

## Quick Pledge™

Quick Pledge is an online pledge management system created specifically for public broadcasting. It is easy to install, simple and cost-effective to maintain. It has customizable pledge forms, real-time pledge reporting, data export capabilities, integrated premium management and e-mail notification for your pledge administrators.

All Quick Pledge stations receive a pledge form with the VeriSign™ Secured Seal, indicating to donors that you have been approved by VeriSign™ to protect confidential information with industry-leading SSL encryption.

Quick Pledge meets the Payment Card Industry Data Security Standard (PCI) and is deemed PCI compliant.

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## Quick Pledge Administrative Tools Login

You can access your **Quick Pledge Administrative Tools** at this URL:

<http://secure.publicbroadcasting.net/xxxx/pledge.pledgeadmin> (Substitute your station for the 'xxxx')

## Pledge Form Manager

Quick Pledge allows you to create up to 10 unique pledge forms in one account without additional set up fees.

With the **Pledge Form Manager**, you can customize form fields, and upload a separate header for each form - making it easy to create different pledge forms for various pledge campaigns.

## Create Pledge Forms

- In the **Pledge Form Manager**, <http://secure.publicbroadcasting.net/xxxx/pledge.pledgeadmin?action=searchPledgeForm> *select copy* to create a copy of an existing form, or *select create new pledge form* to start fresh.

### Create New Pledge Form

- Will direct you to the **Add Pledge Form** page. After completing the fields and clicking 'Go,' choose done or next.
- If you select next, you will go through a series of steps to build your form.
- If you select done, you will go to the **Edit Pledge Form** page. From here you can go through each step individually or select the **Pledge Wizard** to set up and customize your new form.

### Copy an Existing Form

- Will direct you to the **Add Pledge Form** page that lists the copy of the form, ready to edit. Once you have completed the fields click 'Go,' and choose done or next.
- If you select next, you will go through a series of steps to build your form.
- If you select done, you will go to the **Edit Pledge Form** page. From here you can go through each step individually or select the **Pledge Wizard** to set up and customize your new form.

- From the Edit Pledge Form page you can also *assign* your **premiums** to appear on this form by checking the premiums in the **Assign Premiums** *section*.

- **Each pledge** form you create will have a unique URL in this format:  
<http://secure.publicbroadcasting.net/xxxx/formname/pledge.pledgemain>

- Your main pledge form is your **'default' form**:  
<http://secure.publicbroadcasting.net/xxxx/default/pledge.pledgemain>
- You can run reports for individual forms or totals reports for all forms in your account.

## Editing Pledge Forms

In the **Pledge Form Manager**,

<http://secure.publicbroadcasting.net/xxxx/pledge.pledgeadmin?action=searchPledgeForm>  
*click* on the **Edit** button next to the form you want to edit.

### Form Settings Page

- **Form Name:** No spaces or special characters allowed in the name. The name of the form can't be changed, if you need a form with a different name, create a copy of the form and rename it.
- **Source Code:** Can include dynamic values to indicate the date/time of the pledge. This can be passed to you on your daily batch file for uploading to your membership database
- **Pledge Email Address:** Is the address where daily encrypted batch files with donor data will be sent. Security Certificate installation required on the recipient's computer.
- **Templates:** Determines the layout in which sections appear on your Pledge Form.
  - **Radio Template:** Pledge type and levels are listed first, followed by premium and personal information
  - **Television Template:** Premium driven form. Pledge level is determined by premium chosen.
  - **Back Office/Phone Template:** For use by call centers or volunteers during pledge drives. Personal information is listed first, followed by pledge details.
  - **Sustaining Only Template:** Simplified template designed for monthly sustaining memberships. Pledge levels are listed in monthly, instead of annual, totals. Premiums are not part of this template.
- **Custom Buttons:** You may customize the form header image, as well as “Continue“, “Submit Pledge” and “Edit Your Information” buttons that appear on the **Pledge Form** and **Preview Page**. For example, you could test different button sizes and colors to see which perform the best and yield better completion rates.



## Sustaining Member Form

If your station has a sustaining member program, you should consider creating a separate form



using the **Sustaining Member Template**. The pledge levels on this form are listed in **Monthly** amounts, allowing donors to choose an ongoing monthly payment amount instead of the **Annual** total.

