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.
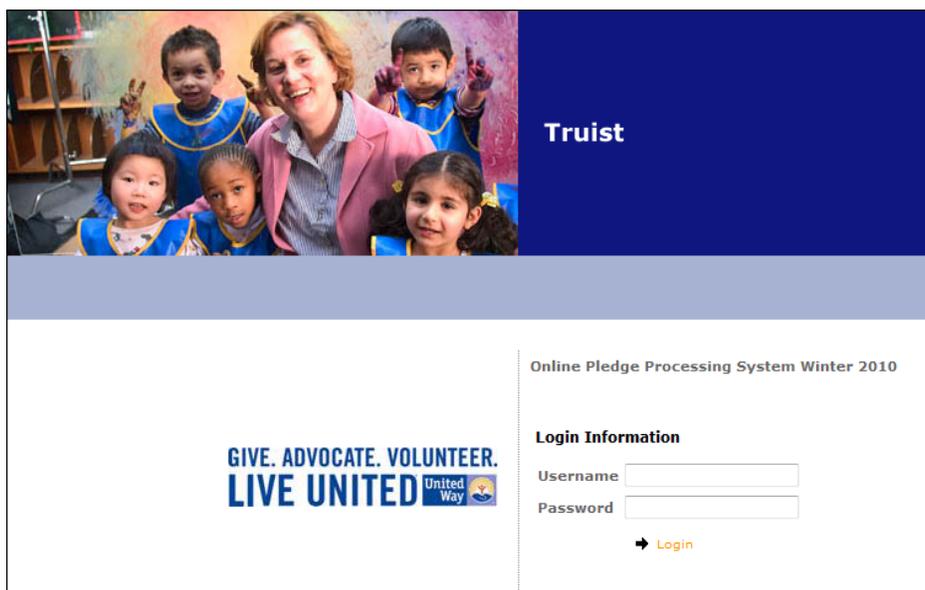
Demo Instance offers two options for testing a campaign:

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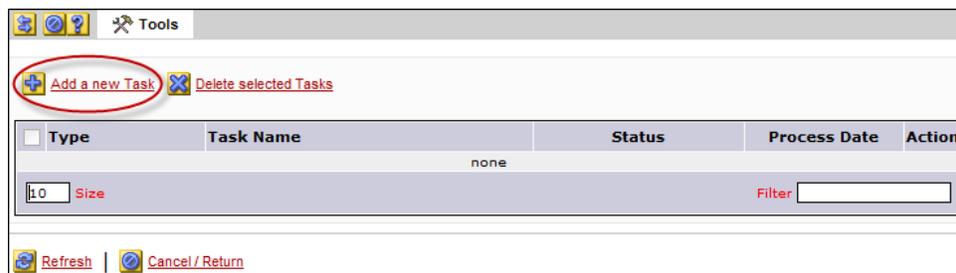
3. From the dropdown menu, select "Deploy Campaign" and mark the pieces of the campaign you wish to copy over to Demo Instance.

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.
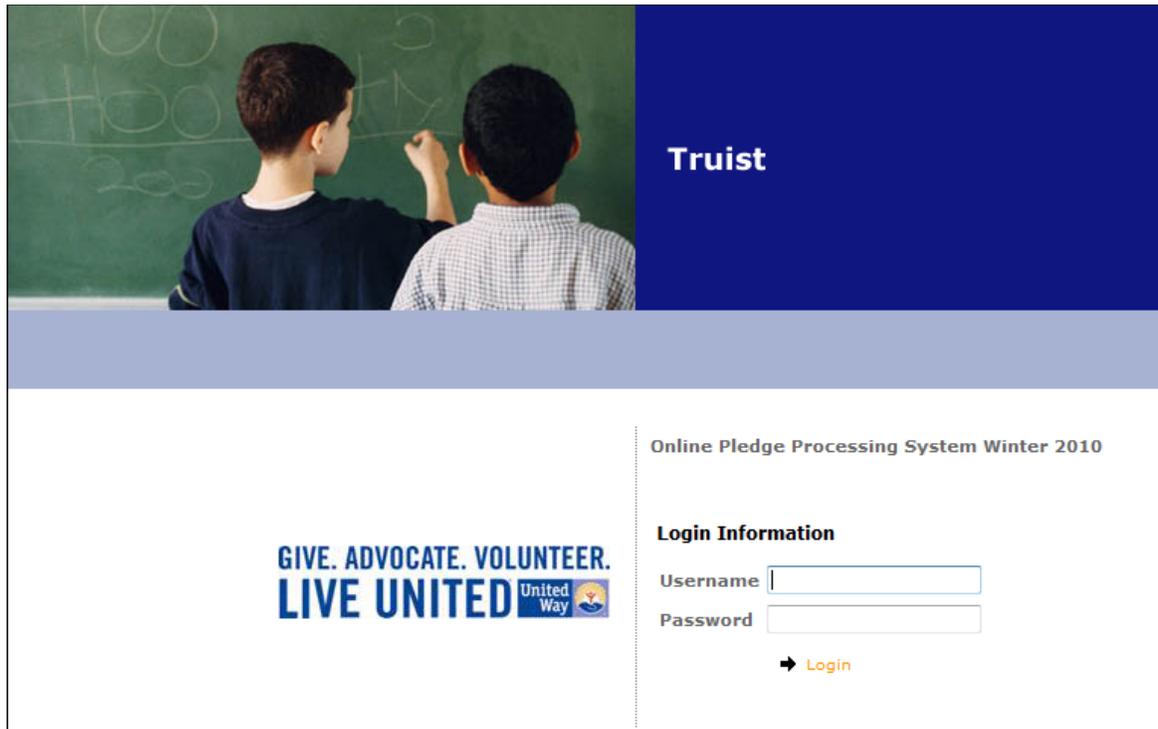

