



CAMPAIGN MANAGEMENT SPECIAL EVENTS

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Introduction

Special Events are organized events designed to raise money for a specific charity or cause. Special Events in OPPS provide companies the ability to easily record special event dollars. Using the Special Events functionality on Campaign Management, campaign coordinators may group event dollars by Coordinator Level, Company Level, Functional Level, as well as by Donor Group. Special Events can be configured on the backend by a FrontStream account manager or a campaign coordinator with the Special Events permission in Campaign Management. Once configured in OPPS, Special Events can be easily managed on the campaign Dashboard.

Note: Special Event dollars are not counted towards the campaign totals or pledge bar amounts. Donation goal adjustments may be used to include the Special Event dollars on pledge bars. Donation goal adjustments may be made on the *Campaign Settings* page for the overall campaign pledge bar or on the *Donor Group Settings* page for Donor Group related pledge bars.

A Special Events Export is provided for reporting special event dollars.

The screenshot shows a web application interface with a dark blue sidebar on the left containing navigation links: Home, FAQs, Giving History, Contact Us, and Dashboard. The main content area is titled "Special Events" and contains a form with the following fields: "Level" (set to "1030000 - Canada"), "Event Name" (text input with an asterisk), "Description" (text area), "Beneficiary" (text input with an asterisk), "Total Dollars Raised" (text input with a dollar sign and an asterisk), and "Event Date" (calendar icon and text input with an asterisk). At the bottom of the form are "Commit" and "Cancel" buttons.




Special Events on Campaign Dashboard

Configuring Special Events

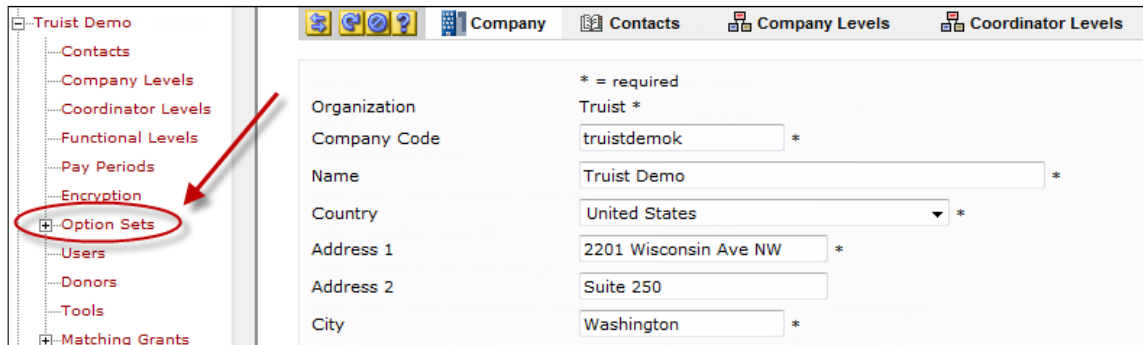
Note: A basic campaign with Dashboard functionality must previously be enabled on CM.

Step 1

Log in to Campaign Management and click the *Companies* node ( **Companies**). Click a company and the company profile will display.

Step 2

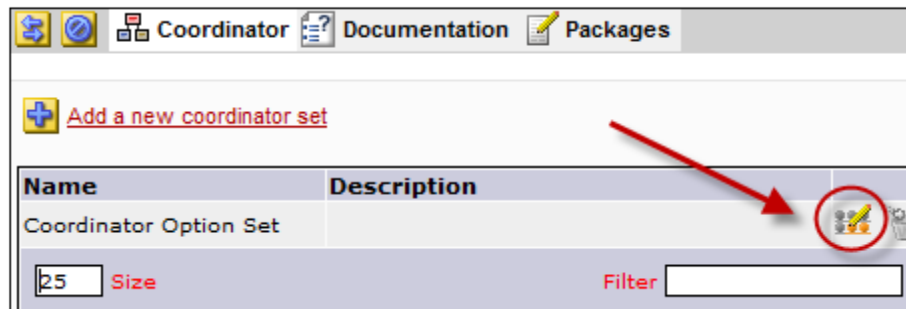
Open the Company Option Set.