Example of this form:

<http://secure.publicbroadcasting.net/wmht/SustainingPartnerForm/pledge.pledgemain>

### Create a Sustaining Member Form:

- In the **Pledge Form Manager**, *create* a new form.
- On **Form Settings** page for 'Form Template' *select* **'Sustaining Only Template'** from the dropdown menu
- *Customize* the form as needed entering **Pledge Levels** as **Monthly Amounts**.
- Provide links on your website for both donation options: **one-time donations** and **monthly sustaining memberships**.
- You may decide to build a bridge page that explains both one-time and sustaining gift options, like this example:  
[http://www.purdue.edu/wbaa/support\\_wbaa/pledgeForms.shtml](http://www.purdue.edu/wbaa/support_wbaa/pledgeForms.shtml)

## Back Office Form

Quick Pledge includes a secure **Back Office Form** that you, your volunteers and call centers can use to enter phone pledges.

- The Back Office Form is based on your default Quick Pledge form, but the fields are ordered differently.
- **Reporting:** Station administrators can sort and run reports on both phone and online pledges. For Back Office pledges, the Pledge source is automatically coded 'phone', while online pledges are coded 'web.'
- **Link:** You can find the link to the Back Office Form in the top right corner of your admin tools. Bookmark this form for your volunteers.
- If you use the real-time processing option, your volunteer pledges are processed immediately just like your web pledges.

If you want to further customize the Back Office Form with additional instructions for volunteers or different fields, you can also create a new custom Back Office pledge form(s) for your volunteers and/or call centers.

### Create a Custom Back Office Form:

- In **Pledge Form Manager**, *create a new form*.
- On **Form Settings** page name your form and **and for 'Form Template'** *select Back Office/Phone Template* from the dropdown menu.
- *Customize* the form as needed using the Edit Pledge Form features.
- You'll be able to run reports separately for this form and you will receive a **separate daily batch file** for each form.

### Pitch Page

A pitch page functions as a bridge page to your pledge form and may include information about your pledge drive, contest you might be running or allow you to highlight particular premiums you're featuring. In addition to custom copy, you can upload an image to appear next to the copy and customize the '**Pledge Now**' button.

### Pledge Form Wizard

Pledge form Wizard walks you through all the sections of your pledge form allowing you to customize them, and activate, or remove sections from your page.

- **Pledge Message:** Customize the title and intro copy that appears on top of your pledge form.
- **Pledge Types:** Enter and customize the pledge types to be displayed on your form.
  - **Enter Contest Only:** If you are running a special promotional contest in conjunction with your pledge drive, you can add an option on your Pledge Form that will allow users to enter the contest without pledging. Many states require this option for all publicly-promoted contests. To set this option up *select option Type 8, Enter me in the drawing only*. When someone chooses this option, Quick Pledge requires personal information only, no payment information is required.
- **This Pledge Supports:** Allows you to add options such as Radio/TV/Both or Classical/Jazz/News to find out the desired designation of the donation.
- **Pledge Levels:**
  - You can customize and activate your desired pledge levels and enter a description for each pledge level. **Note:** the levels entered are Annual totals, with the exception of the Sustaining Only Template, which includes Monthly pledge levels.
  - **Sustaining Membership:** If you are combining both One-Time and Sustaining memberships on one form, you can turn on the checkbox and customize the copy to allow donors to submit an ongoing donation.
  - **Installments:** You can offer installment payment plan options in various frequencies. You may also define a monthly minimum.
- **Thank You Gifts:** You can edit the copy around the Thank You Gifts area as well as change the default display order. **Note:** the gifts themselves are entered and edited via Premiums Manager.
- **Personal Information:** You can turn on/off any of the fields. In addition, you can select which fields are marked as required.

- **Shipping Information:** You can activate a separate Shipping section on your form to allow donor to enter different address for shipping the premium.
- **Payment Information:** Select which credit cards you accept. Additionally, you can offer **EFT** and **University Payroll Deduction** options, and provide information about how the program works.
- **Request for Additional Contribution:** Use this section to request an additional dollar amount (such as for capital campaign or an extra shipping charge) from your donors. If a donor elects to contribute, the dollar amount you indicate will be added to their pledge.
- **Employer Matching Contribution:** If there are local companies which do matching for donations, enter them to the list to allow donors to select their employer.
- **Comments:** You can customize this area by asking a specific open ended question or allowing donors to include any comments or questions they might have about their donation.
- **Optional Yes/No Question:** Use this section to create an optional yes/no question to ask your donor. You will be able to search your donor's information based on this answer.

