



September 2015
NPR DS Marketing Form:
Offline Forms

Agenda

- What Are Offline Forms?
- PCI Compliance
- Volunteer Logins
- How to Get Started
- Questions

Offline Forms

- Email addresses not required
- New “volunteer” admin role for entering pledges with limited admin access
- Speed up pledge entry by bypassing confirmation pages
- "Market Source" field appears on offline forms & may be manually edited as needed. (Appears in Source Code field in donation export)
- The CVV field can be made optional

PCI Compliance

- DS Marketing Forms have the same level of PCI Compliance reporting as Quick Pledge offered for hosted, ecommerce applications.
- In addition, DS Marketing Forms are submitted to an annual audit of our ecommerce platform, through a third party, qualified security analyst firm (QSA).
- We recommend sending our PCI Compliance Attestation of Compliance document to your internal PCI Compliance officer to review.

Volunteer Logins

- You must be logged in to enter pledges in offline mode.
- “Volunteer” admins can only access offline forms. No access to reports or payment management.
- Volunteer admin access recommended for:
 - Staff who need to enter pledges, but don’t need additional access to forms admin
 - Volunteers who will be entering phone pledges at your station

We recommend limiting the number of staff with full admin access as much as possible.

Volunteer Logins

- Volunteers can only see your phone forms in offline mode
- Volunteers have a “My Forms” block at the top of the page linking to your active phone forms

WTST Support WBUR

[RETURN TO SITE](#)

[1.800.909.9287](#)

My Forms

[Phone Form Spring 2015 Volunteers](#)

Thanks for becoming a sustaining **member**, For information about our matching gifts, here's more info.

Donation Amount

Summary:
Please select an amount.

Sign me up to receive the station

Volunteer Logins

- Send NPR DS a support ticket if you need to set up additional logins for volunteers/staff, including the email address to connect to the new account(s).
 - **TIP:** If you normally have a bank of volunteers during a drive, create a single gmail account to connect to your volunteer logins.

We can then create multiple, unique logins connected to the same gmail account via aliases connected to the email.

For example, the email `wxyzvolunteers@gmail.com` will automatically be connected to `wxyzvolunteers+1@gmail.com`, `wxyzvolunteers+2@gmail.com`, etc.

How to get started

1. Submit a ticket confirming you want offline forms turned on. Include:
 - Which form(s) do you want designated for entering offline pledge? (you can clone your primary form for this if you don't already have a phone form)
 - What do you want the default Market Source code to be on each form?
 - Do you need new volunteer logins created? What email address(es) should be connected to the logins?
2. NPR DS will confirm once the feature is active on your account.

Helpful Links

- DS Marketing Forms help docs:
<http://nprds.screenstepslive.com/s/4375/m/13812/c/86992>
- About Offline Forms:
<http://digitalservices.npr.org/post/now-available-offline-mode-npr-ds-marketing-forms>
- PCI Compliance:
<http://nprds.screenstepslive.com/s/4375/m/13812/l/279839-pci-dss-3-0-compliance-and-npr-digital-services-marketing-forms>
- Help Center: <http://info.ds.npr.org/support.html>