6. Log in to Demo Instance and take the steps that follow in this documentation to test your campaign and "port" it back into production.

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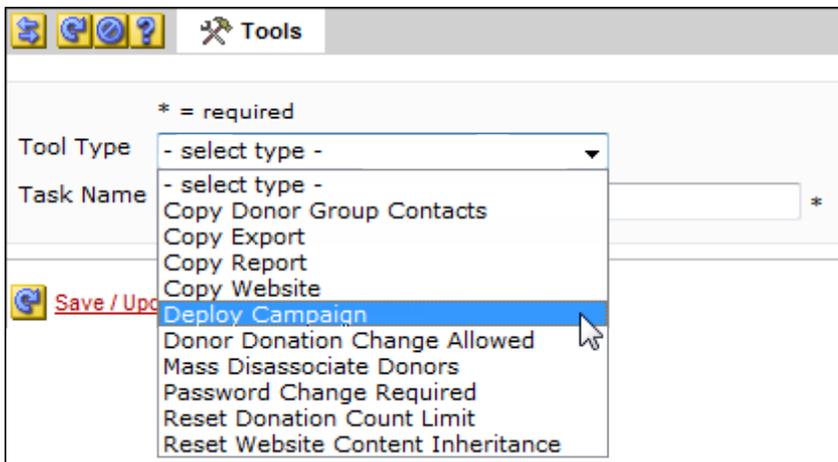
IV. Once testing is complete, and the campaign Website, Option Packages, and Option Sets are ready to go into production, click Tools, located at the 🎯 Campaigns level of Demo Instance.
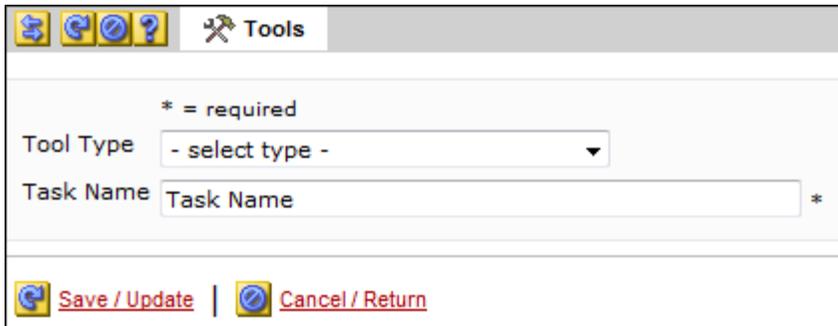

