frontstream WORKPLACE PHILANTHROPY

CAMPAIGN MANAGEMENT
SPECIAL EVENTS

Document Version 1.0
April 8, 2013

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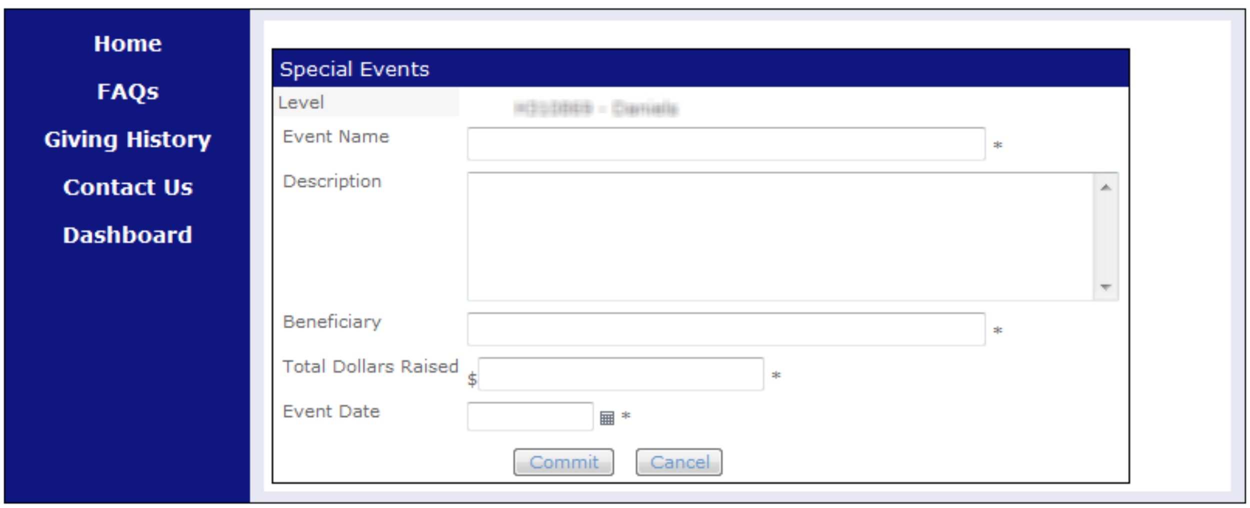
Introduction

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.



Special Events on Campaign Dashboard

Configuring Special Events

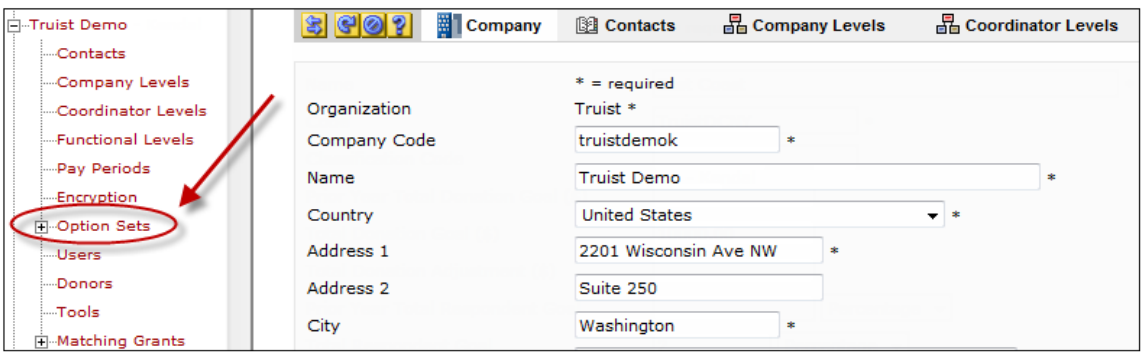
Note: A basic campaign with Dashboard functionality must previously be enabled on CM.

Step 1

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

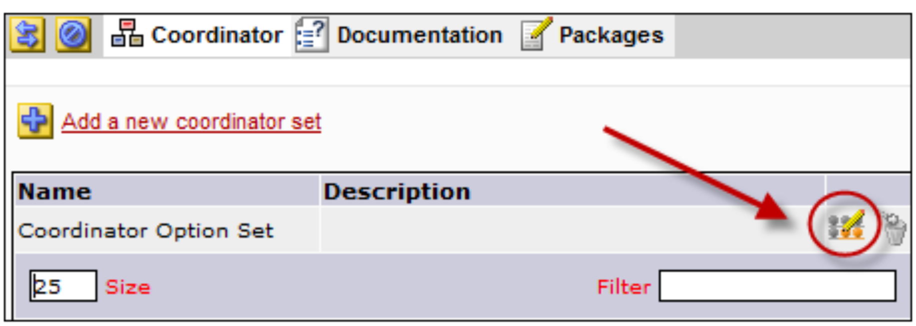
Step 2

Open the Company Option Set.