### Assign Pledge Premiums

Select which premiums you want to show up on your pledge form. Checking or unchecking the box on the top of the list will activate/de-activate all premiums.

**Note:** only premiums in “**Live**” status show up on this list. To activate a “**Pending**” premium, go to the Premiums Manager section first and make the premiums live.

### Don't Leave Pop Up

Many users abandon the pledge form before completing their transaction. You can create an optional pop-up window displaying a custom message which will display when donors navigate to another page prior to completing a transaction. You can include information, such as pledge phone number or other contact information, for your Membership Department to provide alternate ways of donating.

### Thank You Page

Create a custom thank-you page, which appears after the pledge transaction has been completed. The system will automatically display a pledge summary, but you can customize the message appearing on the top of the page.

### Email Receipt

After a donation has been successfully completed, an automated **Email Receipt** is sent to the donor confirming that their transaction was submitted. This email also serves as a tax receipt of their donation. If you entered the **Fair Market Value** for the Premium chosen, the **tax deductible amount** of the donation will be calculated and displayed on the receipt.

You can customize the body of the email that gets sent along with their receipt information. You may also modify the default subject line, which states “Thank you for your contribution,” as well as the ‘From’ email address, which will allow recipients to send replies to you directly.

You also have an option to **turn off the automated email receipt** that is sent to the donor. It is recommended that you leave it turned on for all your web forms. However, if you have a special back office form used to enter phone/mail donations, and don't want to send an email receipt for these transaction, you may deactivate the receipt option.

### Quick Pledge Email Notification

With **Quick Pledge**, one or more staffers can receive a pledge notification email when a new pledge comes in. The notification email includes the full donation details, with the exception of credit card information. These email notifications are **different** from your encrypted pledge file emails which include the full donation information. Notifications are great for non-drive times when you may not check for online pledges regularly. You can set different addresses for each form.

#### To Set or Edit Your Pledge Notification Email Addresses:

- From your **Quick Pledge Tools Index**, *click Pledge Form Manager*.
- *Click Edit* for the form of your choice.
- *Click Pledge Email Notification*.
- *Select Yes* for **Would you like to receive this notification?**
- In the box below, *Enter* the **email address(es)** to the desired destinations, separating multiple addresses with commas.
- *Click Preview*. Check to make sure the address(es) you added are correct.

### Premiums Manager

The **Premiums Manager** makes it possible for you to add premiums one at a time or import them from a tab delimited (.txt) file. Easily add text, images, inventory codes, and fair market value. Once the gift information is entered, the system automatically generates pop-up windows that display descriptions and images when users select a premium to view. The Premiums Manager also makes turning premiums on and off simple, as well as making some premiums active while leaving others pending for future drives.

#### Adding Premium

- From your **Quick Pledge Tools Index**, *click Premiums Manager*
- *Click Add Premiums*
- *Enter* information about the premium. **Amount** and **Name** are the only required fields. If **Description** and **Image** are added those will appear on the pop-up window.

### Fair Market Value of a Premium

**Fair Market Value Calculator** is a tool that allows you to enter a fair market value on the 'Add Premium' page and calculate the tax deductible portion of a donor's pledge on the **Thank You page** and again on their **Email Receipt**. The copy reads as follows:

Your contribution of \_\_\_\_\_ is greatly appreciated. The fair market value of the gift(s) you selected is \_\_\_\_\_, therefore the tax deductible portion of your contribution is \_\_\_\_\_. Please retain this form for your records.

## Assign and Activate Premiums

When adding new premiums to your account or activating existing premiums, remember to **assign premiums** to each form.

Even if you are not taking advantage of the multiple forms feature and have only one 'default' form, you need to assign the premiums to the form make them appear.

Only premiums that have the status of 'live' can be assigned to appear on the form, 'pending' premiums will not appear.

