



CAMPAIGN MANAGEMENT: SETTING UP A BASIC CAMPAIGN

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Introduction

Campaign Management is a robust ePledging solution that offers many options that can be configured to customize the donor experience within a particular campaign, company, or donor group. This document will focus on the items required to set up a basic campaign. Once you have set-up the basic campaign you can further configure the system to meet the desired business rules for each campaign your organization is managing.

Preparing to Set Up the Campaign

Prior to creating the initial campaign profile, you will need to set-up the following items which form the campaign building blocks and control the campaign business rules:

- **Option Package:** Option Packages and the Option Sets that comprise them define the business rules that will be used for the campaign (i.e. payment types, acknowledgment questions, designation limit). These are set up at the  **Organizations** level and can be used for multiple campaigns.
- **Designation Panel:** Designation Panels and the Panel Groups and Agencies that comprise them define the designation options that will be presented to the donors within the campaign. These are set up at the  **Organizations** level and can be used for multiple campaigns.
- **Company:** Companies are the entities to which the potential donors and campaigns are associated. These are set up at the  **Companies** level. Multiple campaigns can be associated with a single company.

Refer to the specific instructional guide for each of these items for details on how to setup and activate these.



Basic Campaign Set-up Overview


Once you have set up the Option Package, Designation Panel and Company that will be associated to the campaign, you are ready to begin. The steps for setting up a basic campaign are as follows:

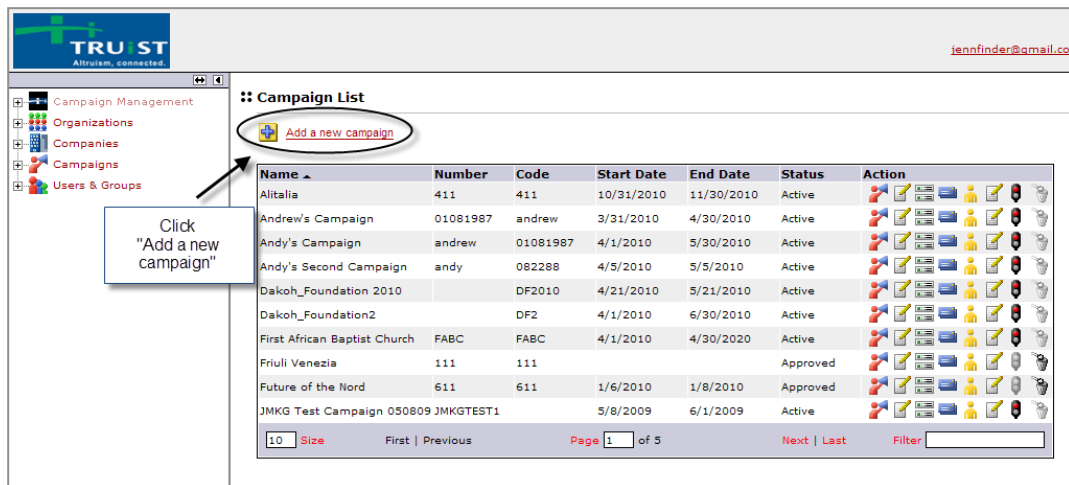
- A. Create the Campaign Profile
- B. Create & Activate a Default Campaign Website
- C. Create & Activate a Default Donor Group
- D. Establish the Campaign Settings
- E. Configure the Registration Options
- F. Configure the Designation Panels
- G. Activate the Campaign

See the sections that follow for step-by-step instructions for completing each of the above Campaign set-up steps.

Basic Campaign Set-up Step-by-Step

A. Create the Campaign Profile

1. Select  **Campaigns** from the left navigation tree to access the **:: Campaign List** page (**Note:** This is the default page when you first login to Campaign Management).
2. From the **:: Campaign List** page, click the **“Add a new campaign”** link to access the Campaign Profile page.



The screenshot shows the TRU ST Campaign List interface. The left navigation tree includes Campaign Management, Organizations, Companies, Campaigns, and Users & Groups. The main content area displays a table of campaigns with the following data:

Name	Number	Code	Start Date	End Date	Status	Action
Alitalia	411	411	10/31/2010	11/30/2010	Active	[Action icons]
Andrew's Campaign	01081987	andrew	3/31/2010	4/30/2010	Active	[Action icons]
Andy's Campaign	andrew	01081987	4/1/2010	5/30/2010	Active	[Action icons]
Andy's Second Campaign	andy	082288	4/5/2010	5/5/2010	Active	[Action icons]
Dakoh_Foundation 2010		DF2010	4/21/2010	5/21/2010	Active	[Action icons]
Dakoh_Foundation2		DF2	4/1/2010	6/30/2010	Active	[Action icons]
First African Baptist Church	FABC	FABC	4/1/2010	4/30/2020	Active	[Action icons]
Friuli Venezia	111	111			Approved	[Action icons]
Future of the Nord	611	611	1/6/2010	1/8/2010	Approved	[Action icons]
JMKG Test Campaign 050809 JMKGTEST1			5/8/2009	6/1/2009	Active	[Action icons]

A callout box points to the "Add a new campaign" link in the navigation tree with the text: "Click 'Add a new campaign'".



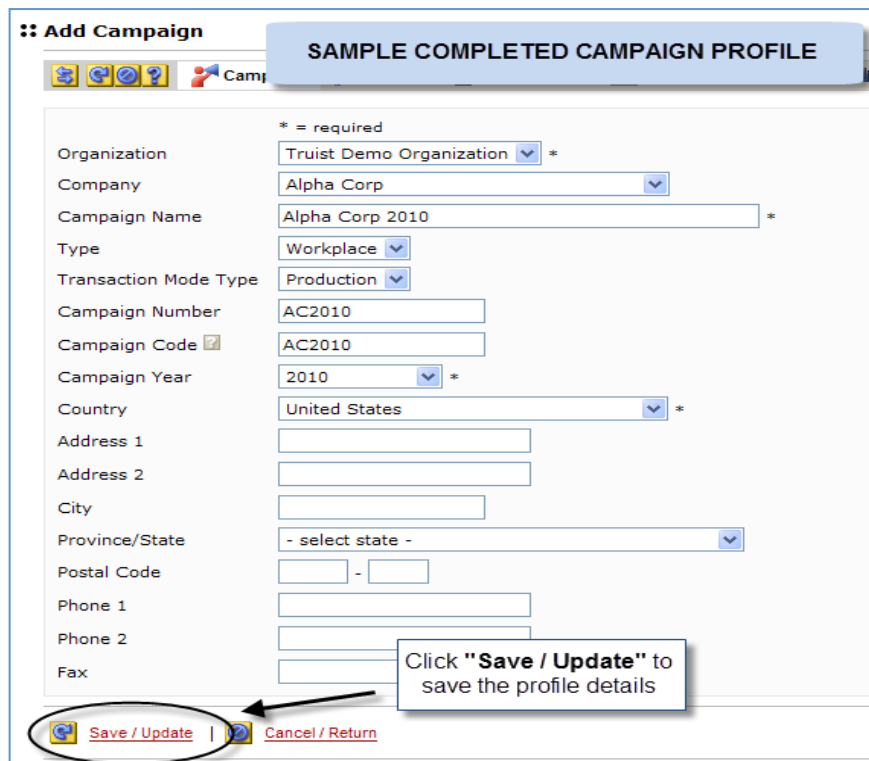
3. Enter the required and optional campaign profile data into the fields on the Campaign Profile page. **Note:** Required fields are indicated by an asterisk (*).

