BASIC REQUIREMENTS FOR USING THE CAMPAIGN SET-UP WIZARD

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The following is a quick reference for admin users planning to build a template and create a campaign in the Campaign Set-Up Wizard. This checklist covers:

- The steps taken to ensure intended users have permission to use the Campaign Set-Up Wizard configuration in OPPS.
- The Organization settings that **require** configuration before a template can be built.
- The steps taken to ensure intended users have permission to use templates in the Campaign Set-Up Wizard.
- Campaign settings that **may require** additional configuration after a campaign is built using the wizard.

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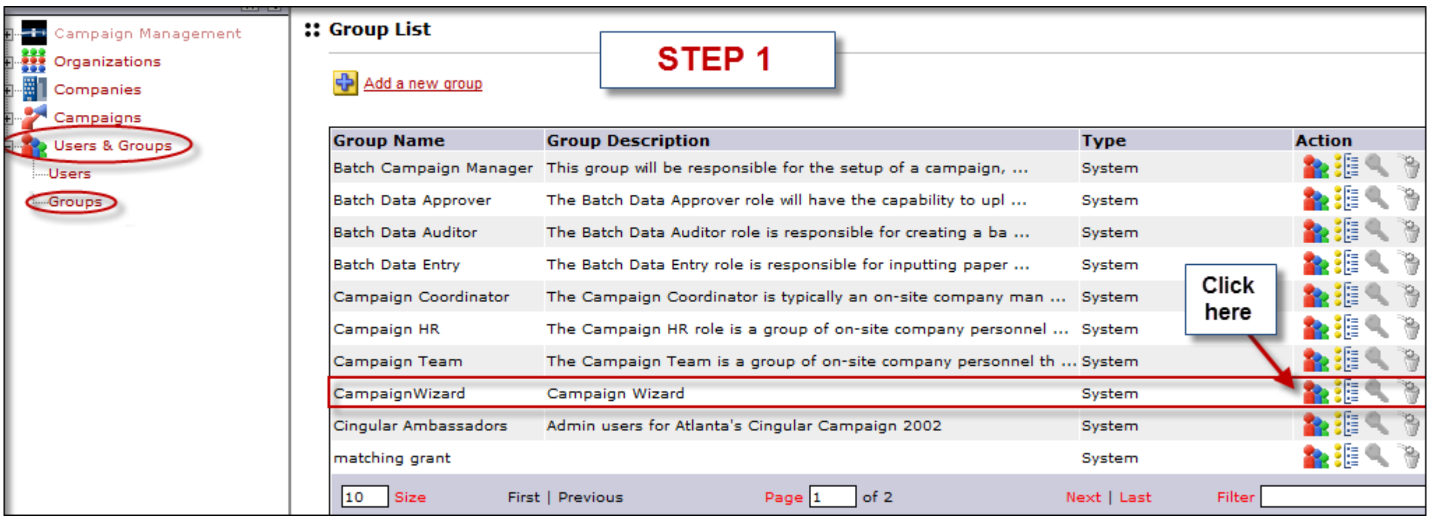
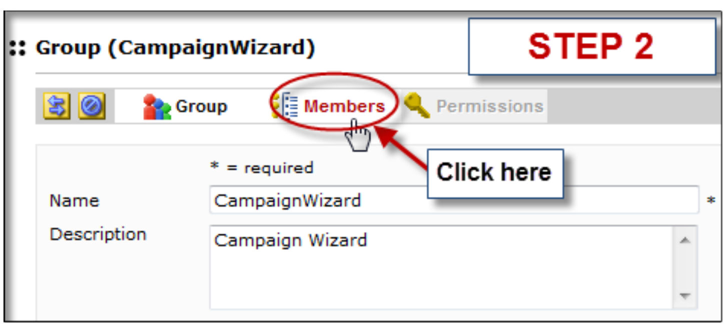
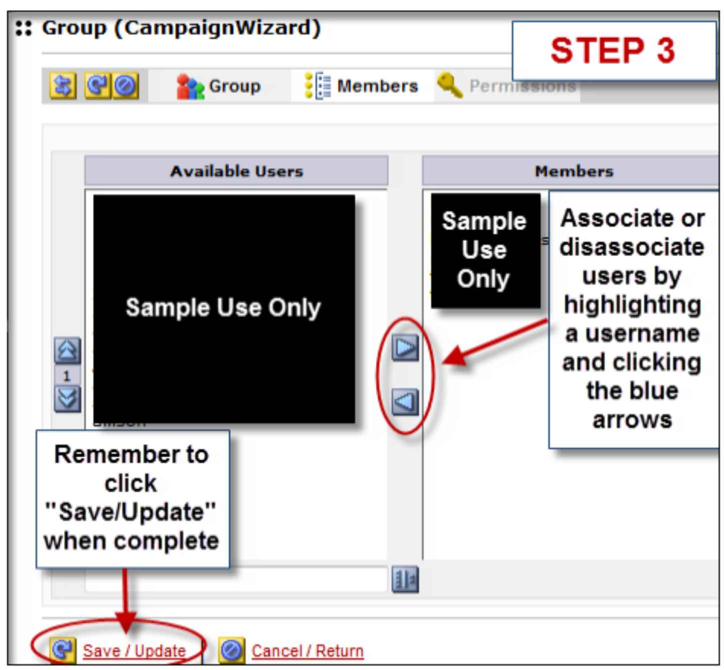
Prior to Building a Template