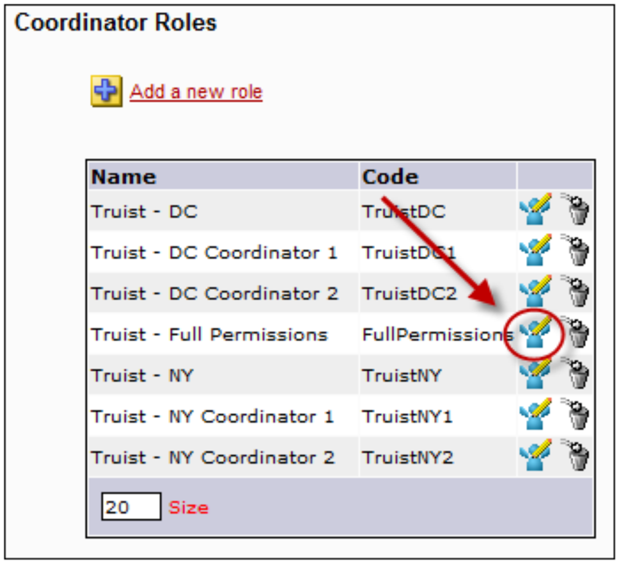
Step 3

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



Step 4

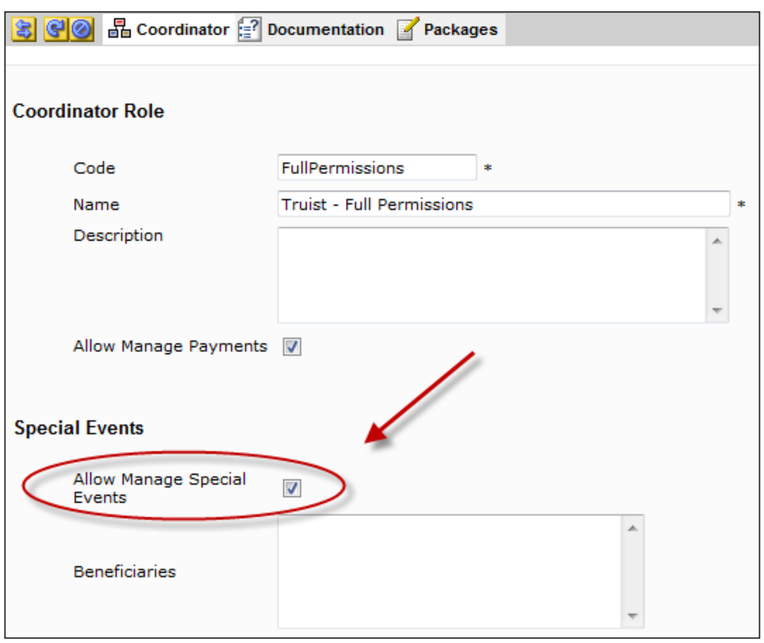
Open a Coordinator Role by clicking the edit icon ( ).



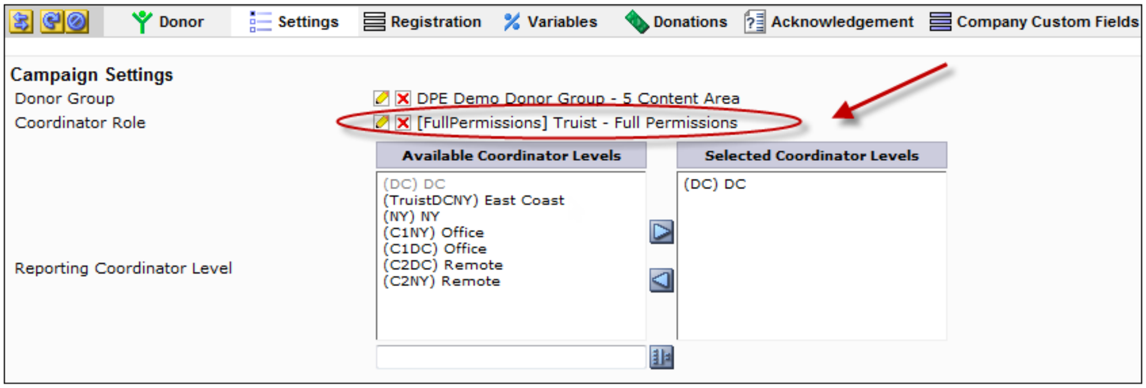
Step 5

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.