Campaign Profile Fields		
Req	Field	Description
*	Organization	Organization to associate the Campaign to – <i>select from the drop down list.</i>
	Company	Company to associate the Campaign to – <i>select from the drop down list.</i> Note: While this is an optional field, a company MUST be selected if you are setting up a “Workplace” campaign. “Public” campaigns do not need to be associated with a company.
*	Campaign Name	This is the name that will be used to identify the campaign in the navigation tree and on the campaign list. Note: It is recommended that you include the company name as this first element of the campaign name (i.e. Alpha Corp 2010). This will group company campaigns together on the campaign list, and make it easier to locate.
	Type	Type of Campaign you will be running – <i>select either “Workplace” or “Public” from the drop down list.</i> Note: The default is “Workplace”.
	Transaction Mode Type	Designates whether transactions made on this campaign are live or for demo purposes – <i>select either “Production” or “Demo” from the drop down list.</i> Note: The default is “Production”. Selecting “Demo” mode allows you to configure and test a campaign without being charged transaction fees.
	Campaign Number	This is a unique identifier assigned to a campaign by your organization. Note: This number can be mapped to an internal accounting system to facilitate the processing of donations.
	Campaign Code	Campaign code is utilized with donor login information 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. Note: The campaign code must be unique across the entire Campaign Management system. Therefore it is recommended that you include an identifier for your Organization as part of the Campaign Code.



Campaign Profile Fields		
Req	Field	Description
*	Campaign Year	Indicates the year in which the campaign will run – <i>select the appropriate year from the drop down list.</i>
*	Country	Country – <i>select the country in which the campaign will run from the drop down list.</i>
	Address 1	Address - <i>informational only</i>
	Address 2	Address - <i>informational only</i>
	City	City - <i>informational only</i>
	Province/State	State - <i>informational only</i>
	Postal Code	Zip Code- <i>informational only</i>
	Phone 1	Primary Phone - <i>informational only</i>
	Phone 2	Secondary Phone - <i>informational only</i>
	Fax	Fax - <i>informational only</i>

4. Click **“Save / Update”** at the bottom of the Campaign Profile page to save your profile details and create the campaign shell.



:: Add Campaign **SAMPLE COMPLETED CAMPAIGN PROFILE**

* = required

Organization: *

Company:

Campaign Name: *

Type:

Transaction Mode Type:

Campaign Number:

Campaign Code:

Campaign Year: *

Country: *

Address 1:

Address 2:

City:

Province/State:

Postal Code: -

Phone 1:

Phone 2:


Fax:

|

Click **“Save / Update”** to save the profile details




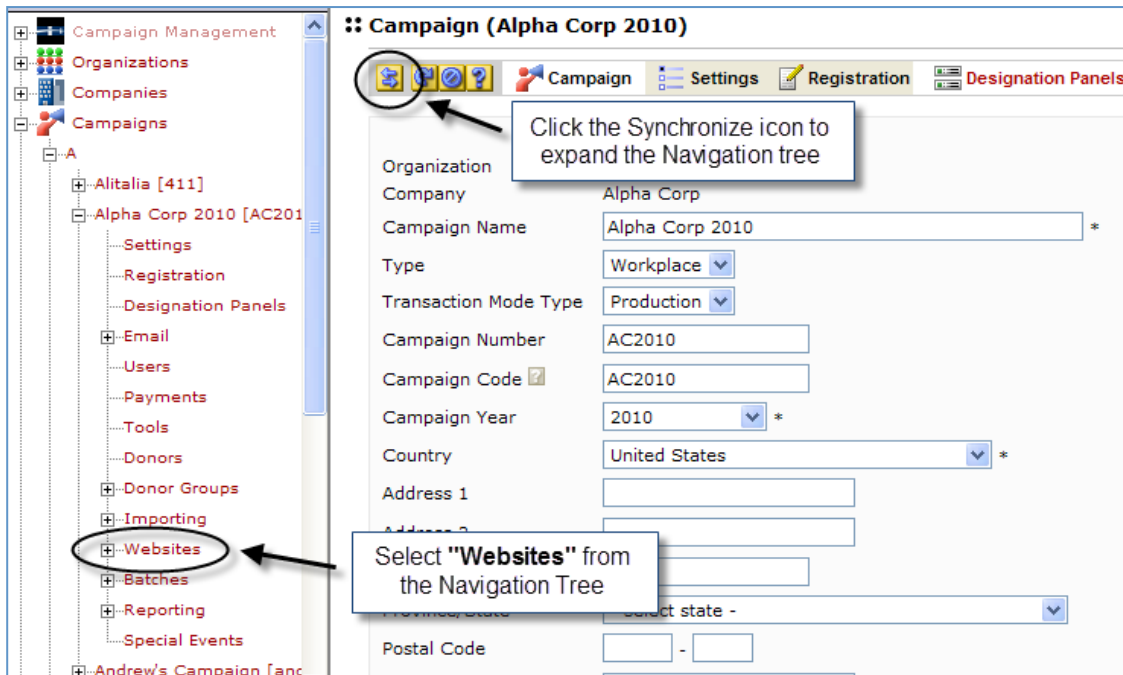
B. Create & Activate a Default Campaign Website

Once you have created your Campaign Profile, you will need to create a default Website. Websites control the 'Look and Feel' along with the messaging content on the donor site. These are set up at the  **Campaigns** level and are specific to that campaign. At least one Website must be setup for each campaign. However, multiple websites can be setup and associated with a single campaign to alter the donor experience with a particular Donor Group.

The steps below describe the basic steps for setting up a default campaign Website. The website will be populated with system generated default content. For information on establishing the campaign specific website content view the more detailed instructional documents on *Campaign Websites*.