There are two ways to assign premiums to your forms:

### Assigning one premium at a time using the Premiums Manager:

- In **Premiums Manager**, *click* to **Search/Edit** premiums.
- *Edit* the **premium** by *clicking* on the **premium name** in the search results view.
- Make sure the status of the premium is set to 'live'.
- Under **Make Premium Available on check** the **box(es)** next to the form name(s) you wish to assign the premium to appear on.

### Assigning multiple premiums to a form using the Pledge Form Manager:

- *Click* the **Edit** button next to the pledge form to which you'd like to add premiums.
- *Click* on the **Assign Pledge Premiums** link. A complete list of live premiums displays
- *Select* the **Premiums** you wish to display on the form. *Uncheck* any **premiums** you want to remove.
- *Click* **Save** once you have adjusted the premium list.

## Fast Premium Updates

You can quickly change the status of multiple premiums between Live and Pending or Delete them altogether.

### To Alter the Status for Multiple Premiums:

- *Log in* to your **Premiums Manager**.
- *Click* **Search/Edit**.
- *Check off* **multiple premiums**.
- *Click* **Make Live** or **Make Pending** or **Delete Checked** to publish the information.

**Note:** If making premiums live, make sure they are assigned to the correct forms.

## Link to Your Premiums Display

Use this url to link directly to your view all gifts pop up window:

<http://secure.publicbroadcasting.net/xxxx/pledge.pledgemain?action=viewPremiums&newSearch=true&premiumType=all> (substitute your call letters)

## Reporting Options

The real-time reporting features let you analyze the success of a pledge drive instantly. All pledge data, excluding the credit card numbers, is available and searchable via the Quick Pledge reporting tools.

- **Search/Export Pledges:** Search all pledges by specific form, day part, source, date, name, premium, and more. Select from three different output formats:
  - **Block of Data:** Easy to read card catalog format for viewing individual transactions in a browser window or printing individual transaction information
  - **Single Row of Data:** View multiple transactions in a sortable column format.
  - **Tab Delimited Export File:** For exporting data to an external program.
- **Today's Pledges Quick View:** Review the day's totals (since the previous midnight). Sort pledges by any of the column headers.
- **Quick Pledge Form Report:** View each form's total pledge amounts and number of pledges during a given date range.
- **Quick Premium Count Report:** View a count of premiums selected during a given date range. The Count Report is useful when dealing with a limited number of items or when testing the revenue associated with a particular premium.
- **Quick Membership Type Report:** View totals for membership types from a specific date range.

## Reporting Only Login Access

Quick Pledge administration tools allows you to create separate logins for staff members or volunteers who need access to view pledge totals or run reports, but should not have access to editing your pledge forms or premiums. For example, show hosts could view real-time pledge totals during pledge drives.

**To add a Reporting Only user account for Quick Pledge,** email [help@publicinteractive.com](mailto:help@publicinteractive.com) and include your Quick Pledge Station/Account ID, and the preferred username and password for the new login.

All users will access Quick Pledge administration tools using the same url <http://secure.publicbroadcasting.net/xxxx/pledge.pledgeadmin> (Substitute your station ID for the 'xxxx'), and based on their access level will either see the full list of options, or links to the reporting tools only.

## Receiving Donor Data

Pledge information is delivered to stations via encrypted emails either as a nightly batch file or individual real-time transaction. The person receiving the emails will need to have a **security certificate** installed on their computer to allow them to decrypt the message.

### Requirements:

- We recommend that station sets up a dedicated email address (e.g., [membership@xxxx.org](mailto:membership@xxxx.org), substitute your station for the 'xxxx') rather than a personal email address to receive the pledges.
- Windows OS and an email client that supports S/MIME encryption (Outlook, Outlook Express, Thunderbird or Netscape Mail).
- Decryption key (provided by NPR Digital Services) will be installed on a single computer at the station that will be used to receive the encrypted pledge emails and decrypt the pledges.

## Data Filters

You have the option to receive pledge data consolidated in a **daily batch file** that you can import into your membership database or upload for processing. With the encrypted batch files, the pledge data comes in once per day (around 4 am ET the following morning) allowing you to receive and process the day's pledges all at once, rather than tracking and processing individual donations throughout the day.

Batch pledge files are easier to import into your membership database as well, as they are formatted to match your membership database. Data filters are available for **Allegiance, Enterprise, Memsys, Scout, Team Approach**, custom formats and more.

