Panel Options

Maximum Item Count	255 [1-255] *
Allow Organization	☑
Allow Service Area	☑
Allow Agency Group	☑
Allow Agency	☑

Primary Panel

Primary Panel Options

Maximum Item Count	255 [1-255] *
Allow Organization	☑
Allow Service Area	☑
Allow Agency Group	☑
Allow Designation Panel Group	☑
Allow Agency	☑

Locate an Agency Panel

LocateAnAgency Panel Options

Allow Organization	☑
Allow Service Area	☑
Allow Agency Group	☑
Allow Agency	☑

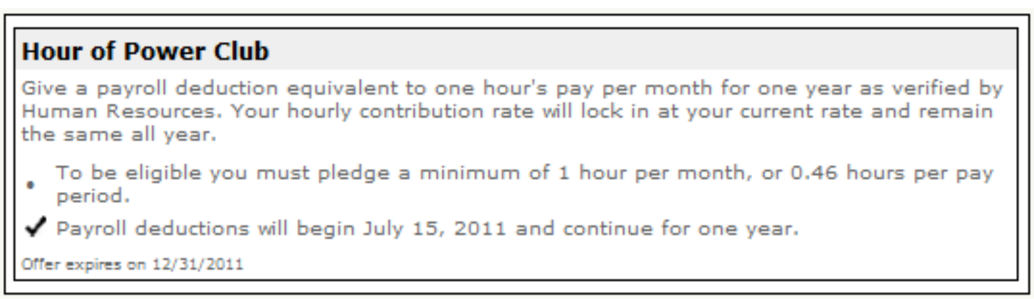
Panel Option Set Settings		
Req	**Field**	**Description**
*	Maximum Item Count	1-255: Defaults to 255. Controls the number of designation items displayed on the Introductory and Primary Designation Panels.
	Allow Organization	If activated, allows a Catalog United Way organization to display on the panel.
	Allow Service Area	When activated, allows a Catalog Service Area to display on the panel.
	Allow Agency Group	When activated, allows a Catalog Agency Group to display on the panel.
	Allow Panel Group	When activated, allows a Panel Group and its items to display on the panel. **Note**: This is not available on the Introductory Designation Panel.
	Allow Agency	When activated, allows Catalog agency or OPPS agency to display on the panel.

5. When finished configuring each Panel option, click Save / Update

Note: Designation and Panel Option Sets are often confused with Designation Panels at the Organizations level. Note that Designation Panels at the Organization level define which charities are available for use in company campaigns associated with this Organization. Under Option Sets, *Designation* defines the rules around designations for a specific campaign; *Panel* defines how charities are displayed on the Introductory, Primary, and Locate An Agency panels.

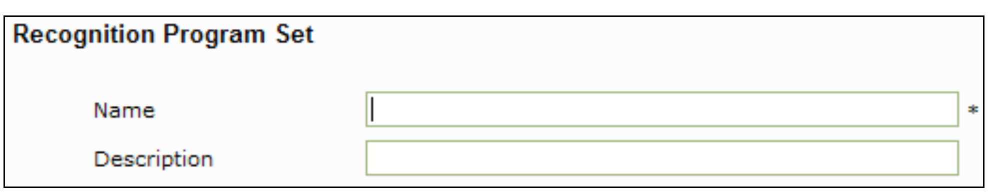
Redesignation

At the Recognition level, administrators can provide an incentive for donors to give by creating donor recognitions. When all Recognition Program rules are met, the donor is asked to opt-in to receive the award of the program.

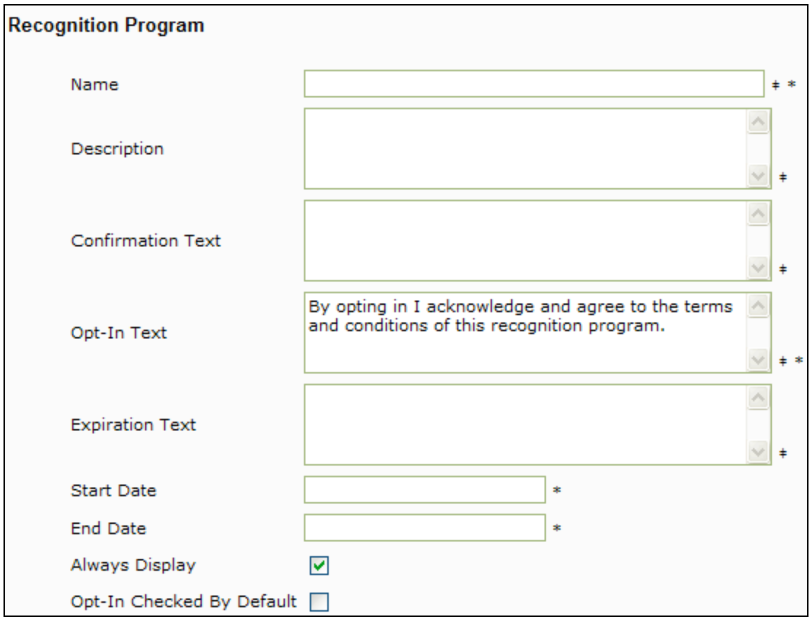


To Add a Recognition Program:

1. In order to add a Recognition Program, a Recognition Program Set must first be added. Click Add a new recognition program set
2. Enter the name and description

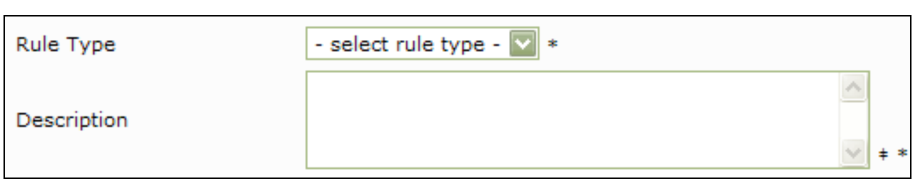


3. Click Save / Update
4. Then the ability to add a new Recognition Program will appear. Click Add a new recognition program
5. Fill in the fields provided to define the Recognition Program



6. Click Save / Update
7. Then Program Rules will appear below. Program Rules define how Recognition Programs will display for the donor. Click Add a new program rule
8. Select a Rule Type

Add a Recognition Program Fields	
Rule Type	**Description**
Designation	Requires the donor to designate a specified minimum amount to a specific designation entity (Organization, Service Area, Agency, Etc). For example, the donor must designate at least $100 to the Community Fund to qualify.
Donor Information	Requires specific information from the donor. The donor custom fields are available for use in the Donor information rule type, allowing for greater flexibility. For example, the donor must provide Home Contact information to qualify.
Annual Amount	Requires a donor to pledge a specified total annual value. For example, the donor must submit a pledge of at least $250 to qualify.
Payment Type	Requires donor to make a pledge with a specified payment type. For example, the donor must donate using a credit card to qualify.



9. Based on the Rule Type chosen, more fields will appear. Fill in the appropriate information in the fields provided.

Rule Type Fields		
Req	**Field**	**Description**
Designation		
*	Description	Can be the same as Rule Type or can provide more detail on the rule.
*	Min. Amount	The minimum amount a donor is required to donate to receive recognition.
*	Amount Type	Donor must make designation in one of the following: Dollars, Percent of Salary, Hours per Pay Period, Dollars Additive, Dollars per Pay Period, Dollars per Day, Cents per Day, Bonus Dollars, PTO Hours, or Dollars per Month.
*	Designation Entity	Click to search for agencies. See Organizations Level, Panel Groups for more detail on searching for agencies.
	Rule Upgrade Feature	Check this to enable the ability to enter a message that encourages the donor to donate in accordance to this rule type.
Donor Information		
*	Description	Can be the same as Rule Type or can provide more detail on the rule.
	Fields Required	Check fields donor is required to provide to receive recognition.
Annual Amount		
*	Description	Can be the same as Rule Type or can provide more detail on the rule.
*	Min. Amount	The minimum amount a donor is required to donate to receive recognition.
*	Amount Type	Donor must give an annual amount in one of the following: Dollars, Percent of Salary, Hours per Pay Period, Dollars Additive, Dollars per Pay Period, Dollars per Day, Cents per Day, Bonus Dollars, PTO Hours, or Dollars per Month.
	Rule Upgrade Feature	Check this to enable the ability to enter a message that encourages the donor to donate in accordance to this rule type.
Payment Type		
*	Description	Can be the same as Rule Type or can provide more detail on the rule.
*	Payment Types	Select payment types from the Available Payment Types pool and click to move to the Associated Payment Types pool.

10. Click Save / Update

Continuous Giving

Continuous Giving offers the ability to bring all pledges from the prior year forward to the current year's campaign.

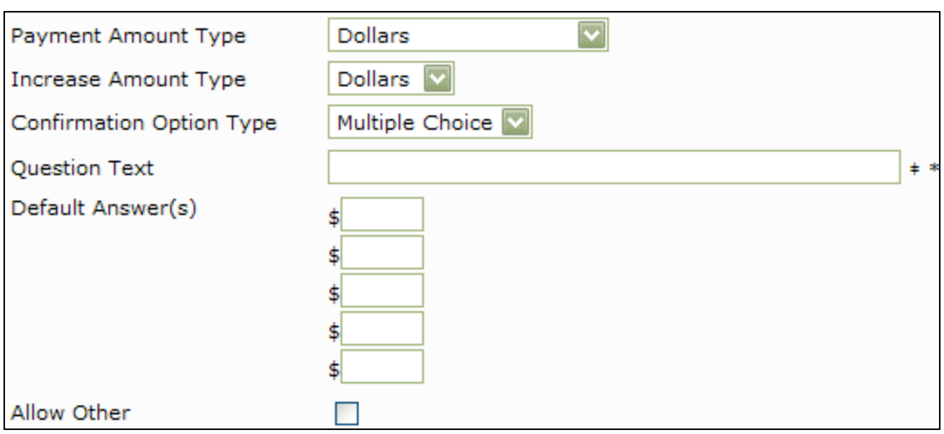
To Add a Continuous Giving Set

1. Click Add a new continuous giving set
2. Fill in the appropriate information in the fields provided

Continuous Giving Set Fields		
Req	**Field**	**Description**
*	Name	This name will be used to identify the Continuous Giving Set.
	Description	Can be the same as the name or can be used to provide additional details.
	Show Welcome Page	Offers the ability to toggle the Welcome Page for donors with unconfirmed donations. By

Continuous Giving Set Fields		
Req	**Field**	**Description**
		default, the Welcome Page is not visible to unconfirmed donors; instead unconfirmed donors are shown the donation summary page.
	Auto Add Organization Designation Option	Offers the ability to have the system automatically add Organization Designation Options.
	Allow Auto Renew	Offers the ability to allow the donor to opt in/out of having their donation auto-renewed in the next campaign.

3. Click Save / Update
4. Then Continuous Giving Increase Options will appear. Click Add a new confirmation increase option
5. Fill in the appropriate information in the fields provided



6. Click Save / Update

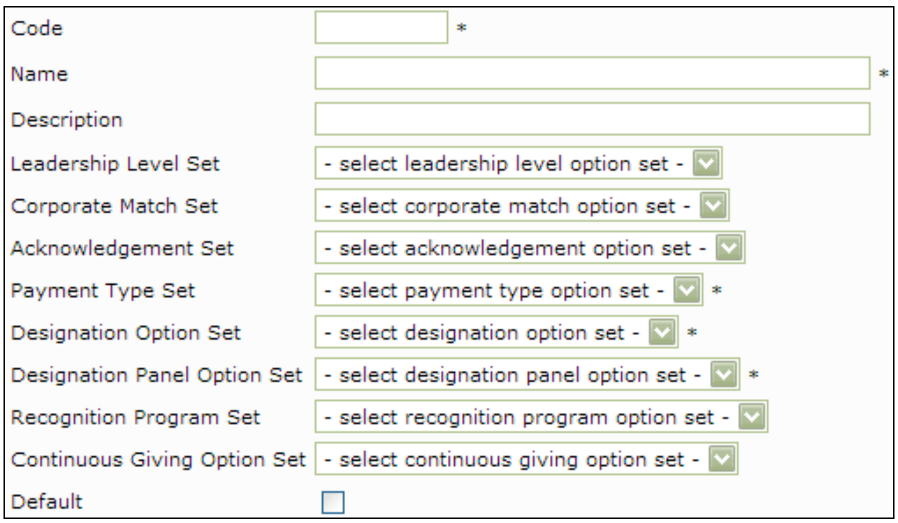
Packages

Packages bundle together all the previously configured material. Packages tag configured settings to a campaign or to a Donor Group in order to create different donor experiences for different Donor Groups.

Note: Always name Packages very intuitively or develop a naming convention at the Organization level, to ensure Packages are easily identified. For example, "Carly's Cakes 2011" is more identifiable than "Option Set 1" or "CC2011."

To Add an Option Package

1. Click Add a new option package
2. Fill in the appropriate information in the fields provided to define the Option Package



Code	*
Name	*
Description	
Leadership Level Set	- select leadership level option set -
Corporate Match Set	- select corporate match option set -
Acknowledgement Set	- select acknowledgement option set -
Payment Type Set	- select payment type option set - *
Designation Option Set	- select designation option set - *
Designation Panel Option Set	- select designation panel option set - *
Recognition Program Set	- select recognition program option set -
Continuous Giving Option Set	- select continuous giving option set -
Default	

3. Click Save / Update

Reporting Option Sets

Reporting Option Sets is where an administrator configures the settings for reporting.

Delivery

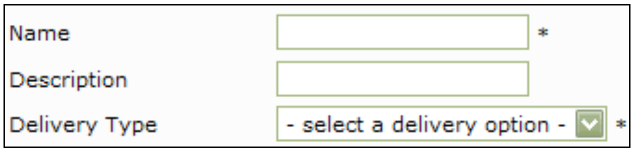
Delivery is a tool that delivers a report to different users in the system.

To set up Delivery Options

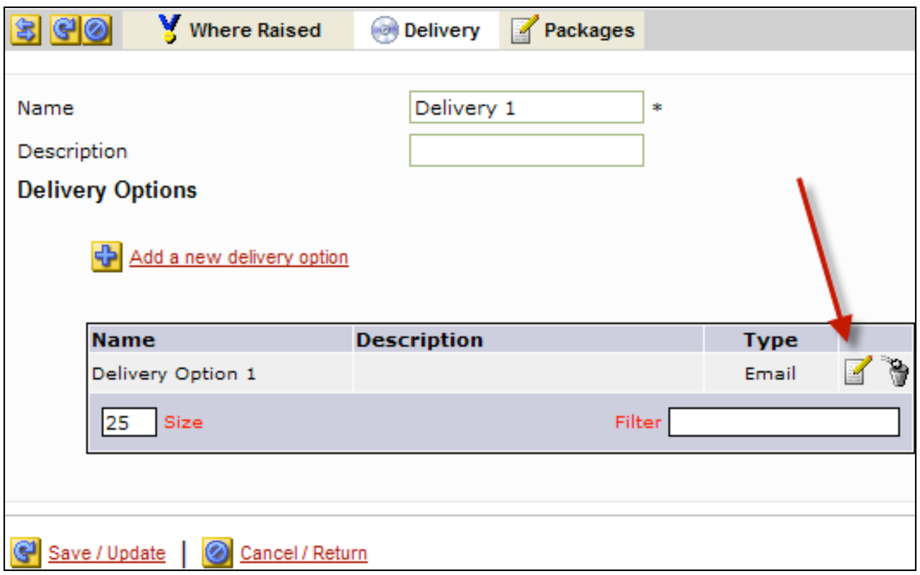
1. Click Add a new delivery option set
2. Enter a name and description

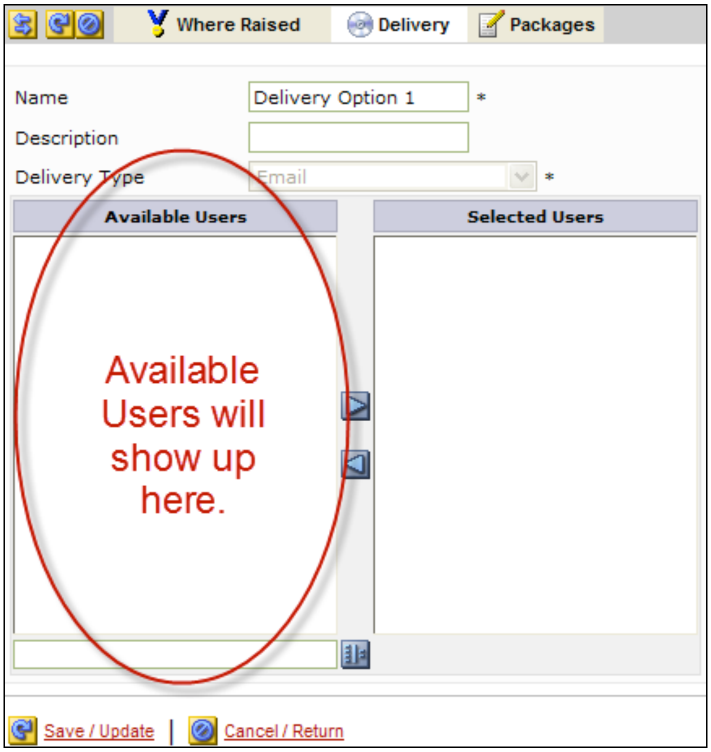
Name	*
Description	

3. Click Save / Update
4. Then click Add a new delivery option
5. Enter a name, description, and delivery type



6. Click Save / Update
7. After clicking Save / Update, a new box will appear. Click to select users to receive the delivery.





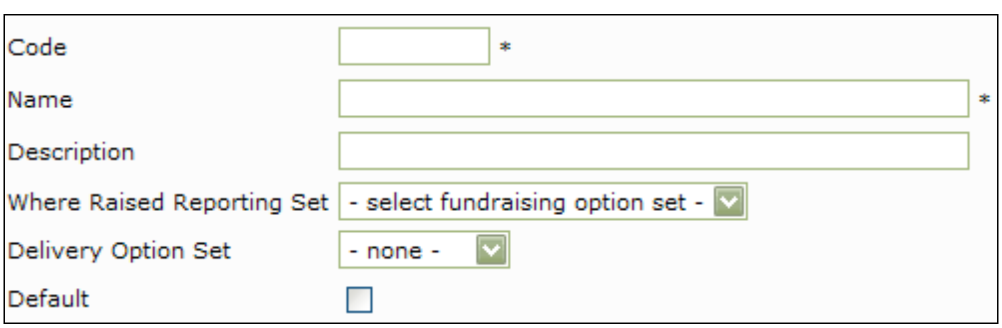
8. Use to move Available Users into the Selected Users pool
9. Click Save / Update when complete

Reporting Option Package

Use Packages to bundle up the settings configured in Reporting Option Sets. Packages tag configured settings to a campaign or to a Donor Group in order to create different donor experiences for different Donor Groups.

To Add a Reporting Option Package:

1. Click Add a new option package
2. Fill in the appropriate information in the fields provided to define the Reporting Option Package



3. Click Save / Update

Importing

At the Importing level in Organizations administrators can import data files, such as Agency Imports.

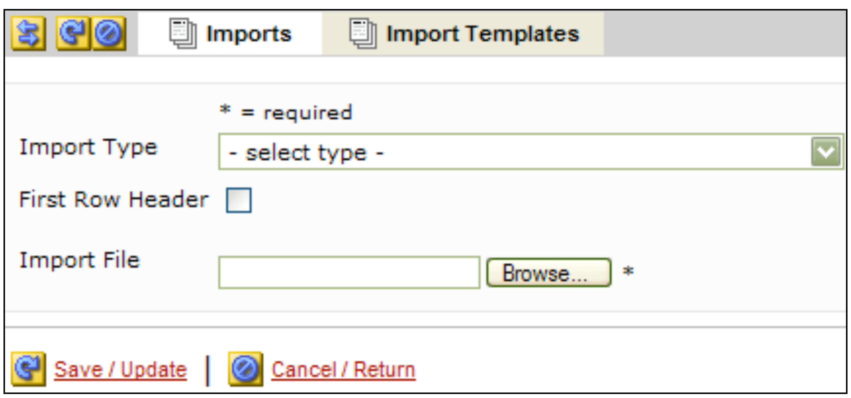
Import Types at the Organizations level include:

- **Agency Import** – Provides the ability to import Agencies into the system.
- **Entity Identifier to Standard Account Code Mapping** – Provides the ability to import Entity Identifier to Standard Account Code Mappings into the system.
- **Territory Zip Code Import** – Provides the ability to import Territory zip codes into the system.
- **Vetting Agency Import** – Provides the ability to import Vetting Agencies into the system.

To Add an Import:

1. Click Add a new Import
2. Select an Import Type, then click Browse... to choose a file to import

   Note: The file selected to import must be a Tab Delimited format



3. Click Save / Update

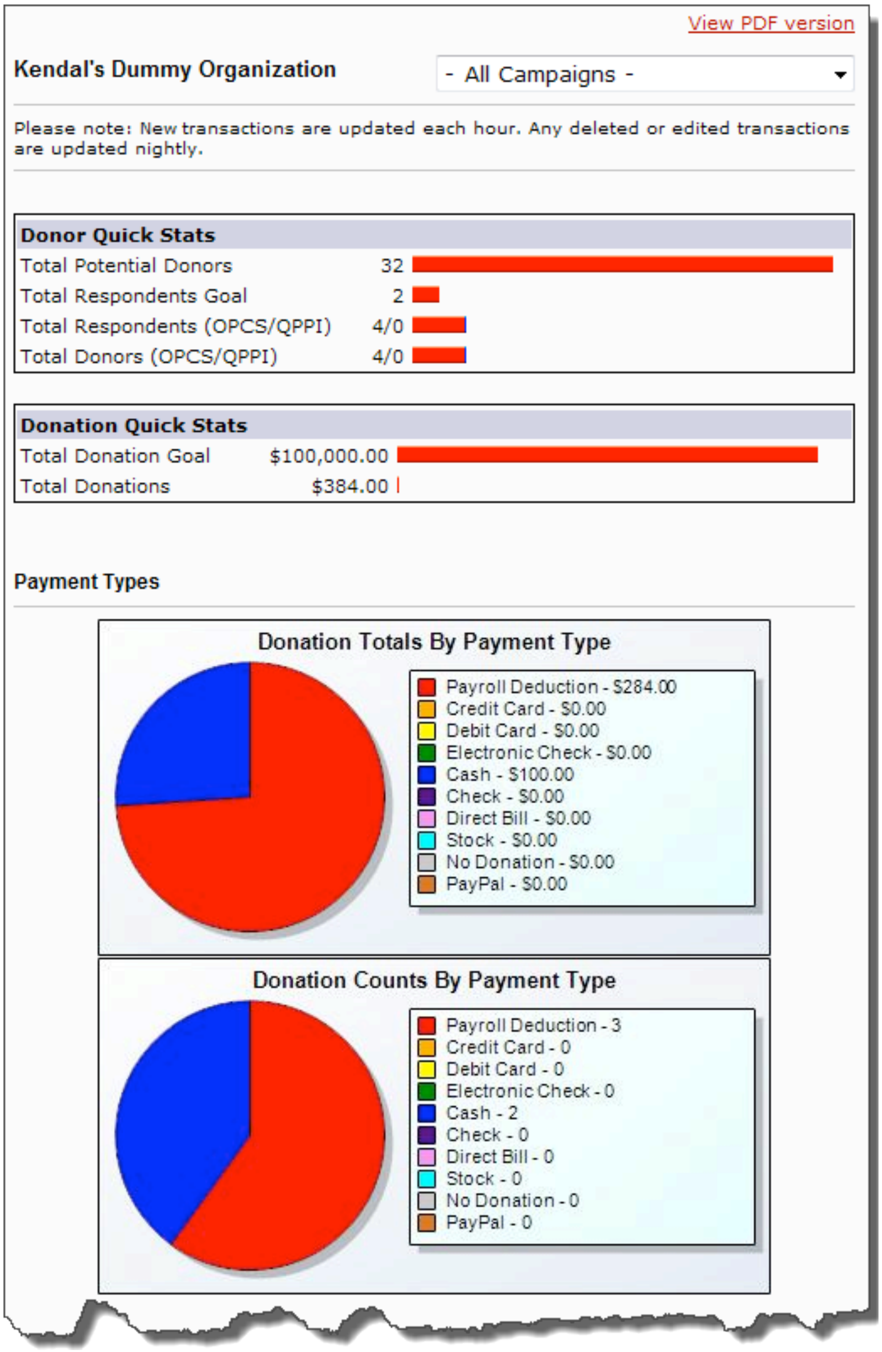
Reporting

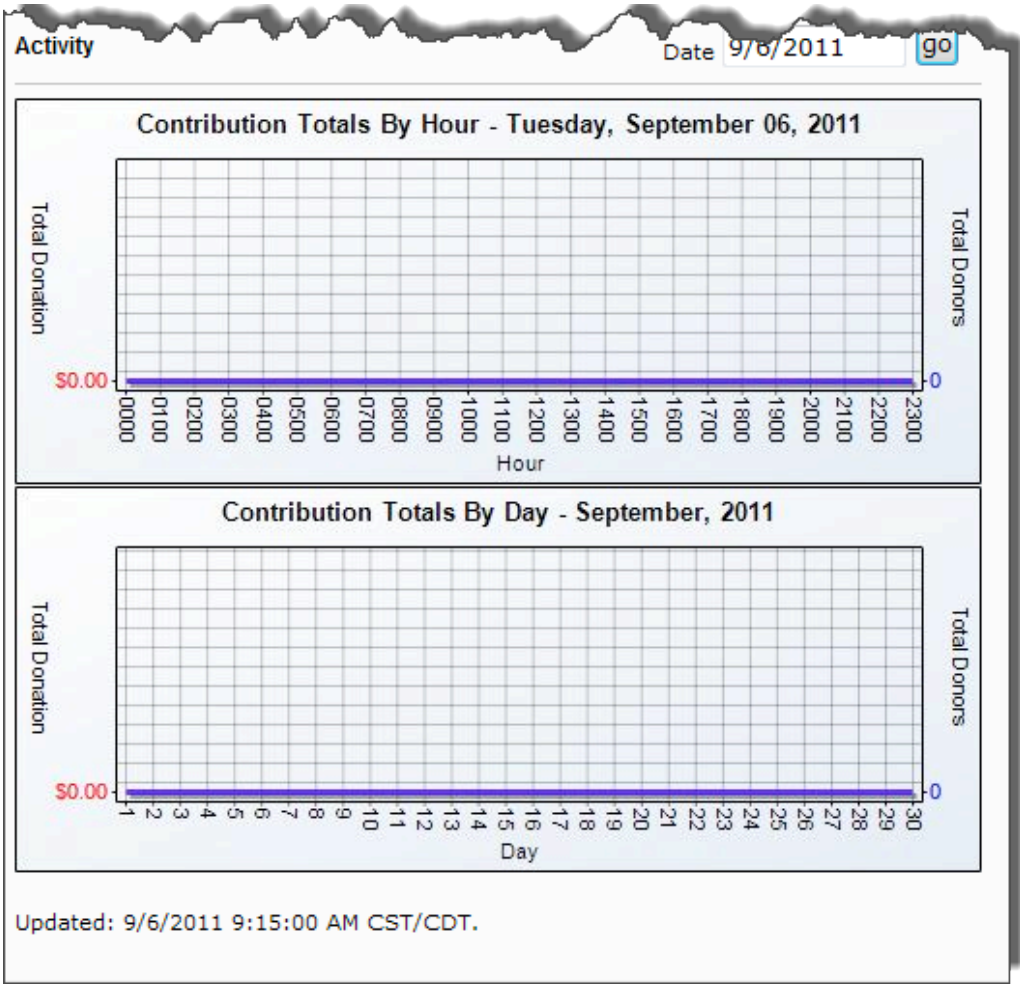
Reporting is available at all three levels of Campaign Management (Organizations, Companies and Campaigns). At each level, Reporting displays the reports associated to that level. Reports can be filtered and customized.

From the Organizations level, Reporting is divided into three major categories.

Reporting Summary

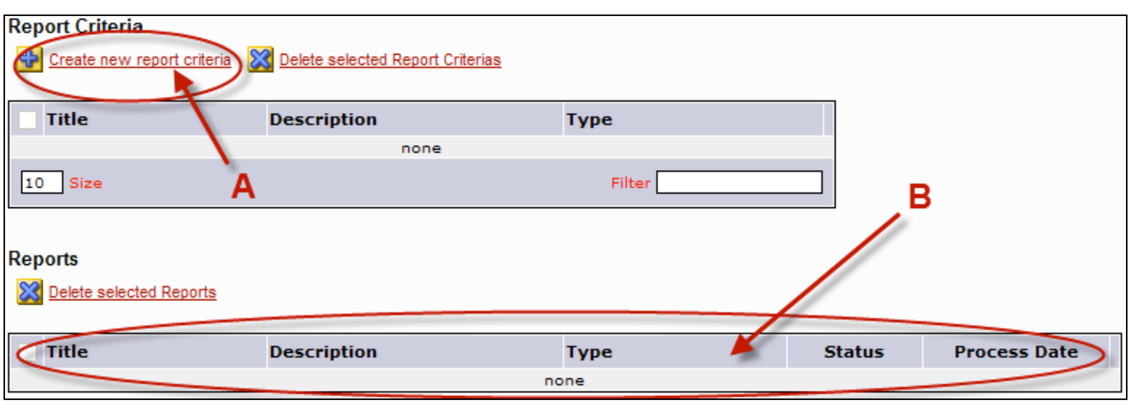
From this level, campaign administrators can view a summary of this level's activity. All information is updated hourly, in central time.



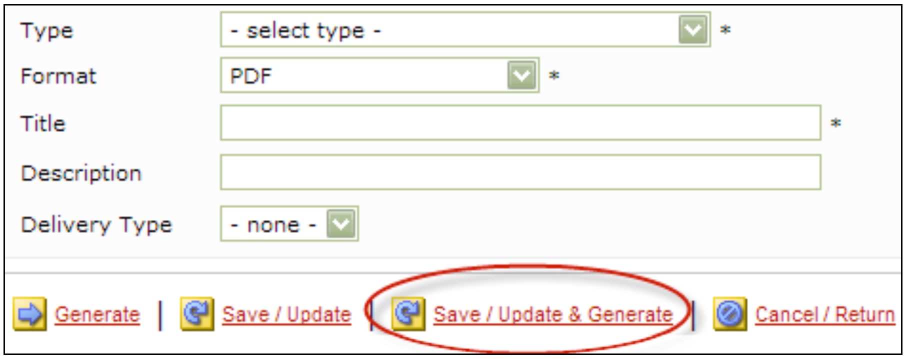


Reports

Reports are designed to provide management tools to the campaign staff. Reports can be generated as a PDF file, Text- Comma Delimited, Text- Tab Delimited, or Rich text (HTML) file. Note where to create new report criteria (A) and where to view or delete created reports (B) (see below).

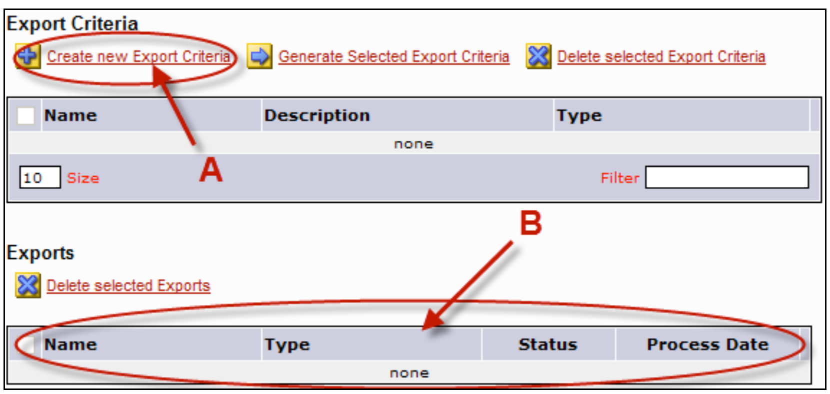


Also note that in order to generate a new report, Save / Update & Generate must be selected (see below).

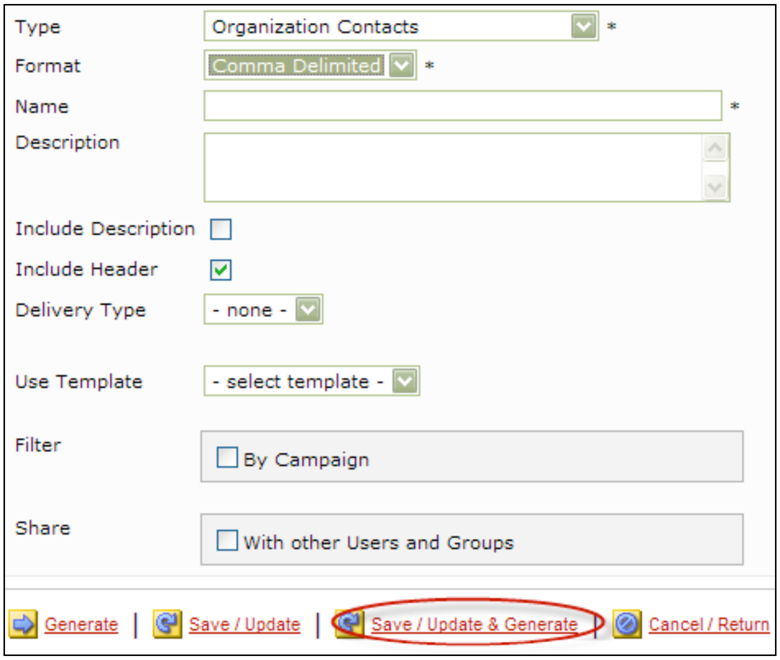


Exports

Exports are generated by Excel or as .txt files (comma delimited and tab delimited) and they contain raw data that can be manipulated in excel or another similar program before uploading into a legacy system. Note where to create new export criteria (A) and where to view or delete created export criteria (B) (see below).



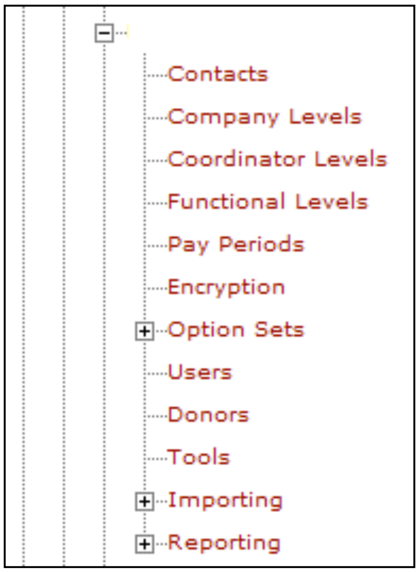
Also note that in order to generate a new export, Save / Update & Generate must be selected (see below).



For more information on Reporting, refer to Reporting documentation.

Company Level

The Companies level is the second level of Campaign Management. At this level, administrators set up a company in the system. The Companies level is very similar to the Organizations level, as it also does not require much upkeep once it has been configured.

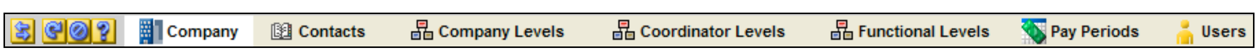


The Companies level consists of:

- **Company**
- **Contacts**
- **Company Levels**
- **Coordinator Levels**
- **Functional Levels**
- **Pay Periods**
- **Encryption**
- **Option Sets**
- **Users**
- **Donors**
- **Tools**
- **Importing**
- **Reporting**

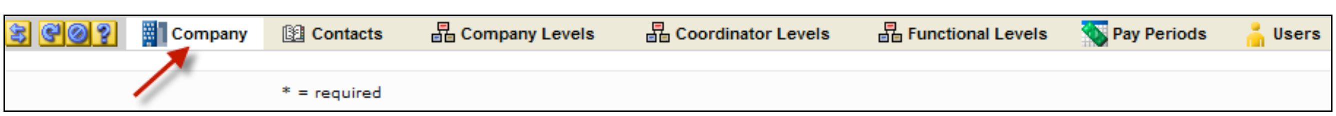
Companies are listed in alphabetical order and, like all configurable parts of Campaign Management, are structured in the form of a tree. They expand and collapse, as marked with the ⊞ (plus sign) or ⊟ (negative sign), to view or hide more levels.

Company, Contacts, Company Levels, Coordinator Levels, Functional Levels, Pay Periods, and Users can also be accessed on the top navigation bar, once the Companies level is opened.

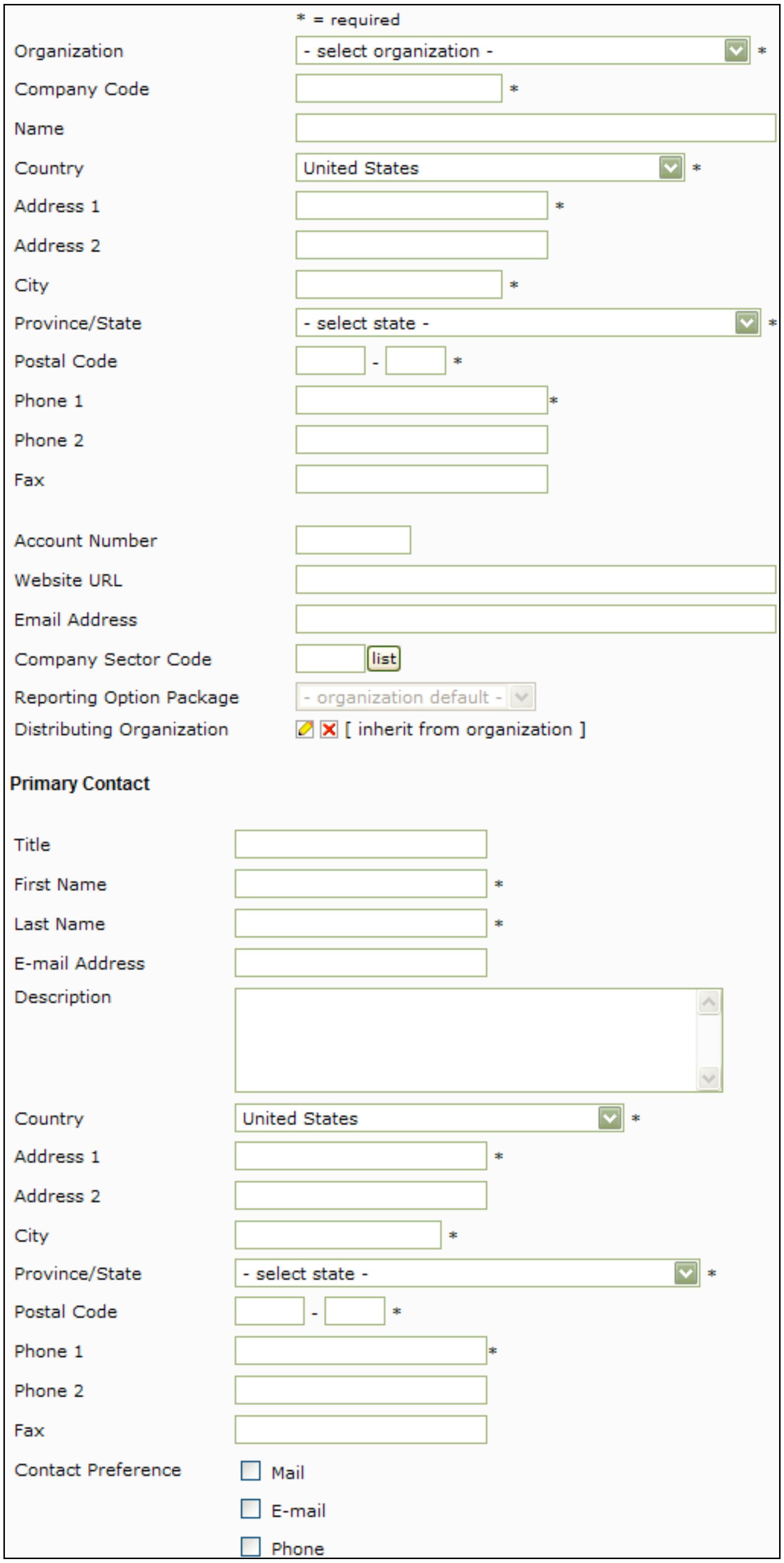


To Add a Company:

1. Click Companies to expand and view the Companies level. This will open the the Company tab.



2. Click Add a new company
3. Fill in the fields provided to define company details



* = required

Organization	- select organization -	*
Company Code		*
Name		
Country	United States	*
Address 1		*
Address 2		
City		*
Province/State	- select state -	*
Postal Code	-	*
Phone 1		*
Phone 2		
Fax		
Account Number		
Website URL		
Email Address		
Company Sector Code	list	
Reporting Option Package	- organization default -	
Distributing Organization	[inherit from organization]	

Primary Contact

Title		
First Name		*
Last Name		*
E-mail Address		
Description		
Country	United States	*
Address 1		*
Address 2		
City		*
Province/State	- select state -	*
Postal Code	-	*
Phone 1		*
Phone 2		
Fax		
Contact Preference	Mail E-mail Phone	

4. Click Save / Update

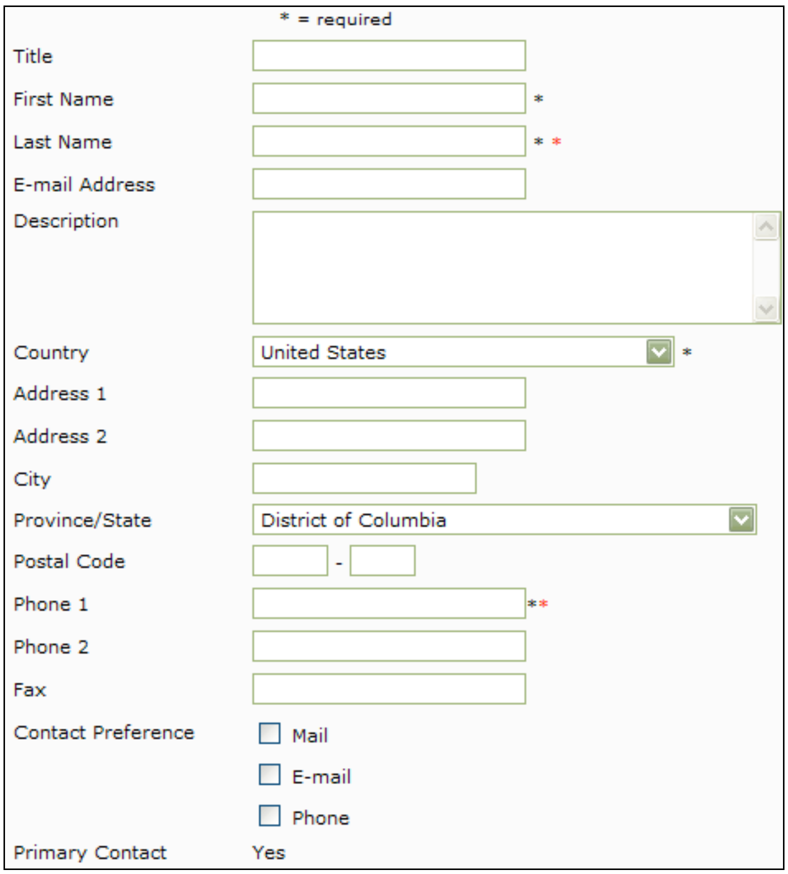
Contacts

All Companies require a primary contact.

Note: These contacts are just for administrative purposes. See *Contact Us Page* at the Campaign level, under Websites, Content, to have Campaign Contacts displayed to donors during the campaign.

To Add a Contact

1. Click Add a new contact
2. Fill in the fields provided to establish a contact



3. Click Save / Update

Company Levels

Company Levels can be a very helpful tool in managing a campaign. Company Levels are typically set up as a hierarchical structure of the company's Organization levels that reflect the company's divisions, departments, etc. (there can be up to 99 levels of depth within each company). Company levels can either be manually entered into the system or imported with a data file.

Company Levels are used for filtering Campaign Reports and Exports. In addition, email can be sent to donors who are aligned to specific Company Levels.

If a campaign is going to utilize Company Levels, it is essential the levels are created before the donor record file is imported into the system.

Company Levels and Functional Levels can be used in tandem for multiple reporting structures; for example, Company Levels could be set up based on geography and Functional Levels could be set up by business unit.

Coordinator Levels

Coordinator Levels are a hierarchical representation of reporting levels, similar to Company Levels. Coordinator Levels determine what donor records a Coordinator will have access to through the campaign Dashboard.

Donors are associated to a Coordinator Level in a campaign. Donors that are also Coordinators for a campaign are assigned a Coordinator Reporting Code. These individuals will have access to donors associated to the assigned Coordinator Level and that Coordinator Level's child levels.

Functional Levels

Functional Levels can be a very helpful tool in managing a campaign. Functional Levels, similar to Company Levels, are typically setup as a hierarchical structure of the company's organization levels that reflect the company's divisions, departments, etc. Functional levels can either be manually entered into the system or imported with a data file.

Functional Levels are used for filtering Campaign Reports and Exports. In addition, email can be sent to donors who are aligned to specific Functional Levels.

A campaign utilizing Functional Levels, should create levels before the donor record file is imported into the system.

Pay Periods

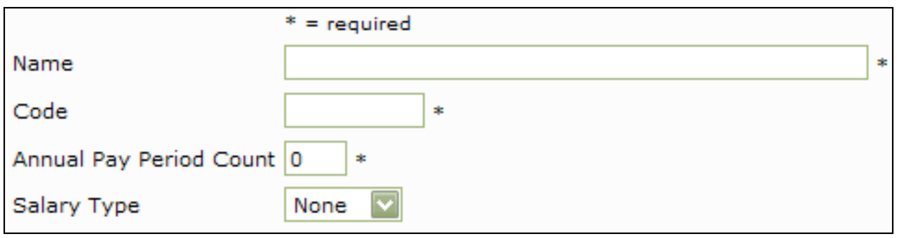
The Pay Periods level is where administrators set up company payroll information.

Note: Pay Periods cannot be deleted if a donor is attached to it.

To Add a Company to a Pay Period

1. Click Add a new company pay period
2. Fill in the fields provided to define the pay period

Add a Company Pay Period Fields		
Req	**Field**	**Description**
*	Name	This name will be used to identify the Company Pay Period
	Code	It is a good idea to create a code that corresponds with company employee records, for quick reference.
*	Annual Pay Period Count	The number of pay periods in a year.
*	Salary Type	Can choose Salary or Hourly.


* = required
Name *
Code *
Annual Pay Period Count 0 *
Salary Type None

3. Click Save / Update

Option Sets

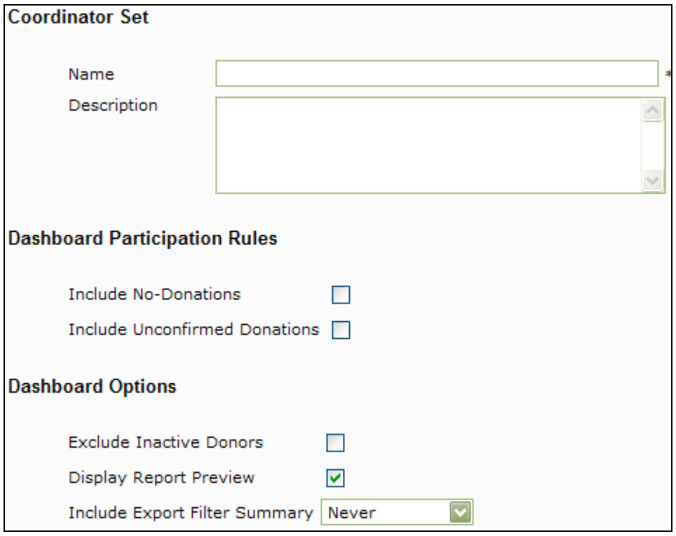
Option Sets, at the Companies level, are different from those found at the Organizations level. The rules created for Option Sets at the Companies level are associated with the Dashboard, and therefore, everything configured here is visible on Dashboard.