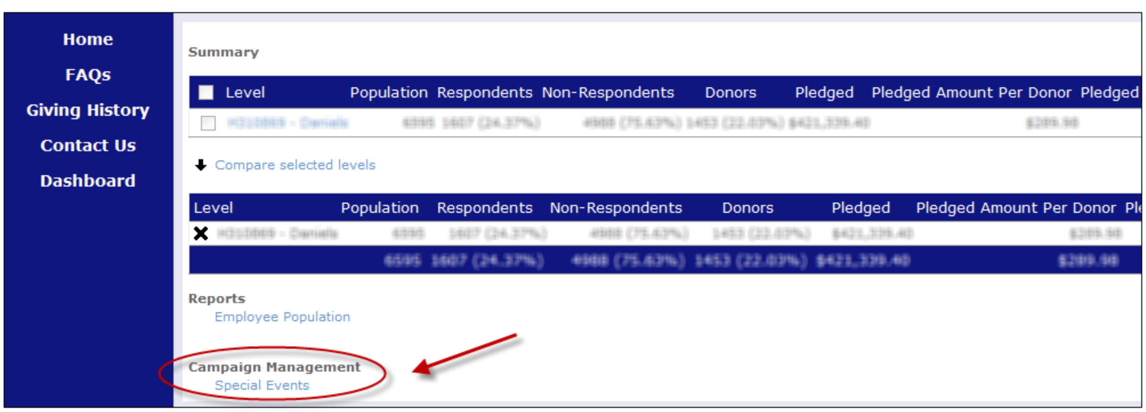


Managing Special Events on the Dashboard

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).

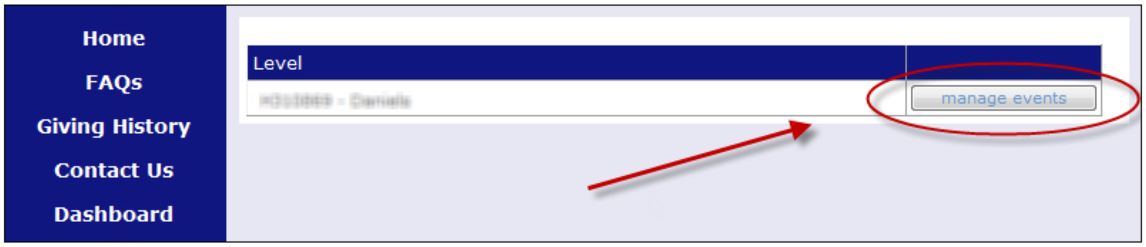
Step 1

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.



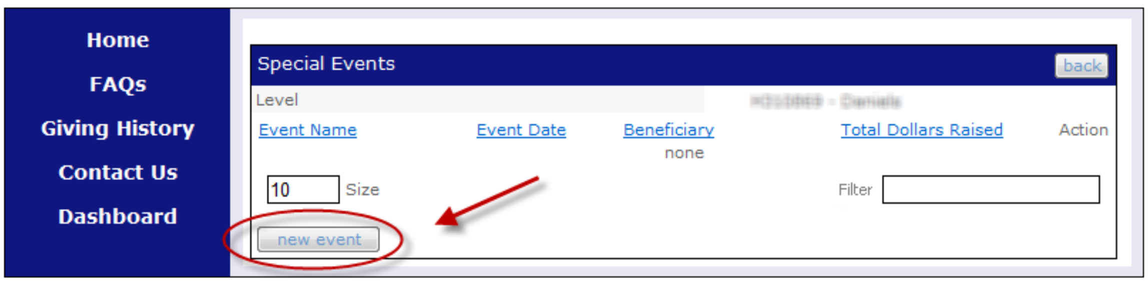
Step 2

Select a level in which to manage Special Events and click manage events.