Field	Value
Organization	Truist *
Company Code	truistdemok *
Name	Truist Demo *
Country	United States *
Address 1	2201 Wisconsin Ave NW *
Address 2	Suite 250
City	Washington *

Step 3

Open a Coordinator Option Set by clicking the edit icon ().



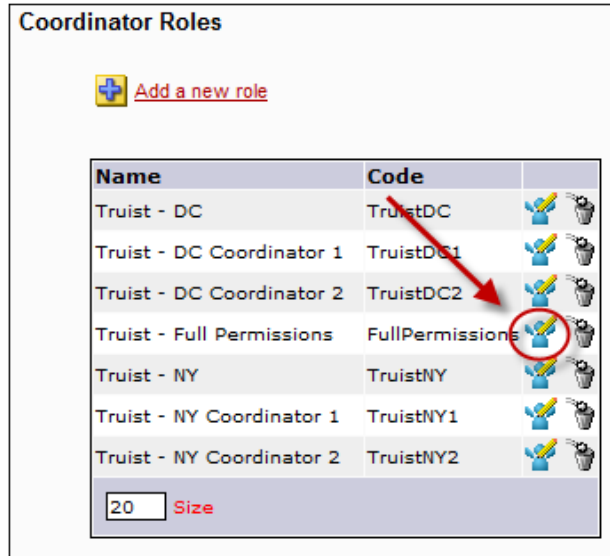
Name	Description
Coordinator Option Set	

25 Size Filter



Step 4

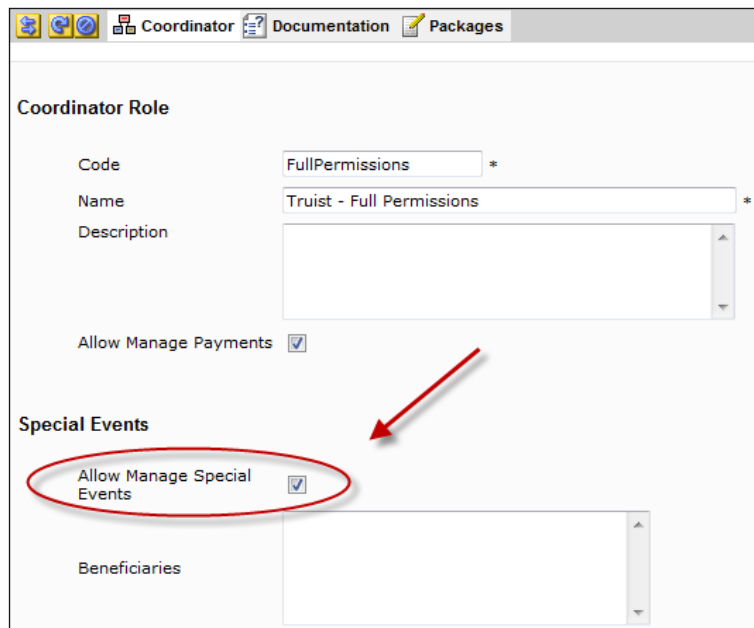
Open a Coordinator Role by clicking the edit icon (✖).



Step 5

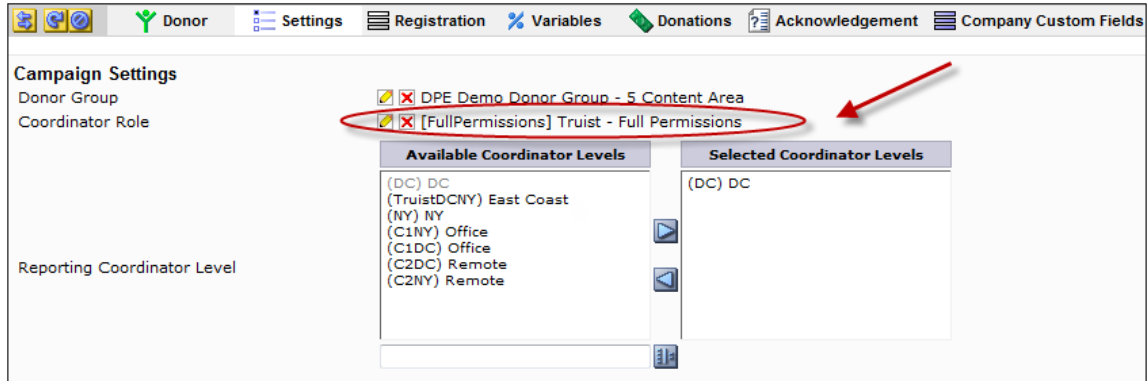
Enable the “Allow Manage Special Events” feature, by marking the check box. Then click Save / Update.