You can always get up-to-the-minute results with the real-time reporting tools in Quick Pledge and via the pledge email notification option so you keep track of your totals.

## Pledge Email Address

You can update the email address where your encrypted pledge data is sent to, and set a different address for each form.

### To Set or Edit Your Secure Pledge Email Addresses:

- From your **Quick Pledge Tools Index**, *click Pledge Form Manager*.
- *Click Edit* for the form of your choice.
- *Click Form Settings*.
- The third option is Pledge Email Address - update the email address here. This is the email address that the encrypted transactions are sent to.

- In the box below, *Enter* the **email address(es)** to the desired destinations, separating multiple addresses with commas.
- *Scroll* to the bottom of the page and *Click* the **Go button**.

### Quick Pledge™ Certificate Install

The person receiving the encrypted pledge emails needs to have a security certificate installed on their computer to be able to view the data.

If you are unable to decrypt your pledges, the security certificate may need to be reinstalled. This is often needed if you purchase a new computer or change email programs.

#### To Install or Reinstall Security Certificates:

- *Log in* to your **Reports Drop Box** found at the following address:  
<https://reports.publicinteractive.com/xxxx/dropbox/> (Substitute your station for the 'xxxx').
- *Enter* the same **user** and **password** you use to access your Quick Pledge Admin Tools.
- *Right-click* on the file **xxxx.p12** (substitute your station for the 'xxxx') and *Save file* to your **desktop**.
- **Contact NPR Digital Services to walk you through the rest of the installation process.**

### Pledge Delivery Manager

Pledge Delivery Manager allows you to resend a daily batch file or real-time pledge transaction email to the dedicated pledge email address.

If you need to change the email address where the encrypted files go to, you can do that on the Form Settings page for each form (see page 4).

#### Resend a Daily Batch File

The daily batch files are sent to you automatically each morning for the previous day's transactions.

**Resend a daily batch file you missed:** When resending a file, enter the date of the pledges, not the date the file would have been sent to you.

- **Example:** You're missing a Monday morning file that would include Sunday's transactions. Enter Sunday's date..

**Send Early on the Same Day:** You can also use this function to receive transactions earlier, e.g., so you can start processing Dec 31 transactions on Dec 31st.

- If you generate today's pledge batch file early, you will receive transactions from midnight until the present time. The automatic daily batch file will be sent to you as usual the following morning, and it will contain the full day's transactions, including those previously sent. Please check for duplicates before processing your files.

### Resend an Individual Real-Time Pledge

Use this option if you receive your pledge data as individual real-time transaction emails. Use the Search/Export Pledges tool to find the Pledge ID of the transaction you need resent.

#### To access the Pledge Delivery Manager:

- *Log* into your **Quick Pledge Administrative Tools**
- *Scroll* to the bottom of the Index page to **Administrative** section
- *Click* on **Pledge Delivery Manager**

### Real-Time Processing Options

Quick Pledge can be integrated for a PCI compliant real-time processing with **Paypal Payflow Pro** or **Sage Payments Solutions** to eliminate the need for you to receive and store credit card information in your systems - making the process faster and more secure.

#### Paypal Payflow Pro

NPR Digital Services installs and hosts an **online credit card payment gateway** using **Paypal Payment Services**, which securely verifies and routes the transaction funds to the station's online-enabled merchant account.

- Pledges are processed in real time, including phone pledges entered via the Back Office form.
- You get access to the **Paypal Manager** to view transactions, run reports and manage recurring payment profiles
- Credit card data is **not** included in your daily batch file, it's passed directly to Paypal when the transaction is processed.

#### Sage

Quick Pledge can be integrated with your Sage Payment Solutions account to provide an alternative solution for processing cards in a PCI compliant manner.

- NPR Digital Services will link your Quick Pledge account to the **Sage Vault**.
- Credit card information is sent to Sage Vault and swapped with **GUID**, which gets attached to the donation record and sent to you in the daily batch file.
- The processing of the transactions is done **via your membership database** linked up with Sage.

For more information about either of these Processing Options, contact [help@publicinteractive.com](mailto:help@publicinteractive.com).

## Pulse™ Integration

Quick Pledge integrates with **Pulse email marketing system** making it easy for you to track the success of your e-solicitations and your fundraising campaigns.