V. Then click ➕ Add a new Task.
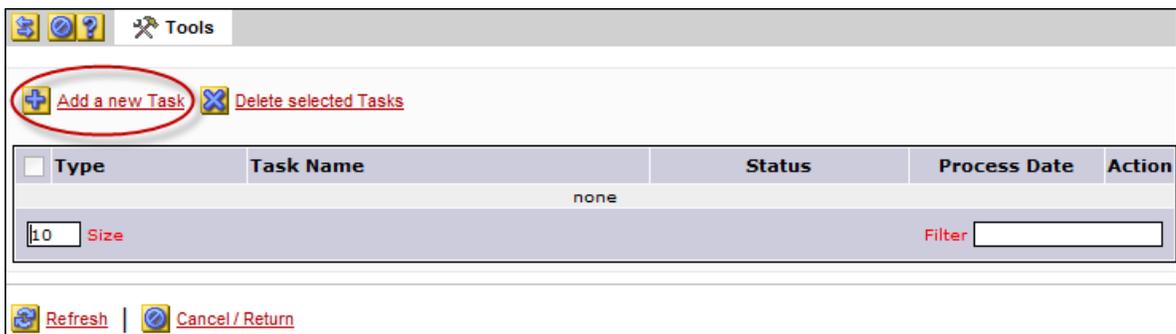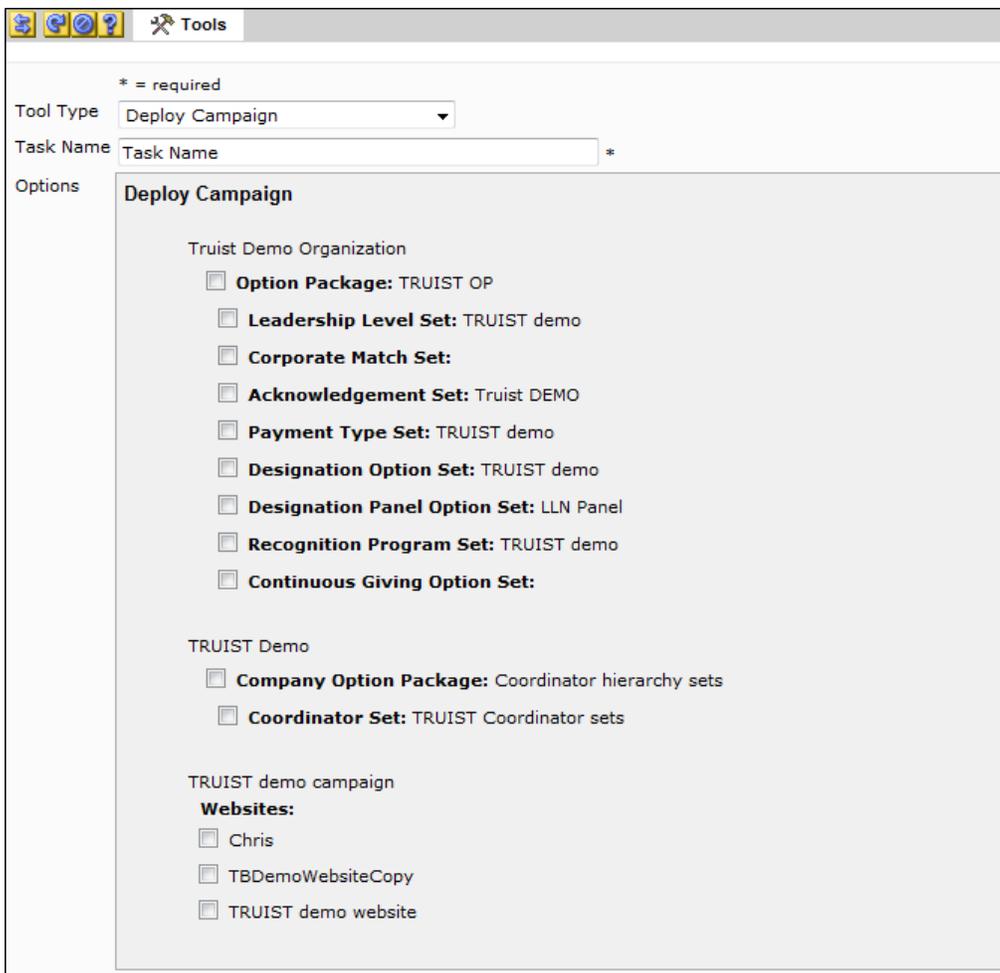

VI. From the dropdown menu, select "Deploy Campaign."

VII.   Enter a Task Name.

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

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

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.