For more information on the Dashboard, please see further documentation, *Dashboard Configuration.*

Coordinator

To Add a Coordinator Set:

1. Click Add a new coordinator set
2. Fill in the appropriate information in the fields provided


Coordinator Set

Name *

Description

Dashboard Participation Rules

Include No-Donations

Include Unconfirmed Donations

Dashboard Options

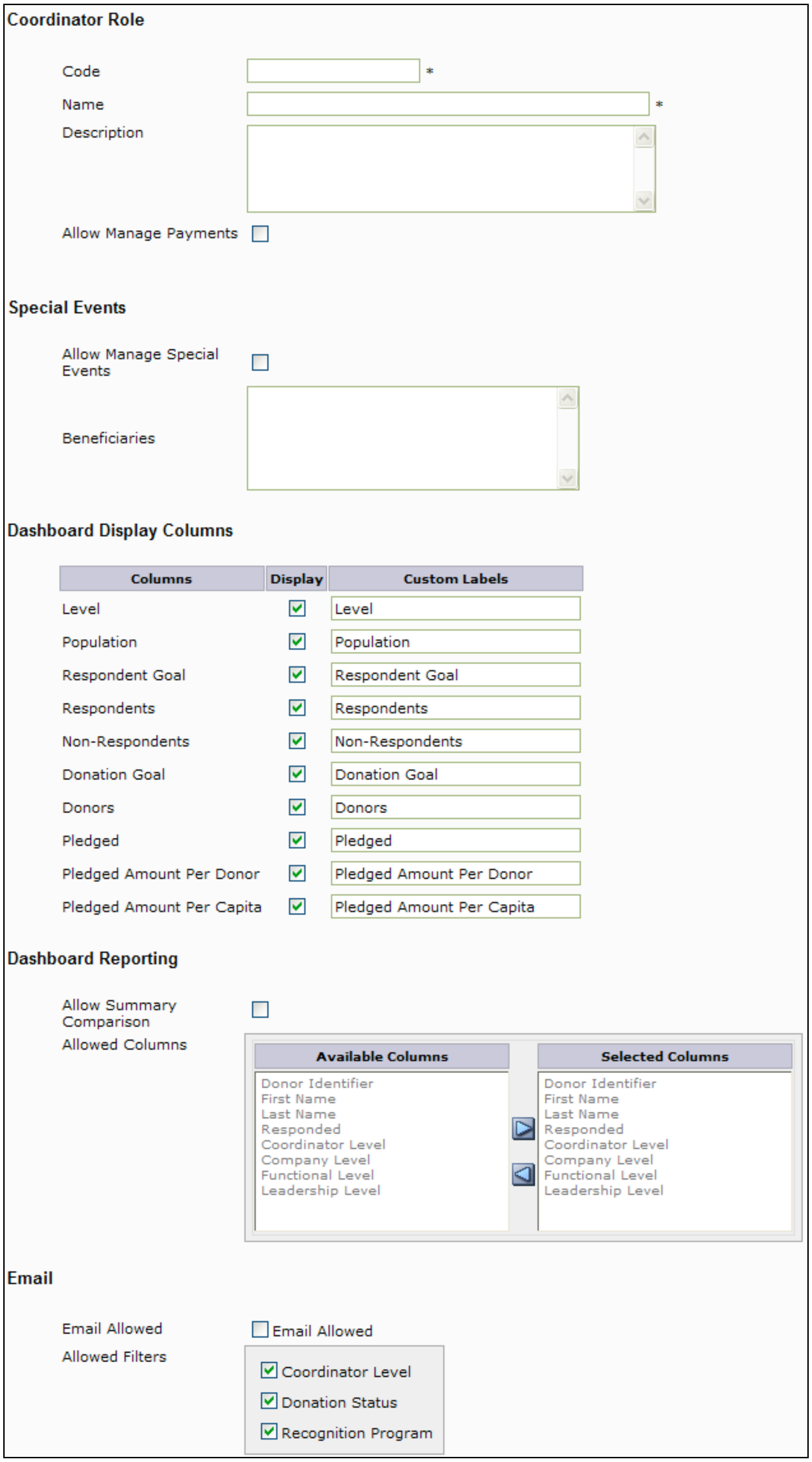
Exclude Inactive Donors

Display Report Preview

Include Export Filter Summary Never

3. Click Save / Update
4. Then the option to add a Coordinator Role will appear. Click Add a new role
5. Fill in the fields provided to define Coordinator Roles

Add a Coordinator Set Fields		
Req	**Field**	**Description**
Coordinator Role		
*	Code	This code will be used to identify the Coordinator Role.
*	Name	This name will be used to identify the Coordinator Role.
	Description	Can be the same as the name or can be used to provide additional details.
	Allow Manage Payments	Choose to allow coordinator access to manage payments.
Special Events		
	Allow Manage Special Events	Allows coordinators to manage special events.
	Beneficiaries	Allows coordinators to manage beneficiaries.
Dashboard Display Columns		Check boxes to display items on the Dashboard. There is also an option to change the name of the labels.
Dashboard Reporting		This grants permission to compare one level with another in Reports. Use to choose selected columns.
Email		This gives the coordinator the ability to reach out to employees in specific areas to communicate about the campaign. **Note**: Emails are sent in Central Time and it is always a good idea to allow a 15-20 minute buffer time when scheduling emails.
	Email Allowed	Check to allow a coordinator permission to use email functionality.
	Allowed Filters	Choose which filters a coordinator is permitted to use.



Coordinator Role

Code *

Name *

Description

Allow Manage Payments

Special Events

Allow Manage Special Events

Beneficiaries

Dashboard Display Columns

Columns	Display	Custom Labels
Level	☑	Level
Population	☑	Population
Respondent Goal	☑	Respondent Goal
Respondents	☑	Respondents
Non-Respondents	☑	Non-Respondents
Donation Goal	☑	Donation Goal
Donors	☑	Donors
Pledged	☑	Pledged
Pledged Amount Per Donor	☑	Pledged Amount Per Donor
Pledged Amount Per Capita	☑	Pledged Amount Per Capita

Dashboard Reporting

Allow Summary Comparison

Allowed Columns

Available Columns	Selected Columns
Donor Identifier	Donor Identifier
First Name	First Name
Last Name	Last Name
Responded	Responded
Coordinator Level	Coordinator Level
Company Level	Company Level
Functional Level	Functional Level
Leadership Level	Leadership Level

Email

Email Allowed — Email Allowed

Allowed Filters

- ☑ Coordinator Level
- ☑ Donation Status
- ☑ Recognition Program

6. Click Save / Update

Packages

Use Packages to bundle the settings configured above. See Organization Level, Option Sets, Packages, above, for more details on configuring packages, as all packages have similar structures.

Users

From the Users level, administrators have the capability to affiliate users to different levels of the campaign. At the Companies level, users are associated to various company settings.

Donors

This is where donors are grouped to their company. The Company Donor Profile contains basic information about an individual donor; name, work address, home address, and spouse information. Once donors have been uploaded or manually entered into the system, the ability to view and edit the donor record is enabled. Additionally, at the Companies level, campaign coordinators have the ability to view donors who have been used over multiple campaigns for a company and the donor's donations.

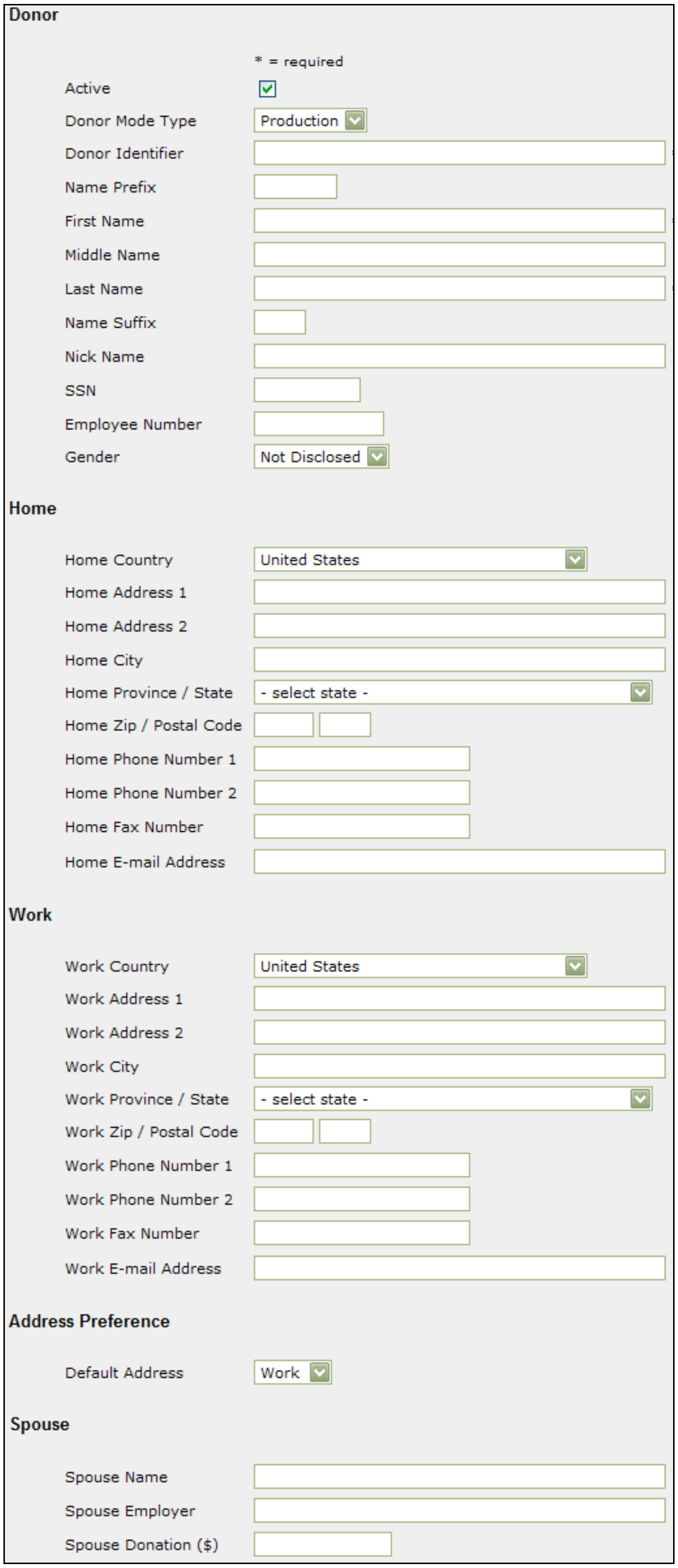
Note: When a donor is added at the Campaigns level, they also appear here.

Donors can be searched by their name or by their *Identifier*. An *Identifier* is the code assigned to the donor when entered into the system.

To Add a Donor

1. Click Add a new donor
2. Fill in the appropriate information in the fields provided

Add a Donor Fields		
Req	**Field**	**Description**
Donor		
	Active	Required to activate the donor.
*	Donor Mode Type	***Production*** – Use for the actual campaign. ***Demo*** – Use when impersonating a donor.
*	Donor Identifier	A code associated to the donor.



Donor

* = required

Active	☑
Donor Mode Type	Production
Donor Identifier	
Name Prefix	
First Name	
Middle Name	
Last Name	
Name Suffix	
Nick Name	
SSN	
Employee Number	
Gender	Not Disclosed

Home

Home Country	United States
Home Address 1	
Home Address 2	
Home City	
Home Province / State	- select state -
Home Zip / Postal Code	
Home Phone Number 1	
Home Phone Number 2	
Home Fax Number	
Home E-mail Address	

Work

Work Country	United States
Work Address 1	
Work Address 2	
Work City	
Work Province / State	- select state -
Work Zip / Postal Code	
Work Phone Number 1	
Work Phone Number 2	
Work Fax Number	
Work E-mail Address	

Address Preference

Default Address	Work

Spouse

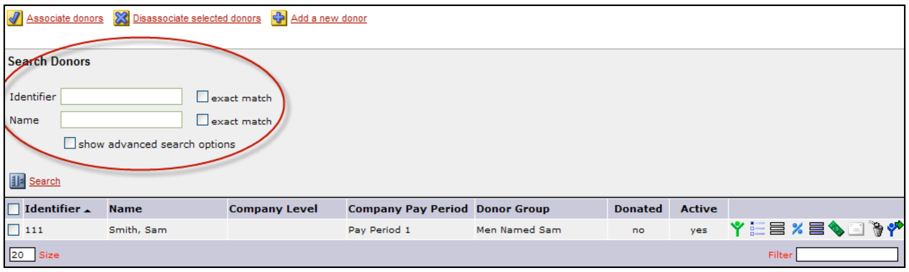
Spouse Name	
Spouse Employer	
Spouse Donation ($)	

3. Click Save / Update

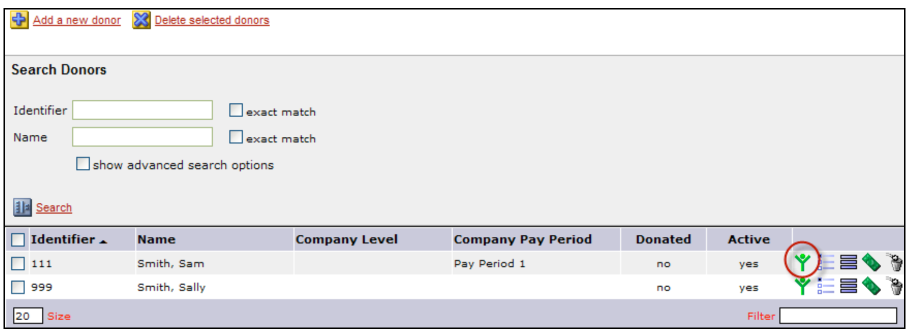
To Activate / Deactivate Donors

To activate or deactivate an individual donor at the Companies level, check or uncheck the *Active* box, found when editing donor information.

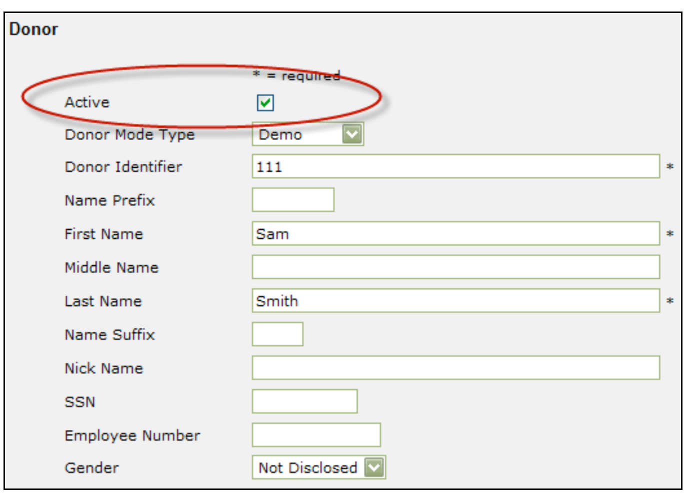
1. Search for a donor in the Donor List. Can search either by the donor's name or *Identifier*.



2. Once a specific donor is found, click , located next to the donor's name



3. Check the *Active* box to activate the donor or uncheck the *Active* box to deactivate the donor



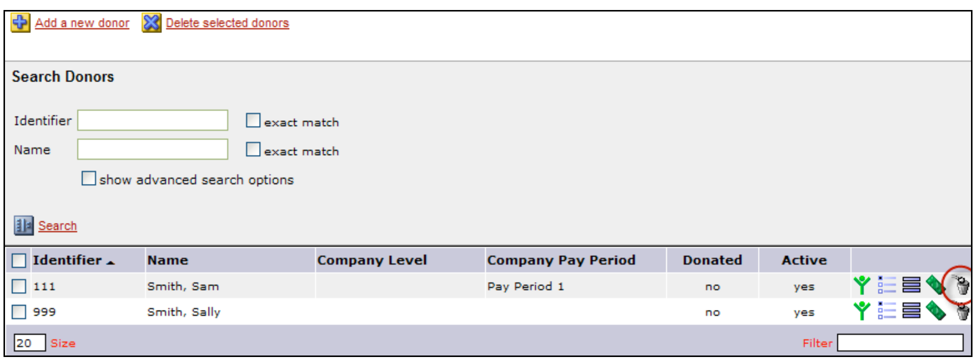
4. Click Save / Update

When a donor list is imported into the system, administrators prepare the settings for active or inactive donors on the document.

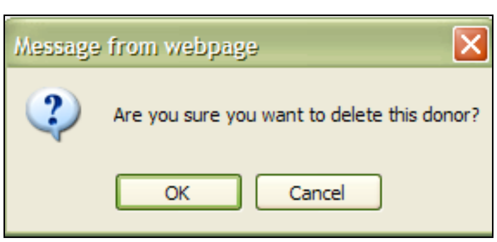
To Delete Donors

1. Search for a donor in the Donor List. Can search either by the donor's name or *Identifier*.

2. Once a specific donor is found, click , located next to the donor's name



3. A message will pop up, asking the administrator to verify their decision to delete the donor



4. Click *Ok* to delete the donor or *Cancel* to cancel the transaction

Tools

Tools are a convenient way to perform highly functional jobs at the Companies level.

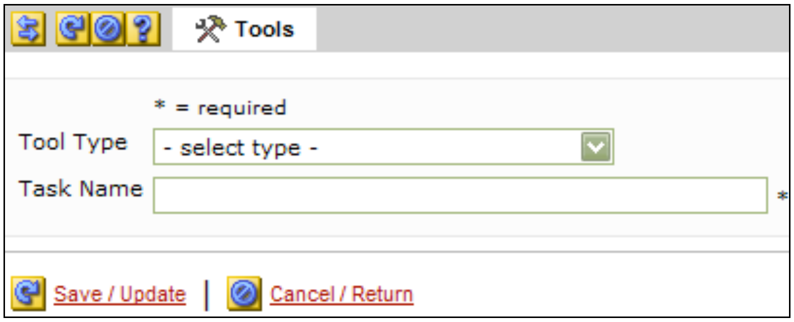
From Tools, at the Companies level, administrators can:

- **Copy Exports** – The ability to copy saved export criteria between companies. This feature streamlines the export preparation and management process, especially when exports are configured the same way for multiple campaigns.
- **Copy Reports** – The ability to copy saved report criteria between companies. This feature streamlines the report preparation and management process, especially when reports are configured the same way for multiple campaigns.
- **Mass Delete Company Levels** – The ability to delete multiple Company Levels at once. Administrators have the option to Selective Delete, which allows administrators to choose multiple Company Levels to delete, or to Mass Delete, which allows administrators to delete all existing company levels at once.
- **Mass Delete Coordinator Levels** – The ability to delete multiple Coordinator Levels at once. Administrators have the option to Selective Delete, which allows administrators to choose multiple Coordinator Levels to delete, or to Mass Delete, which allows administrators to delete all existing coordinator levels at once.
- **Mass Delete Donor Password History** – Due to powerful security, provided with the system, donors have a limited number of login attempts. Additionally, the Donor Site's response time slows down every time a donor enters an incorrect password. This feature also forces the donor passwords to expire every two months. Once a password expires, a new password must be created. In the event companies wish to utilize the same passwords for following campaigns, users have the ability to delete donor password history to block the system from enforcing the security regulations.
- **Mass Delete Donors** – The ability to delete multiple donors at once. Note that the Mass Delete Donors functionality cannot be undone.
- **Mass Delete Functional Levels** – The ability to delete multiple Functional Levels at once. Administrators have the option to Selective Delete, which allows administrators to choose multiple Functional Levels to delete, or to Mass Delete, which allows administrators to delete all existing Functional Levels at once.

To Perform a Task in Tools

1. Click Add a new Task
2. Select a Tool Type from the dropdown menu
3. Enter a Task Name
4. Click Save / Update

Note: The process goes into a queue and, therefore, is not performed instantly.



Importing

At the Importing level, administrators can import data files. Importing at this level is similar to Importing at the Organizations level, except it offers different options.

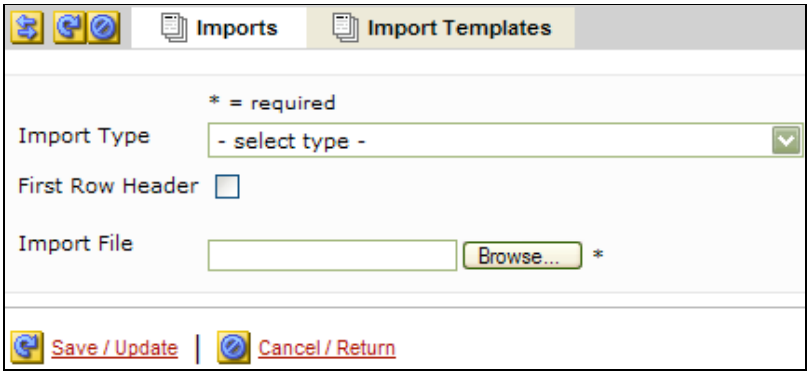
Import Types at the Companies level include:

- **Company Level Import** – Provides the ability to import Company Levels.
- **Company Pay Period Import** – Provides the ability to import Company Pay Period information.
- **Coordinator Import** – Provides the ability to import Coordinators into the system.
- **Direct Match Import** – Provides the ability to import Direct Matches.
- **Donors** – Provide the ability to import Donors into the system.
- **Donor Identification Updates** – Provides the ability to import Donor Identification Updates.
- **Donor Where Raised Zip Code Reports** – Provide the ability to import Donor Where Raised Zip Code Reports.
- **Functional Level Import** – Provides the ability to import Functional Levels into the system.
- **Match Election Imports** – Provides the ability to import Match Elections.
- **Matching Gift Status Updates** – Provides the ability to import Matching Gift Status Updates.

To Add an Import

1. Click Add a new Import
2. Select an Import Type, then click Browse... to choose a file to import

   Note: The file selected to import must be a Tab Delimited format



3. Click Save / Update

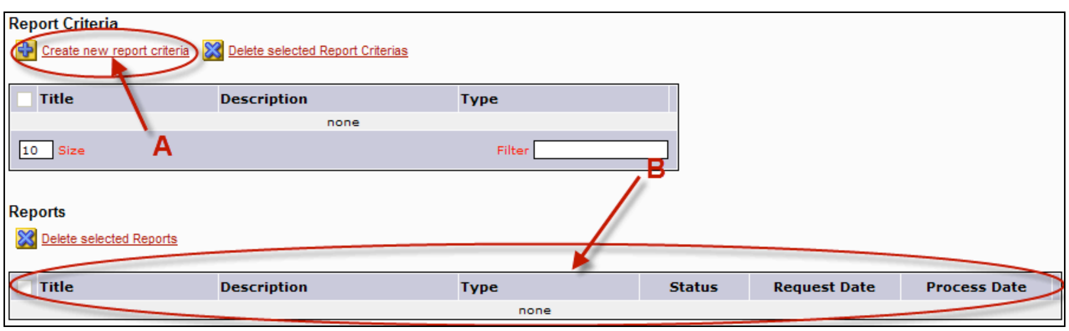
Reporting

Reporting is available at all three levels of Campaign Management (Organizations, Companies and Campaigns). At each level, Reporting displays the reports associated to the selected level. Reports can be filtered and customized.

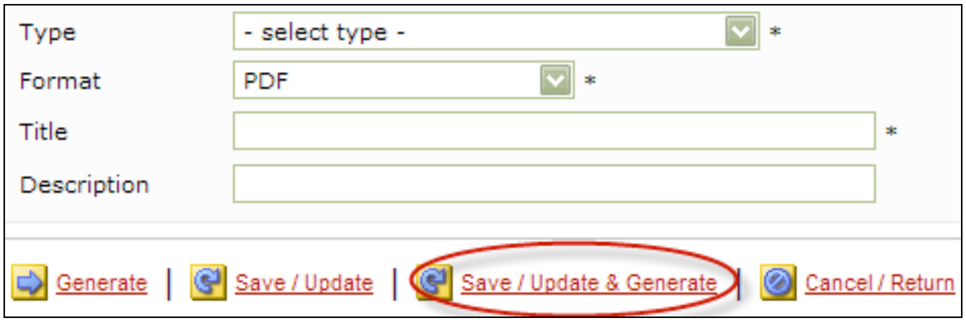
From the Companies level, Reporting is divided into two major categories.

Reports

Reports are designed to provide management tools to the campaign staff. Reports can be generated as a PDF file, Text- Comma Delimited, Text- Tab Delimited, or Rich text (HTML) file. Note where to create new report criteria (A) and where to view or delete created reports (B).

