



EXPORTING PANEL GROUP AGENCIES

This document contains the steps to export OPPS agencies in your Panel Groups.

1. Log in to OPPS.

	Truist
TRUIST	Online Pledge Processing System Summer 2011
	Login Information Username
	Password → Login

2. Expand **Organizations** > [your organization (Truist)].







- 3. Obtain the Panel Group code.
 - a. Open **Panel Groups** > [your Panel Group(s)].

-The United Way of San Diego	S 0 9 5 0	rganization 🔚 Settings	🚍 Merchant	Contacts	Territories	🙀 Agencies	👬 Panel Groups	👗 Users	Region
-Trident United Way	Add a new par	nel group							
Settings Merchants	Panel Group Code	Name 🔺		Description					
Contacts	TRUISTUWW					(::			
Territories	10 Size	10 Size Filter default							
Agencies									
Users	O Cancel / Return								

b. Note the Panel Group code and name.

**Truist Default - UWW	*
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	**Truist Default - UWW TRUISTUWW * Dynamic

4. Expand the **Reporting** node and click **Exports**.



5. Click Create new Export Criteria



a. From the *Type* dropdown menu, select "Agency Flexport."





8 - 60	🎐 Summary	Reports	Exports	Series	📑 Templates
Туре	- select type -	•			
Name	- select type - Acknowledgement		*		
Description	Agency Agency Designation		*		
	Agency Designation De Agency Flexport	tail Flexport	-		
Include Description	Agency Mapping Donation	5			
Include Header	Donation Flexport Donor Designation				
Delivery Type	Invoice Flexport Organization Contacts				
	Organization Survey C	omment Detail			
🥪 Generate 💽 Save / Update 💽 Save / Update & Generate 🞯 Cancel / Return					

b. Choose tab delimited format.

😫 💐 🚱 🖉 Sumr	nary 🗒 Reports	Exports	📑 Series	📑 Templates
Туре	Agency Flexport	* *		
Format	Comma Delimited 👻 *			
Name	Tab Delimited		•	
Description	Excel 2003+	*		
		~		
Include Description				
Include Header				
Include Header on Empty File	es 📃			
Delivery Type	- none - 🔻			

- c. Filter by Panel Group.
 - i. Select "Include only selected Panel Groups" from the dropdown menu.
 - ii. Find your Panel Group(s) using the Panel Group Code.

Filter	By Age	ncy Identification nel Group	
		Available Panel Groups [allison text)Triangle United Way Funded Agencies [(Barrie's homework) Corporate Charity A1 - TEST br [Battle Test) Test Homework Group [100000-2281] (DA Test) Susan G. Komen [test1234] (JMKG) Test Homework [100000-3328]	Selected Panel Groups

- 6. Click Save / Update & Generate
- 7. Once complete, save the file and open it in Excel. The report will list the agency for each panel group it is aligned to, including Panel Groups you did not select. You will need to filter out the Panel Groups of other companies.