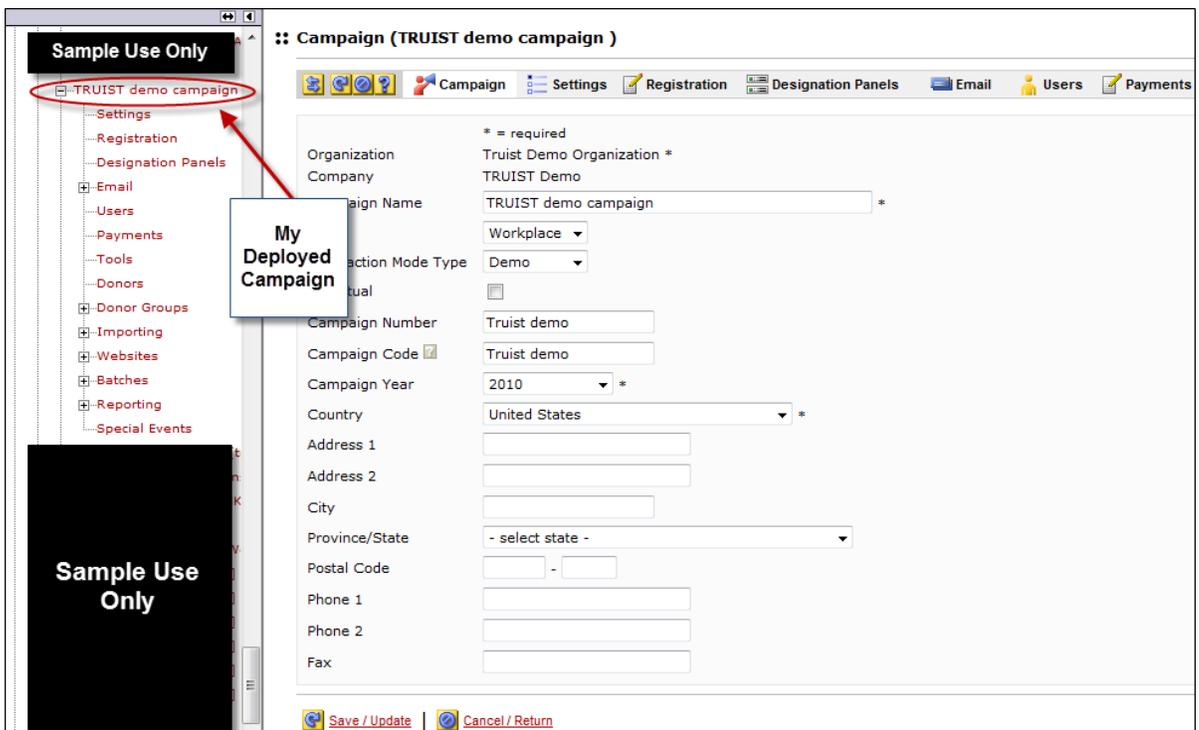X.   Once the task runs, click the error button to ensure everything deployed successfully.
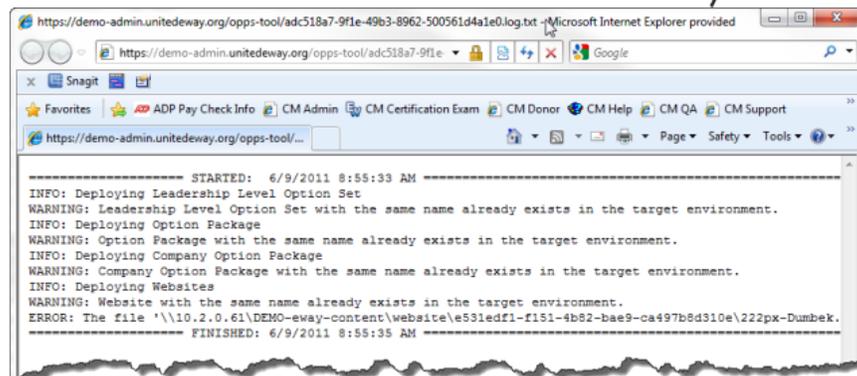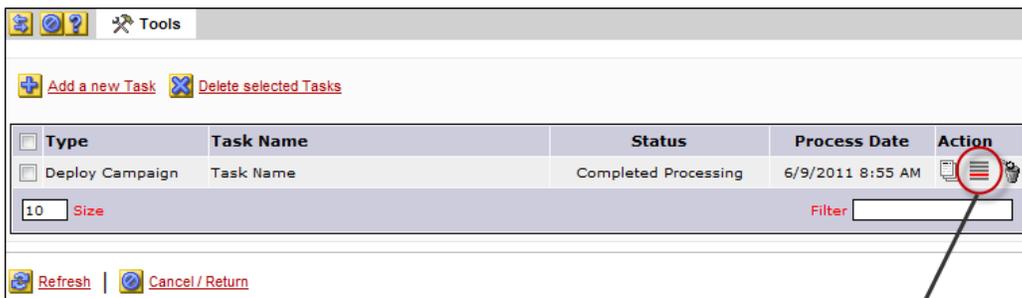
XI.   Log in to production to view all items you created in Demo Instance in the production mode.

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.