Another option for creating a default campaign Website is to leverage the **“Copy Website”** tool. This tool will allow you to copy the website settings and content from an existing website associated with your Organization. View the *Copy Website* instructional document for details on how to use this feature.

1. From the Campaign Profile page, click the  Synchronize Icon to expand the Navigation Tree.
2. Select the **“Websites”** link listed under the campaign you just created to access the **Website List** page.



The screenshot displays the 'Campaign (Alpha Corp 2010)' page. On the left is a navigation tree with the following items: Campaign Management, Organizations, Companies, Campaigns, Alpha Corp 2010 [AC2010] (expanded), Settings, Registration, Designation Panels, Email, Users, Payments, Tools, Donors, Donor Groups, Importing, Websites (circled in red), Batches, Reporting, Special Events, and Andrew's Campaign [anc]. A callout box points to the 'Synchronize' icon (a blue square with a white refresh symbol) in the top navigation bar, stating: 'Click the Synchronize icon to expand the Navigation tree'. Another callout box points to the 'Websites' link in the navigation tree, stating: 'Select "Websites" from the Navigation Tree'. The main content area shows campaign details for 'Alpha Corp 2010', including fields for Organization (Alpha Corp), Campaign Name (Alpha Corp 2010), Type (Workplace), Transaction Mode Type (Production), Campaign Number (AC2010), Campaign Code (AC2010), Campaign Year (2010), and Country (United States).



- From the **Website List** page, click “Add a new website”.



- Enter the required information to define a default website. **Note:** Required fields are indicated by an asterisk (*).

Website Fields		
Req	Field	Description
*	Type	Pledge flow used for this campaign – <i>select either “Standard Pledge Experience” (SPE) or “Impact Pledge Experience” (IPE) from the drop down list.</i> Note: The default is “Standard Pledge Experience.”
*	Name	This is the name that 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	ADVANCED FUNCTIONALITY - does not apply to the first website created under a campaign.
*	Skin	Site Design/Layout that will be used to define the ‘Look & Feel’ of the website – <i>select either a legacy or custom skin from the drop down list.</i> Note: When your website “Type” is set to “Impact Pledge Experience” (IPE) a skin designed for the IPE experience must be utilized.

- Click “Save / Update” at the bottom of the page to save your entries and create the website.



:: Add Website (Alpha Corp 2010)

SAMPLE COMPLETED WEBSITE PROFILE

* = required

Type: Standard Pledge Experience *

Name: Alpha 2010 Default Website *

Description: Alpha Corp 2010 Campaign Default Website *

Master Website: - select website -

Skin

Default Skin: Legacy Blue/Beige *

Save / Update | Cancel /

Click "Save / Update" to save the website details

- Once created, you will need to activate the website. To do this, select "Websites" from the Navigation Tree to return to the **:: Website List** page then click the "Traffic Light" icon.

:: Website List

Add a new website

Name	Description	Master Website	Skin	Active	Action
Alpha 2010 Default Website	Alpha Corp 2010 Campaign Default Website		Legacy Blue/Beige	No	[Icons]

10 Size Filter


Click "Websites" to access the Website List

Click the "Traffic Light" to Activate the Website

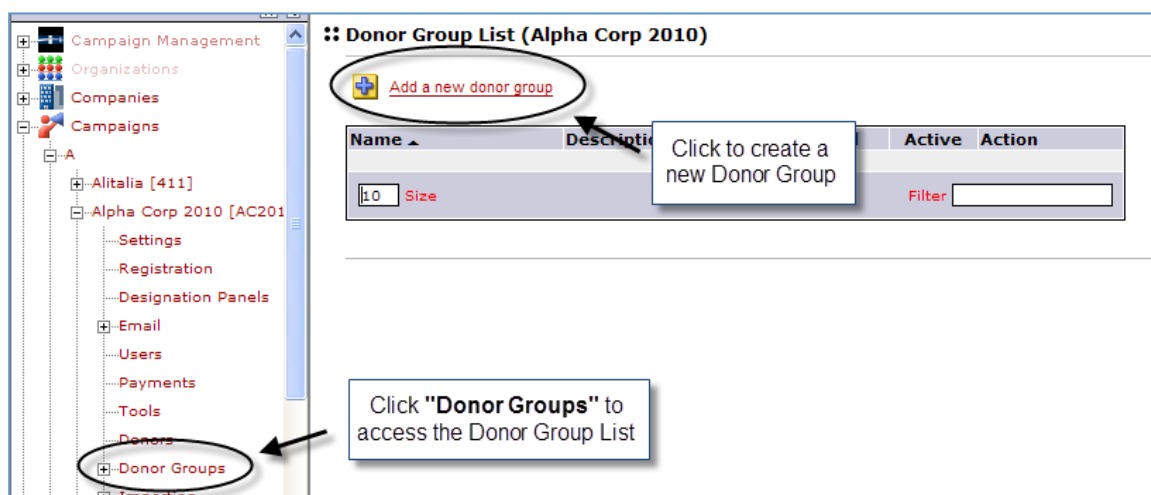
Note: An active website will say "Yes" under the **Active** column next to the Website Name, and the "Traffic Light" icon will appear 'red'.



C. Create & Activate a Default Donor Group

Once you have created your Website, you will need to create a default Donor Group. Donor Groups provide the means of segmenting donors and establishing unique sets of business rules to different groups of donors. These are set up at the  Campaigns level and are specific to that campaign. 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. For more information on Donor Groups and how they impact the donor experience and reporting refer to the detailed documentation on *Donor Groups*.

1. Select “Donor Groups” from the Navigation Tree to access the **Donor Group List** page.
2. From the **Donor Group List** page, click “Add a new donor group”.



3. Enter the required information to define a default Donor Group profile. **Note:** Required fields are indicated by an asterisk (*).

Donor Group Profile 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.



Donor Group Profile Fields		
Req	Field	Description
	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 your organization responsible for the management of the campaign experience of this donor group – <i>select from the drop down list.</i>
	Company Primary Contact	Indicates the Primary Contact person from the company responsible for the management of the campaign experience of this donor group – <i>select from the drop down list.</i>

- Click **“Save / Update”** at the bottom of the page to save your entries and create the Donor Group.

:: Add Donor Group (Alpha Corp 2010)

SAMPLE COMPLETED DONOR GROUP PROFILE

* = required

Name: Alpha Corp Default *

Description: Alpha Corp 2010 Campaign Default Donor Group *

Label:

Tag 1:

Tag 2:

Tag 3:

Organization Primary Contact: Gammon, Karla *

Company Primary Contact: Finder, Jenn

Save / Update | **Cancel**

Click **“Save / Update”** to save the Donor Group profile

- Click the Donor Group **Settings** tab at the top of the page to access the **Donor Group Settings** page.

