



# CAMPAIGN MANAGEMENT DEMO INSTANCE

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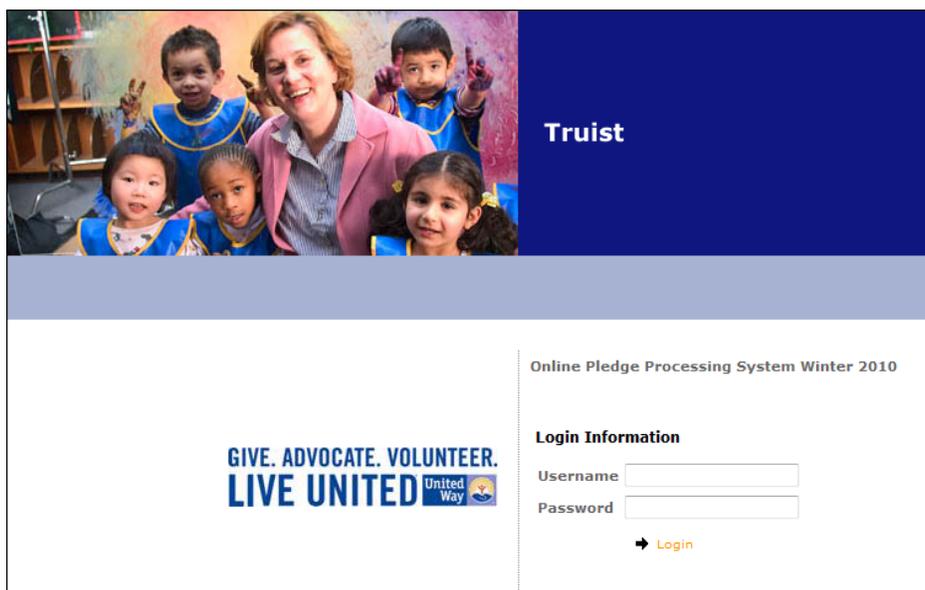
**Demo Instance URL:** <https://demo-admin.unitedeway.org>

The Campaign Management Demo Instance is an environment that allows Local United Ways to create campaigns and run unlimited test transactions for the purpose of testing at no additional cost. This environment also allows admins to “port” campaign elements over to production to ensure live campaigns are as efficient as the campaign tested in Demo Instance.

Benefits of using Demo Instance vs. “demo” mode in OPPS include:

- Unlimited test transactions
- Safe environment for training
- Unlimited donor imports
- The ability to test website changes during a live campaign
- Preventing the need to have to build campaigns twice

This document contains the steps to successfully deploy a campaign from Demo Instance to production.





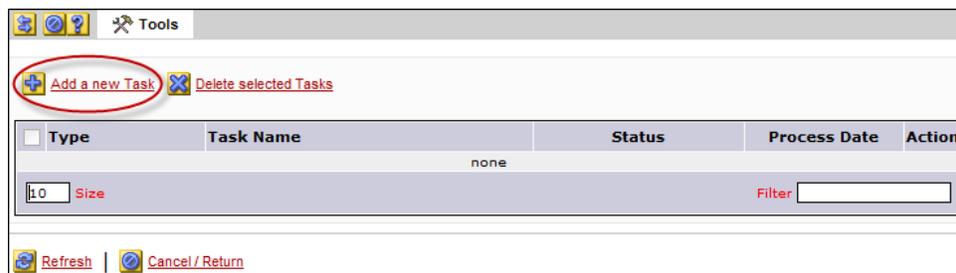
Demo Instance offers two options for testing a campaign:

- a) Admins can first build a campaign shell in **production**, deploy the campaign into Demo Instance for testing, and then, once testing is complete, they can deploy the campaign back into production.
- b) Admins can start by building a campaign shell in **Demo Instance**, do their testing, and then, once testing is complete, they can deploy the campaign into production.

To deploy a campaign from **production into Demo Instance** (if option a, above, is chosen):

**Note:** Option Packages, Websites, and Donor Groups do not need to be created until after the campaign shell is “ported” into Demo Instance.

1. Go to the  **Campaigns** level of OPPS. Expand **your campaign > Tools**.
2. Click  **Add a new Task**.



3. From the dropdown menu, select “Deploy Campaign” and mark the pieces of the campaign you wish to copy over to Demo Instance.