With special reporting tools, you can easily view the **total dollars raised** and **number of pledges received** from an e-solicitation, and view details about each individual pledge in Quick Pledge reporting.

| Email ID | Email Name         | Subject                            | Date Sent               | # of Pledges | Total Pledge |
|----------|--------------------|------------------------------------|-------------------------|--------------|--------------|
| 194189   | DEI Pre-Drive News | WXYZ: Your Trusted Source For News | Mar 28, 2008 @ 11:07 AM | 0            | \$0.00       |
| 215300   | DEI Pre-Drive News | WXYZ: Your Trusted Source For News | Jul 01, 2008 @ 09:29 AM | 3            | \$1,215.00   |

  

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|--|--|--|--|--|--|
| <b>Quick Pledge Page Views (total/unique) for demo:</b>                                    |  |  |  |  |  |
| Pitch Page: 3 / 1  |  |  |  |  |  |
| Pledge Form: 5 / 1   |  |  |  |  |  |
| Pledge Preview Page: 3 / 1   |  |  |  |  |  |
| Pledge Thank You Page: 3 / 3   |  |  |  |  |  |
| Total Pledges: 3 totaling \$1,215.00   |  |  |  |  |  |
| <a href="#">View Details About Individual Pledges (log into demo's Quick Pledge tools)</a> |  |  |  |  |  |

You can link the donor to a prefilled Quick Pledge form from any email you send out with Pulse, making it quicker and easier for the donor to complete the transaction.

## Quick Pledge FAQ

### Can I have multiple forms in my account?

Yes, you can create up to 10 unique pledge forms. If you need more than that, nominal set up fee applies. Contact NPR Digital Services for details.

With the **Pledge Form Manager**, you can not only customize form fields, but also upload a separate header for each form. This is a useful way to create different pledge form for a particular pledge campaign or build a back office form that differs from your web form during a pledge drive.

### Useful Tips for Creating Multiple Pledge Forms:

- In the **Pledge Form Manager**, *choose* to either **create a copy** of an existing form or **create a new form** altogether
- On the **Form Settings** of your form, *customize* the **settings** and *upload* a **new header**.
- *Go through* the **Pledge Wizard** to customize the fields on your form.
- *Assign* your **premiums** to appear on this form by checking the premiums on the **Assign Premiums** section.
- Each pledge form you create will have a unique URL in this format:  
<http://secure.publicbroadcasting.net/xxxx/formname/pledge.pledgemain> (substitute your station for the 'xxxx')
- Your main pledge form is assigned as your **'default' form**:  
<http://secure.publicbroadcasting.net/wxxx/default/pledge.pledgemain>
- You can run reports for individual forms or totals reports for all forms in your account.

### How do I receive my pledge data from Quick Pledge?

Pledge data will be sent to you via **encrypted email in a daily batch file** that you can import into your membership database or upload for processing. With the encrypted batch files, the pledge data comes in once per day; allowing you to receive and process the day's pledges all at once, rather than tracking and processing individual donations throughout the day. Batch pledges files are easier to import into your membership database as well, formatted to match your membership database.

Data filters are available for Allegiance, Enterprise, Memsys, Scout, Team Approach, custom formats and more. You can always get up-to-the-minute results with the real-time reporting tools in Quick Pledge and via the pledge email notification option so you keep track of your totals.

The person receiving the encrypted emails will need to have a security certificate installed on their computer to allow them to decrypt the messages.

## How do I update the email address my encrypted pledge files are sent to?

You can update the email address where your encrypted pledge data is sent to, and set a different address for each form.

### To Set or Edit Your Secure Pledge Email Addresses:

- From your **Quick Pledge Tools Index**, *click Pledge Form Manager*.
- *Click Edit* for the form of your choice.
- *Click Form Settings*.
- The third option is Pledge Email Address - update the email address here. This is the email address that the encrypted transactions are sent to.
- In the box below, *Enter* the **email address(es)** to the desired destinations, separating multiple addresses with commas.
- *Scroll* to the bottom of the page and *Click* the **Go button**.

## I can't open my pledge emails anymore. How do I reinstall the Quick Pledge™ Certificate?

The person receiving the encrypted pledge emails needs to have a security certificate installed on their computer to be able to view the data.

If you are unable to decrypt your pledges, the security certificate may need to be reinstalled. This happens if you get a new computer or change email programs.