:: Donor Group (Alpha Corp Default, Alpha Corp 2010)

Donor Group **Settings** | Contact | Stories | Users

Click **“Settings”** to access the Donor Group Settings



6. Enter the required and desired optional information to define the Donor Group settings.
Note: Required fields are indicated by an asterisk (*).

Donor Group Settings Fields		
Req	Field	Description
*	Website	A donor group must be associated with an Active Website in order for donors to login to a donor site – <i>select the desired Website from the drop down list.</i>
*	Option Package	Option Package that will be used to define the donor experience for donors in this group. By default the Option Package will inherit from the campaign setting – <i>if desired select a specific Option Package from the drop down list.</i> Note: All Optional Packages created under your Organization will populate in the drop down list.
	Designation Match Election Option Set	ADVANCED FUNCTIONALITY – only applies if setting up an advanced campaign with matching.
	Direct Match Request Option Set	ADVANCED FUNCTIONALITY – only applies if setting up an advanced campaign with matching.
	Gift Amount Alert Threshold	Gift Amount that will trigger an automated email to the assigned site coordinator alerting him 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 “unchecked” or “public”
	Total Donation Goal	Dollar goal for donors within the donor group. Note: The amount recorded here will be used to calculate and display percent of goal on the “Pledge Thermometer” if activated.
	Total Donation Adjustment	Allows you 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: The amount recorded here will be used to calculate and display percent of goal on the “Participation



Donor Group Settings Fields		
Req	Field	Description
		Thermometer" if activated.
	Total Respondent Adjustment	Allows you 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 you to select a <i>"donor group tag"</i> (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 – <i>select from the drop down list if applicable.</i>

7. Click **"Save / Update"** at the bottom of the page to save your Donor Group Settings.

:: Donor Group (Alpha Corp Default, Alpha Corp 2010)

Donor Group
Settings
Contacts
Designation Panels
Territories

SAMPLE COMPLETED DONOR GROUP SETTINGS

Settings

Website: Alpha 2010 Default Website
 Option Package: - inherit from campaign -
 Designation Match Election Option Set: - inherit from campaign -
 Direct Match Request Option Set: - inherit from campaign -
 Gift Amount Alert Threshold (\$): 1000.00
 Private:

Totals

Total Donation Goal (\$): 250000.00
 Total Donation Adjustment (\$):
 Total Respondent Goal: 50 Percentage
 Total Respondent Adjustment: Respondents
 Estimated Potential Donor Count: 2500 Donors
 Summation Tag: - none -

Save / Update
Cancel

Click **"Save / Update"** to save your Donor Group Settings



- Once created, you will need to activate the Donor Group. To do this, select “Donor Groups” from the Navigation Tree to return to the **Donor Group List** page then click the “Traffic Light” icon.

Donor Group List (Alpha Corp 2010)

[Add a new donor group](#)

Name	Description	Label	Active	Action
Alpha Corp Default	Alpha Corp 2010 Camp ...		No	

Size

Click "Donor Groups" to access the Donor Group List

Click the "Traffic Light" to Activate the Donor Group

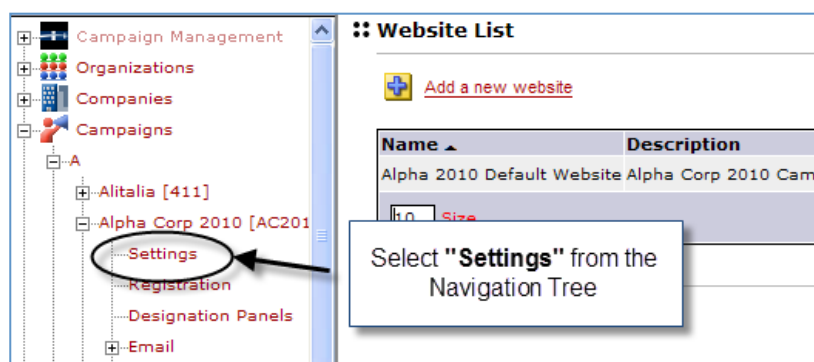
Note: An active Donor Group will say “Yes” under the **Active** column next to the Donor Group Name, and the “Traffic Light” icon will appear ‘red’.



D. Establish the Campaign Settings

With a default Donor Group set up, you can now associate that Donor Group to the Campaign and establish the other campaign settings.

1. Select “Settings” on the Navigation Tree to access the Campaign Settings page.




2. Enter the required and desired optional information to define the Campaign settings.

Note: There are many campaign settings that are configured on this page. Below is a listing of those fields and what they control. Fields that must be completed prior to activating a campaign are indicated by an asterisk (*).

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





Campaign Settings Fields		
Req	Field	Description
		<p>this field controls whether donors will be aligned based upon their 'Home Zip Code' or 'Work Zip Code' – <i>if applicable, select the appropriate choice from the drop down list.</i></p> <p>Note: 'Home Zip Code' is the default.</p>
*	Option Package	<p>Option Packages contain the business rules for the campaign, including gift options and leadership levels. Option Packages are configured at the Organization Level. You must have at least one Option Package created under your Organization in order to activate your campaign.</p> <p>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.</p>
	Reporting Option Package	<p>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.</p>
	Company Option Package	<p>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.</p>
	Designation Match Election Option Set	<p>ADVANCED FUNCTIONALITY – Advanced campaign function that controls the match programs associated to a donor's pledge. Applies to IPE campaigns only.</p>
	Direct Match Request Option Set	<p>ADVANCED FUNCTIONALITY – Advanced campaign function that controls a donors ability to make a request for a matching gift on a donation given directly to an eligible charity.</p>
*	Currency	<p>Currency that donors will use when making their pledges – <i>select the appropriate currency from the drop down list.</i></p> <p>Note: The default is 'United States Dollars'.</p>
*	Default Donor Group	<p>Donor Group that will be used as the default should a donor record not be previously associated with one. <i>You must set-up and assign a default donor in order to activate the campaign.</i> To do this, follow the steps below:</p> <ul style="list-style-type: none"> • click the  icon to display a list of available Donor Groups • select the desired group from the list