Tools

\* = required

Tool Type: Deploy Campaign

Task Name: Deploy Test 1 \*

Options

**Deploy Campaign**

Kendal's Dummy Organization

- Option Package:** Kendal's Option Package
- Leadership Level Set:** Leadership Levels
- Corporate Match Set:** Corporate Match 1
- Acknowledgement Set:** Acknowledgement Set 1
- Payment Type Set:** Payment Types 1
- Designation Option Set:** Designation 1
- Designation Panel Option Set:** Panel 1
- Recognition Program Set:** Recognition Program 1
- Continuous Giving Option Set:**

Kendal's Dummy Company

- Company Option Package:** Option Package Name
- Coordinator Set:** Coordinator 1

Kendal's Dummy Campaign 1

**Websites:**

- Demo Campaign Site

4. Click [Save / Update](#).
5. The task will then go into queue. Click [Refresh](#) to refresh the page until the status indicates the task is no longer in queue.

Tools

[Add a new Task](#) [Delete selected Tasks](#)

Type	Task Name	Status	Process Date	Action
<input type="checkbox"/> Deploy Campaign	Deploy Test 1	Queued (1)		

10 Size Filter

[Refresh](#) [Cancel / Return](#)

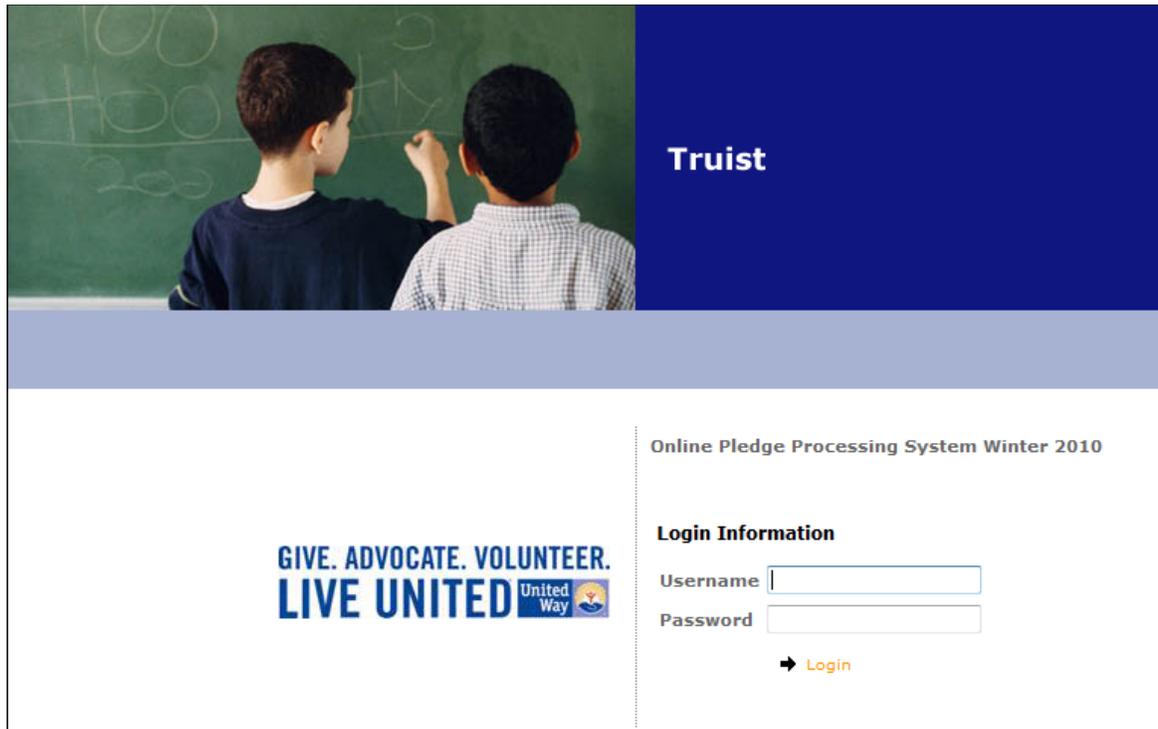
6. Log in to Demo Instance and take the steps that follow in this documentation to test your campaign and “port” it back into production.



### Utilizing Demo Instance

Start here if option **b**, above, is chosen.

- I. Log in to Demo Instance at the following URL: <https://demo-admin.unitedeway.org>



- II. Build a campaign shell in Demo Instance. **Note that imported files, such as Donor Groups, Donor Records, Donation Imports, and hierarchies, WILL NOT “port” over to production if added in Demo Instance.**

If a campaign shell has already been configured in the production environment, you **MUST** use the **same** campaign name, campaign code, and company. However, Option Packages and Option Sets **MUST** be named **uniquely**, as they will **NOT** copy over to production if they have the same name as existing Option Packages and Option Sets.