Note that the Beneficiary grid indicates who/what benefits from the special event.





All coordinators assigned to this Coordinator Role will have access to manage Special Events from the campaign Dashboard. This can be verified at the Campaign Level by opening Donor Settings > Campaign Settings > Coordinator Role.

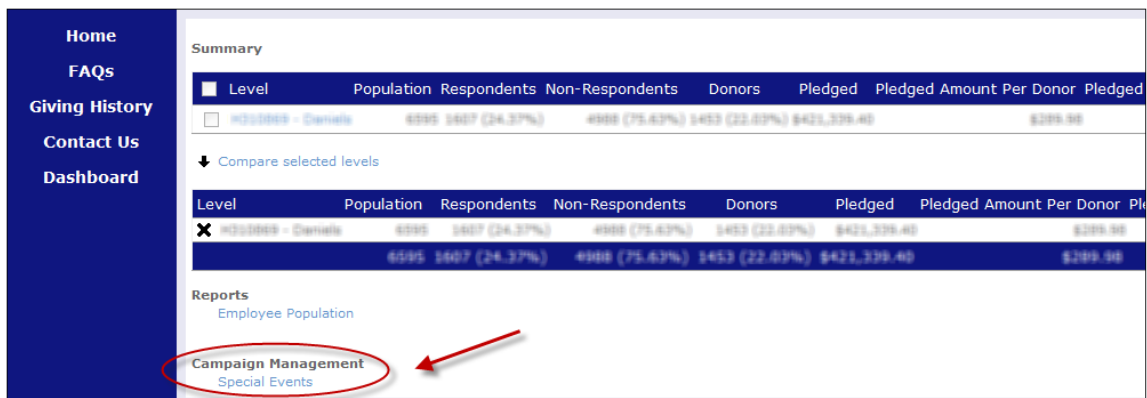


Managing Special Events on the Dashboard

Once the “Allow Manage Special Events” feature has been enabled on the Coordinator Role, coordinators will have the ability to manage Special Events from the campaign Dashboard. Coordinators will only have access to create/manage Special Events on the Dashboard for level(s) they are assigned to in OPPS. They will not have the ability to add/edit outside of their assigned level(s).

Step 1

Log in to the campaign site and select the “Dashboard” link from the left navigation bar. A “Special Events” link will appear at the bottom of the page. Click here.





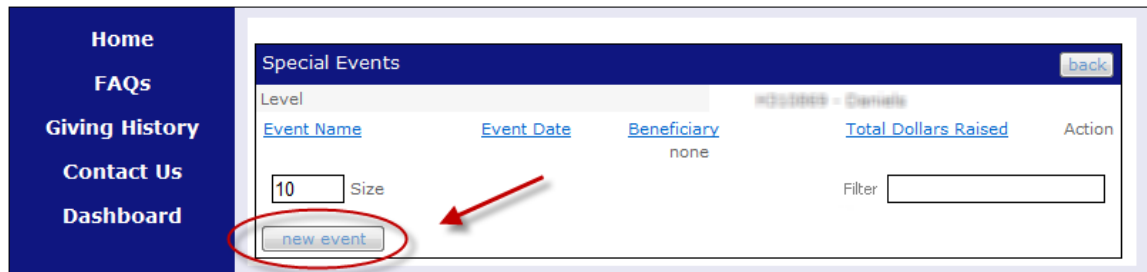
Step 2

Select a level in which to manage Special Events and click [manage events](#).