Campaign Settings Fields		
Req	Field	Description
		<ul style="list-style-type: none"> click the <select> button
	Donors May Custom Align	<p>In campaigns where the Designation Panels are 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.</p> <p>Note: By default this is unchecked preventing donors from custom aligning.</p>
	Allow Donation Cancellation	<p>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 have the option to 'Delete' only and will not be able to 'Cancel' an ongoing donation.</p> <p>Note: By default this is unchecked preventing donors from cancelling a pledge.</p>
*	Pledge Status	<p>Indicates whether the pledge and/or cancel/delete features are active – <i>select the appropriate choice from the drop down list.</i></p> <p>Note: 'Pledging and Cancel / Delete Active' is the default.</p>
*	Donor Donation Count Limit	<p>Establishes the number of donations a donor can make within the campaign.</p> <p>Note: The default is '1'.</p>
*	Donor Payroll Donation Count Limit	<p>Establishes the number of payroll donations a donor can make within the campaign.</p> <p>Note: The default is '1'.</p>
	Minimum Donation For Designation	<p>Sets the minimum donation amount required for the donor to search a broader database of agency designation options.</p> <p>Note: Leaving this blank will allow the donor to designate regardless of donation amount.</p>
	Last Year Campaign	<p>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) - <i>select the appropriate campaign from the drop down list.</i></p> <p>Note: Once established you may to 'Show Previous Campaign Donations' to the donor on the "Donation History Page". This is set up in the Website Content area.</p>
Merchant		



Campaign Settings Fields		
Req	Field	Description
	Merchant Account	<p>This allows for an alternate merchant account or manual processing override to be established for campaigns accepting Credit Card donations.</p> <p>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.</p>
Distributor		
*	Distributing Organization	<p>Designates the Organization responsible for processing and disbursement of funds collected through the campaign.</p> <p>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, you can override this default by clicking the  icon to select an Organization from the list. This will allow that Organization to access specific campaign reports to facilitate the disbursements.</p>
Totals		
	Total Donation Goal	<p>Denotes the dollar goal for the campaign.</p> <p>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.</p>
	Total Donation Adjustment	Allows you to adjust the total dollars raised display on the Pledge Bar by either a positive or negative number.
	Total Respondent Goal	<p>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.</p> <p>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.</p>
	Total Respondent Adjustment	Allows you 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	Determines whether or not individuals selecting 'No Donation' will be included in the campaign



Campaign Settings Fields		
Req	Field	Description
	Totals	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.
	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 – <i>check the box to activate the functionality.</i> Note: By default this is unchecked.
	Login Requirement	APPLIES TO PUBLIC CAMPAIGNS ONLY: Controls when in the pledging process a donor must log-in or register in a ‘Public Campaign’ – <i>select the appropriate choice from the drop down list.</i>



Campaign Settings Fields		
Req	Field	Description
		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 2 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 – <i>select the appropriate URL from the drop down list.</i> 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 – <i>select the appropriate URL from the drop down list.</i> 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.

3. Click **“Save / Update”** the bottom of the page to save your Campaign Settings.



Campaign (Alpha Corp 2010)

SAMPLE COMPLETED CAMPAIGN SETTINGS

Settings

Start Date:

End Date:

Estimated Potential Donors:

Estimated Online Respondents:

Estimated Batch Respondents:

Align Donors By:

Option Package:

Reporting Option Package:

Company Option Package:

Designation Match Election Option Set:

Direct Match Request Option Set:

Currency:

Default Donor Group: Alpha Corp Default

Donors May Custom Align:

Allow Donation Cancellation:

Pledge Status:

Donor Donation Count Limit:

Donor Payroll Donation Count Limit:

Minimum Donation For Designation:

Last Year Campaign:

Merchant

Merchant Account: Manual Processing Override
 [organization default]

Distributor

Distributing Organization: [inherit from organization]

Totals

Total Donation Goal (\$):

Total Donation Adjustment (\$):

Total Respondent Goal:

Total Respondent Adjustment: Respondents

Include 'No Donation' In Totals:

Include Unconfirmed Donations In Totals:

Exclude Inactive Donors in Totals:

Login

Campaign Username:

Campaign Password: (no value)

Confirm Campaign Password:

Campaign Login Active:

Login Requirement:

Donors May Change Password:

Forgot Password Active:

Password Expiration Active:

Primary Pledge URL:

Default Website Skin:

Single Sign-on

Key, Vector Encoding Type:

Encryption Key:

Cipher Mode:

Padding Mode:

Input Vector:

* = required

Click "Save / Update" to save your Donor Group Settings

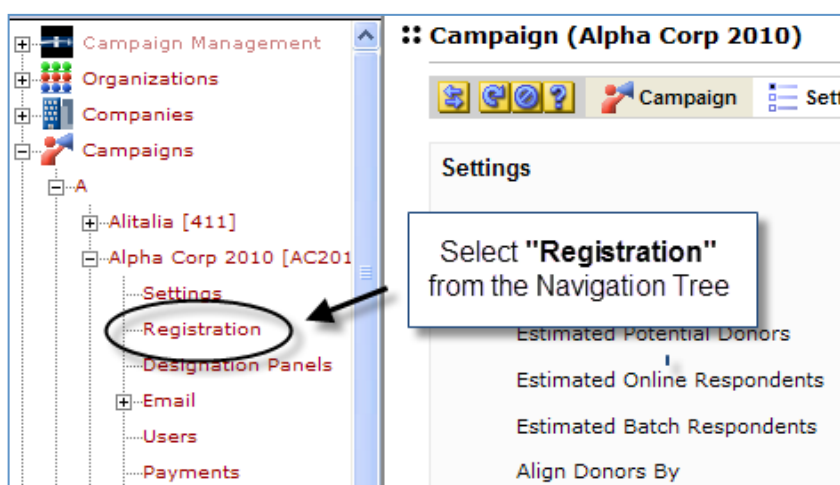


E. Configure the Registration Options

The Registration Options control the information the donors are prompted to provide about themselves during the donation process. By default the donor 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.

If desired follow the steps below to configure the Registration Page to collect additional donor details.