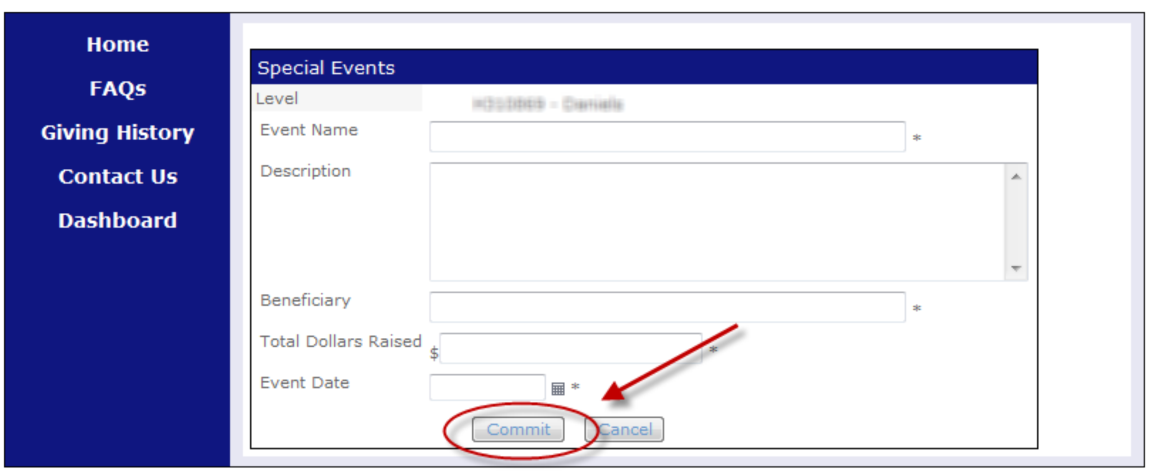
Step 2

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.