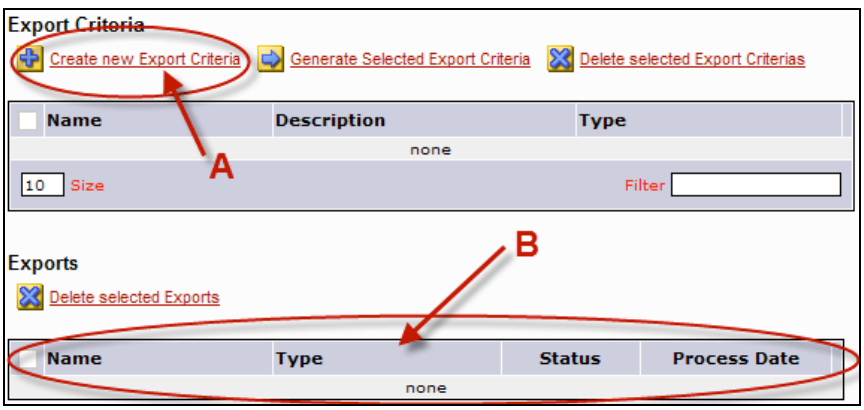


Also note that in order to generate a new report, Save / Update & Generate must be selected (see below).

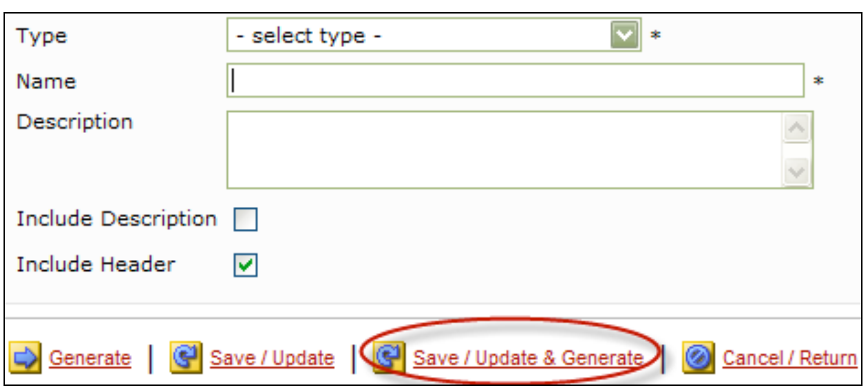


Exports

Exports are generated as .txt files (comma delimited and tab delimited) and they contain raw data that can be manipulated in excel or another similar program before uploading into a legacy system. Note where to create new export criteria (A) and where to view or delete created export criteria (B).



Also note that in order to generate a new export, Save / Update & Generate must be selected (see below).



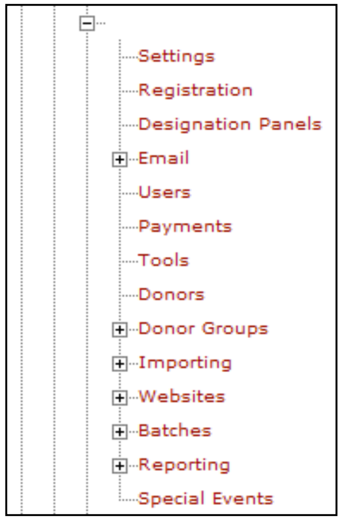
For more information on Reporting, refer to Reporting documentation.

Campaign Level

The Campaigns level is where administrators configure year specific campaigns for a company. Each campaign is unique and may have different requirements.

The Campaigns level consists of:

- **Campaign**
- **Settings**
- **Registration**
- **Designation Panels**
- **Email**, **Users**, **Payments**
- **Tools**, **Donors**
- **Donor Groups**
- **Importing**
- **Websites**
- **Batches**
- **Reporting**
- **Special Events**



Campaigns are listed in alphabetical order and, like all configurable parts of Campaign Management, are structured in the form of a tree. They expand and collapse, as marked with the ⊞ (plus sign) and ⊟ (negative sign), to view or hide more levels.

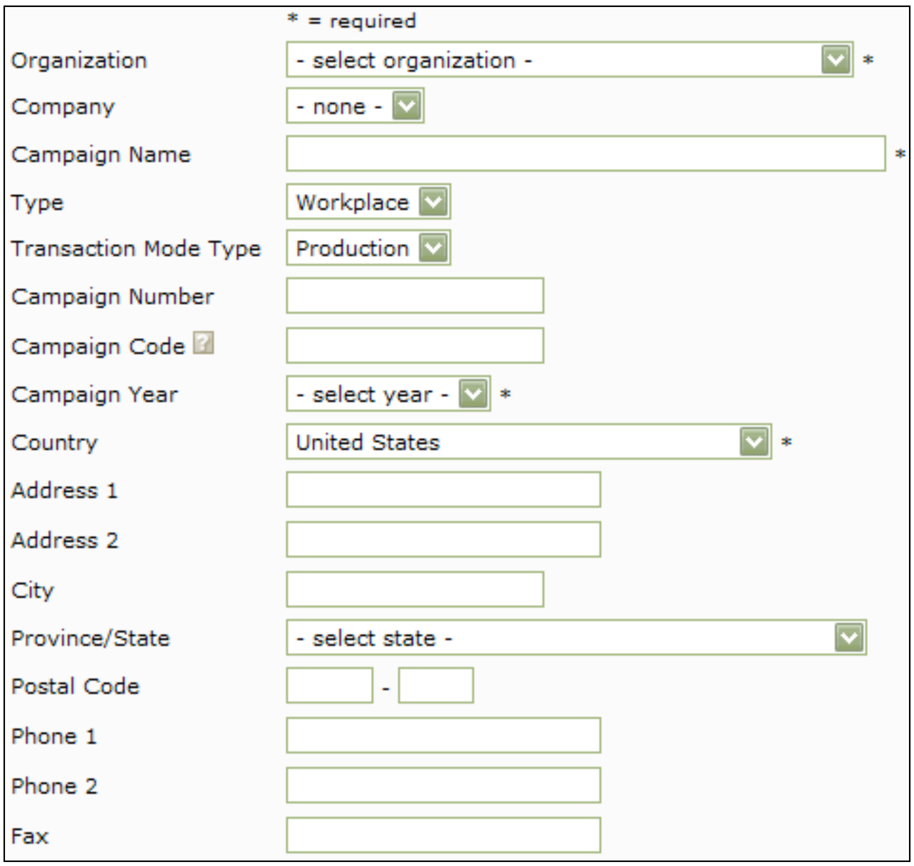
Campaign, Settings, Registration, Designation Panels, Email, Users, and Payments can also be accessed on the top navigation bar, once the Campaigns level is opened.

To Add a Campaign

1. Click Campaigns to expand and view the Campaigns level. This will open the Campaigns tab.
2. Click Add a new campaign
3. Fill in the appropriate information in the fields provided

Add a Campaign Fields		
Req	Field	Description
*	Organization	Select the organization the campaign belongs to from the dropdown list.
*	Company	Select the company the campaign belongs to from the dropdown list.
*	Campaign Name	This name will be used to identify then campaign name.
	Type	Can choose to create a *workplace* or *public* campaign.
	Transaction Mode Type	***Production*** – Used if ready to activate the campaign. ***Demo*** – Used to demo the campaign.
	Campaign Number	This is a unique identifier assigned to a campaign.

Add a Campaign Fields		
Req	Field	Description
	Campaign Code	In addition to donor login information, Campaign Codes are required to access the Donor Site in workplace campaigns. The Campaign Code can also be embedded into the website URL to facilitate access to a specific campaign.
	Campaign Year	Select the year of the campaign from the dropdown list.



4. Click Save / Update

Settings

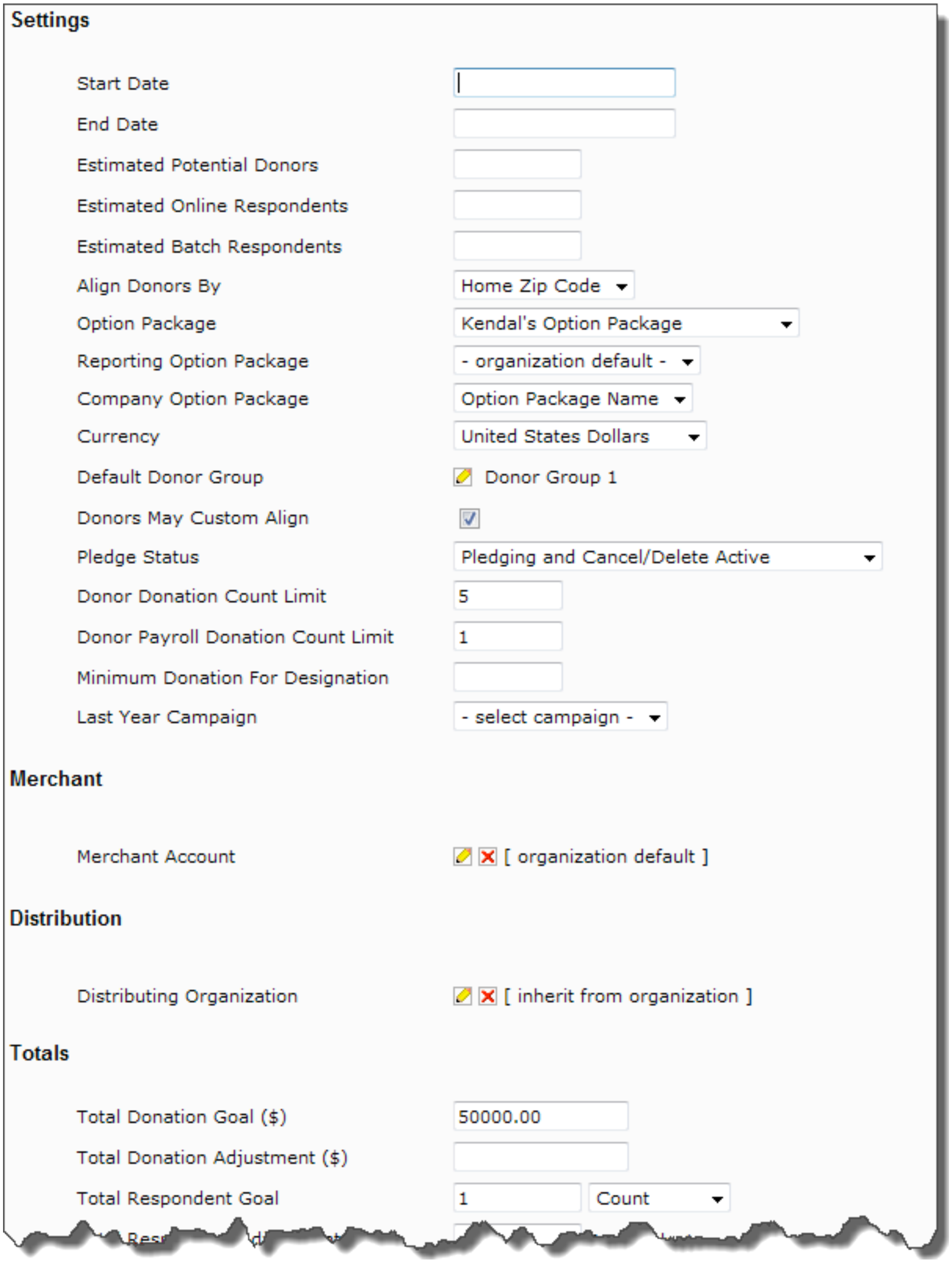
The Settings level is where administrators configure the campaign settings. Fill in the appropriate information in the fields provided.

Campaign Settings Fields		
Req	**Field**	**Description**
Settings		
	Start Date	Kickoff date for the campaign. **Note:** If the campaign and pledge options are active, then donors will still be able to make a donation outside of the campaign dates.
	End Date	Last date of the campaign. **Note:** If the campaign and pledge options are active, then donors will still be able to make a donation outside of the campaign dates.
	Estimated Potential Donors	Estimated maximum number of donors expected to participate in the campaign.
	Estimated Online Respondents	Estimated number of donors expected to pledge via the online Donor Site.
	Estimated Batch Respondents	Estimated number of paper pledge cards that will be entered into the system via the batch feature.
*	Align Donors By	When Geographically Aligned Designation Panels are used, this field controls whether donors will be aligned based upon their *Home Zip Code* or *Work Zip Code – if applicable, select the appropriate choice from the dropdown list.* **Note:** *Home Zip Code* is the default.
*	Option Package	Option Packages contain the business rules for the campaign, including gift options and leadership levels. Option Packages are configured at the Organization Level. At least one Option Package must be created under an organization in order to activate a campaign. **Note:** The Option Package designated as the Organization Default will be used by default. To override this, select the desired Option Package from the list.
	Reporting Option Package	**ADVANCED FUNCTIONALITY –** The Reporting Option Package contains the Option Sets that control Where Raised Reporting (FrontStream only) and report/export Delivery Options (email or FTP). Reporting Option Packages are configured at the Organization Level.
	Company Option Package	**ADVANCED FUNCTIONALITY –** The Company Option Package contains the Option Sets that control Dashboard Reporting and Where Raised Reporting (FrontStream only) documentation. Dashboard Reporting allows campaign coordinators to view campaign specific summary information by Coordinator Level, selected reports and/or send emails.
*	Currency	Currency that donors will use when making a pledge – *select the appropriate currency from the dropdown list.* **Note:** The default is *United States Dollars*.
*	Default Donor Group	Donor Group that will be used as the default should a donor record not be previously associated with one. ***A default donor must be set-up and assigned in order to activate the campaign.*** To do this, follow the steps below: 1. Click the icon to display a list of available Donor Groups 2. Select the desired group from the list 3. Click the <select> button
	Donors May Custom Align	In campaigns with Designation Panels set up to Geographically Align, this setting allows the donor to manually enter an alternate zip code to align to, in order to see different designation options.

Campaign Settings Fields		
Req	**Field**	**Description**
		Note: By default, this is unchecked, preventing donors from custom aligning.
	Allow Donation Cancellation	This feature controls the donor's ability to cancel a pledge when the Pledge Status is set to *Cancel/Delete Active*. If unchecked, donors will only have the option to delete and will not be able to cancel an ongoing donation. **Note**: By default, this is unchecked, preventing donors from cancelling a pledge.
*	Pledge Status	Indicates whether the pledge and/or cancel/delete features are active – *select the appropriate choice from the dropdown list.* **Note:** The default is *Pledging and Cancel/Delete Active*.
*	Donor Donation Count Limit	Establishes the number of donations a donor can make within the campaign. **Note:** The default is 1.
*	Donor Payroll Donation Count Limit	Establishes the number of payroll donations a donor can make within the campaign. **Note:** The default is 1.
	Minimum Donation For Designation	Sets the minimum donation amount required for the donor to search a broader database of agency designation options. **Note:** Leaving this blank will allow the donor to designate regardless of donation amount.
	Last Year Campaign	Associates a prior campaign with the current campaign, allowing for multiple years of Giving History to be displayed to the donor. It also controls which campaign's donations are used with the Carry Over function **(ADVANCED FUNCTIONALITY)** - *select the appropriate campaign from the dropdown list.* **Note:** Once established, *Show Previous Campaign Donations* may be selected as visible to the donor on the Donation History Page. This is set up in the Website Content area.
Merchant		
	Merchant Account	This allows for an alternate merchant account or manual processing override to be established for campaigns accepting Credit Card donations. **Note:** The Merchant Account designated as the organization default will be used by default. To override this default, either click the box next to *Manual Processing Override* or click the icon to select an alternate merchant account from the list.
Distributor		
*	Distributing Organization	Designates the organization responsible for processing and disbursement of funds collected through the campaign. **Note:** By default, this is set to the organization that configures the campaign. If the campaign funds will be distributed by another organization using the Campaign Management system, this can be overridden by clicking and selecting an organization from the list. This will allow that organization to access specific campaign reports to facilitate the disbursements.
Totals		
	Total Donation Goal	Denotes the dollar goal for the campaign.

Campaign Settings Fields		
Req	**Field**	**Description**
		Note: The amount recorded here will be used to calculate and display percent of goal on the Pledge Thermometer, if activated. It will also be used to calculate the Campaign Summary Reports and Quick Stats.
	Total Donation Adjustment	Allows the campaign coordinator to adjust the total dollars raised display on the Pledge Bar by either a positive or negative number.
	Total Respondent Goal	Participation goal for the campaign. Value can be entered as either a count of the actual number of respondents, or as a percentage of the Estimated Potential Donor Count established for the campaign. **Note:** The amount recorded here will be used to calculate and display percent of goal on the Participation Thermometer, if activated. It will also be used to calculate the Campaign Summary Reports and Quick Stats.
	Total Respondent Adjustment	Allows coordinators to adjust the number of total respondent rate displayed on the pledge bar by either a positive or negative number. The adjustment will affect both the pledge bars and the respondent goal in the Campaign Reporting Summary.
	Include 'No Donation' In Totals	Determines whether or not individuals selecting *No Donation* will be included in the campaign Participation/Respondent totals for OPPS Reporting/Exporting. **Note:** By default, these individuals will not be included. Check the box to include them in the campaign totals.
	Include Unconfirmed Donations In Totals	**ADVANCED FUNCTIONALITY –** Determines whether or not individuals with unconfirmed donations will be included in the campaign totals for OPPS Reporting/Exporting.
	Exclude Inactive Donors in Totals	Determines whether or not inactive donors are included in the OPPS campaign Reporting/Exporting totals. **Note:** By default, these individuals will not be included. Check the box to include them in the campaign totals.
Login		
	Campaign Username	**ADVANCED FUNCTIONALITY –** Establishes a campaign username that allows for individuals that did not have a donor record created, as part of a workplace campaign donor import, to self-register. **Note:** Donors must provide the Campaign Code, Campaign User Name and Campaign Password in order to access the campaign. They will then be prompted to set up a donor account by providing their personal information.
	Campaign Password	**ADVANCED FUNCTIONALITY –** Establishes a Campaign Password that allows for individuals that did not have a Donor Record created as part of a workplace campaign donor import to self-register. **Note:** Donors must provide the Campaign Code, Campaign User Name, and Campaign Password in order to access the campaign. They will then be prompted to set up a donor account by providing their personal information.
	Confirm Campaign Password	**ADVANCED FUNCTIONALITY –** Prompt to reenter the Campaign Password to confirm it was typed correctly.
	Campaign Login Active	**ADVANCED FUNCTIONALITY –** Activates the ability for donors to utilize the Campaign Level Login – *check the box to activate the functionality.*

Campaign Settings Fields		
Req	**Field**	**Description**
		Note: By default, this is unchecked.
	Login Requirement	**APPLIES TO PUBLIC CAMPAIGNS ONLY:** Controls when, during the pledging process, a donor must log in or register in a Public Campaign – *select the appropriate choice from the dropdown list.* **Note:** The default is *Entire Site*
	Donors May Change Password	Activates a link in the Donor Site navigation bar that allows the donor to change their password at any time. **Note:** By default, donors may not change their passwords. Check the box to activate this feature.
	Forgot Password Active	Activates the Forgot Password link on the campaign login page, allowing the donor to receive an email with his/her password and establish a custom question in case he/she forgets the password again. **Note:** By default, the Forgot Password feature is inactive. Check the box to activate this feature.
	Password Expiration Active	Determines if donor passwords will expire. If activated, passwords will expire after two months. Once a password expires, a donor must change his/her password before gaining access to the Donor Site. The new password cannot be one of the last five passwords created for that donor. **Note:** By default, the Password Expiration feature is inactive. Check the box to activate this feature.
*	Primary Pledge URL	Establishes the primary URL that donors will use to access the site. This is the URL that will populate in system generated emails – *select the appropriate URL from the dropdown list.* **Note:** Use of any of the URLs will still grant access to the campaign site regardless of the primary URL indicated here.
	Default Website Skin	Sets the default website skin and establishes the look & feel of the campaign login page – *select the appropriate URL from the dropdown list.* **Note:** A generic skin created by FrontStream will be used if a specific skin is not selected from the list.
Single Sign-on		
	Single Sign-on Fields	**ADVANCED FUNCTIONALITY –** Only applies if setting up an advanced campaign that facilitates donor access to the site through Single Sign-on.



Settings

Start Date	
End Date	
Estimated Potential Donors	
Estimated Online Respondents	
Estimated Batch Respondents	
Align Donors By	Home Zip Code
Option Package	Kendal's Option Package
Reporting Option Package	- organization default -
Company Option Package	Option Package Name
Currency	United States Dollars
Default Donor Group	Donor Group 1
Donors May Custom Align	☑
Pledge Status	Pledging and Cancel/Delete Active
Donor Donation Count Limit	5
Donor Payroll Donation Count Limit	1
Minimum Donation For Designation	
Last Year Campaign	- select campaign -

Merchant

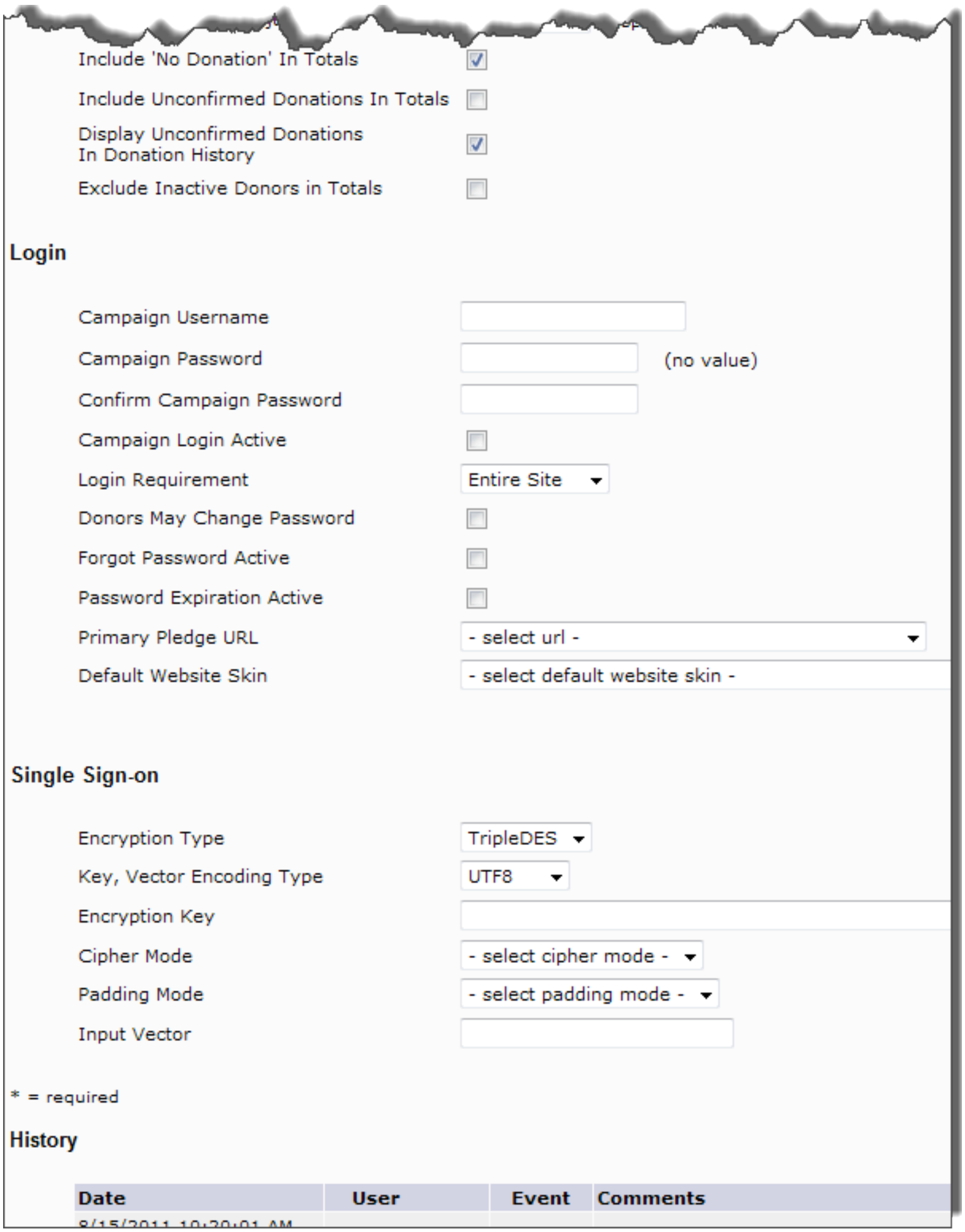
Merchant Account	[organization default]

Distribution

Distributing Organization	[inherit from organization]

Totals

Total Donation Goal ($)	50000.00
Total Donation Adjustment ($)	
Total Respondent Goal	1 Count



Include 'No Donation' In Totals ☑
Include Unconfirmed Donations In Totals ☐
Display Unconfirmed Donations In Donation History ☑
Exclude Inactive Donors in Totals ☐

Login

Campaign Username
Campaign Password (no value)
Confirm Campaign Password
Campaign Login Active ☐
Login Requirement: Entire Site
Donors May Change Password ☐
Forgot Password Active ☐
Password Expiration Active ☐
Primary Pledge URL: - select url -
Default Website Skin: - select default website skin -

Single Sign-on

Encryption Type: TripleDES
Key, Vector Encoding Type: UTF8
Encryption Key
Cipher Mode: - select cipher mode -
Padding Mode: - select padding mode -
Input Vector

* = required

History

Date	User	Event	Comments

When done filling out the campaign setting, click Save / Update .