1. Select **“Registration”** from the Navigation Tree to access the Campaign Registration Page.



2. Enter the desired information 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 – <i>check the ‘active’ next to ‘Home’ and/or ‘Work’ to activate these fields. If desired, you can also check the ‘required’ box to force the donor to provide this information prior to submitting his/her donation.</i>
	Contact Information	Allows for the collection of the donor’s Home and/or Work email, phone and fax – <i>check the ‘active’ next to ‘Home’ and/or ‘Work’ to activate these fields. If desired, you can also check the ‘required’ box to force the donor to provide this information prior to submitting his/her donation.</i>
	Registration Fields	Allows the configuration of up to eight (8) custom registration questions – <i>follow the steps below to configure these:</i> <ul style="list-style-type: none"> • Enter a field label into the ‘Label’ column (this is



Registration Settings Fields		
Req	Field	Description
		<p>the field name that the donor will see)</p> <ul style="list-style-type: none"> • Select either 'Text' or 'List' from the 'Field Type' drop down • 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 – <i>Check box next to 'Employee ID' and/or 'Prefix, Middle Name, Suffix, Nickname' to activate these fields.</i>

3. Click **"Save / Update"** the bottom of the page to save your Registration Settings.

Registration Settings

Address

Home Address Active Required

Work Address Active Required

Contact Information

Home Contact Information Active Required

Work Contact Information Active Required

Registration Fields

Field	Label	Field Type	Default Value	Validation	Active	Required
1	Giving Focus Area Interest	List	Education Income Health	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2		Text		None	<input type="checkbox"/>	<input type="checkbox"/>
3		Text		None	<input type="checkbox"/>	<input type="checkbox"/>
4		Text		None	<input type="checkbox"/>	<input type="checkbox"/>
5		Text		None	<input type="checkbox"/>	<input type="checkbox"/>
6		Text		None	<input type="checkbox"/>	<input type="checkbox"/>
7		Text		None	<input type="checkbox"/>	<input type="checkbox"/>
8		Text		None	<input type="checkbox"/>	<input type="checkbox"/>

Optional Fields

Employee Number Active

Prefix, Middle Name, Suffix, Nickname Active

Click **"Save / Update"** to save your Registration Settings

Save / Update **Cancel**

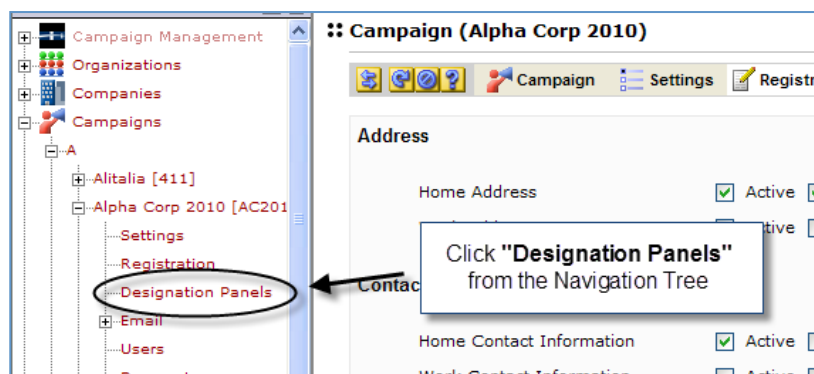


F. Configure the Designation Panels

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.

If desired, follow the steps below to modify the designation options for a specific campaign.


1. Select **“Designation Panels”** from the Navigation Tree to access the Designation Panels page.



2. Select the designation options desired for the campaign.

Designation Panel Settings Fields		
Req	Field	Description
	Introductory Panel	<p>Contains one or more designation options that will be made available to the donor as part of a highlighted initial “Invest Your Donation” area the pledge process – <i>select the appropriate panel from the drop down list.</i></p> <p>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.</p>
	Primary Panel	<p>Contains one or more designation options that will be made available to the donor on the “Invest Your Donation” page during the pledge process – <i>select the appropriate panel from the drop down list.</i></p> <p>Note: Campaigns using the IPE do not utilize Primary Panels. For IPE campaigns select a designation panel that has been configured to be “blank”.</p>



Designation Panel Settings Fields		
Req	Field	Description
	Locate An Agency Panel	<p>Locate an Agency Panels allow you to present large groupings of agencies to your donors in a searchable format – <i>select the appropriate panel from the drop down list.</i></p> <p>Note: For both SPE and IPE campaigns this appears when the donor selects the “Locate an Agency” link on the “Invest Your Donation” page.</p>
	Panel Item Exceptions	<p>Panel Item Exceptions enable you to include or exclude specific designation items from Designation Panels - <i>follow the steps below to configure these:</i></p> <ul style="list-style-type: none"> • Use the search area to locate the desired agency you wish to include or exclude • Click to highlight the desired the agency in the appropriate Search Results box • Click the  button next to the highlighted agency to add it to the Inclusions or Exclusions box as appropriate <p>Note: Inclusions – will include specific designation Items on the Primary Designation Panel; Exclusions – will exclude specific designation Items on all types of Designation Panels.</p>

3. Click **“Save / Update”** at the bottom of the page to save your Designation Panel settings.



Campaign (Alpha Corp 2010)

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

Panels

SAMPLE COMPLETED DESIGNATION PANEL SETTINGS

Introductory Panel: Intro_Truiст_Default
 Primary Panel: Primary_Truiст_default
 Locate An Agency Panel: Locate_Def_Truiст

Panel Item Exceptions

Search: Agencies

By Identification
 By Location

search

Search Results	Inclusions
<ul style="list-style-type: none"> [A] "Freedom Guide Dogs For The Blind, Inc." [A] "LBS Cadets, Inc." [A] (HAND) Helping After Neonatal Death [A] 100 Club Inc. [A] 100 Club of Buffalo Ltd. [A] 100 Women Charitable Foundation Inc [A] 2009 Special Olympics World Winter Games [A] 2nd Chance Animal Shelter Inc [A] 4 Paws for Ability Inc. [A] 4-H CLUBS & AFFILIATED 4-H ORGANIZATIONS 	<ul style="list-style-type: none"> [A] Alpha Corp Employee Assistance Fund
<ul style="list-style-type: none"> [A] "Freedom Guide Dogs For The Blind, Inc." [A] "LBS Cadets, Inc." [A] (HAND) Helping After Neonatal Death [A] 100 Club Inc. [A] 100 Club of Buffalo Ltd. [A] 100 Women Charitable Foundation Inc [A] 2009 Special Olympics World Winter Games [A] 2nd Chance Animal Shelter Inc [A] 4 Paws for Ability Inc. [A] 4-H CLUBS & AFFILIATED 4-H ORGANIZATIONS 	<p>Exclusions</p>