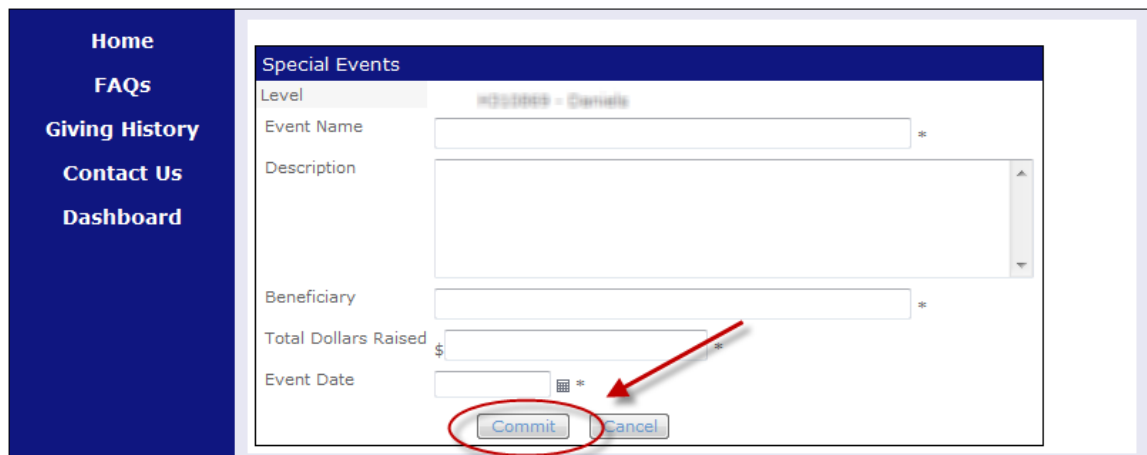
Step 2

From here, open an existing event to edit or select [new event](#).



Step 3

Fill in the fields provided and select [Commit](#).





Please note the following:

- Coordinators will have the ability to edit a Special Event once it has been submitted.
- There is an audit trail for changes entered on Special Events.
- There is an option to delete a Special Event if needed.
- Any applicable Dashboard reports are available for use on Special Events.

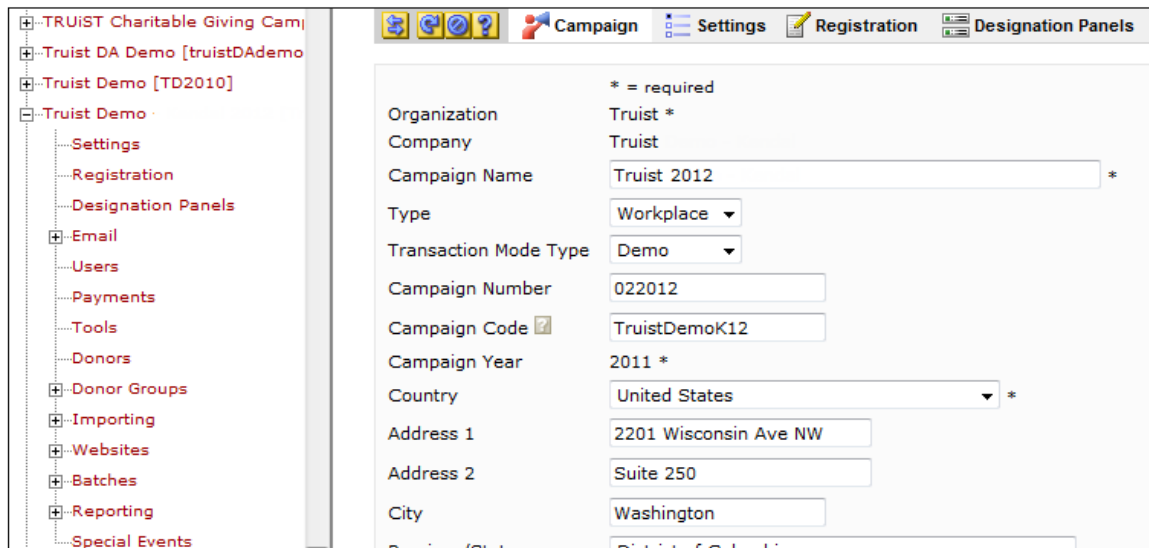
Managing Special Events in OPPS

Special Events can also be managed in OPPS by the FrontStream account manager or the company campaign coordinator with the appropriate permissions.