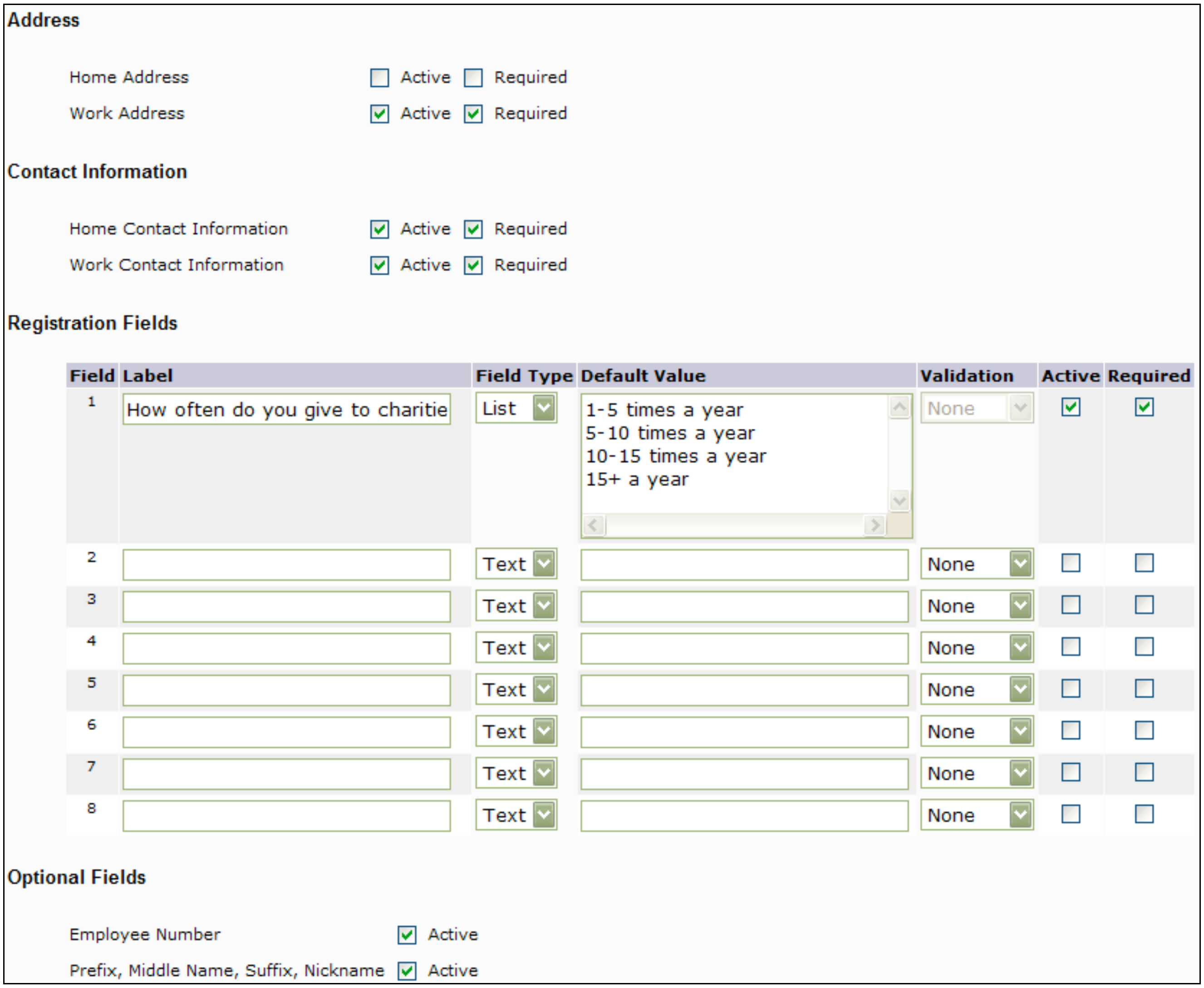
Registration

The Registration options control information donors are prompted to provide about themselves during the donation process. By default, the donor's first name and last name are collected. If these were previously provided through a donor import, they are displayed and can be edited by the donor. Registration fields are a useful way of getting information about the donors; for example, finding out their typical donating habits.

This tool is optional, but to use fill in the fields provided to define the Registration settings.

Registration Settings Fields

Req	Field	Description
	Address	Allows for the collection of the donor's Home and/or Work address – *check the active next to Home and/or Work to activate either of these fields. If desired, donors can also be forced to provide this information prior to submitting his/her donation.*
	Contact Information	Allows for the collection of the donor's Home and/or Work email, phone and fax – *check Active next to Home and/or Work to activate these fields. If desired, donors can also be forced to provide this information prior to submitting his/her donation.*
	Registration Fields	Allows the configuration of up to eight custom registration questions – *follow the steps below to configure these:* • Enter a field label into the Label column (this is the field name that the donor will see) • Select either *Text* or *List* from the Field Type dropdown • If applicable, enter the default value(s) in the Default Value column **Note:** If *List* is selected as the Field Type then at least one Default Value must be entered. • If desired, pick either *Numeric* or *Date* from the Validation column to activate the validation feature • Check the *Active* box to make the field active • If desired, check the *Required* box to force the donor to provide the information prior to submitting his/her donation
	Optional Fields	Allows for the collection of the Employee ID and/or additional name fields – *Check box next to Employee ID and/or Prefix, Middle Name, Suffix, Nickname to activate these fields.*



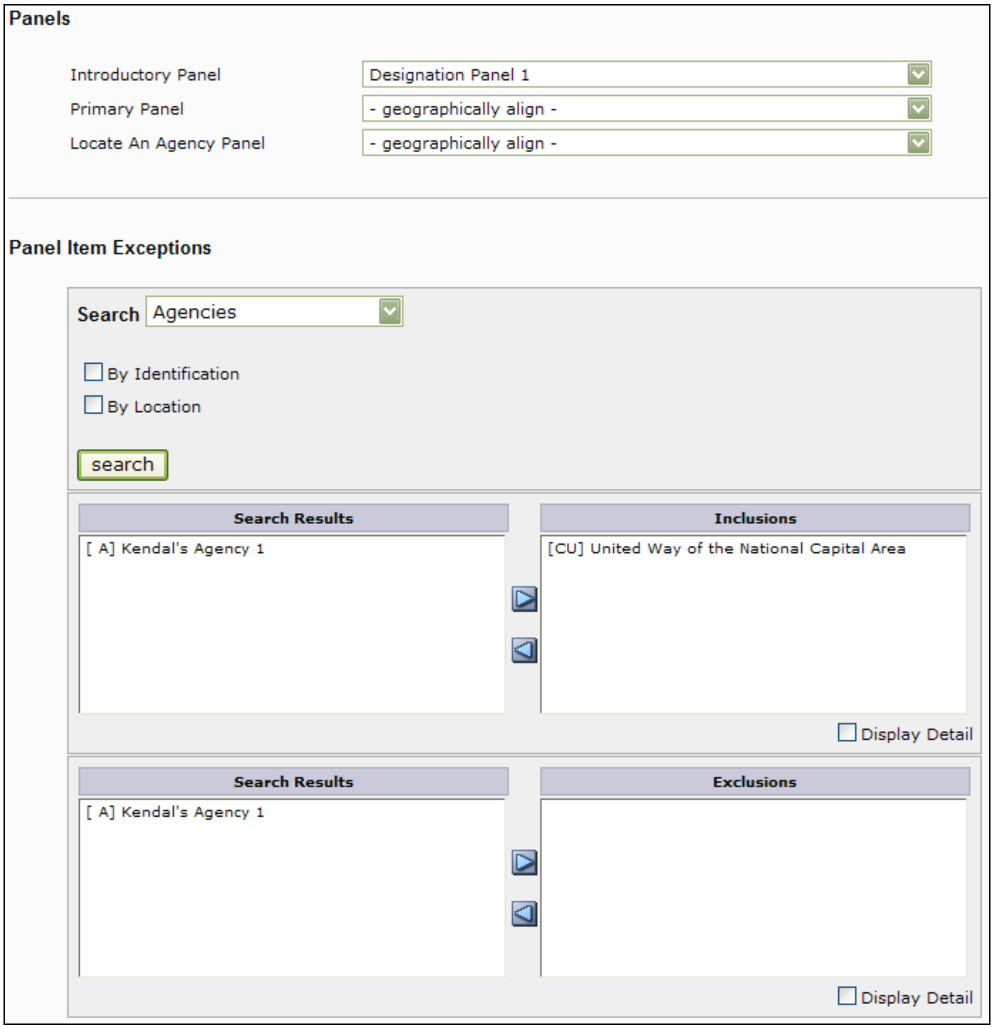
Designation Panels

Designation Panels control the donation designation options displayed to the donor during the pledge process. These are set up at the Organizations level and are associated to a specific campaign on the Designation Panels page. By default, the campaign will Geographically Align donors based upon the selected *Align Donors By* option on the Settings page.

To Modify Designation Options for a Specific Campaign

1. Enter the appropriate information in the fields provided

Designation Panel Settings Fields		
Req	**Field**	**Description**
	Introductory Panel	Contains one or more designation options that will be made available to the donor as part of a highlighted initial Invest Your Donation area of the pledge process – *select the appropriate panel from the dropdown list.* **Note:** For campaigns using the Standard Pledge Experience (SPE), this is located at the bottom of the Payment Details page; for campaigns using the Impact Pledge Experience (IPE), this is located on Home Page of the campaign website.
	Primary Panel	Contains one or more designation options that will be made available to the donor on the Invest Your Donation page, during the pledge process – *select the appropriate panel from the dropdown list.* **Note:** Campaigns using the IPE do not utilize Primary Panels. For IPE campaigns, select a Designation Panel that has been configured to be blank.
	Locate An Agency Panel	Locate an Agency Panels enable the ability to present large groupings of agencies to donors in a searchable format – *select the appropriate panel from the dropdown list.* **Note:** For both SPE and IPE campaigns this appears when the donor selects the ***Locate an Agency*** link on the Invest Your Donation page.
	Panel Item Exceptions	Panel Item Exceptions enables the administrator to *include* or *exclude* specific designation items from Designation Panels - *follow the steps below to configure these:* 1. Use the search area to locate the desired agency to include or exclude 2. Click to highlight the desired the agency in the appropriate Search Results box 3. Click the button next to the highlighted agency to add it to the Inclusions or Exclusions box as appropriate **Note:** Inclusions will include specific designation Items on the Primary Designation Panel**;** Exclusions will exclude specific designation Items on all types of Designation Panels.



2. When complete, click Save / Update

Email

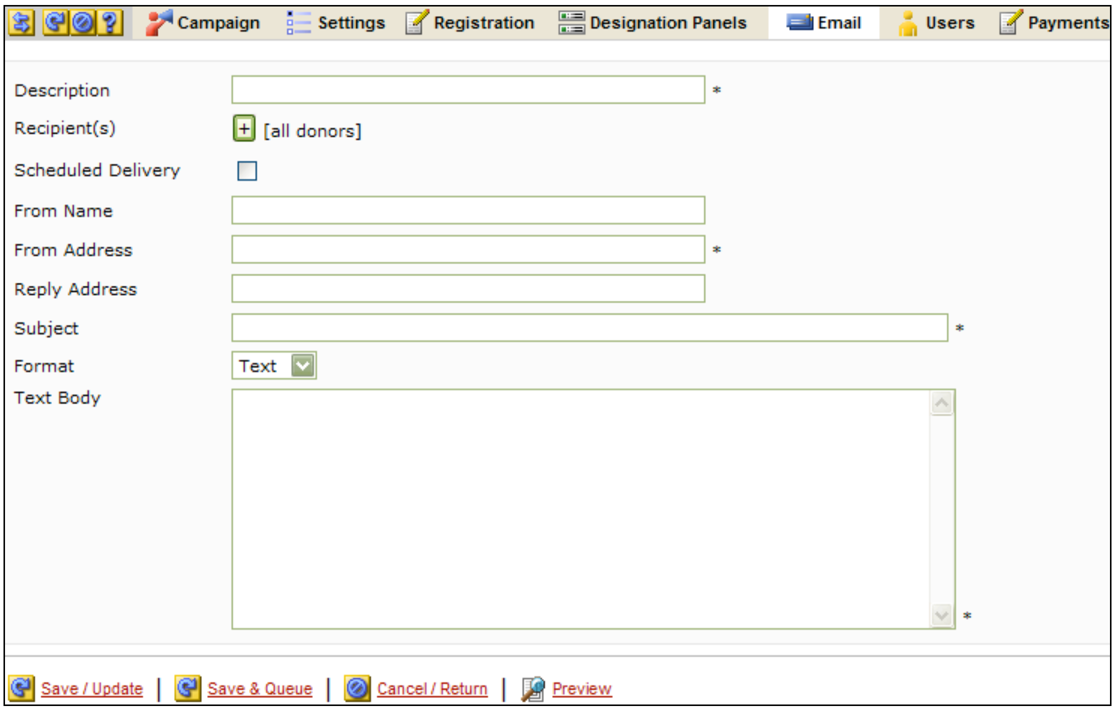
Like the Companies level, Email at the Campaigns level gives coordinators the ability to provide information about the campaign to donors via email .

Note:

- Emails are sent in Central Time and it is always a good idea to allow a 15-20 minute buffer time when scheduling emails.
- Share the FrontStream server IP address that emails are sent from with campaign coordinators so they can work with their IT department in order to instruct their anti-spam software to allow the emails from United eWay to be received. All emails from United eWay will have an IP address of 66.111.111.133.

To Create an Email

1. Click Add a new email
2. Fill in the fields provided to establish an email



3. Click Save / Update to save and update the system with the new email

   Click Save & Queue to save the email and place it in the send queue

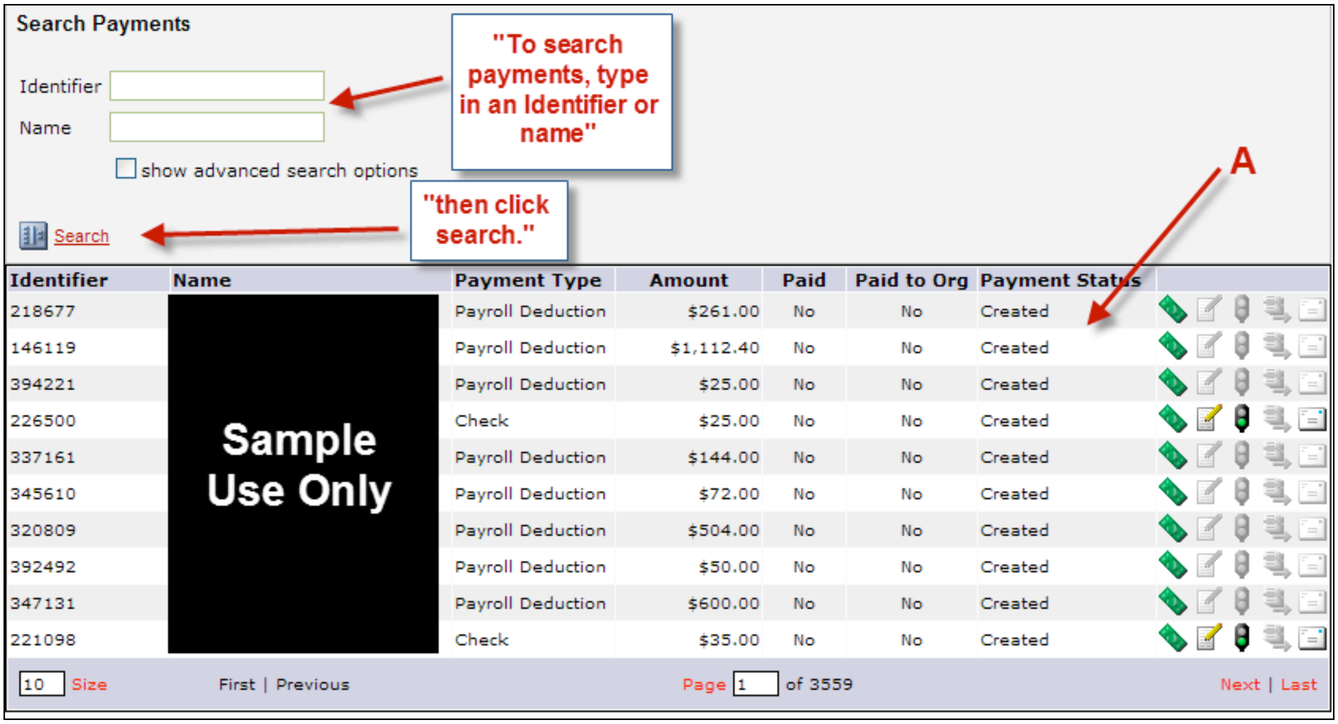
   Click Preview to preview the email

Users

From the Users level, administrators have the capability to affiliate users to different levels of the campaign. At the Campaigns level, users are associated to various campaign settings.

Payments

The Payments level gives administrators the ability to view and track pledges in the system. To search payments, type in an Identifier or name, then click *search*. The search results will appear below (A).



Identifier	Name	Payment Type	Amount	Paid	Paid to Org	Payment Status
218677	[redacted]	Payroll Deduction	$261.00	No	No	Created
146119		Payroll Deduction	$1,112.40	No	No	Created
394221		Payroll Deduction	$25.00	No	No	Created
226500		Check	$25.00	No	No	Created
337161		Payroll Deduction	$144.00	No	No	Created
345610		Payroll Deduction	$72.00	No	No	Created
320809		Payroll Deduction	$504.00	No	No	Created
392492		Payroll Deduction	$50.00	No	No	Created
347131		Payroll Deduction	$600.00	No	No	Created
221098		Check	$35.00	No	No	Created

For a Check payment type, administrators will have access to mark the checks as *paid* or *paid to org* once the coordinator has received the check, or if the check was sent directly to the organization. This feature can be useful in tracking which donors still need to submit their checks for payment.

Tools

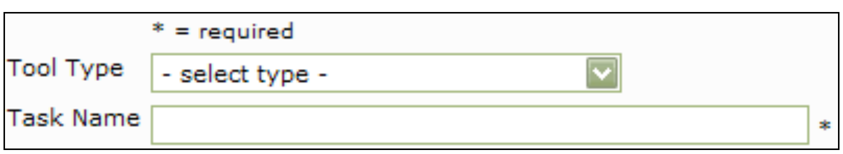
Like at the Companies level, Tools are a convenient way to perform highly functional jobs at the Campaigns level.

From Tools at the Campaigns level, administrators can:

- **Copy Donor Group Contacts** – Provides the ability to copy Donor Group contacts from the same or other campaigns.
- **Copy Exports** – Provides the ability to copy existing export criteria from another campaign.
- **Copy Reports** – Provides the ability to copy existing report criteria from another campaign.
- **Copy Websites** – Provides the ability to easily create new Donor Sites by copying an existing site from any of the campaigns configured.
- **Donor Donation Change Allowed** – Controls the ability for donors to edit an existing pledge. ***Never*** indicates the donor does not have the option to edit an existing pledge, ***Once*** gives the donor the option to edit an existing pledge one time, and ***Always*** gives the donor the option to edit an existing pledge multiple times.
- **Mass Disassociate Donors** – Allows for the mass disassociation of donors from a campaign.
- **Password Change Required** – Provides the ability to force existing donors to change their password upon their next login to the Donor Site.
- **Reset Donation Count Limit** – Controls the ability for existing donors to make multiple gifts. By default, donors are only allowed to make a single gift. Administrators should establish the number of gifts a donor is allowed to make. The maximum allowed gifts is 99.
- **Reset Website Content Inheritance** – Provides the ability to reset website content inheritance from inherit all to none, or vice versa.

To Perform a Task in Tools

1. Click Add a new Task
2. Select a Tool Type from the dropdown menu. Specific instructions will appear for each Tool Type.
3. Enter a Task Name



4. Click Save / Update

Donors

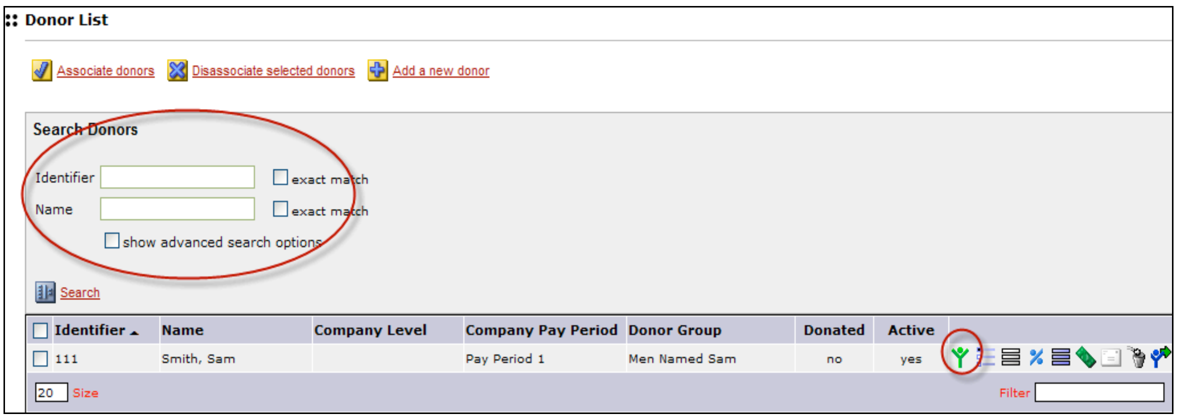
This is where donors are grouped to their campaign into a Donor List.