Display Detail

Display Detail


Click "Save / Update" to save your Designation Panel Settings

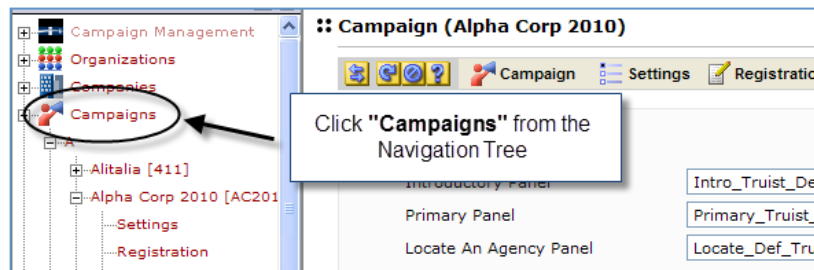


G. Activate the Campaign

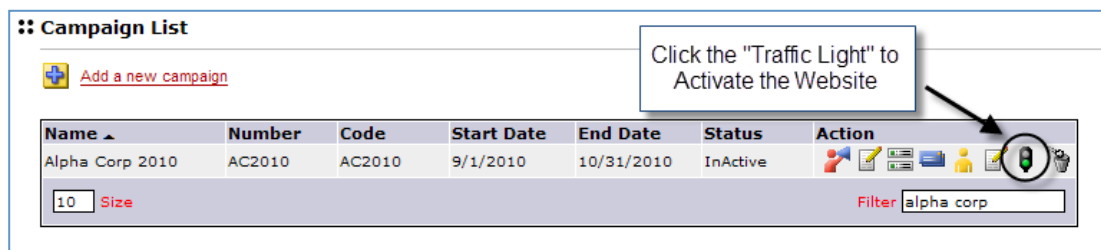
With the basic campaign settings set you can now activate the campaign. Activating the campaign will allow it to be accessible to users possessing the URL, 'Campaign ID' and appropriate login credentials.

Note: You will need to activate the campaign prior to being able to review and test the site.

1. Select  **Campaigns** from the left navigation tree to access the **Campaign List** page.



2. Enter the 'Campaign Name' or 'Campaign Code' into the **Filter** at the bottom of the campaign list and hit the **<Enter>** key on your keyboard.
3. Click the traffic light icon next to the campaign to activate it.



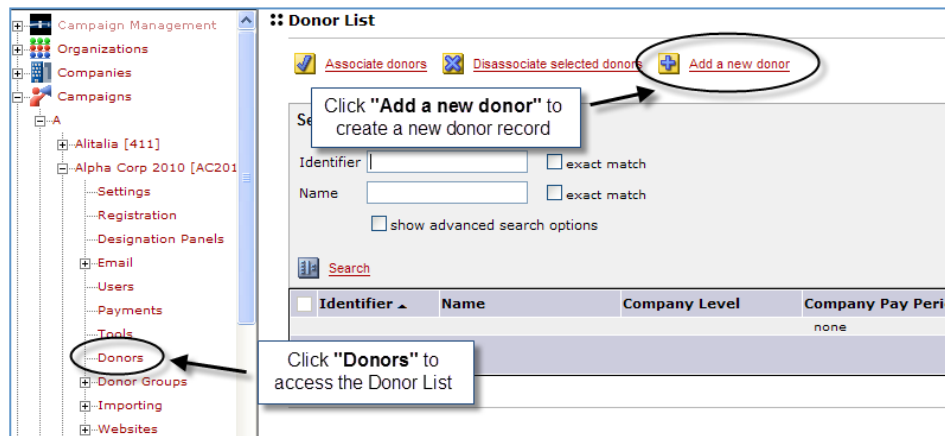
Note: An active Campaign will say "Active" under the **Status** column next to the Campaign Name, and the "Traffic Light" icon will appear 'red'.



H. Review & Test the Campaign

It is important to review and test your campaign to ensure that it is configured properly. To do this you will need to create a test Donor and associate it with the campaign. You can then login as this donor to view and test the campaign.

1. Click “Donors” from the Navigation Tree to access the **Donor List** page.
2. From the **Donor List** page, click “Add a new donor”.



3. Enter data into the following fields to create your test donor record.

Note: Only those fields that are either required or recommended for testing purposes are listed in the table below. Fields that are required in order to create a demo / test donor account are marked with an asterisk (*).

Donor Account Fields		
Req	Field	Description
*	Donor Mode	Flags transactions made by this donor as either ‘Production’ or ‘Demo’ – select ‘Demo’ from the drop down list.
*	Donor Identifier	This is the unique identifier that will be associated with this donor throughout the system. Note: The identifier must be unique across all campaigns under a Company.
*	First Name	Provide a first name for the donor record.
*	Last Name	Provide a last name for the donor record.
	Address	If your campaign is set to geographically align enter an address into either the ‘home’ or ‘work’ address fields as appropriate to your campaign. Note: The system data checks require that a full address be entered if any address fields are recorded. Therefore,



Donor Account Fields		
Req	Field	Description
		you will need to enter a full address in order to enter a zip code for testing purposes.
	Email	<i>In order to test the system generated emails, enter an email address into either the 'Home E-mail Address' or 'Work E-mail Address' field.</i>
	Address Preference	Indicates the primary contact information - <i>select either 'home' or 'work' from the drop down list to map to the address and/or email information entered for this donor record.</i>

4. Click **“Save / Update”** at the bottom of the page to create the Donor Record.



Donor (Test01, Alpha Corp 2010)

Donor Settings Registration Variables Donations

Company Donor Profile Donor **SAMPLE COMPLETED DONOR PROFILE**

* = required

Active

Donor Mode Type **Demo**

Donor Identifier **Test01** *

Name Prefix

First Name **Test01** *

Middle Name

Last Name **Donor** *

Name Suffix

Nick Name

SSN

Employee Number

Gender **Not Disclosed**

Home

Home Country **United States**

Home Address 1 **16 Home Way**

Home Address 2

Home City **Anywhere**

Home Province / State **Maryland**

Home Zip / Postal Code **20852**

Home Phone Number 1

Home Phone Number 2

Home Fax Number

Home E-mail Address **jfinder@truist.com**

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 **Home**

Spouse

Spouse Name

Spouse Employer


Spouse Donation (\$)

[View/Edit company donor p...](#)



Save / Update **Cancel / Return**

Click "Save / Update" to create the Donor Record




5. Click “Donors” from the Navigation Tree to return to the **:: Donor List** page.
6. Click the  icon next to the test donor name to impersonate the donor and access the donor site.

:: Donor List







 Associate donors
  Disassociate selected donors
  Add a new donor

Search Donors

Identifier exact match
 Name exact match
 show advanced search options

 Search

Click the "Impersonate" icon to view the donor site

<input type="checkbox"/> Identifier	Name	Company Level	Company Pay Period	Donor Group	Donated	Active	
<input type="checkbox"/> Test01	Donor, Test01			Alpha Corp Default	no	yes	     

20 Size Filter

7. Tour the site and make note of any items that need tweaking prior to the campaign launch.



Appendix A: Sample Screen Shots of Finished Campaign Donor Site

Note: The screen shots below show the donor Standard Pledge Experience (SPE). See the **Impact Pledge Experience (IPE) Configuration** documentation for screen shots showing the donor experience for IPE.