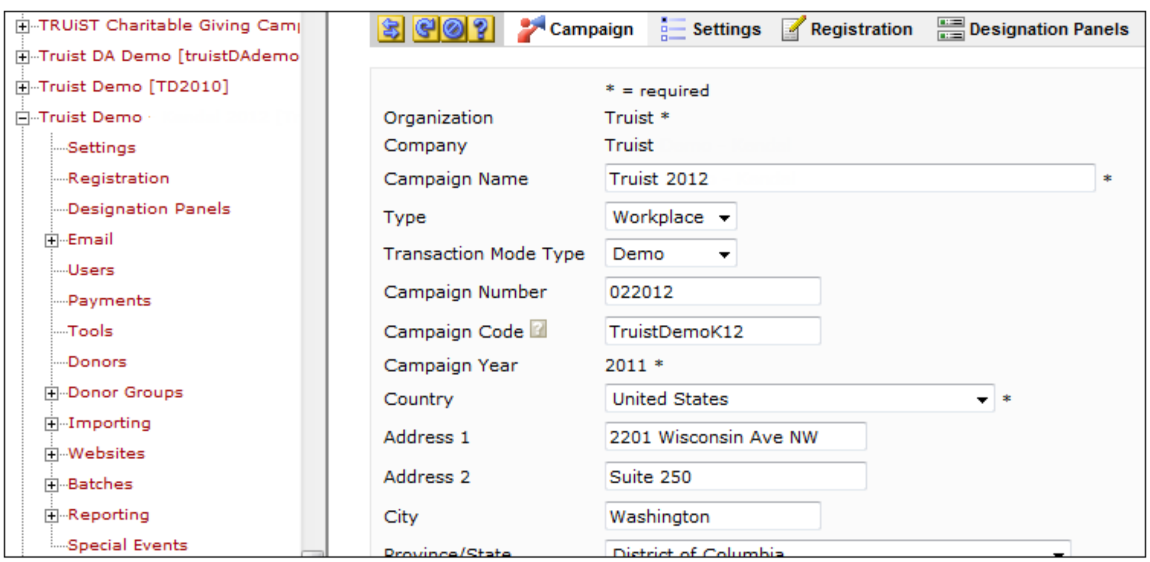
Managing Special Events in OPPS

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

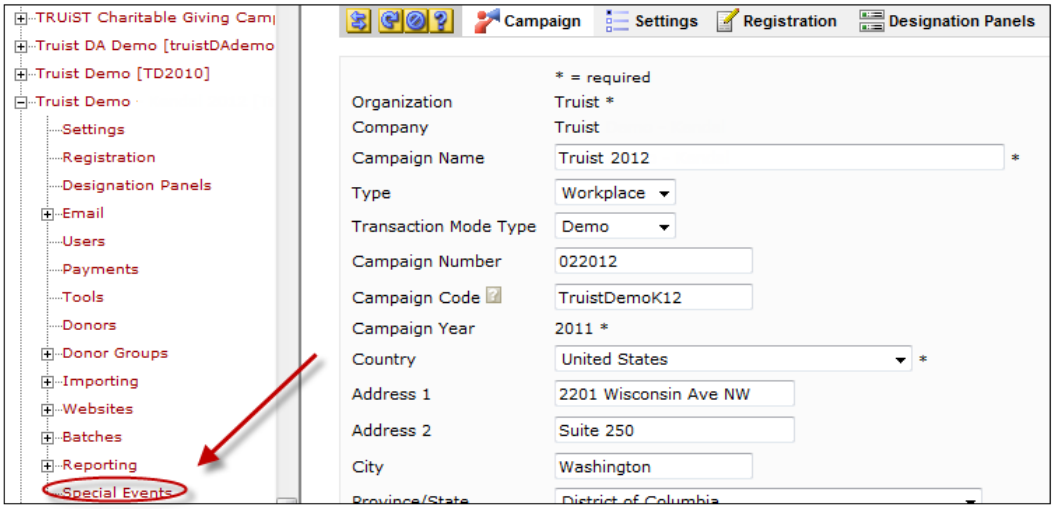
Step 1

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



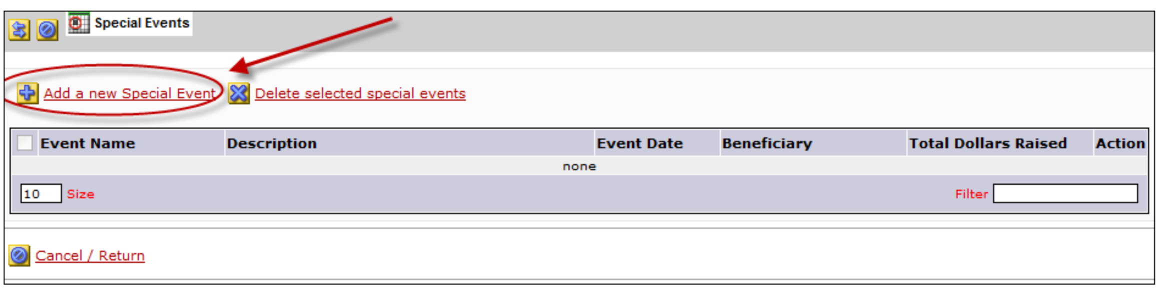
Step 2

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



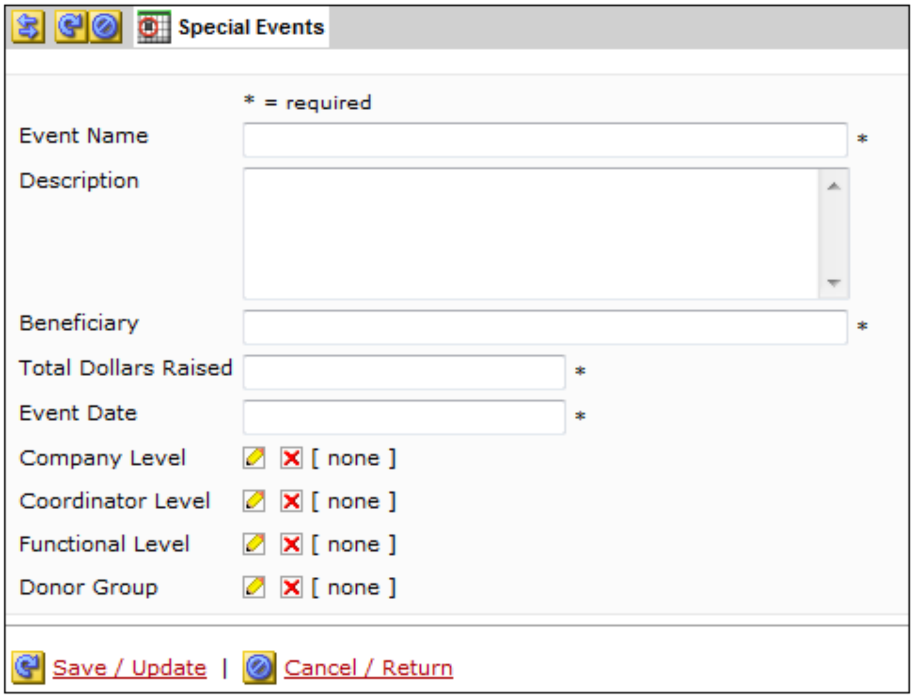
Step 3

Click Add a new Special Event.