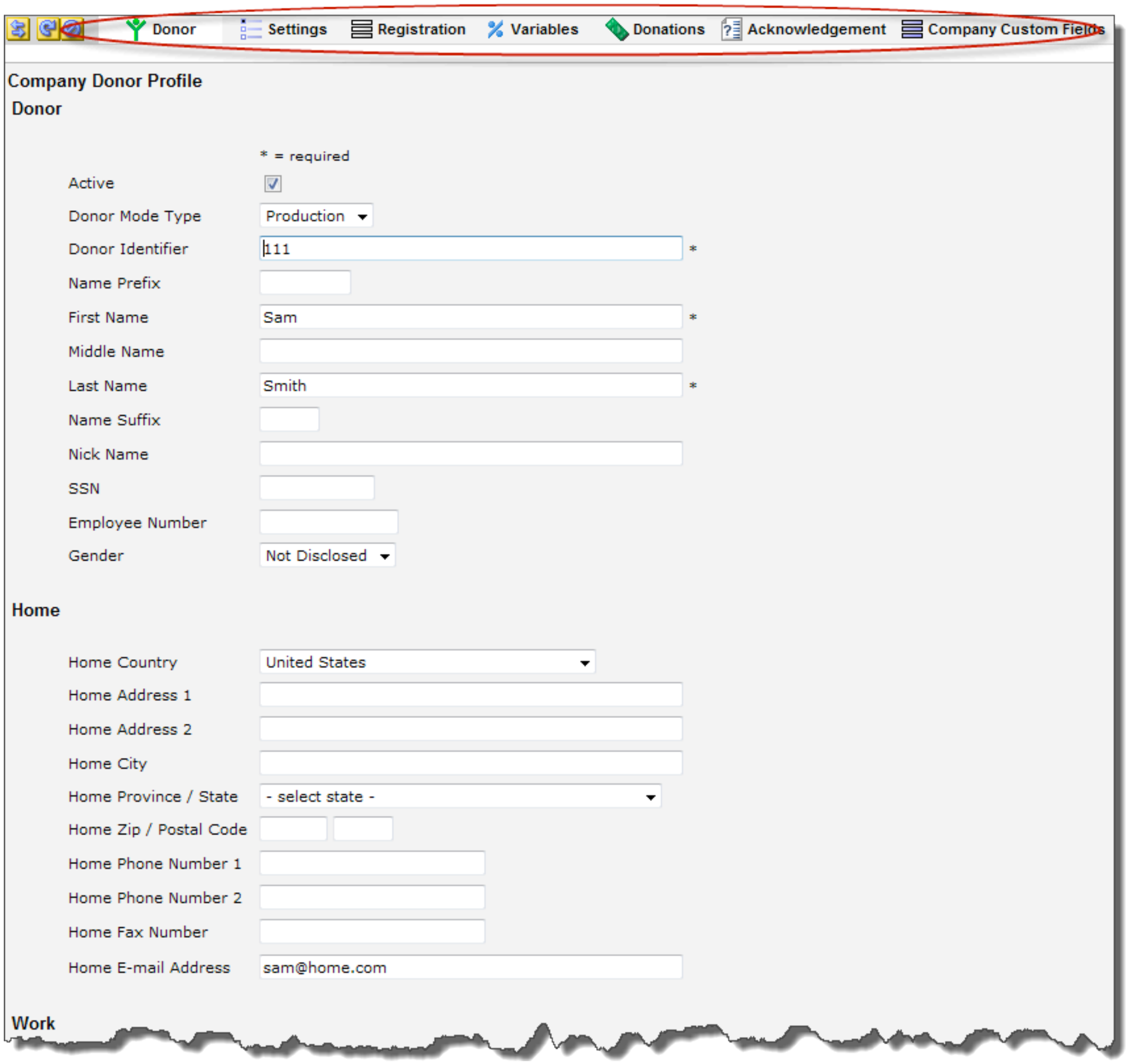
Note: Donors added here are also visible at the Companies level.

Donors can be searched by their name or by their *Identifier*. An *Identifier* is the code assigned to the donor when entered into the system.

Each donor in the system has several options to view and configure. All these options can be accessed from the top navigation bar after a specific donor has been selected.

> **Note:** To view a donor's profile information, utilize the Search functionality, using the fields on the main donor page. Then click .





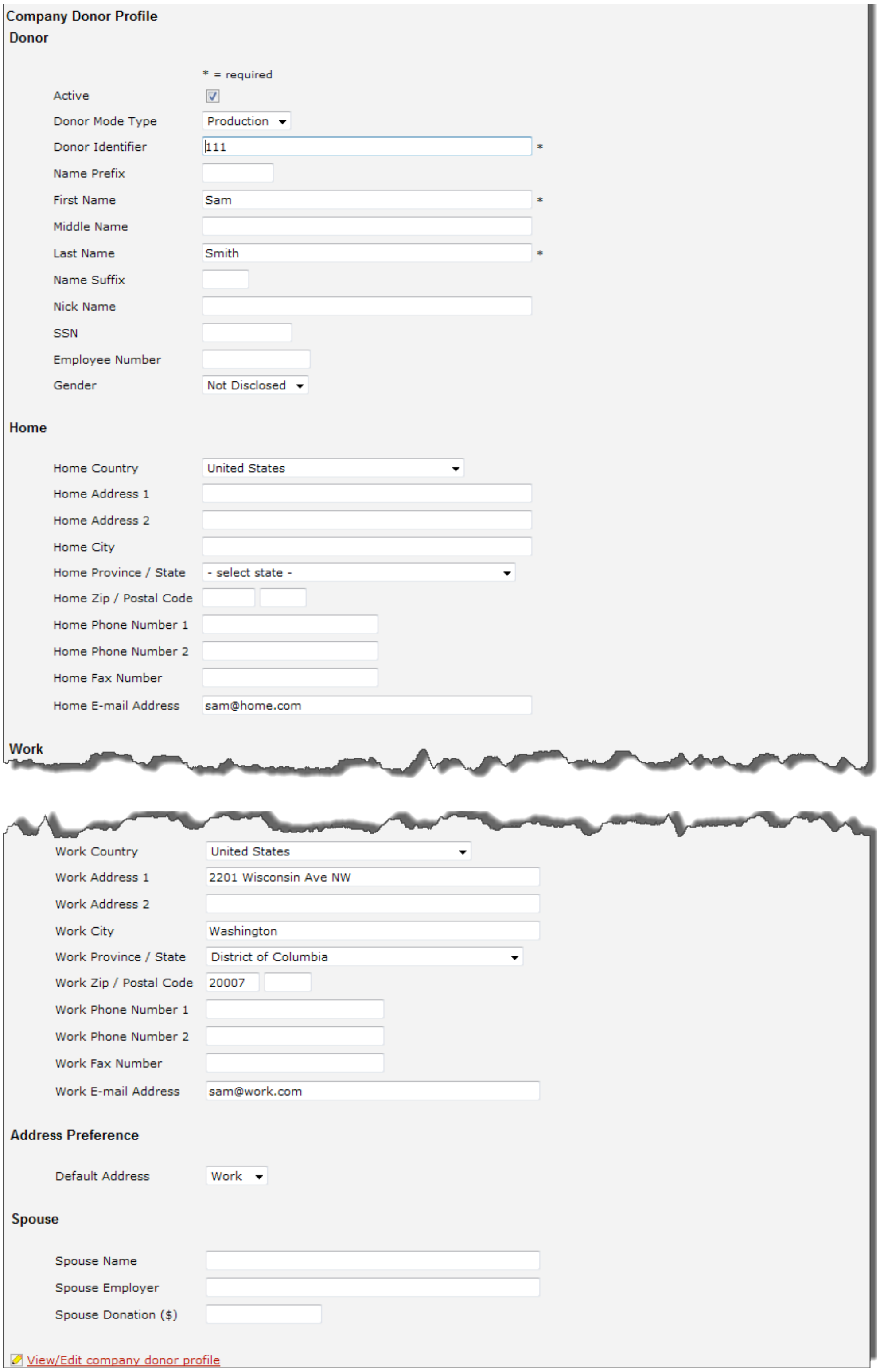
To Add Donors One at a Time

Note: To add donors in bulk, see section on Importing

1. Click Add a new donor
2. Fill in the fields provided to establish donor details

Add a Donor Fields		
Req	**Field**	**Description**
Donor		
	Active	Required to activate the donor.
*	Donor Mode Type	***Production*** – Use for the actual campaign. ***Demo*** – Use when impersonating a donor.
*	Donor Identifier	A code associated to the donor.

Note: When choosing an Address Preference, it is more common to choose *Work* as the Default Address.


Company Donor Profile

Donor

* = required

Active	☑
Donor Mode Type	Production
Donor Identifier	111 *
Name Prefix	
First Name	Sam *
Middle Name	
Last Name	Smith *
Name Suffix	
Nick Name	
SSN	
Employee Number	
Gender	Not Disclosed

Home

Home Country	United States
Home Address 1	
Home Address 2	
Home City	
Home Province / State	- select state -
Home Zip / Postal Code	
Home Phone Number 1	
Home Phone Number 2	
Home Fax Number	
Home E-mail Address	sam@home.com

Work

Work Country	United States
Work Address 1	2201 Wisconsin Ave NW
Work Address 2	
Work City	Washington
Work Province / State	District of Columbia
Work Zip / Postal Code	20007
Work Phone Number 1	
Work Phone Number 2	
Work Fax Number	
Work E-mail Address	sam@work.com

Address Preference

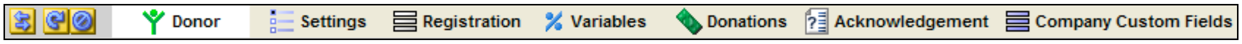
Default Address	Work

Spouse

Spouse Name	
Spouse Employer	
Spouse Donation ($)	

View/Edit company donor profile

3. Click Save / Update
4. After clicking Save / Update, the top navigation bar will become active and administrators gain access to further customize donor options.



5. Navigate to each tab and fill in the fields provided to further define the donor

Settings Tab Fields		
Req	**Field**	**Description**
Campaign Settings – Determines the options available to a donor, on the Donor Site.		
*	Donor Group	The group the donor is aligned to for the campaign.
*	Coordinator Role	This offers the ability to assign the donor to a Coordinator Role in the system. **Note**: There is an option to select *none*.
	Reporting Coordinator Level	This offers the ability to assign the donor to a Reporting Coordinator Level. Use to move available coordinator levels to the selected coordinator levels pool.
	Summary Coordinator Level	This offers administrators the ability to compare Dashboard totals by the coordinator levels selected here.
	Distributing Organization Date Terms and Conditions Accepted	FrontStream use only.
Giving – Determines the various aspects of donor giving.		
	Last Year Total Gift ($)	Amount donor gave in the previous year.
	Leadership Recognition Name	How the donor would like to be recognized in publications when they obtain a Leadership Level.
	Anonymous	Activating this option indicates the donor wishes to remain anonymous and does not want to be recognized in Leadership recognition publications.
	Donation Ask Amount ($)	An amount to ask the donor for. **Note:** This option can be very useful when a company is unwilling to provide donor salary information.
	Donor May Change Donation	Controls the donor's ability to change a pledge. Select *Never*, *Once*, or *Always.*
	Donation Count Limit	Controls the donor's ability to submit multiple gifts. The default for new donors is 1, and the maximum number of gifts is 99.
	Spouse Name	The donor's spouse's name, as captured for combined leadership recognition during the specific campaign – *If applicable.*
	Spouse Employer	The donor's spouse's Employer, as captured for combined leadership recognition during the specific campaign – *If applicable.*
	Spouse Donation ($)	The donor's spouse's Donation, as captured for combined leadership recognition during the specific campaign – *If applicable.*
Company Settings		
Account – These fields affect the donor's Login Account		

Settings Tab Fields		
Req	**Field**	**Description**
	User Name	When a donor logs in to the donor site, he/she will be asked for the campaign code, a username, and password (if SSO is not enabled for the campaign). The username must be unique for each donor within a company and can consist of alpha, numeric, and/or special characters. **Note:** The character limit is 50.
	Password	Passwords must be 6-15 characters in length and contain at least one character from two of the following three groups: alpha, numeric, and special character.
	Confirm Password	Confirm the password entered in the above field.
	Required to Change Password at Next Login	Activating this option will mandate the donor to change their password the next time they log in to the donor site. This setting can be activated globally for an entire donor group or for all donors within a campaign.
Settings – These settings affect filtering of reports and email recipients. Additionally, these fields provide administrators with a Single Sign On link from the donor site to the administrative site.		
	Company Level	Company Levels are informational and used for reporting and segmenting email.
	Coordinator Level	Determines what donor records a coordinator will have access to through the Campaign Dashboard.
	Functional Level	Used for filtering Campaign Reports and Exports. In addition, you can send Email to donors aligned to specific Functional Levels.
	Coordinator	All administrative users associated with the associated campaigns will be available for associating a donor as their site coordinator.
	System Administrator User Name	You will only be able to associate a specific administrative username to one donor in the company. That is to say, you cannot assign the same system administrative username to two donors within the same company.
	Donor Ceiling Override	This field overrides the campaign donor ceiling.
Salary – These fields determine how the system computers payroll deductions and the type of payroll deduction "ask" questions that can be used. They can also determine what information is asked of the donor when the "donor may input salary" option has been activated. These fields cannot be changed once a pledge is submitted (online or batch).		
	Company Pay Period	Select from the dropdown menu. All established pay cycles for the company will be available for association.
	Hourly Pay rate ($)	**Note:** Due to security reasons, this field will never appear to be populated. (Value not shown) – indicates there is a value in the database. (no value) – indicates there is no value available in the database.
	Annual Salary ($)	**Note:** Due to security reasons, this field will never appear to be populated. (Value not shown) – indicates there is a value in the database. (no value) – indicates there is no value available in the database.
	PTO Hourly rate ($)	**Note:** Due to security reasons, this field will never appear to be populated. (Value not shown) – indicates there is a value in the database. (no value) – indicates there is no value available in the database.

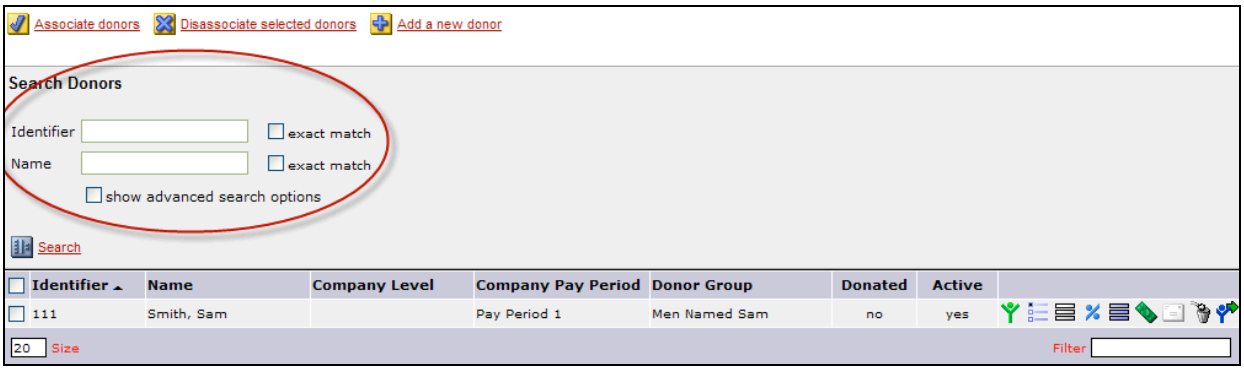
The remaining tabs (Registration, Variables, Donations, Acknowledgement, and Company Custom Fields) allow administrators the ability to add custom fields under each section for the particular donor.

6. Remember to always click Save / Update after configuring every tab page

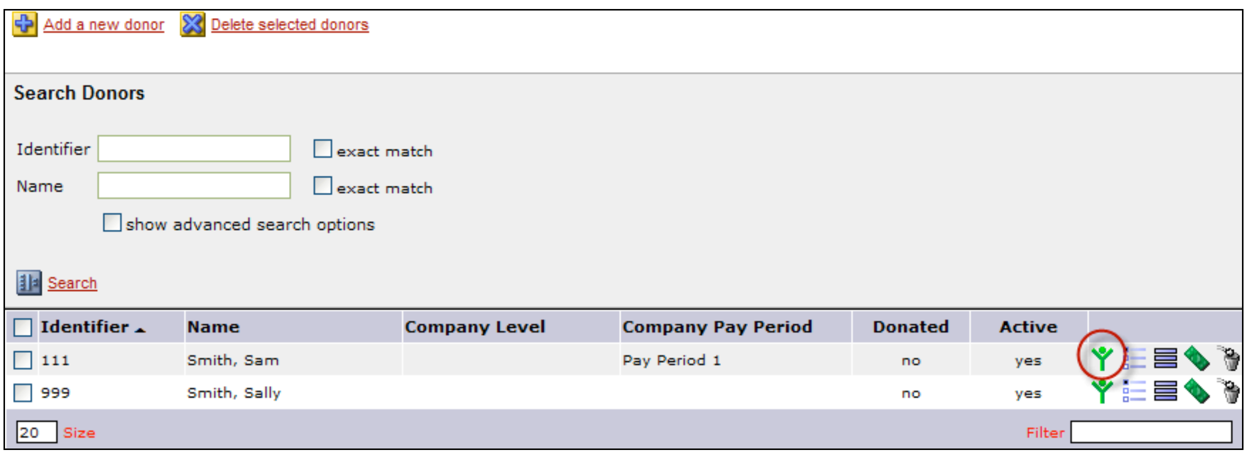
To Activate/Deactivate Donors

To activate or deactivate an individual donor at the Campaigns level, check or uncheck the *Active* box, found when editing donor information.

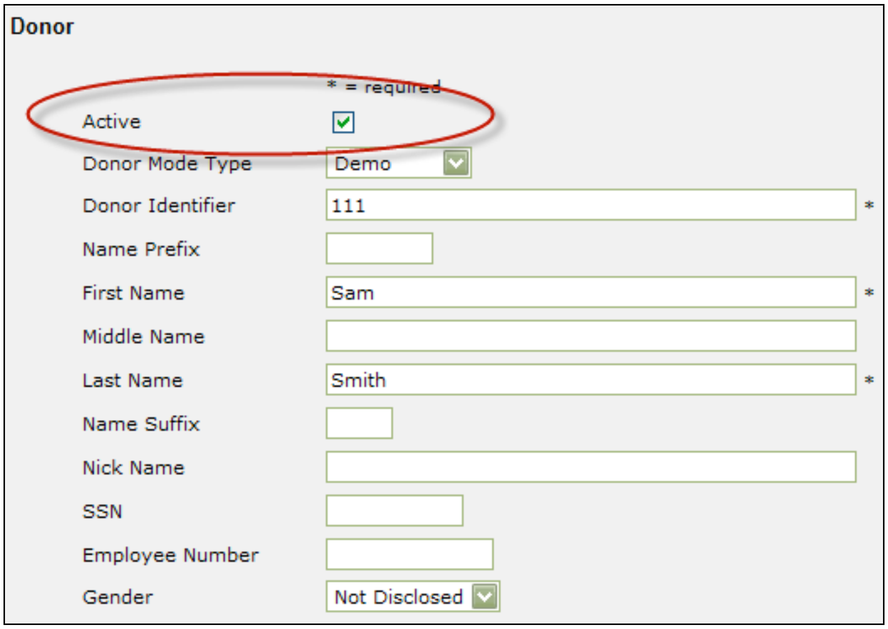
1. Search for a donor in the Donor List. Can search either by the donor's name or *Identifier*.



2. Once a specific donor is found, click the green donor icon, located next to the donor's name



3. Check the *Active* box to activate the donor or uncheck the *Active* box to deactivate the donor



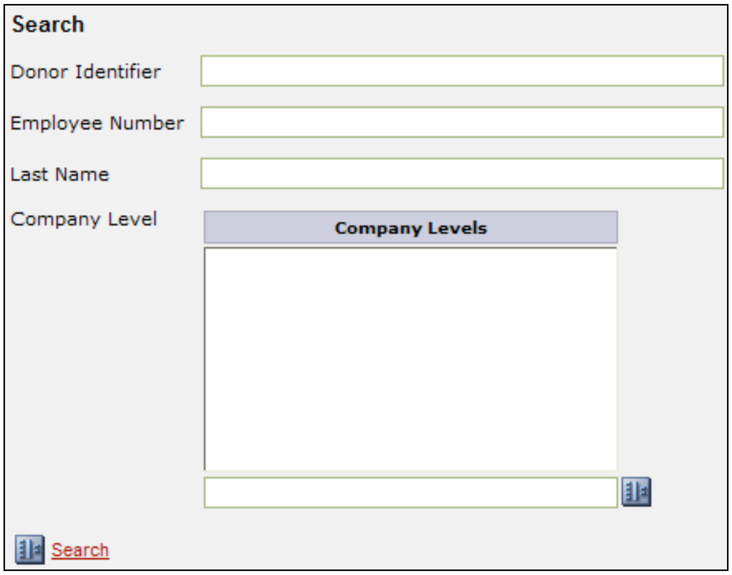
4. Click Save / Update

When a donor list is imported into the system, administrators prepare the settings for active or inactive donors on the document.

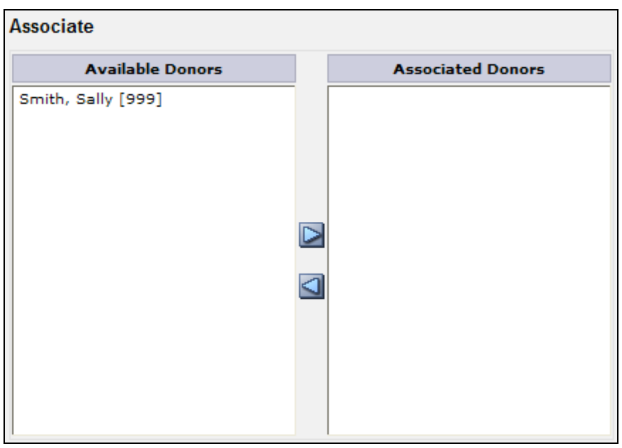
To Associate Donors

Note: Associating donors to a campaign differs from activating donors. Association refers connecting the donor to a campaign.

1. Click Associate donors
2. Search for a donor by their *Donor Identifier*, *Employee Number*, *Last Name*, and/or their *Company Level*



3. Then select donors from the list of available donors and move them to the list of associated donors, using . Donors can be moved back by selecting an associated donor and clicking .

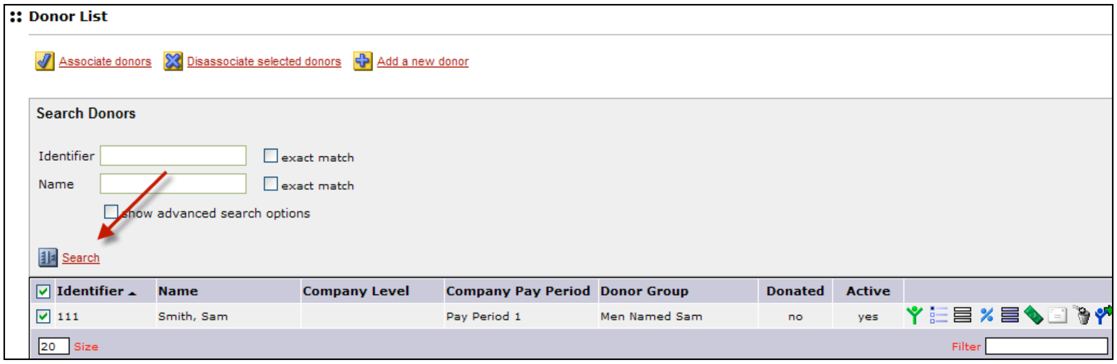


4. When complete, click Save / Update

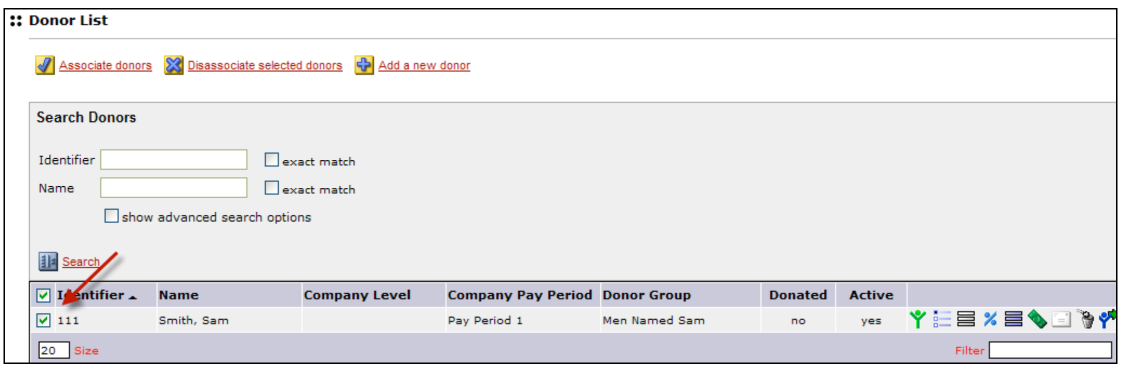
To Disassociate Donors from the Campaign

Note: Disassociating donors from a campaign differs from deactivating donors. Disassociation refers disconnecting the donor from the campaign. After disassociating a donor from a campaign, the donor remains active in other campaigns he/she is associated to.

1. Search for donors by clicking Search



2. Check donors to disassociate



3. Click Disassociate selected donors
4. A popup will appear verifying it is OK to disassociate the selected donors from the campaign. Click *OK* to confirm.

There is also an option to Mass Disassociate Donors at the Tools level. See the section on Tools above.