Welcome / Home Page

Logged In: Jane Williams : LOGOUT

Employee Campaign

Welcome Message configured under Website Content/ Welcome Message

>Welcome Janel

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

In communities across America, people are joining forces to focus on long-term solutions for problems like hunger and sickness and homelessness. Behind the scenes, the people who really care about getting to the heart of those problems. The managers, the experts, the volunteers and, of course, companies like Northport.

Think of the lives we can change and the community we can shape by working together. Imagine the impact that the people of Northport Technologies can make in their own world. With that thought in mind, please give as much as you can, or as soon as you can.

Pledge Now

Dollars Raised Towards Goal

Participation towards goal

Pledge Bars configured under Website Content/ Pledge Bars

Payment Type Selection

Logged In: Jane Williams : LOGOUT

Employee Campaign

Step 1: Pledge Information | Step 2: Donor Information | Step 3: Review | Step 4: Complete

← Back | Continue →

I would like to give to our community. My pledge will be made the following way:

Payroll Deduction

Credit Card

Debit Card

No Donation

Check

← Back | Continue →

Payment Type Options pulled from the Option Package



Payment Details with Introductory Panel Active

Logged In: Jane Williams : LOGOUT

NORTHPORT Employee Campaign


Pledge Now
Home
My Account

Step 1: Pledge Information | Step 2: Donor Information | Step 3: Review | Step 4: Complete

← Back Continue →

Check Payment
I would like to contribute the following one-time check amount:
Amount \$

Invest Your Donation

United Way of the National Capital Area
 A local health and human service organization providing resources to nonprofits corporate and individual donors and volunteers throughout the Greater Washington Metropolitan Region.

I would like to give to another organization in addition to or in lieu of the one listed above.

← Back Continue →

Introductory Panel

Designation Details

Logged In: Jane Williams : LOGOUT

NORTHPORT Employee Campaign

Pledge Now
Home
Giving History
My Account

Step 1: Pledge Information | Step 2: Donor Information | Step 3: Review | Step 4: Complete

← Back Continue →

Please choose how your total annual gift of \$50.00 is invested. You may give all of your donation to one organization or divide it among several.

You may direct your gifts to support a United Way part human service 501(c)(3) non-profit, tax-exempt organ

Designation Amount Type Options
pulled from Option Set

Donation Distribution
I would like to invest my donation using:
 Percentages of my donation Dollar amounts from my donation

% Alpha Corp Employee Assistance Fund

% **United Way of the National Capital Area**
 A local health and human service organization providing resources to nonprofits corporate and individual donors and volunteers throughout the Greater Washington Metropolitan Region.

UWNCA Initiatives
United Way of the National Capital Area has endorsed the following two community impact initiatives:

% **UWNCA Child Wellness Initiative**
 Health. Community. Connection. The initiative will focus on creating long-term healthful solutions, strengthening community, and developing connections.

% **UWNCA Affordable Housing Initiative**
 UWNCA's Affordable Housing Initiative supports projects that prevent homelessness and displacement, preserve and produce affordable housing, and focus on building key partnerships around the region.

% Total

Locate an Agency Link
activation pulled from Option Set

→ Find an agency

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


← Back Continue →

Primary Panel




Registration / Donor Information

Logged In: Jane Williams - LOGOUT



Employee Campaign



Pledge Now

Home

My Account

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete
----------------------------	---------------------------	----------------	------------------

← Back
Continue →

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

Acknowledgements

Acknowledgement Options pulled from the Option Set

I would like to receive an acknowledgement from the Charity confirming my contribution.

I would like to release my name to the charity(ies) receiving my contribution.

I would like to receive future emails from the charity.

Account Information

Username

Personal Information

First Name

Last Name

Giving Focus Area Interest (optional)

Custom Registration Field

Home Contact Information

Home Email Address (optional)

or

Phone Number 1 (optional)

Phone Number 2 (optional)

Fax Number (optional)

Home Address

Home Country (dropdown)

Home Address 1

Home Address 2 (optional)

Home City

Home State (dropdown)

Home Zip Code

← Back
Continue →



Pledge Review / Submission

Logged In: Jane Williams : LOGOUT

NORTHPORT Employee Campaign

Pledge Now

Home

My Account

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete
----------------------------	---------------------------	----------------	------------------

← Back **Submit Contribution** →

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

edit Personal Information

Name Jane Williams
 Home Address 16 Home Way, Anywhere, MD 20852 US
 Home Phone
 Home Email jennifer@gmail.com

Acknowledgements

- I would like to receive an acknowledgement from the Charity confirming my contribution.
- I would like to release my name to the charity(ies) receiving my contribution.
- I would like to receive future emails from the charity.

edit Transaction

Status Pending
 Payment Type Check
 Pledge \$50.00

edit Charity Details

50.00 % United Way of the National Capital Area
 50.00 % Alpha Corp Employee Assistance Fund

← Back **Submit Contribution** →

Thank You

Logged In: Jane Williams : LOGOUT

NORTHPORT Employee Campaign

Pledge Now

Home

My Account

Step 1: Pledge Information	Step 2: Donor Information	Step 3: Review	Step 4: Complete
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← Back **Print pledge summary** ↑ Logout

Thank You!

Thank you for your participation in our employee giving campaign. Together we can truly make a difference in the communities in which we live and work.

[Please participate in a survey.](#) We value your feedback!

← Back **Print pledge summary** ↑ Logout →

Survey activated in Website Content

Thank You Message configured in Website Content



Giving History

Logged In: Jane Williams : LOGOUT

NORTHPORT Employee Campaign

Pledge Now

Home Below you will find information related to past gifts that you have made.

Giving History

My Account

Date	Campaign	Pledge	Payment Type	Total
Transaction #10017383766				
Date Created	7/14/2010 4:01:48 PM CST/CDT			
Date Last Updated	7/14/2010 4:01:48 PM CST/CDT			
Status	Submitted			
Payment Type	Check			
Pledge	\$50.00			
Charity Details				
50.00 % United Way of the National Capital Area				
50.00 % Alpha Corp Employee Assistance Fund				

Giving History Link activated in Website Content

My Account

Logged In: Jane Williams : LOGOUT

NORTHPORT Employee Campaign

Pledge Now

Home

Giving History

My Account

Personal Information

First Name

Last Name

Giving Focus Area Interest (optional)

Custom Registration Field

Home Contact Information

Home Email Address (optional)

or

Phone Number 1 (optional)

Phone Number 2 (optional)

Fax Number (optional)

Home Address

Home Country

Home Address 1

Home Address 2 (optional)

Home City

Home State

Home Zip Code

Save

My Account Link activated under Website Content/ Donor Registration