1. Associate Users to the Campaign Set-Up Wizard

Before admins have access to build a template for the Campaign Set-Up Wizard, they must be associated to the **Campaign Wizard** User Group, located at the Users & Groups level of Campaign Management. See the diagram, below, for details.







2. Check Organization Settings

To ensure all settings are set up and ready for use in the template, verify the following areas of the Organizations level are configured before beginning to build a template. To access the Organization level, log in to **OPPS**, and expand the **Organization level** > **(Your Organization)**.

For details on configuring these settings see further documentation, ***The New Admin's Guide to Campaign Management***.

Check that the following are set up for your organization:

- **Merchant Account** – A Merchant Account must be set up if your campaign will be using credit cards as a payment type. To configure, see: **Your Organization** > **Merchants** > **Add a new merchant account**.

- **Agencies** – Agencies must be added to the organization. To add agencies, see **Your Organization** > **Agencies** > **Add a new agency.** Agency imports can be done at the Importing level. See: **Your Organization** > **Importing** > **Add a new Import** > **Agency Import.** You can also use the iGuide via Dynamic Panels. See: **Your Organization** > **Panels** > **Add a new panel group**, and then, when asked to choose a panel group type, select **Dynamic**, which will pull agencies from the iGuide.

- **Panel Groups (Optional)** – This is where Panel Groups are created. If Panel Groups are to be utilized in the campaign, at least one Panel Group needs to be configured here. To configure, see: **Your Organization** > **Panel Groups**.

- **Users** – This is where users are added to the Organization. This task must be completed before users will have access to your organization and subsequently, the Set-Up Wizard. To set up, see: **Your Organization** > **Users**.

- **Designation Panels** – Designation Panels must be configured in order for the Introductory, Primary, and Locate an Agency Panels to function. To configure, see: **Your Organization** > **Designation Panels**.

- **Option Sets** – Not all Option Sets are required; however, if you want the optional Option Sets to be utilized in the campaign, they must be set up in order for them to show up in the lists available in the template. To configure, see: **Your Organization** > **Option Sets**.

- **Leadership Levels (Optional)** – A Leadership Level Set is optional; however, at least one must be configured if you wish to use Leadership Levels in your campaign. Leadership Levels set thresholds of gift amounts to encourage donors to give more. To configure, see: **Your Organization** > **Option Sets** > **Leadership**.