Demo Instance has the same look and feel as the production environment. Use the same steps in Demo Instance as the steps taken to create a campaign in production. For details, see further documentation, The *New Admin’s Guide to Campaign Management* or *Setting up a Basic Campaign*.

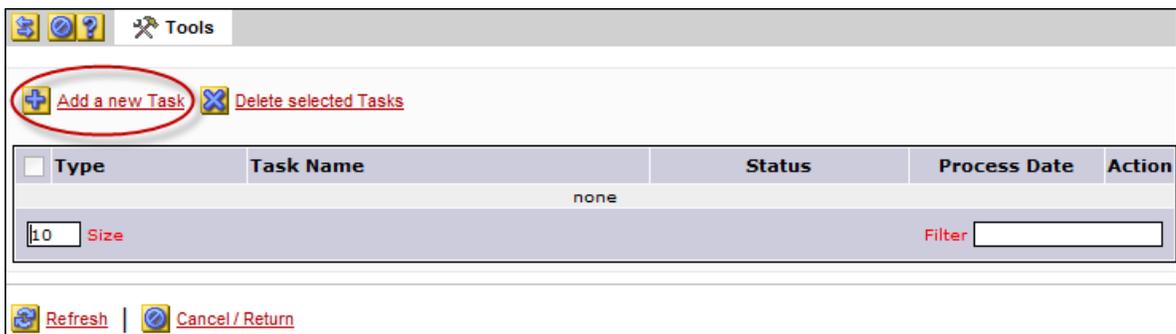
- III. Activate the campaign in Demo Instance and perform as much testing as desired. This includes test transactions, donor imports, donation imports, deletes, etc.



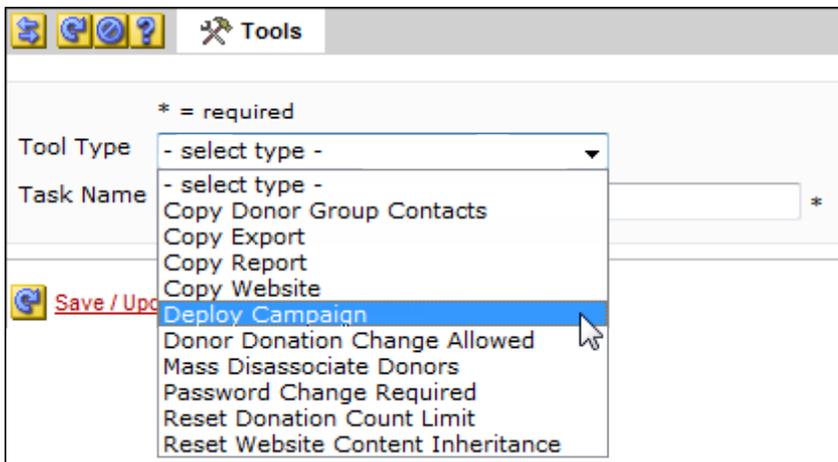
- IV. Once testing is complete, and the campaign Website, Option Packages, and Option Sets are ready to go into production, click **Tools**, located at the **Campaigns** level of Demo Instance.



- V. Then click **Add a new Task**.



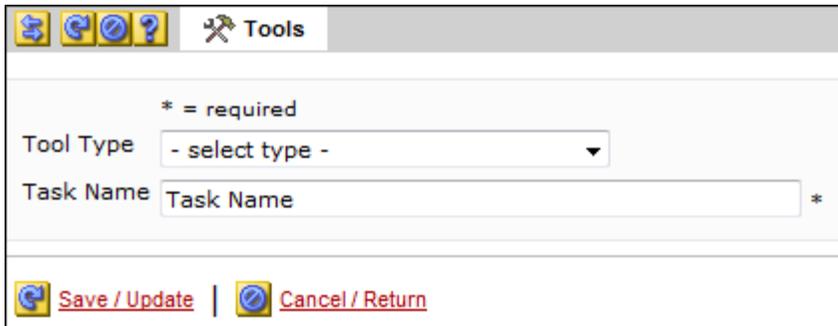
- VI. From the dropdown menu, select “Deploy Campaign.”