Managing a Special Event in OPPS

Step 1

Log in to Campaign Management and select  Campaigns. Click a campaign and the campaign profile will display.



The screenshot displays the Campaign Management interface. On the left is a navigation tree with the following items: TRUIST Charitable Giving Cam, Truist DA Demo [truistDAdemo], Truist Demo [TD2010], Truist Demo (expanded), Settings, Registration, Designation Panels, Email, Users, Payments, Tools, Donors, Donor Groups, Importing, Websites, Batches, Reporting, and Special Events. The main content area shows the campaign profile for 'Truist 2012'. The profile includes the following fields:

Field	Value	Required
Organization	Truist	*
Company	Truist	
Campaign Name	Truist 2012	*
Type	Workplace	
Transaction Mode Type	Demo	
Campaign Number	022012	
Campaign Code	TruistDemoK12	
Campaign Year	2011	*
Country	United States	*
Address 1	2201 Wisconsin Ave NW	
Address 2	Suite 250	
City	Washington	
Province/State	District of Columbia	



Step 2

Select the *Special Events* node (**Special Events**) in the navigation tree.

The screenshot shows a web application interface. On the left is a navigation tree with several nodes. The 'Special Events' node at the bottom is circled in red, and a red arrow points to it from the right. On the right is a form titled 'Campaign' with various input fields and dropdown menus. The form fields include: Organization (Truist *), Company (Truist), Campaign Name (Truist 2012 *), Type (Workplace), Transaction Mode Type (Demo), Campaign Number (022012), Campaign Code (TruistDemoK12), Campaign Year (2011 *), Country (United States *), Address 1 (2201 Wisconsin Ave NW), Address 2 (Suite 250), City (Washington), and Province/State (District of Columbia). A red arrow also points from the 'Special Events' node in the navigation tree to the 'Add a new Special Event' button in the next screenshot.

Step 3

Click **Add a new Special Event**.

The screenshot shows the 'Special Events' page. At the top, there are two buttons: 'Add a new Special Event' (with a plus icon) and 'Delete selected special events' (with a minus icon). The 'Add a new Special Event' button is circled in red, and a red arrow points to it from the right. Below the buttons is a table with the following columns: Event Name, Description, Event Date, Beneficiary, Total Dollars Raised, and Action. The table is currently empty. Below the table, there is a 'Filter' input field and a 'Cancel / Return' button.

Event Name	Description	Event Date	Beneficiary	Total Dollars Raised	Action



Step 4

Fill in the fields provided and click [Save / Update](#).

Special Events

* = required

Event Name *

Description

Beneficiary *

Total Dollars Raised *

Event Date *

Company Level [none]

Coordinator Level [none]

Functional Level [none]

Donor Group [none]

[Save / Update](#) | [Cancel / Return](#)

Events will display on the Special Events menu. To edit an event, click the edit icon ().
 To delete an event, click the trash icon ().

Special Events

[Add a new Special Event](#) | [Delete selected special events](#)

Event Name	Description	Event Date	Beneficiary	Total Dollars Raised	Action
<input type="checkbox"/> Softball Tournament		1/31/2013	UWNCA	\$2,000.00	

Size Filter





Special Events Reporting

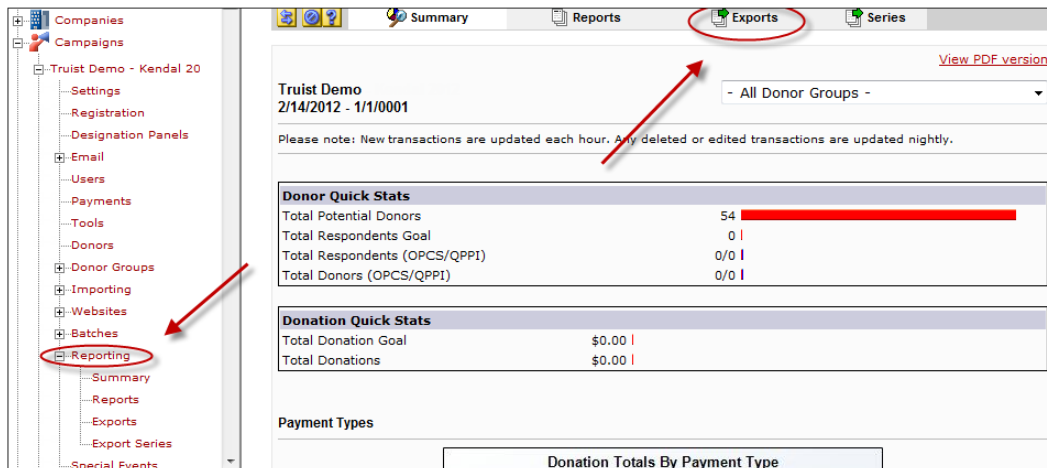
OPPS offers a Special Events export to collect Special Event data. This report includes the following:

- **Event Name** – Name of the event
- **Event Description** – Event description
- **Beneficiary** – Beneficiary of the event
- **Total Dollars Raised** – Total dollars raised for this Special Event
- **Event Date** – Date of the event
- **Company Level** – Special Event’s Company Level
- **Functional Level** – Special Event’s Functional Level
- **Coordinator Level** – Special Event’s Coordinator Level
- **Donor Group** – Donor Group name

To access the Special Events export, take the following steps:

Step 1

Open a campaign and click the *Reporting* node ( **Reporting**). Then click  **Exports** at the top of the page.



The screenshot shows the OPPS software interface. On the left is a navigation tree with the following structure:

- Companies
- Campaigns
 - Truist Demo - Kendal 20
 - Settings
 - Registration
 - Designation Panels
 - Email
 - Users
 - Payments
 - Tools
 - Donors
 - Donor Groups
 - Importing
 - Websites
 - Batches
 - Reporting** (circled in red)
 - Summary
 - Reports
 - Exports
 - Export Series
 - Special Events

At the top of the main content area, there are tabs for Summary, Reports, **Exports** (circled in red), and Series. A red arrow points from the 'Reporting' node in the sidebar to the 'Exports' tab. Below the tabs, the main content area displays the following information:

Truist Demo
2/14/2012 - 1/1/0001

[View PDF version](#)

- All Donor Groups -

Please note: New transactions are updated each hour. Any deleted or edited transactions are updated nightly.

Donor Quick Stats	
Total Potential Donors	54
Total Respondents Goal	0
Total Respondents (OPCS/QPP1)	0/0
Total Donors (OPCS/QPP1)	0/0