- **Corporate Match (Optional)** – A Corporate Match Set is optional; however, at least one must be configured if you wish to use Corporate Match in your campaign. These settings set up a Corporate Match program for the campaign. To configure, see: **Your Organization** > **Option Sets** > **Corporate Match**.

- **Acknowledgement** – In the template, you are required to select an Acknowledgement Question Set. Acknowledgement Questions are questions presented to the donor at the end of the pledging process. To configure, see: **Your Organization** > **Option Sets** > **Acknowledgement**.

- **Payment Types** – In the template, you are required to select a Payment Type Set. These settings set up the payment types available to the donor. To configure, see: **Your Organization** > **Option Sets** > **Payment Types**.

- **Designation** – In the template, you are required to select a Designation Option Set. These settings affect designation options on the Primary Designation Panel. To configure, see: **Your Organization** > **Option Sets** > **Designation**.

- **Panel (Optional)** – A Designation Panel Set is optional; however, at least one must be configured if you wish to use Panel Groups in your campaign. These settings set the business rules that determine the maximum item count and type of designation entity allowed on the Designation Panel. To configure, see: **Your Organization** > **Option Sets** > **Panel**.

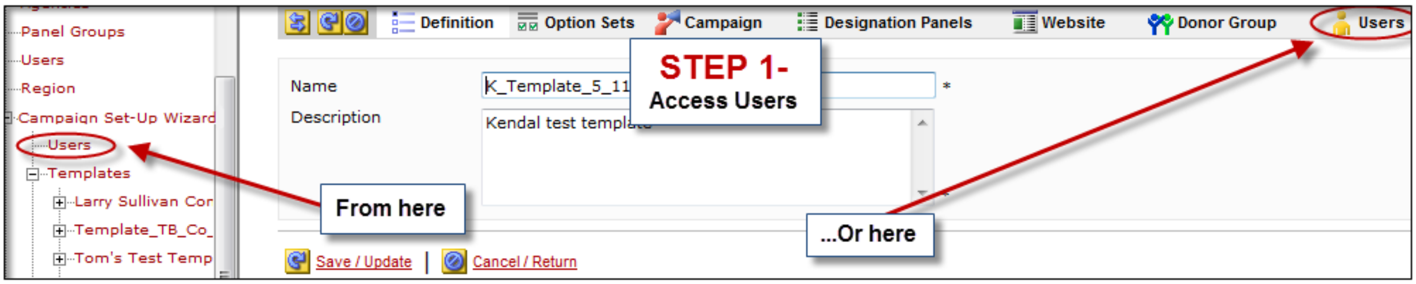
After the steps listed above are complete, you may build your template in Campaign Management.

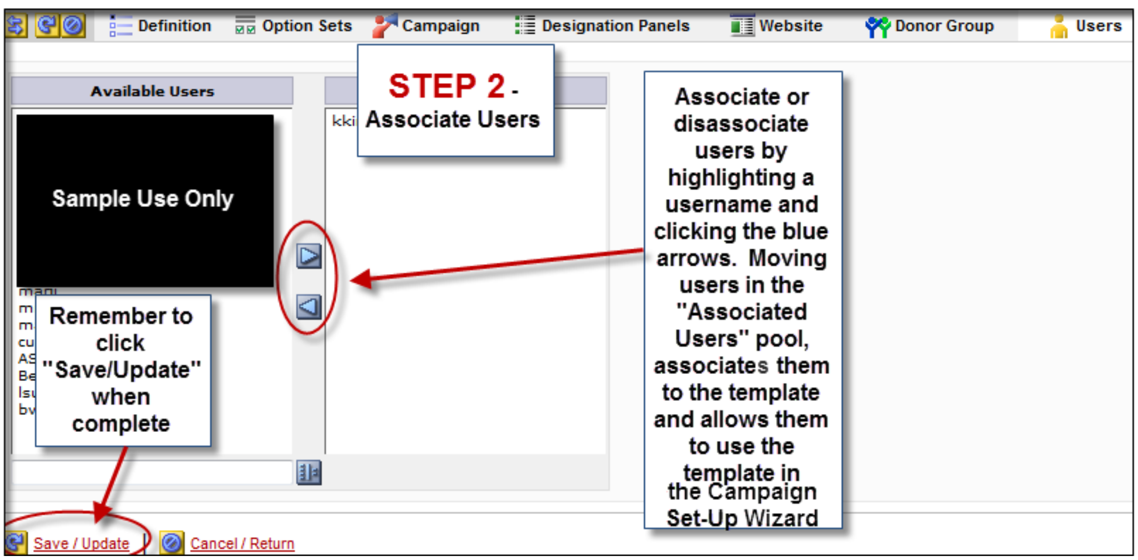
Note: For detail on building templates, see further documentation, ***Setting up a Basic Template for the Campaign Set-Up Wizard***.

