




## *Campaign Management Release Notes: Delete OPPS Agencies*

This enhancement provides the ability to delete one or more OPPS agencies within a user's organization. Once an agency has been deleted, all reference to that agency under the organization is also removed. This includes all Designation Panels, Designation Panel Groups, Campaign and Donor Group Designation Panel Exceptions, and Matching Gift Program Rule Inclusions and Exclusions. Any designations made to the agency before it is deleted will still exist and process in the system.

This enhancement is permission based and can be added from the Campaign Management Permission Settings.

To enable this feature for a user in OPPS, take the following steps:


1. Log in to Campaign Management and navigate to the left navigation tree. Select the  **Users & Groups** node.
2. Search the system for a user or group.

**Click here to view and search users**

**Click here to view and search groups**

User Name	Full Name	Last Login	Action
Administrator	System Administrator	12/6/2012 10:01:00 AM	[Icons]
10220	marji 10220	10/14/2003 3:07:00 PM	[Icons]
11295	password i. password1	11/14/2003 2:22:00 PM	[Icons]
11936	problem 11936	11/5/2003 1:48:00 PM	[Icons]
123	123 123	1/1/0001 12:00:00 AM	[Icons]
123123	123 123	1/1/0001 12:00:00 AM	[Icons]
2.7UWAdmin	2.7 UWAdmin	2/19/2004 12:44:00 PM	[Icons]
293	293 Test	5/21/2005 8:03:00 PM	[Icons]
aa@truist.com	Allison Anderson	9/8/2011 3:06:00 PM	[Icons]
aamatore	Alex Amatore	4/8/2003 11:10:00 AM	[Icons]


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3. Click the key icon (  ) in the Action column to edit the permissions for a user or group.


**Click here to view and / or edit the user or group's permission settings**

Group Name	Group Description	Type	Action
Batch Campaign Manager	This group will be responsible for the setup of a campaign, ...	System	[Icons]
Batch Data Approver	The Batch Data Approver role will have the capability to upl ...	System	[Icons]
Batch Data Auditor	The Batch Data Auditor role is responsible for creating a ba ...	System	[Icons]
Batch Data Entry	The Batch Data Entry role is responsible for inputting paper ...	System	[Icons]
Campaign Coordinator	The Campaign Coordinator is typically an on-site company man ...	System	[Icons]
Campaign HR	The Campaign HR role is a group of on-site company personnel ...	System	[Icons]
Campaign Team	The Campaign Team is a group of on-site company personnel th ...	System	[Icons]
CampaignWizard	Campaign Wizard	System	[Icons]
Cingular Ambassadors	Admin users for Atlanta's Cingular Campaign 2002	System	[Icons]
matching grant		System	[Icons]
Site Coordinator	Can view Site Coordinator associated Donor Record and report ...	System	[Icons]
System Administrator	System Administrators have complete and unrestricted access ...	System	[Icons]
UW - Account Manager	Limited Access to view Website Content and Donor Gr		[Icons]
UW Administrator	Full Access to their United Way, All associated compar		[Icons]
UW Data Coordinator	Has full access to Upload Files, Export Files and Repo		[Icons]
UW Donor Group	Can add, edit all Donor Groups associated to a camp		[Icons]
UW Website Content	Can add, edit all Website Content associated to a car		[Icons]
Support Admin	Testing	User	[Icons]
UPS Coordinator Role	UPS Coordinator Role	User	[Icons]



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4. Click the expand button (  ) to open and view the "Organization" permission settings. Scroll down the page to "Delete Organization Agency Reference Count Override" and check "Grant" to enable this feature.

Add Designation Option	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
View Recognition Program	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Add Recognition Program	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Edit Recognition Program	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Delete Recognition Program	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
View Delivery Option	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Add Delivery Option	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Edit Delivery Option	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Delete Delivery Option	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Import Entity Identifier To Standard Account Code Mapping	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Import Designation Distribution Activity	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Import Organization Vetted Agency	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Add Campaign Set-Up Wizard Template	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Delete Campaign Set-Up Wizard Template	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Edit Campaign Set-Up Wizard Template	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
View Campaign Set-Up Wizard Template	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Delete Organization Agency Reference Count Override	<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
<b>Company</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	

5. Click  [Save / Update](#) at the bottom of the page.

Manage All Websites	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	<input checked="" type="checkbox"/>
Import Invoice	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
Manage All Campaign Set-Up Wizard Templates	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Campaign Management</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Organization</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Company</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Matching Gift</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Matching Gift Website</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Campaign</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Donor Group</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Website</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Donor</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Campaign Management Reporting</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Organization Reporting</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Campaign Reporting</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	
<b>Tools</b>	<input type="checkbox"/> Grant	<input type="checkbox"/> Deny	

 [Save / Update](#)  [Cancel / Return](#)

6. The next time the user logs in to OPPS, they will have the ability to delete OPPS agencies from any organization they are associated to.

