

TRUIST

Campaign Management Release Notes: Increased Visibility on Panel Group & Option Package

This enhancement provides increased visibility into where each Panel Group is being used and what campaigns are using each Option Package. Within the Organization node, under Panel Groups, a list of Designation Panels using the Panel Group will display at the bottom of the page. Under the Organization Option Packages, a list of campaigns using the Option Package will display at the bottom of the page.

Panel Groups

The screenshot displays the 'Organization (Truist)' interface. On the left sidebar, 'Panel Groups' is highlighted. The main content area shows a table of panel groups with columns for 'Panel Group Code', 'Name', and 'Description'. A red circle highlights the 'allchar' row, and a red arrow points to it from a callout box.

Panel Group Code	Name	Description
allchar	All Charities	All Charities
BTPG	Ben's Test Panel Group	This is a test.
Blank	Blank	
education	Education	This is the description for the panel group
envir	Environment	This is the description for t
FL-CA	Fluor CA	
FlrNewUS	Fluor United States Agencies	
FL-US	Fluor US	
jjftest2	JJF_Panel Group Test 2	
mlsp1	Marcy's Panel Group 1	This is a Static Panel

From Campaign Management's Organization Panel Groups, open a Panel Group

Organization Settings Merchant Contacts Territories Agencies Panel Groups

Group

Name: All Charities *

Description: All Charities

Panel Group Code: allchar *

Type: Dynamic

Force Alphabetical Order:

Criteria

Grouping Level 1: - select grouping type -

Grouping Level 2: - select grouping type -

Grouping Level 3: - select grouping type -

Filter:

- By Country
 - United States
- By State
- By United Way
- By Entity Type

Used by Designation Panels:

Type	Name
LocateAnAgency	Default Open Locate Charity
LocateAnAgency	Intel Demo

20 Size

Displays the Designation Panels that use the selected Panel Group

Option Packages

Truist Settings Merchants Contacts Territories Agencies Panel Groups Users Region Campaign Set-Up Wizard Designation Panels Option Sets Leadership Corporate Match Acknowledgement Payment Type Designation Panel

Option Sets (Truist)

Leadership Corporate Match Acknowledgement Payment Type Designation Panel

Add a new option package

Code	Name	Description
5_10_Test	5_10_Test	
67200	67200	
Fluor	Fluor Config Test	Fluor Config Test
FLTest	Fluor US Test	Fluor US Test
GE_AFF_10	GE African American Forum	
IP2012Test	IP 2012 Test	
Jacobs2011	Jacobs 2011 Option Package - N ...	
JCrick	JCrick	
JJF Test 2	JJF Test 2	
JJFTE	JJFTE	
June2011	June2011	
K-001	K-001	

From Campaign Management's Option Packages, open an Option Package

Option Sets (Truist)

Leadership Corporate Match Acknowledgement Payment Type Designation Panel

Code: Fluor *

Name: Fluor Config Test *

Description: Fluor Config Test

Leadership Level Set: - select leadership level option set -

Corporate Match Set: - select corporate match option set -

Acknowledgement Set: JJF Test 2

Payment Type Set: PM Payment Set *

Designation Option Set: NORMA Testing_Without IRS *

Designation Panel Option Set: JJF Test 2 *

Recognition Program Set: - select recognition program option set -

Continuous Giving Option Set: - select continuous giving option set -

Default:

Displays the Campaigns and Donor Groups the selected Option Package is used on

Used On:

Campaign Name	Donor Group Name
Fluor 2012 CA Test	
Fluor 2012 US Test	

Save / Update | Cancel / Return