After a Template is Created

1. Associate Users to the Template

Once the template is built, admins are required to associate users to the template before it can be utilized in the Campaign Set-Up Wizard. This task is completed at the Organizations level, under Campaign Set-Up Wizard , . See the diagram, below, for details.



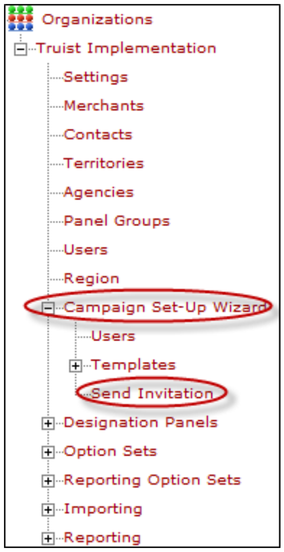


2. Send Users an Invitation

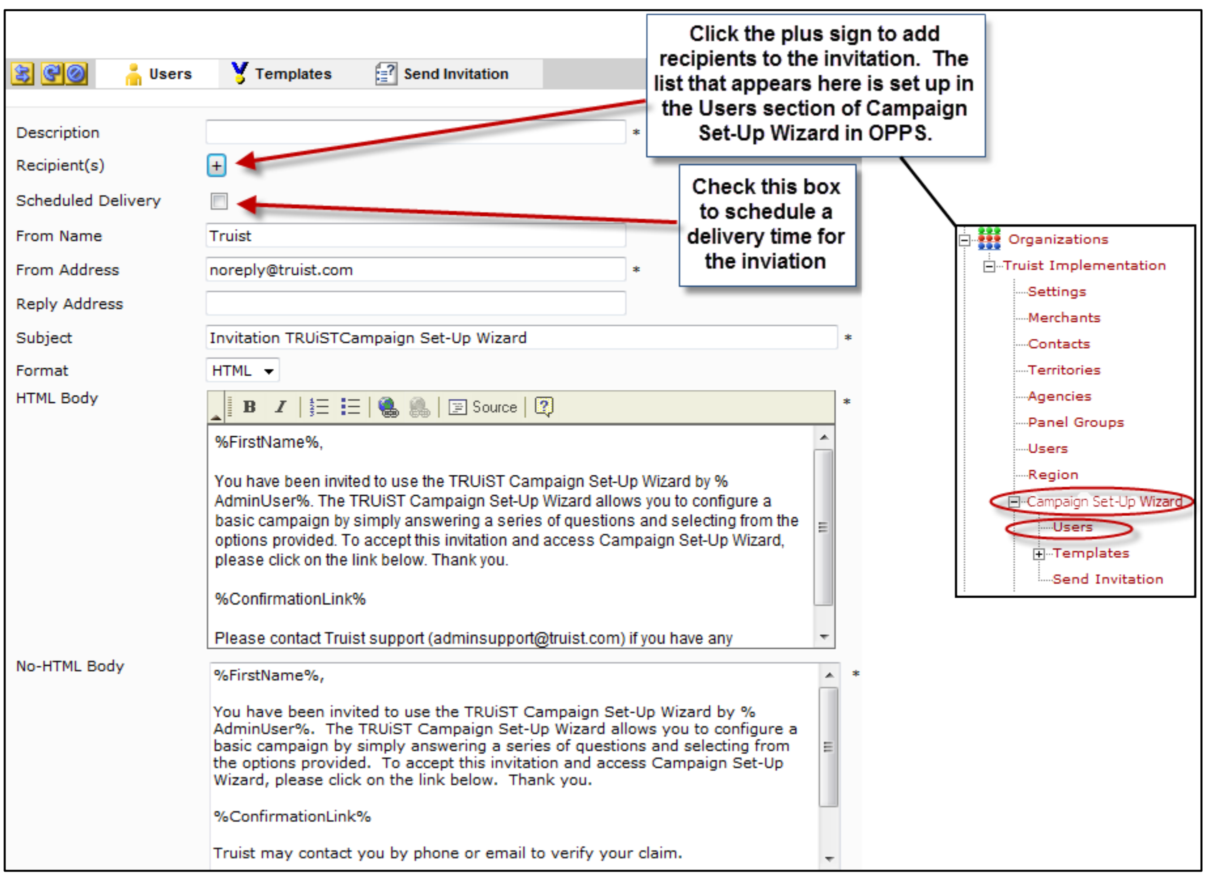
Once users have been associated to a template, there is an option to send them an invitation to use the Campaign Set-Up Wizard.