**Organization (Truist)**

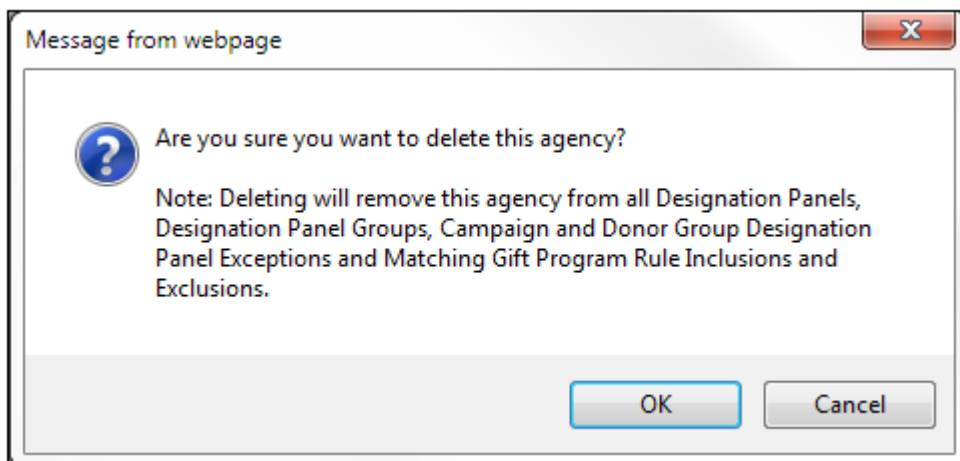
Organization Settings Merchant Contacts Territories Agencies

<input type="checkbox"/> Name ▲	Acct Code	Label	
<input type="checkbox"/> American National Red Cross	FluorUS001		
<input type="checkbox"/> A Childs Haven Inc	FluorUS002		
<input type="checkbox"/> Abrazar Inc.	FluorUS003		
<input type="checkbox"/> Aid Upstate	FluorUS004		
<input type="checkbox"/> AIDS Services Foundation Orange County	FluorUS005		
<input type="checkbox"/> Alameda County Community Food Bank	FluorUS006		
<input type="checkbox"/> Alaska Literacy Program Inc	FluorUS007		
<input type="checkbox"/> Allen Community Outreach	FluorUS008		
<input type="checkbox"/> Alliance for the Mentally Ill of Greenvi	FluorUS009		
<input type="checkbox"/> Alzheimers Disease & Related Disorders A	FluorUS010		

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Trash can will no longer be grayed out. Click to delete an agency.

**Note:** A warning will appear to remind you that once the agency is deleted, it will be removed from all Designation Panels, Designation Panel Groups, Campaign and Donor Group Designation Panel Exceptions, and Matching Gift Program Rule Inclusions and Exclusions. Click "OK" to continue.



7. If a donor searches for the agency on the donor site after it has been deleted, it will not appear in the search results. If an agency is deleted after a donor has already designated to the agency, all gift history details will still appear on the *Donation History* page and the funds will be processed and disbursed as normal.

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

Date	Campaign	Pledge	Payment Type	Total
12/10/2012	Truist 2013 Sales Demo	10023815943	Payroll Deduction	\$260.00
\$260.00 YMCA				
4/25/2011	2011 Campaign	10019268227 - cancelled	Payroll Deduction	\$520.00
100.00 % Global Impact				

Date	Direct Match	Payment Amount	Payment Type	Match Amount
<input type="button" value="remove"/>				<b>Transaction #12000082360</b>
Status	Pending Agency Verification			
Date	11/7/2012 11:18:32 AM CST/CDT			
Payment Date	10/1/2012 CST/CDT			
Payment Type	Check			
Payment Amount	\$300.00			
Match Amount	\$300.00			
Program	Middleburg Matching Gifts Program			
Designation	American National Red Cross			
Special Instructions				
Remain Anonymous	No			
Claim Form	<a href="#">Download Claim Form</a>			