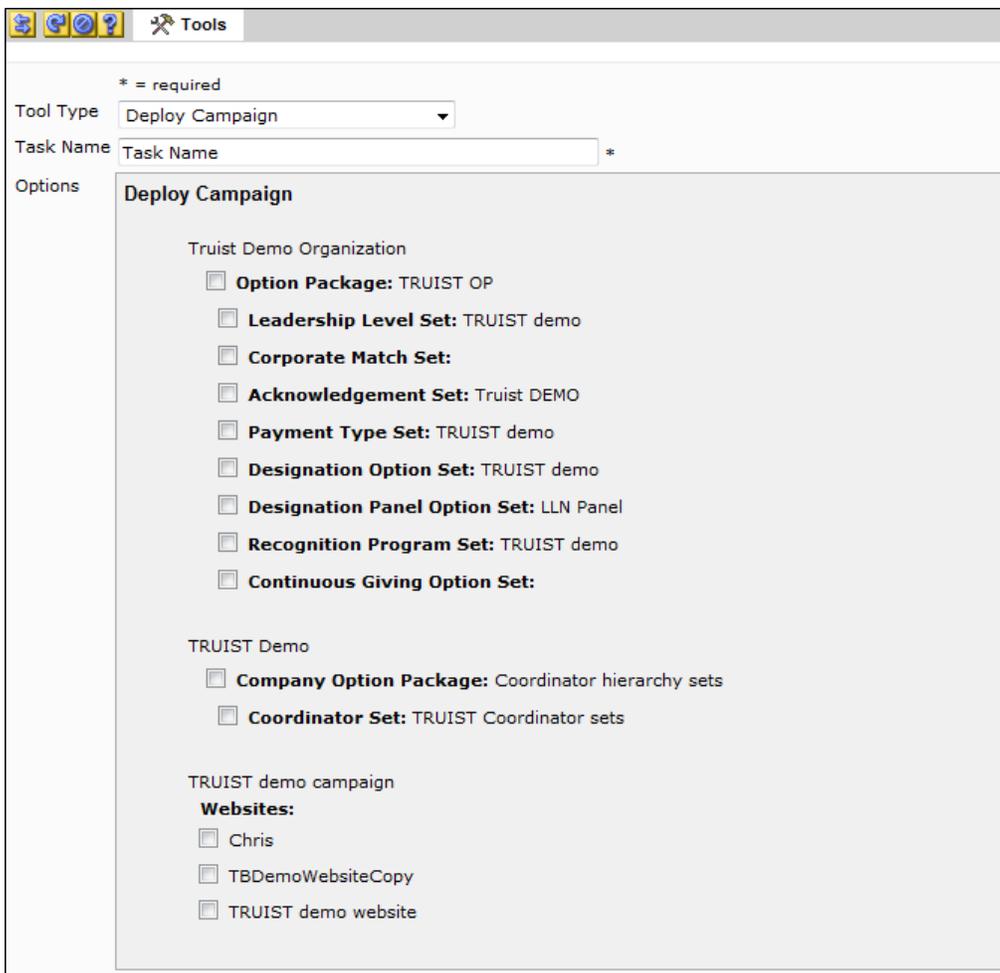
VII. Enter a Task Name.

**Note:** As a best practice, always use good naming conventions.



The screenshot shows a 'Tools' window with a toolbar at the top containing icons for save, refresh, help, and a wrench. Below the toolbar, there is a legend '\* = required'. The 'Tool Type' dropdown menu is set to '- select type -'. The 'Task Name' text input field contains the text 'Task Name' and has an asterisk to its right. At the bottom, there are two buttons: 'Save / Update' and 'Cancel / Return'.

VIII. "Options" will populate. Check the items you wish to deploy back into the production environment. When complete, click  [Save / Update](#).