Donation Quick Stats	
Total Donation Goal	\$0.00
Total Donations	\$0.00

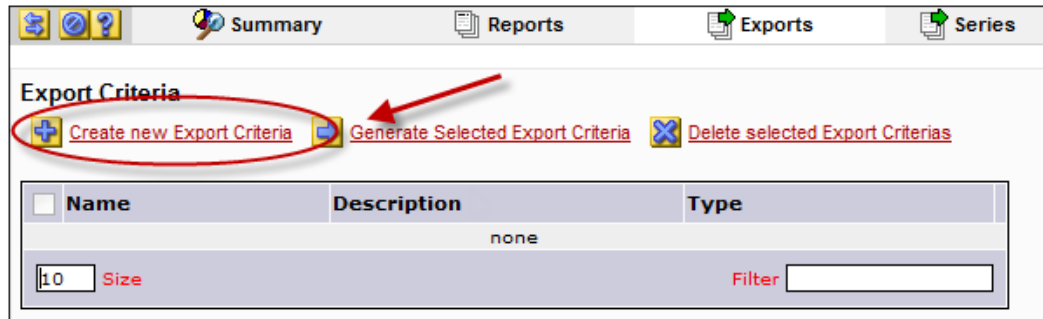
Payment Types

Donation Totals By Payment Type



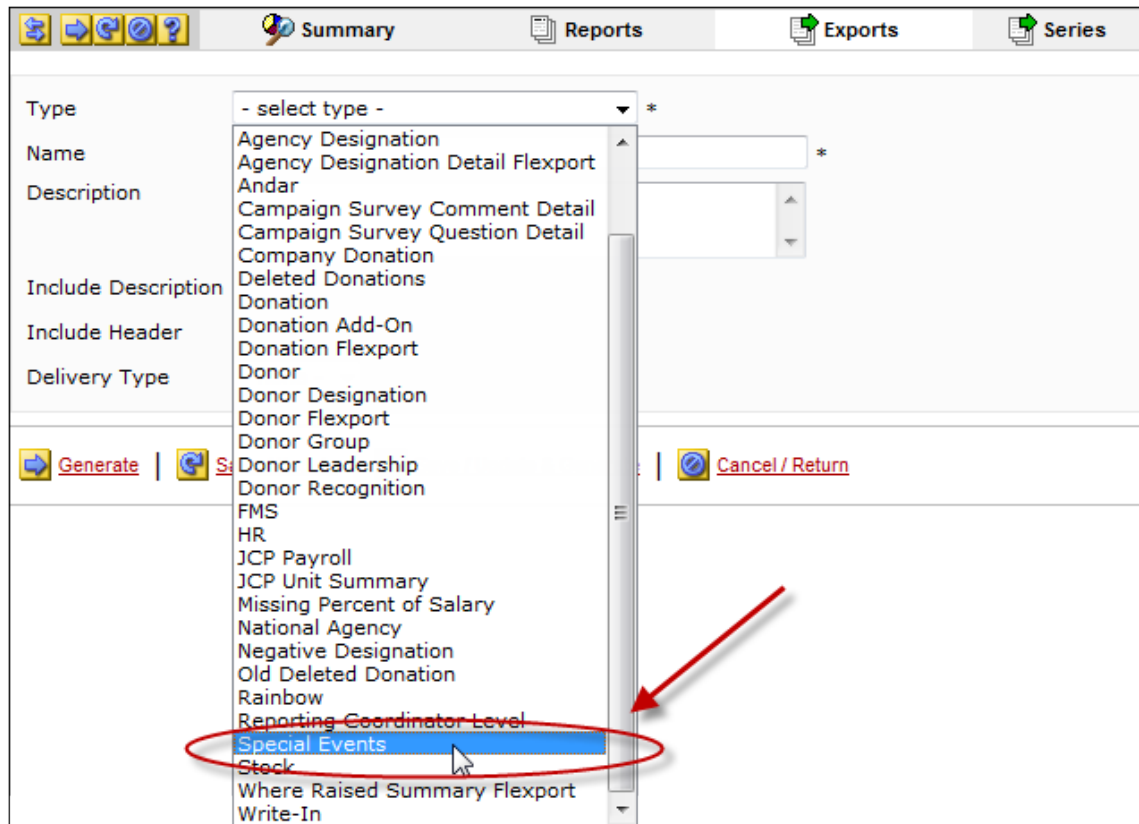
Step 2

Click [Create new Export Criteria](#).



Step 3

Select "Special Events" from the *Report Type* field. Fill in the remaining fields provided and click [Generate](#).



The export will display in the Exports table. Click the open icon () once the file has completed processing.



Summary Reports Exports Series

Export Criteria

[Create new Export Criteria](#)
[Generate Selected Export Criteria](#)
[Delete selected Export Criteria](#)

Name	Description	Type
	none	

10 Size Filter

Exports

[Delete selected Exports](#)

Name	Type	Status	Request Date	Process Date
Special Events 20130204	Special Events - Comma Delimited	Queued (2)	2/4/2013 12:54 PM	

Capturing Special Event Total in OPPS

Special Event dollars are not captured in campaign totals. These totals need to be added to the system manually. In order for Special Event funds to successfully disburse, the following manual process needs to be implemented by a FrontStream account manager:

Step 1

Capture Special Events data by pulling a report on the campaign Dashboard or the Special Events Export in OPPS.

Step 2

Load the Special Events from the Dashboard into OPPS as a Donor Import. Each Special Event will represent an employee record. Please note that these donor records should not be aligned to the Dashboard, as they are “demo donors” that the FrontStream Operations (or Finance) team can use when reconciling the Special Event checks received.

Note: It is recommended to stick to a specific naming convention for the demo donors. This makes it easy to identify which donors are Special Events donations.

Step 3

Load the Special Event donations through a donation import. Finance/TDS should be able to pick up the transaction/record in OPPS and disburse the funds successfully.