Donor Groups

At the Donor Groups level, administrators can organize donors into specific groups. Donor Groups provide the means of segmenting donors and establishing unique sets of business rules to different groups of donors. At least one Donor Group must be set up for each campaign; however, multiple Donor Groups can be set up and associated with a single campaign to alter the donor experience for a particular segment of donors.

A simple campaign typically consists of one Donor Group, with all the donors in one place and all the donors with same options. Most campaigns, however, have a few different Donor Groups, with differing donor options.

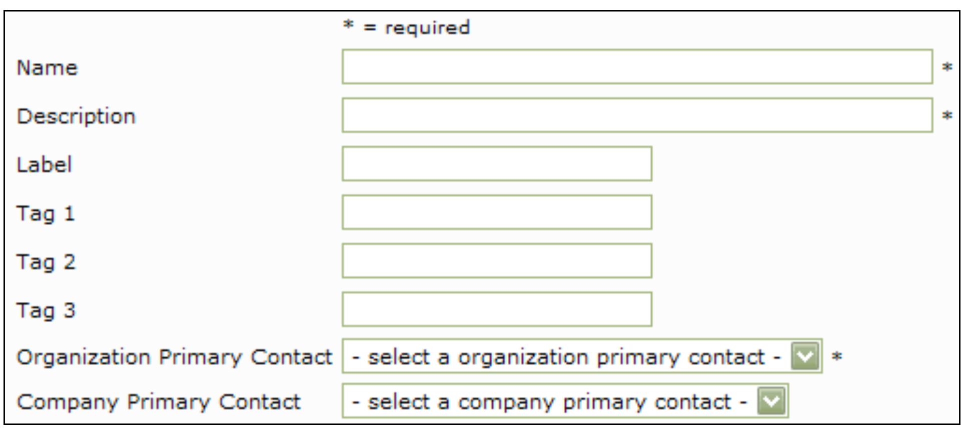
In order to figure out how many Donor Groups are needed for a campaign, it is important to first figure out the kind of business rules groups of donors should be assigned. Every time a business rule is changed, for even a small group of donors, a new Donor Group must be created. Business rules are configured at the Option Sets level.

Note: In order to activate a campaign, a default Donor Group must be set up an assigned to the campaign.

To Add a Donor Group

1. Click Add a new donor group
2. Fill in the fields provided to define a default Donor Group

Add a Donor Group Fields		
Req	**Field**	**Description**
*	Name	This is the name that will be used to identify the Donor Group.
*	Description	Can be the same as the name or can be used to provide additional details.
	Label	This label is used for reporting purposes. **Note:** When a donor submits an online pledge, their donation is flagged with the Donor Group label at the time of their donation. Numerous reports can be filtered by Report Label and most exports contain the Report Label.
	Tag Fields (1, 2, 3)	**ADVANCED FUNCTIONALITY –** The *Tag* fields provide the ability to store up to three additional attributes for each Donor Group. These tags are included in the Donor Group Export and can be used to summarize data across groups with common attributes.
*	Organization Primary Contact	Indicates the Primary Contact person from an organization. This individual is responsible for the management of the campaign experience of this Donor Group – *select from the dropdown list.*
	Company Primary Contact	Indicates the Primary Contact person from the company responsible for the management of the campaign experience of this Donor Group – *select from the dropdown list.*



3. Click Save / Update
4. After clicking Save / Update, the top navigation bar will become active and administrators gain access to further customize donor options.

5. Navigate to each tab and fill in the fields provided to further define the Donor Group

DONOR GROUP TABS

Settings

Settings Tab Fields		
Req	**Field**	**Description**
*	Website	A Donor Group must be associated with an active website in order for donors to log into a Donor Site – *select the desired Website from the dropdown list. If a website has not been set up at this point, come back to assign a website to a Donor Group.*
*	Option Package	Choose the Option Package to be used to define the donor experience for donors in this group. By default, the Option Package will inherit from the campaign setting – *if desired, select a specific Option Package from the dropdown list.* **Note:** All Optional Packages created at the Organization level will populate in the dropdown list.
	Gift Amount Alert Threshold	Gift Amount that will trigger an automated email to the assigned site coordinator alerting him/her when an associated donor submits a pledge that meets or exceeds the specified threshold. **Note:** Refer to the help documentation on setting up Site Coordinator functionality for more information.
	Private	Flags the Donor Group as private. Only donors pre-associated with the Donor Group will be able to access its giving options. **Note:** The default is *public* (unchecked).
	Total Donation Goal	Dollar goal for donors within the Donor Group. **Note:** If activated, the amount recorded here will be used to calculate and display percent of goal on the Pledge Thermometer.
	Total Donation Adjustment	Allows the campaign coordinator to adjust the total dollars raised display on the Pledge Bar by either a positive or negative number.
	Total Respondent Goal	Participation goal for the Donor Group. Value can be entered as either the actual number of respondents, or as a percentage of the Estimated Potential Donor Count established for the Donor Group. **Note:** If activated, the amount recorded here will be used to calculate and display percent of goal on the Participation Thermometer.
	Total Respondent Adjustment	Allows campaign coordinators to adjust the total respondent rate displayed on the pledge bar by either a positive or negative number.
	Estimated Potential Donor Count	Estimated number of donors in the Donor Group. Value is used when Respondent Goal is set to Percentage
	Summation Tag	**ADVANCED FUNCTIONALITY:** This summation tag allows coordinators to select a Donor Group Tag (configured in the Donor Group Profile) to use to aggregate data when using either the Donor Group Donation Pledge Bar or the Donor Group Participation Pledge Bar – *select from the dropdown list if applicable.*

Contacts

1. Click Add a new contact

2. Fill in the fields provided to define the contact
3. Click Save / Update

Designation Panels

Donors are automatically aligned to the Designation Panels settings configured at the Campaigns level. If set up here, however, specific Donor Groups within a campaign can have different Designation settings. Donor Group designation settings are configured the same way Campaign designation settings are configured. See Campaigns level, Designation Panels, above, for more information.

Territories

From Territories, administrators can assign Donor Groups to associated territories. Use to move available territories to the associated territories pool.

Users

From the Users level, administrators have the capability to affiliate users to different levels of the campaign. Under Donor Group settings, users are associated to various Donor Group settings.

6. Remember to always click Save / Update after configuring every tab page

Importing

At the Importing level, administrators can import data files, such as Donor Groups.

Note: For large files it is useful to break them up into smaller batches to cut import wait time. Also, it has been reported that if the file being imported is open on the desktop, the system will not upload the file.

Import Types Include:

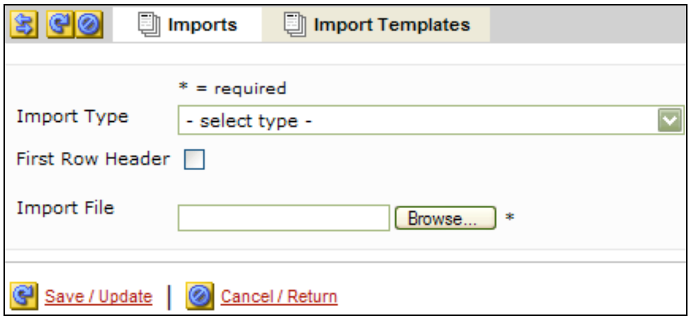
- **Disassociate Donors** – Allows for the selective mass disassociation of donors from a campaign.
- **Donations** – Provides the ability to import donations not made on the Donor Site.
- **Donation Add-on Imports** – Provides the ability to import Donation Add-on information.
- **Donation Deletes** – Provides the ability to delete donations via an import.
- **Donation History** – Provides the ability to import Donation History.
- **Donors** – Allows for a selective mass import of donors into the system or updating of selective fields.
- **Donor Groups** – Allows for an import of Donor Groups into the system.
- **Missing Percent of Salary** – Provides the ability to import Missing Percent of Salaries.
- **Special Events** – Provides the ability to import Special Events.
- **User Associations** – Provides the ability to import User Associations.

To Add an Import

1. Click Add a new Import

2. Select an Import Type, then click Browse... to choose a file to import

   Note: The file selected to import must be a Tab Delimited format



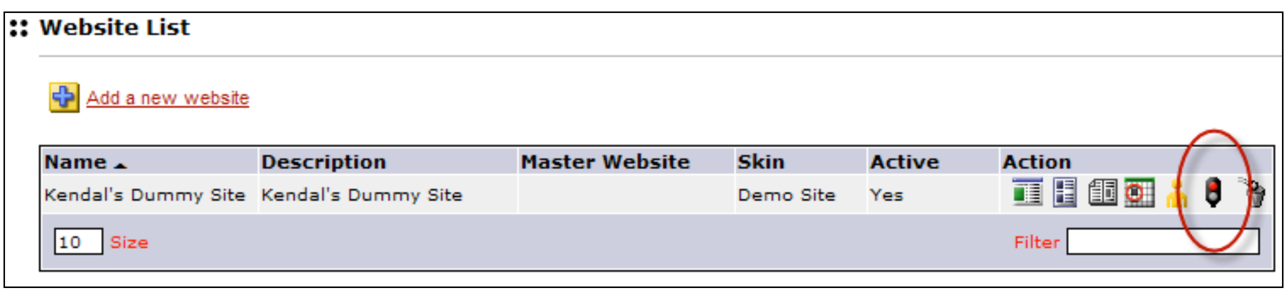
3. Click Save / Update

Websites

Establishing a Website Profile involves naming the website and selecting a desired skin. Once the website is created, custom content, campaign events, and news items can be built. Websites control the look and feel, along with the messaging content on the Donor Site set up at the Campaigns level. At least one website must be set up for each campaign. However, multiple websites can be set up and associated with a single campaign to alter the donor experience with a particular Donor Group.

The options configured at the Websites level generate the appearance and available options on the Donor Site.

In order for a donor to access the Donor Site, the Donor Groups and the Campaign must be active and configured accurately. Activated levels are marked with a red stop light. For example, to verify the Websites level is activated, click Websites, from the Campaigns level, and the page will look similar to the image below:



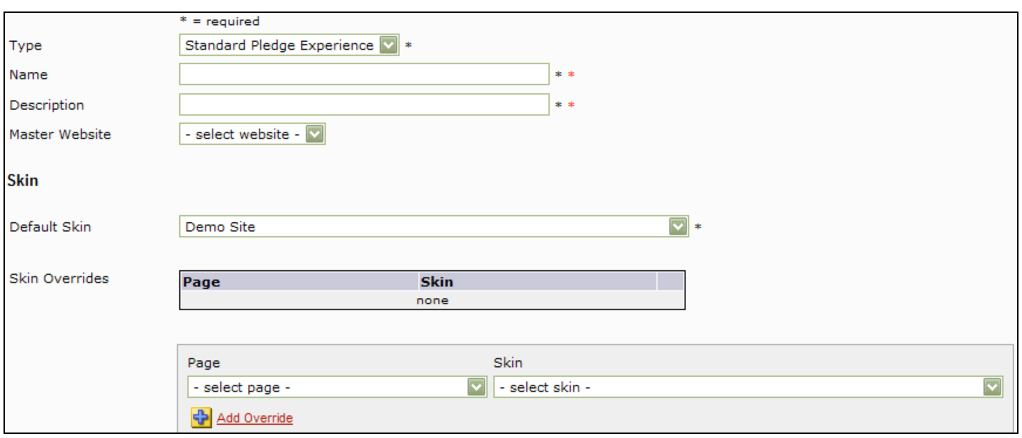
For more detail, please refer to further documentation, *Setting up a Basic Campaign*.

To Add a Website

1. Click Add a new website
2. Fill in the appropriate information in the fields provided

Add a Website Fields

Req	Field	Description
*	Type	***Standard Pledge Experience (SPE)*** – Traditional online pledging experience. Donor accesses the Donor Site, chooses a pledge type, amount to give, designations, and then checks out. On the back end, administrators choose questions based on the donor's salary level. ***Impact Pledge Experience (IPE)*** – Reverses the traditional online campaign experience and provides both high level and in-depth information about a United Way, including its priorities, images, goals, and results. ***Dynamic Pledge Experience (DPE)*** – Provides a new donor interface that integrates a new level of customization in Campaign Management. DPE can be configured to provide a **Pledge Driven** or **Designation Driven** experience for the employees of a campaign. Additionally, DPE enables United Ways to effectively communicate their initiatives to their users. **Note:** The default is *Standard Pledge Experience (SPE)*
*	Name	This name will be used to identify the website.
*	Description	Can be the same as the name or can be used to provide additional details.
	Master Website	Selecting a master website turns this website into a child website, permitting content to pull directly from the master website.
*	Default Skin	Select either a *custom skin* or *legacy skin* from the dropdown list. **Note:** When Impact Pledge Experience (IPE) is selected for the website type, a skin designed for the IPE must be utilized.
	Skin Override	This is an optional feature that allows administrators to associate a different skin to specific pages of the Donor Site.



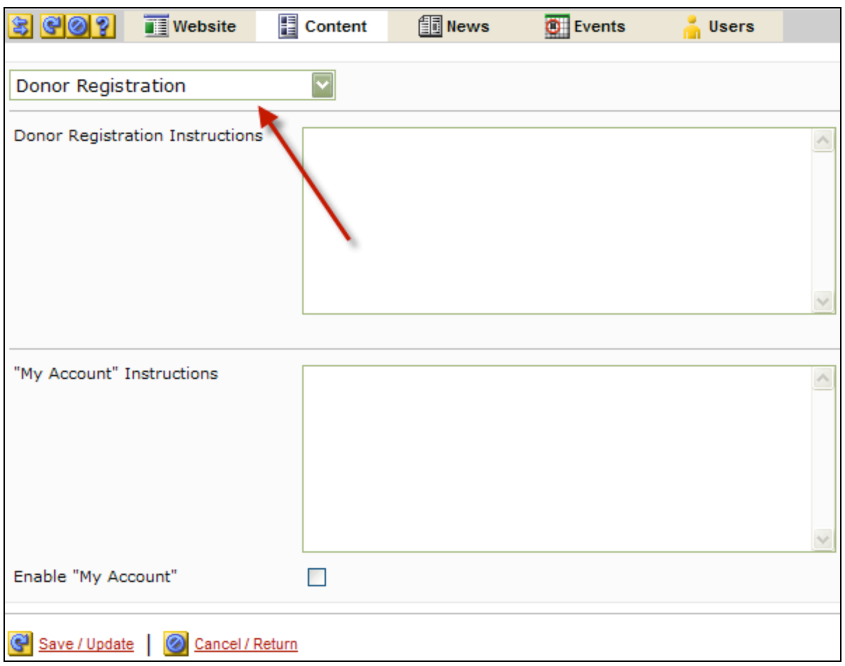
3. Click Save / Update
4. After clicking Save / Update, the top navigation bar will become active and administrators gain access to further customize the website.

5. Navigate to each tab and fill in the fields provided to further define the website options. See the following information in this document to learn more about these tabs. Remember to always click Save / Update whenever changes are made.

Content

Content allows administrators to create custom messaging, activate pledge bars, create email templates, activate campaign surveys, populate a company privacy policy, provide instruction gift type text, and customize instructional text presented on the Designation Panels.

To access and modify the content of a website, select an item to edit from the dropdown menu.



Content Tab Dropdown Menu	
Item	**Description**
Donor Registration	Create customized instructional text to be displayed on the registration page when donors self-register into a campaign.
Login/Logout	Customize the default temporary login disable message that displays to a specified webpage when *logout* is selected or if a time out is reached, requiring a login session renewal. Customize the default text that displays on the login page for self-registering donors. Send an automated email to a donor, alerting them that their password has been changed.
Welcome Message	Create a Welcome Message to display on the donor's homepage when they first log into the Donor Site. The Welcome Message can be accompanied with an image and multimedia files. Often times, the Welcome Message is utilized as a letter to donors from the CEO. There is also the ability to upload a signature image that will appear directly beneath the Welcome Message.

Content Tab Dropdown Menu

Item	**Description**
Marketing Message	Create a Marking Message and upload an associated image. The Marketing Message displays beneath the Welcome Message and multimedia files, on the donor's home page.
CEO Signature Image	Upload an image file to display directly beneath the Welcome Message.
Images	Upload a company logo and campaign graphics. If no logo or graphics are uploaded here, the system displays generic images, as a default.
Website Multimedia	This provides an option to present campaign donors with an audio or video multimedia file. The multimedia files display on the donor's home page, between the Welcome Message and the Marketing Message. The link wording for the multimedia file can be customized.
Pledge Bar	If set up, this displays pledge thermometers to donors, in the right hand panel of the home page. This enables administrators to communicate with donors, by showing them the current campaign status.
Designation Panels	Edit and customize the text displayed to the donors when they invest their contribution. Customize the text that displays with the option to proceed to the Designation Panel, Auto Allocation, Write-in Agency link, Locate an Agency link and pop-up window, and the National Agency Search link.
Thank You Message	When employees have completed the donation process, the campaign administrator has the ability to present the donor with a custom thank you message.
Confirmation Page	Allows for customizing the content that appears when a donor confirms a continuous gift.
Contribution Review	Create and display additional instructions to display at the top of the contribution review page. Create a payroll authorization statement for the printable pledge summary. Customize default text on the pledge summary page. Activate and customize a Submit Contribution reminder pop-up. Customize an IRS message and minimum amount visible on the printable pledge summary for payroll deduction pledges.
Donor Review	Create and display additional instructions to display at the top of the donor information review page.
Confirmation Emails	Create unique confirmation email templates for each gift type. Confirmation emails are automatically sent to donors when a gift is submitted. Donor records must be populated with a valid work email address for this functionality.
Leadership Level Page	If leadership levels are set up for the associated Donor Group, the leadership level link will display in the donor's navigation tree. The text displayed when the donor selects the informational link can be customized. The system will build the page with parameters administrators establish when building the associated Donor Group's leadership levels. System generated text provides administrators the ability to build the Leadership level page dynamically for differing Donor Groups, or administrators can build their own Leadership level page, utilizing text and HTML.
Leadership Recognition	When the combined Leadership Recognition option has been activated in the associated Leadership Option Set, additional Leadership fields are displayed to the donor when they elect to be a Combined Leadership Giver. *Spouse name*, *employer*, and *donation* field labels may be customized in this section, along with the text that is displayed with the option to be a Combined Leadership Giver.
Corporate Match Program Page	If Corporate Match programs are set up for the associated Donor Group, the Corporate Match link will display in the donor's navigation tree. The text displayed when the donor selects the informational link can be customized. The system will build the page with parameters administrators establish when building the associated Donor Group's Corporate Match Programs. System generated text provides administrators the ability to build the Leadership level page dynamically for differing Donor Groups, or administrators can build their own Corporate Match page, utilizing text and HTML.

Content Tab Dropdown Menu	
Item	**Description**
Donation History Page	When donation history has been uploaded for a donor, a new link and page on the Donor Site automatically displays to the donor, showing them their giving history. Customize the default text that displays above the donation history, on the giving history page of the Donor Site. HTML may be used.
Privacy Policy Page	The system does not provide a default private policy that displays to the donor. Create a privacy policy with text and HTML. A PDF can also be uploaded.
Contact Us Page	Customize the default text displayed on the system generated Contact Us page or create a Contact Us page.
Survey	Can enable and disable the survey that displays to online donors at the end of the pledging process.
Custom Pages	When donors view the Donor Site, administrators have the option of presenting information about United Way, company incentives, etc. Use these fields to link an existing website or to create a mini-site of information. Links to the customized pages will appear in the donor's campaign navigation panel.

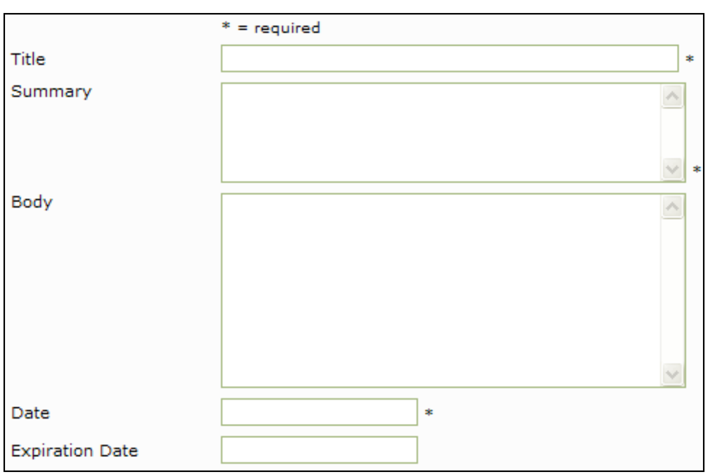
News

Website News allows administrators to keep donors informed of important items of interest regarding the campaign. This feature is often used to motivate donors; for example, letting donors know when a substantial gift has been received or when the campaign committee decides to add a bonus day off for a contribution of a percentage of salary. When an expiration date is met, the news item becomes inactive and is no longer displayed.

To Add a Website News Item

1. Click Add a new website news item
2. Fill in the fields provided to define a news item

   Note: New Items will not appear on the Donor Site until the date indicated in the *Date* field (marked with an asterisk).



* = required
Title *
Summary *
Body
Date *
Expiration Date

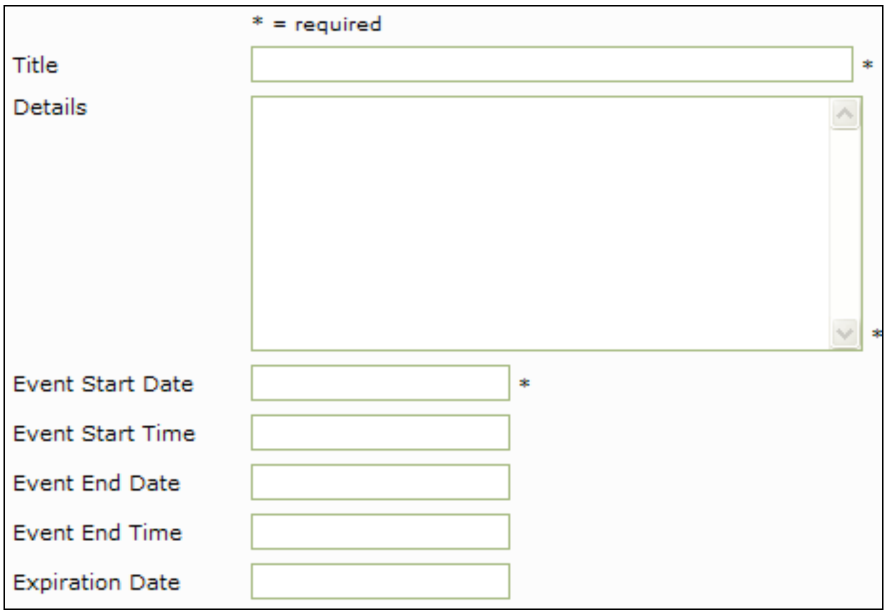
3. Click Save / Update

Events

Website Events gives administrators the capability to inform donors of upcoming campaign events displayed on a calendar.

To Add a Website Event

1. Click Add a new website event
2. Fill in the fields provided to define an event



3. Click Save / Update

Note: Events will appear on the calendar on their Event Start Date, and will be visible on the Donor Site as long as they are active.

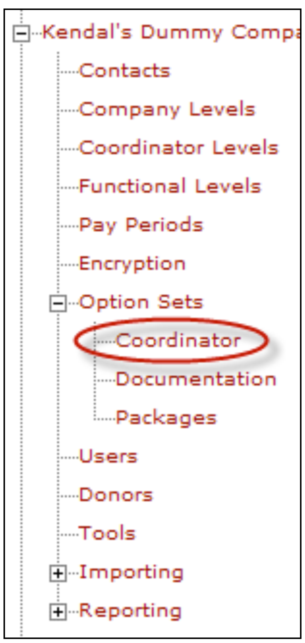
Users

From the Users level, administrators have the capability to affiliate users to different levels of the campaign. Under Websites, users are associated to various Website settings.