To send an invitation, take the following steps:

1. Log in to Campaign Management and expand the Organizations level.
2. Expand your organization and click Campaign Set-Up Wizard .
3. Click Send Invitation.

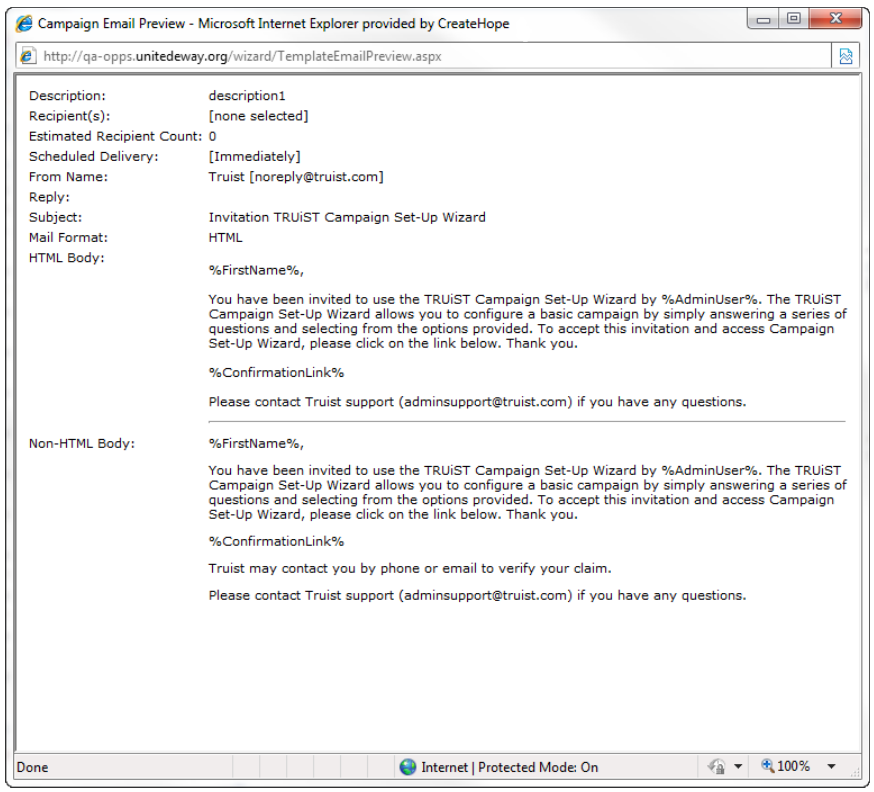


4. Click Add a new email.
5. Fill in the fields provided. Note that the body of the email is already filled out as default, but can be customized if needed. See the screenshot below.