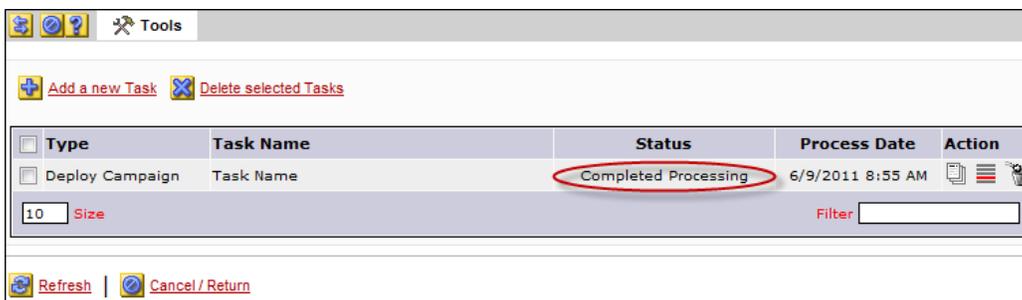
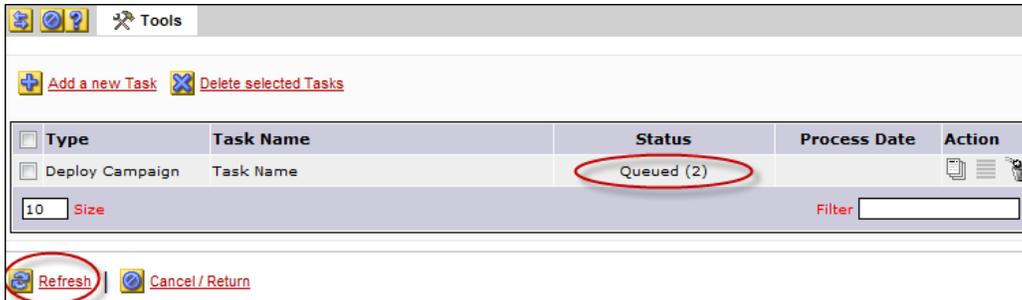


The screenshot shows the 'Tools' window with 'Tool Type' set to 'Deploy Campaign'. The 'Task Name' field is 'Task Name'. The 'Options' section is expanded to show 'Deploy Campaign' settings. These are organized into three categories: 'Truist Demo Organization', 'TRUIST Demo', and 'TRUIST demo campaign'. Each category contains several checkbox options, all of which are currently unchecked.

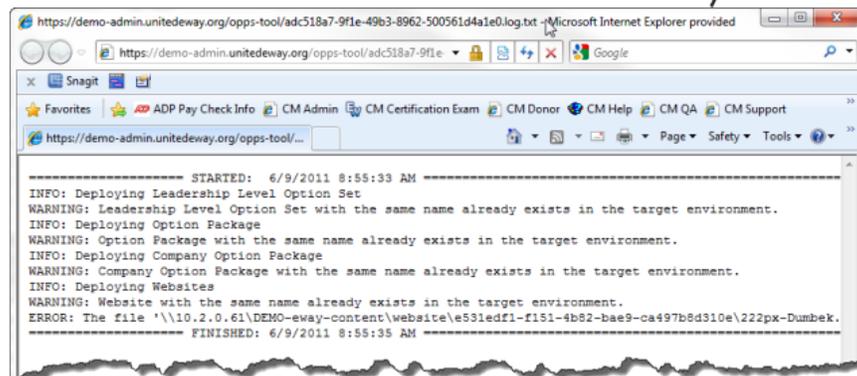
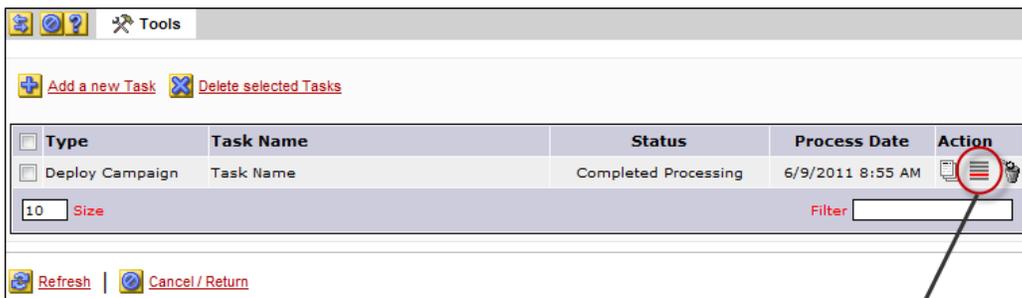
- Truist Demo Organization:**
  - Option Package: TRUIST OP
  - Leadership Level Set: TRUIST demo
  - Corporate Match Set:
  - Acknowledgement Set: Truist DEMO
  - Payment Type Set: TRUIST demo
  - Designation Option Set: TRUIST demo
  - Designation Panel Option Set: LLN Panel
  - Recognition Program Set: TRUIST demo
  - Continuous Giving Option Set:
- TRUIST Demo:**
  - Company Option Package: Coordinator hierarchy sets
  - Coordinator Set: TRUIST Coordinator sets
- TRUIST demo campaign:**
  - Websites:**
    - Chris
    - TBDemoWebsiteCopy
    - TRUIST demo website



- IX. The task will then go into queue. Click Refresh to refresh the page until the status indicates the task is no longer in queue.