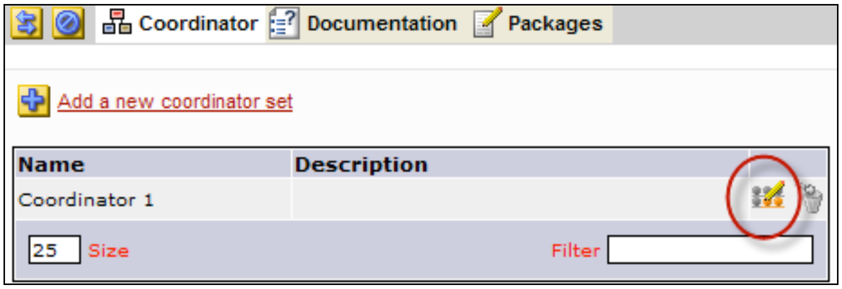
Quick Reference to Setting up and Activating the Dashboard

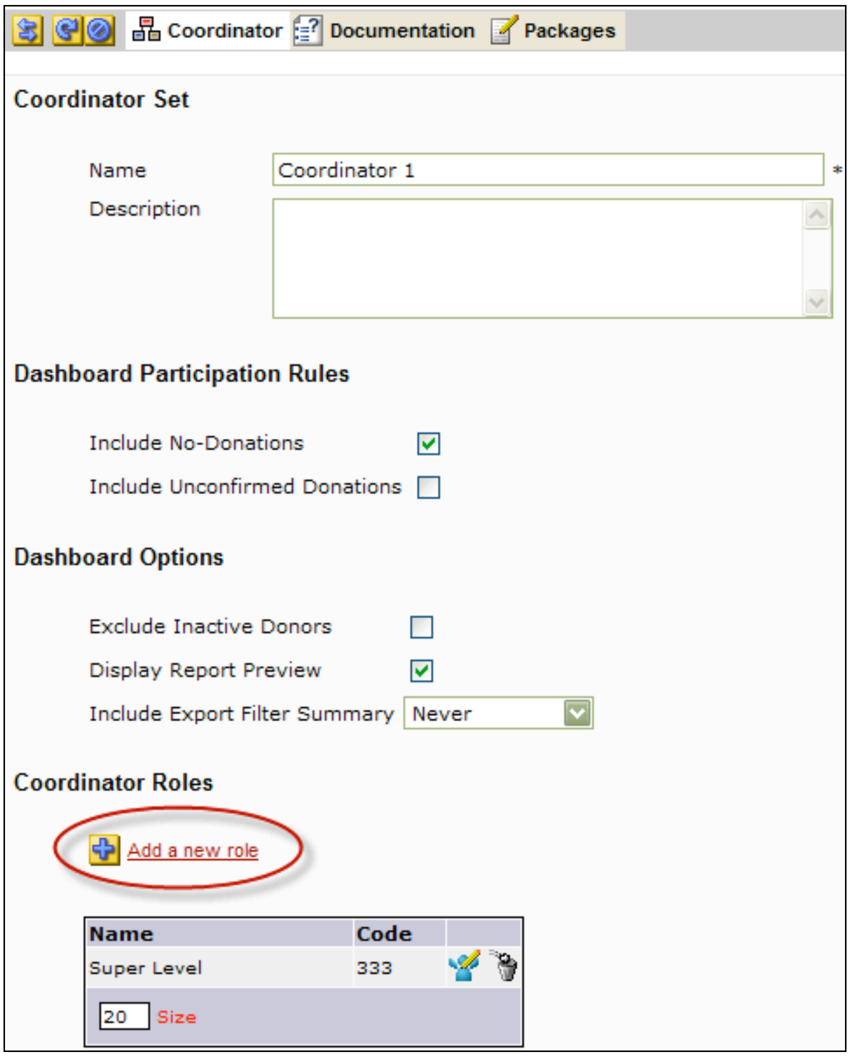
1. Set up a Coordinator Level at the Companies level (see details in the Company Level section, Coordinator Levels)

2. Add a Coordinator Set at the Companies level, under Option Sets (see details in the Company Level section, Option Sets, Coordinator)

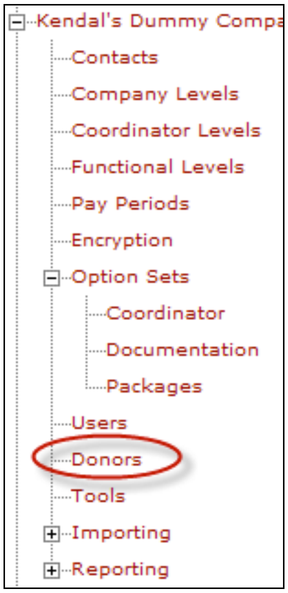


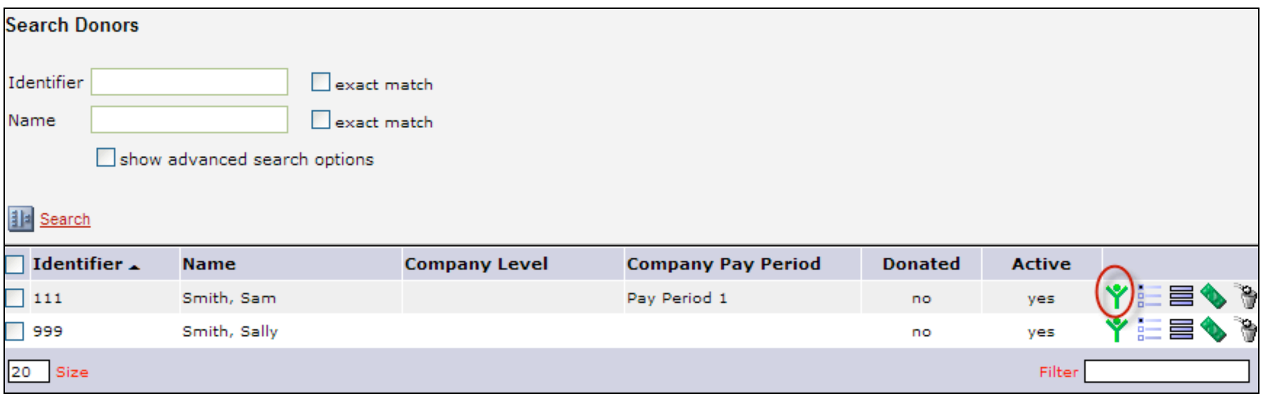
3. Once a Coordinator Set has been configured, add a Coordinator Role at the Companies level, under Option Sets (see details in the Company Level section, Option Sets, Coordinator)

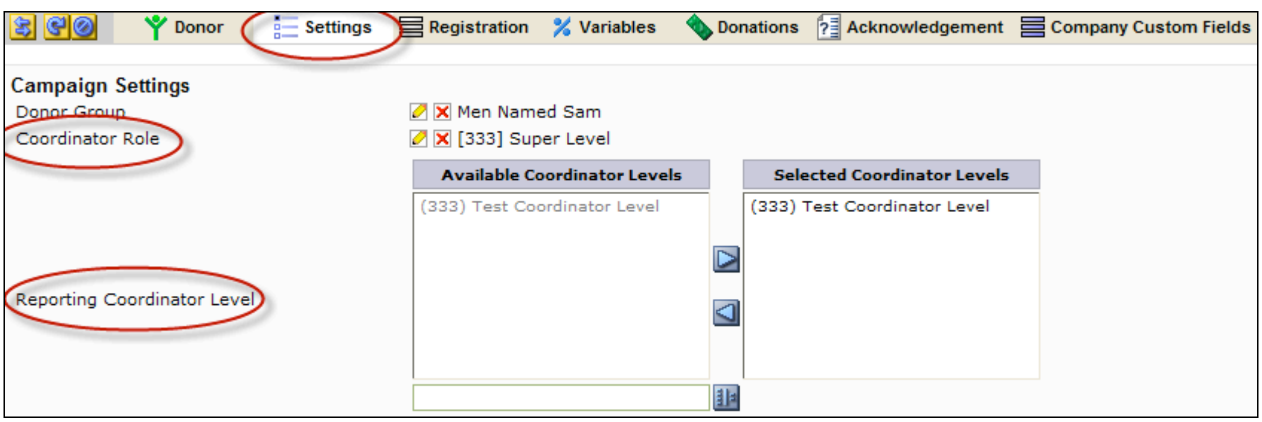




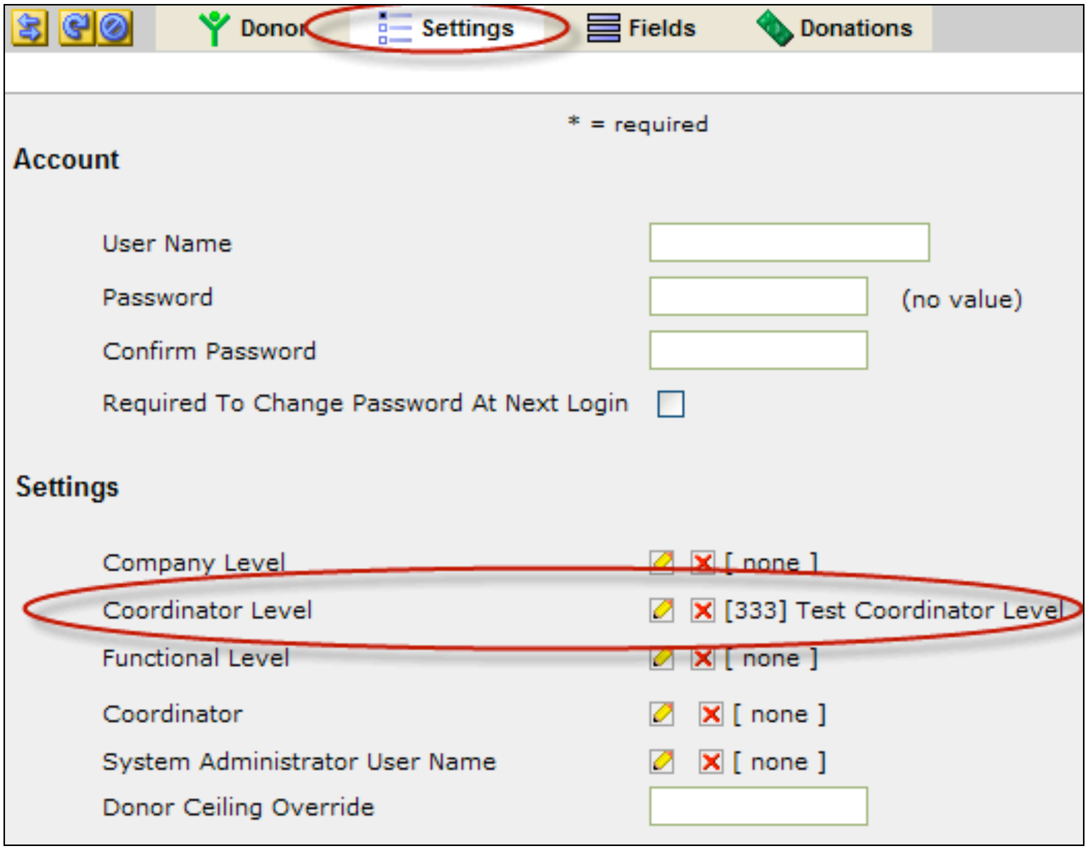
4. Assign a Coordinator Role, Reporting Coordinator Level, and Coordinator Level to a donor at the Companies level, under Donors Settings



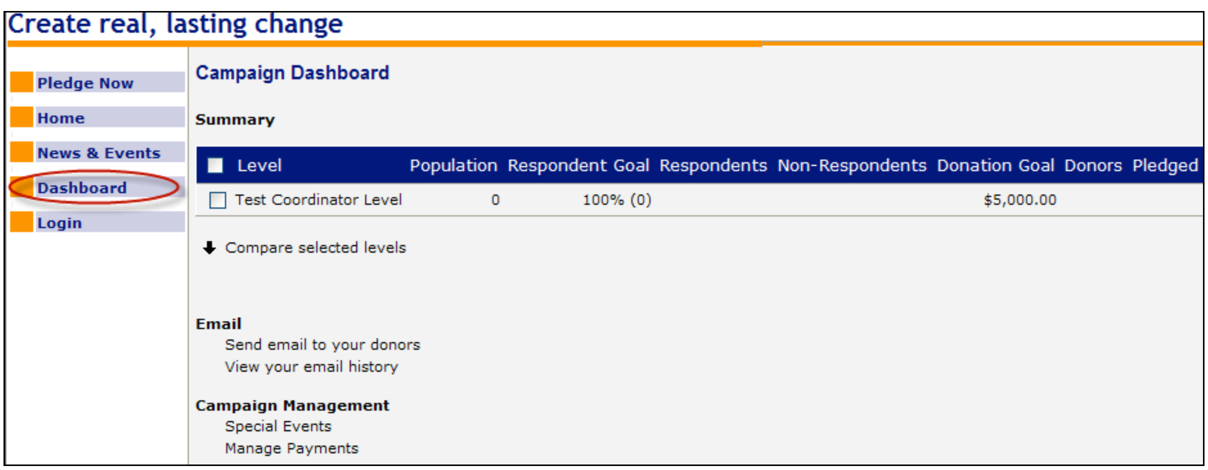




Scroll down the page to Company Settings:



5. Remember to always click Save / Update on every page. Once these steps have been completed the Dashboard will be active on the Donor Site.



Note: These instructions are only a quick reference for a single donor. The same steps can be taken for configuring Dashboard settings for a Donor Group. Please refer to our Dashboard configuration document, *Dashboard Configuration*, for more details on setting up Dashboard settings.

Additionally, allowing donors access to the Dashboard is often accomplished through a donor import. Please see the Support Site import criteria.

Batches

Batches are intended to handle donor pledges received through media, other than the existing Internet-based pledge processing system. Batches allow for pledge processing from paper pledge cards through a 'data entry' style interface, as well as allow for batch style pledge processing from a formatted electronic data file. Batches allow real time reporting on the campaign, versus calculating campaign status from multiple sources (paper and online systems). Once all the pledges have been entered and verified for accuracy they can be processed along with the pledges from donors utilizing the online pledging system. This allows a campaign to contain a combination of online pledges and pledges generated from paper pledge cards or electronic data files.

Reporting

Reporting is available at all three levels of Campaign Management (Organizations, Companies and Campaigns). At each level, Reporting displays the reports associated to that level. Reports can be filtered and customized.

From the Campaigns level, Reporting is divided into three major categories.

Summary

From this level, campaign administrators can view a summary of this level's activity. All information is updated hourly, in central time.

View PDF version

Kendal's Dummy Campaign 1
1/1/0001 - 1/1/0001

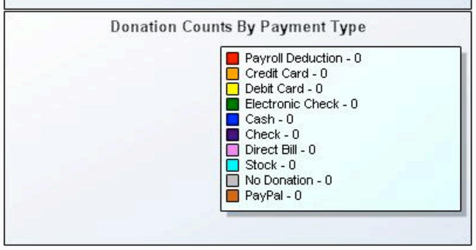
- All Donor Groups -

Please note: New transactions are updated each hour. Any deleted or edited transactions are updated nightly.

Donor Quick Stats	
Total Potential Donors	1
Total Respondents Goal	1
Total Respondents (OPCS/QPPI)	0/0
Total Donors (OPCS/QPPI)	0/0

Donation Quick Stats	
Total Donation Goal	$50,000.00
Total Donations	$0.00

Payment Types



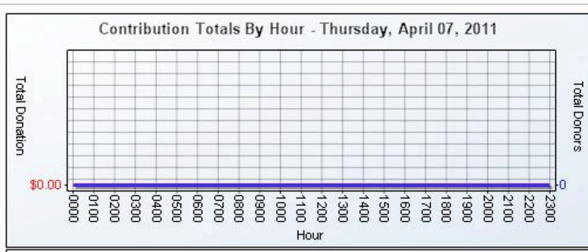
Designations

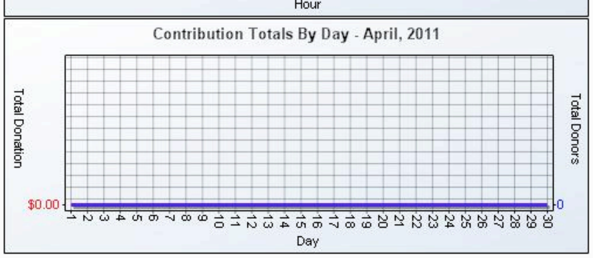
Top Designations By Donation					
Name	**Org Code**	**Std. Acct.**	**Type**	**Donation**	**Count (OPCS/QPPI)**

Top Designations By Count					
Name	**Org Code**	**Std. Acct.**	**Type**	**Count (OPCS/QPPI)**	**Donation**

Activity

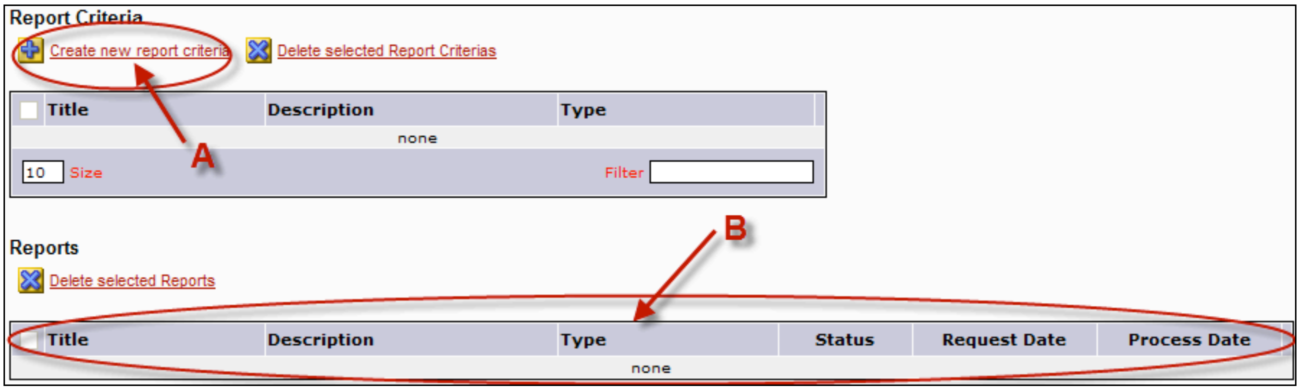
Date 4/7/2011 go



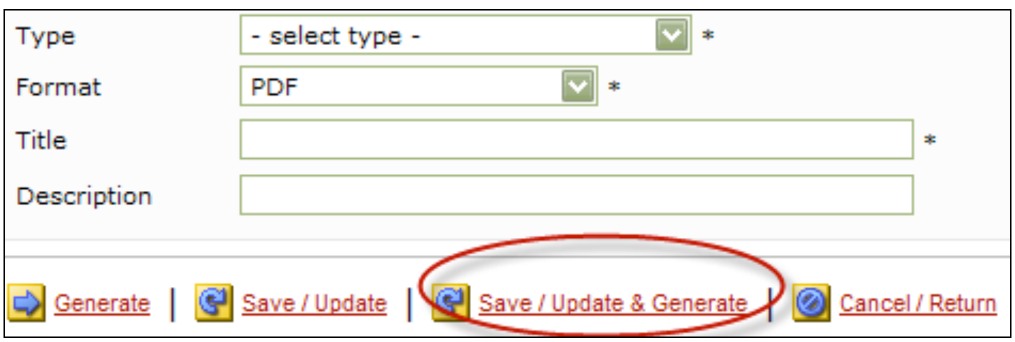


Reports

Reports are designed to provide management tools to the campaign staff. Reports can be generated as a PDF file, Text- Comma Delimited, Text- Tab Delimited, or Rich text (HTML) file. Note where to create new report criteria (A) and where to view or delete created reports (B).

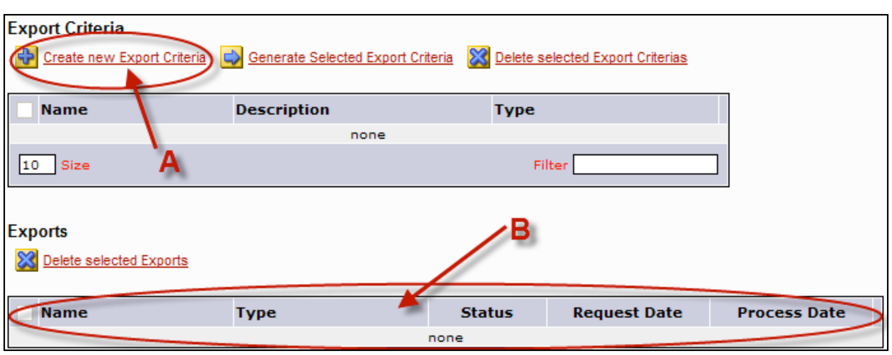


Also note that in order to generate a new report, Save / Update & Generate must be selected (see below).

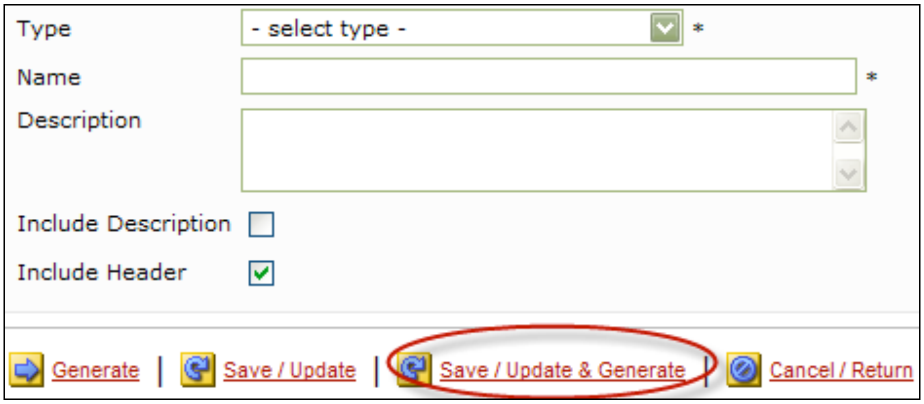


Exports

Exports are generated as .txt files (comma delimited and tab delimited) and they contain raw data that can be manipulated in excel or another similar program before uploading into a legacy system. Note where to create new export criteria (A) and where to view or delete created export criteria (B).



Also note that in order to generate a new export, Save / Update & Generate must be selected (see below).



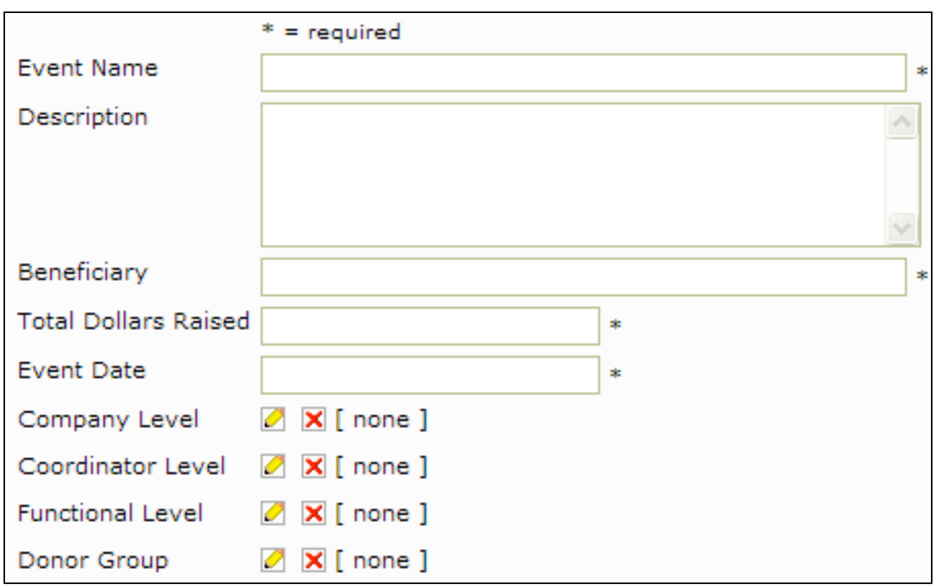
For more information, please refer to Reporting documentation.

Special Events

The Special Events functionality provides the option to group event dollars by Coordinator Level, Company Level, Functional Level, as well as by Donor Group. When a special event is associated with a Coordinator Level, the special event dollars will display to the coordinator on the Dashboard.

To Add a Special Event

1. Click Add a new Special Event
2. Fill in the fields provided to define a special event



3. Click Save / Update

Campaign Management Tips & Tricks

- Add the following to the end of donor site URL to populate Donor Custom Field 8 with 1234:
  RefID=1234
  For example, http://donor.united-e-way.org/default.aspx?campaign=lit&refid=1234