6. Click Save / Update to save the invitation.
   Click Save & Queue to save and put the invitation into queue.
   Click Cancel / Return to cancel and return to the last page.
   Click Preview to see how the invitation will look for the recipient.

   i. When “**Preview**” is clicked, a popup window will appear. The content available in this window is the same as what the recipient will receive (see the image below).



After the Campaign is Built in the Wizard

1. Add Donors to the Campaign

Donors are added to a campaign at the Campaigns level of OPPS. This task is not accomplished during the wizard set-up and must be completed before a campaign can be launched into production. For details on adding donors to a campaign, see further documentation, ***The New Admin's Guide to Campaign Management***.

2. Associate Donors to the Campaign

During the wizard set-up, users are asked to select a name for the Donor Group. This name should appear in at the Campaigns level, under Donor Group. After donors have been added to the system they must be associated to this Donor Group before a campaign can be launched into production. For details on associating donors to a campaign, see further documentation, ***The New Admin's Guide to Campaign Management***.

Note: Steps 1 and 2 can be accomplished simultaneously via a Donor Import. For more information on Imports, see the Support Site.

3. Configure Additional Settings in OPPS (Optional)

Depending on the complexity of your campaign, there may be specific items that will require further configuration in Campaign Management after a campaign is built in the Campaign Set-Up Wizard. Please note that some of these configurations can be done before the campaign is built using the Campaign Set-Up Wizard; however, it is not required.

Company Level

Some settings at the Companies level that may require additional configuration include (but are not limited to):

- **Companies > Company > Add a Company** – This can be done on the fly in the Campaign Set-Up Wizard, but if done in OPPS, it will save a step during the wizard set-up.

- **Companies > Contacts > Add a Primary Contact** – This can be done in the fly in the Campaign Set-Up Wizard, but if done in OPPS, it will save a step during the wizard set-up. The wizard only allows users to add one primary contact; however, more contacts can be added here.

- **Companies** > **Company Levels** > **Add Company Levels** – If Company Levels are desired for the campaign, they must be added here. Company Levels assist in filtering Campaign Reports and Exports.

- **Companies** > **Coordinator Levels** > **Add Coordinator Levels** – If Coordinator Levels are desired for the campaign, they must be added here. Coordinator Levels determine what donor records a Coordinator will have access to through the Campaign Dashboard.

- **Companies** > **Functional Levels** > **Add Functional Levels** – If Functional Levels are desired for the campaign, they must be added here. Functional Levels assist in filtering Campaign Reports and Exports.

- **Companies** > **Pay Periods** > **Add Company Pay Period** – Company Pay Periods cannot be set up in the wizard. If your campaign will be utilizing Company Pay Periods, they will need to be set up here.

Campaign Level

Some settings at the Campaigns level that may require additional configuration include (but are not limited to):

- **Campaigns** > **Settings** – Only crucial settings information will be set up in the wizard. If you would like to include more detail, such as adding a Start Date and End Date to your campaign, you must do so here.

- **Campaigns** > **Registration** – If you would like to include Registration Fields in your campaign, you must add them here. Registration Fields provide a way to customize the information asked for and required on the Donor Review page and Self Registration page during the pledging process.

- **Campaigns** > **Email** – To send Email to donors, set up email settings here.

- **Campaigns** > **Donor Groups** – If additional Donor Groups are desired, they can be added here.

- **Campaigns** > **Websites** – If the content on the Donor Site needs to be further adjusted, it can be done so here.