### To Install or Reinstall Security Certificates:

- *Log in* to your **Reports Drop Box** found at the following address:  
<https://reports.publicinteractive.com/xxxx/dropbox/> (Substitute your station for the 'xxxx').
- *Enter* the same **user** and **password** you use to access your Quick Pledge Admin Tools.
- *Right-click* on the file **xxxx.p12** (substitute your station for the 'xxxx') and *Save file* to your **desktop**.
- **Contact NPR Digital Services to walk you through the rest of the installation process.**

## How do I know when I get a pledge? How do I sign up to receive Quick Pledge Email Notifications?

With **Quick Pledge**, one or more staffers can receive a notification email when a new pledge comes in. The notification email includes the full donation details, with the exception of credit card information. These email notifications are **different** from your encrypted pledge file emails (those include the full donation information formatted for your membership system).

**Pledge notification** emails are great for non-drive times when you may not check for online pledges regularly. You can set different addresses for each form.

### To Set or Edit Your Pledge Notification Email Addresses:

- From your **Quick Pledge Tools Index**, *click* **Pledge Form Manager**.
- *Click* **Edit** for the form of your choice.
- *Click* **Pledge Email Notification**.
- *Select* **Yes** for **Would you like to receive this notification?**
- In the box below, *Enter* the **email address(es)** to the desired destinations, separating multiple addresses with commas.
- *Click* **Preview**. Check to make sure the address(es) you added are correct.

### Why aren't my premiums showing up on my form?

When adding new premiums to your account or activating existing premiums, remember to **assign premiums** to each form.

Even if you have only one 'default' form, you still need to assign the premiums to the form make them appear.

Only premiums that have the status of 'live' can be assigned to appear on the form, 'pending' premiums will not appear.

There are two ways to assign premiums to your forms:

#### Assigning one premium at a time using the Premiums Manager:

- In **Premiums Manager**, *click* to **Search/Edit** premiums.
- *Edit* the **premium** by *clicking* on the **premium name** in the search results view.
- Make sure the status of the premium is set to 'live'.
- Under **Make Premium Available on** *check* the **box(es)** next to the form name(s) you wish to assign the premium to appear on.

#### Assigning multiple premiums to a form using the Pledge Form Manager:

- *Click* the **Edit** button next to the pledge form to which you'd like to add premiums.
- *Click* on the **Assign Pledge Premiums** link. A complete list of live premiums displays
- *Select* the **Premiums** you wish to display on the form. *Uncheck* any **premiums** you want to remove.
- *Click* **Save** once you have adjusted the premium list.

### I'm running a contest, how do I allow people to enter without pledging?

If you're running a special promotional contest in conjunction with your pledge drive, you can add an option on your Pledge Form that will allow users to enter the contest without pledging or

entering payment information. Many states require this option for all publicly-promoted contests. Here's how to set it up:

- *Log* into your Quick Pledge tools:  
**<http://secure.publicbroadcasting.net/xxxx/pledge.pledgeadmin>** (Substitute your station for the 'xxxx')
- *Go* into the "**Pledge Form Wizard**"
- Under "**Pledge Type**" (second screen), *select* option "**Type 8,**" "**Enter me in the drawing only.**" When someone chooses this option, Quick Pledge requires personal information only, no payment information is required.
- *Click* "Next" through the other screens. Be sure to set your desired required fields on the "Personal Information" section
- Complete and save your form. If people choose this option, they will not be required to make a pledge or enter payment information.

### Can I create a separate form for my volunteers or call center to enter pledges?

Quick Pledge includes a secure **Back Office Form** that you, your volunteers and call centers can use to enter phone pledges.

- The default Back Office Form is based on your default Quick Pledge form, but the fields are ordered differently.
- **Reporting:** Station administrators can sort and run reports on both phone and online pledges. For Back Office pledges, the Pledge source is automatically coded 'phone', while online pledges are coded 'web.'
- **Link:** You can find the link to the Back Office Form in the top right corner of your admin tools. Bookmark this form for your volunteers.
- If you use the real-time processing option, your volunteer pledges are processed immediately just like your web pledges.

If you want to further **customize** the Back Office Form with additional instructions for volunteers or different fields, you can also **create a separate custom Back Office pledge form(s)** for your volunteers and/or call centers.