- X. Once the task runs, click the error button to ensure everything deployed successfully.

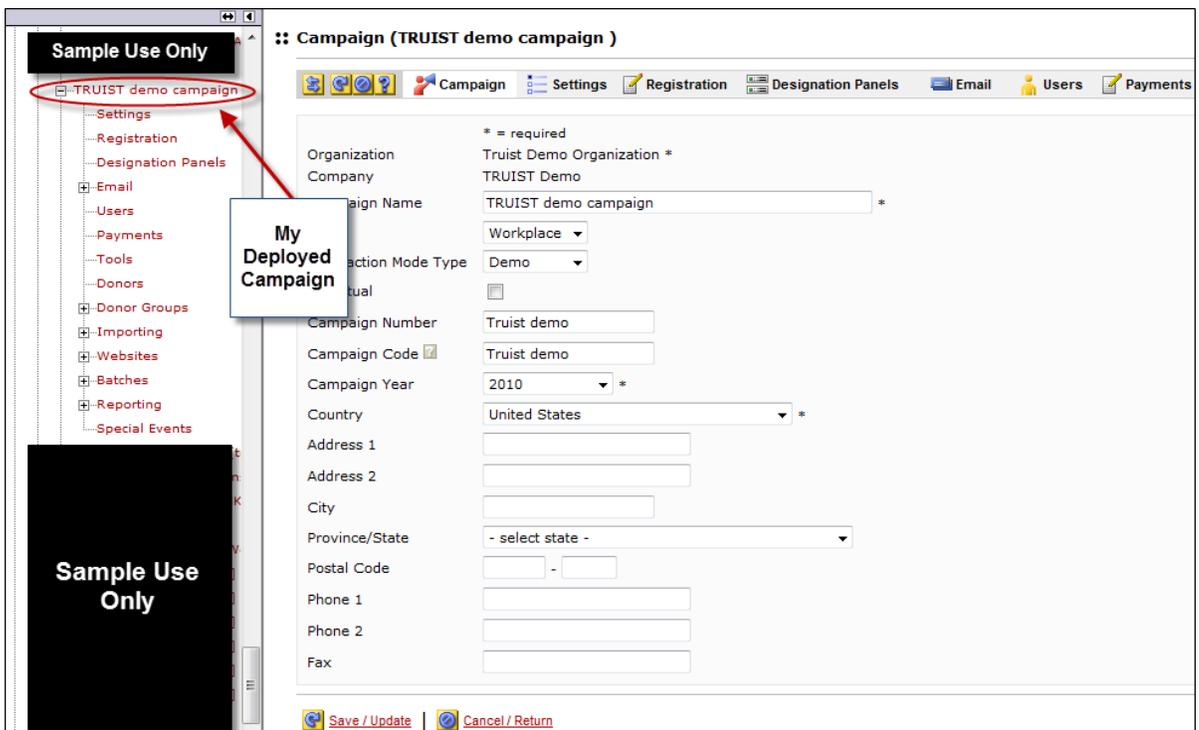




XI. Log in to production to view all items you created in Demo Instance in the production mode.

**Note:** Some items will not “port” over into production from Demo Instance. These items include anything you can import, such as Donor Group, Donor Records, Donation Imports, and hierarchies.

**Note:** The campaign cannot be deployed into production if Option Packages and Option Sets are not named **uniquely**. They cannot have the same name as Option Packages and Option Sets that already exist in OPPS.



**Sample Use Only**

- TRUIST demo campaign
- Settings
- Registration
- Designation Panels
- Email
- Users
- Payments
- Tools
- Donors
- Donor Groups
- Importing
- Websites
- Batches
- Reporting
- Special Events

**My Deployed Campaign**

**Campaign (TRUIST demo campaign)**

\* = required

Organization: Truist Demo Organization \*

Company: TRUIST Demo

Campaign Name: TRUIST demo campaign \*

Workplace

Transaction Mode Type: Demo

Actual

Campaign Number: Truist demo

Campaign Code: Truist demo

Campaign Year: 2010 \*

Country: United States \*

Address 1

Address 2

City

Province/State: - select state -

Postal Code

Phone 1

Phone 2

Fax

Save / Update | Cancel / Return