#### Create a Custom Back Office Form:

- In **Pledge Form Manager**, *create* a **new form**.
- On **Form Settings** page name your form and **for 'Form Template'** *select* **Back Office/Phone Template** from the dropdown menu.
- *Customize* the form as needed using the Edit Pledge Form features.
- You'll be able to run reports separately for this form and you will receive a **separate daily batch file** for each form.

## Can I collect Sustaining Memberships with Quick Pledge?

Yes! If your station has a sustaining member program, you should consider creating a separate



form using the **Sustaining Member Template**. The pledge levels on this form are listed in **Monthly** amounts, allowing donors to choose an ongoing monthly payment amount instead of the **Annual** total.

Example of this form:

<http://secure.publicbroadcasting.net/wmht/SustainingPartnerForm/pledge.pledgemain>

### Create a Sustaining Member Form:

- In the **Pledge Form Manager**, *create* a new form.
- On **Form Settings** page for 'Form Template' *select* '**Sustaining Only Template**' from the dropdown menu
- *Customize* the form as needed entering **Pledge Levels** as **Monthly Amounts**.
- Provide links on your website for both donation options: **one-time donations** and **monthly sustaining memberships**.
- You may decide to build a bridge page that explains both one-time and sustaining gift options, like this example:

[http://www.purdue.edu/wbaa/support\\_wbaa/pledgeForms.shtml](http://www.purdue.edu/wbaa/support_wbaa/pledgeForms.shtml)

If you prefer to combine both One-Time and Sustaining memberships on one form instead of creating a separate Sustaining Member form, you can do that by activating a checkbox in the Pledge Form Wizard under 'Pledge Levels' section.

## Is Quick Pledge PCI Compliant?

Yes, Quick Pledge is PCI compliant and an authorized third party regularly scans our systems to ensure continued compliance with the PCI DSS standard.

Most recent Compliance Certificate can be viewed online at:

<http://www.publicinteractive.com/media/pdfs/PCIPassingScan-Public%20Interactive.pdf>

## What is PCI Compliance all about and why should I care?

**The Payment Card Industry (PCI) Data Security Standard (DSS)** was developed by the founding payment brands of the PCI Security Standards Council, including American Express, Discover Financial Services, JCB International, MasterCard Worldwide and Visa Inc. to increase cardholder data security and provide a baseline for consistent global security measures. It

includes both technical and operational requirements for protecting cardholder data and applies to all entities involved in payment card processing, including merchants, processors, acquirers, issuers, and service providers, as well as all other entities that **store, process or transmit** cardholder data.

### What does this mean for stations?

It means that if you store any credit card information for any length of time, whether in electronic format on your server or simply written on a piece of paper, **the guidelines apply to you and you must go through the certification process and become PCI compliant.**

The only way to avoid this is by not storing any credit card numbers in your systems, and NPR Digital Services can help you with this.

If you use Quick Pledge integrated with **Sage Payment Solutions** or **Paypal Payflow Pro** real-time processing for all your credit card transactions AND you do not store any credit card information locally, you don't have to become PCI compliant yourselves.

### What are the payment processing options with Quick Pledge?

Quick Pledge can be integrated for a PCI compliant real-time processing with **Paypal Payflow Pro** or **Sage Payments Solutions** to eliminate the need for you to receive and store credit card information in your systems - making the process faster and more secure.

#### Paypal Payflow Pro

NPR Digital Services installs and hosts an **online credit card payment gateway** using **Paypal Payment Services**, which securely verifies and routes the transaction funds to the station's online-enabled merchant account.

- Pledges are **processed in real time**, including phone pledges entered via the Back Office form.
- You get access to the **Paypal Manager** to view transactions, run reports and manage recurring payment profiles
- Credit card data is **not** included in your daily batch file, it's passed directly to Paypal when the transaction is processed.

#### Sage

Quick Pledge can be integrated with your Sage Payment Solutions account to provide an alternative solution for processing cards in a PCI compliant manner.

- NPR Digital Services will link your Quick Pledge account to the **Sage Vault**.
- Credit card information is sent to Sage Vault and swapped with **GUID**, which gets attached to the donation record and sent to you in the daily batch file.
- The processing of the transactions is done **via your membership database** linked up with Sage.