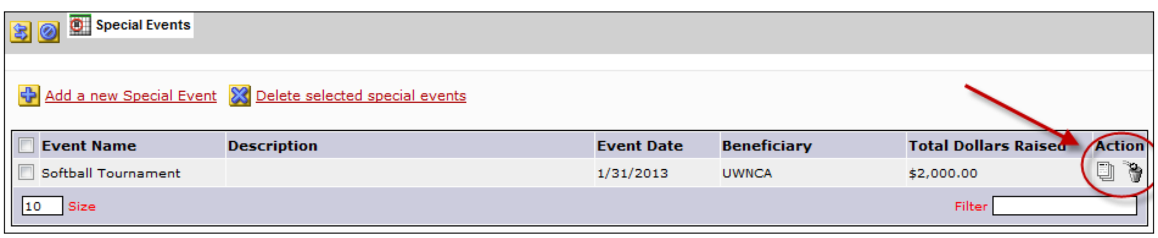


Step 4

Fill in the fields provided and click Save / Update.



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 Reporting

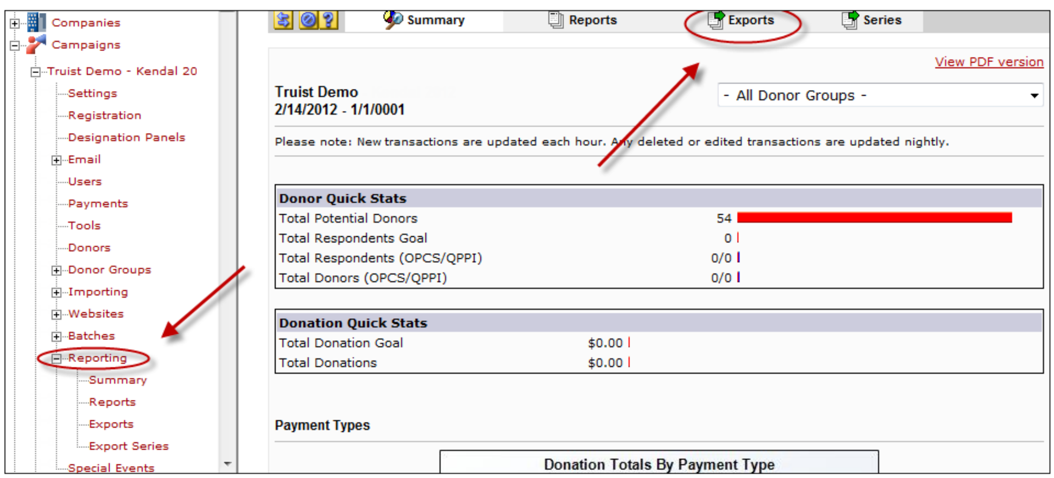
OPPS offers a Special Events export to collect Special Event data. This report includes the following:

- 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:

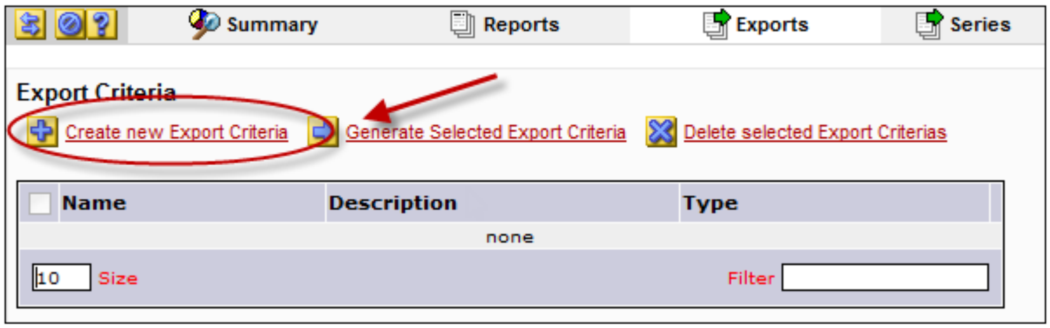
Step 1

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



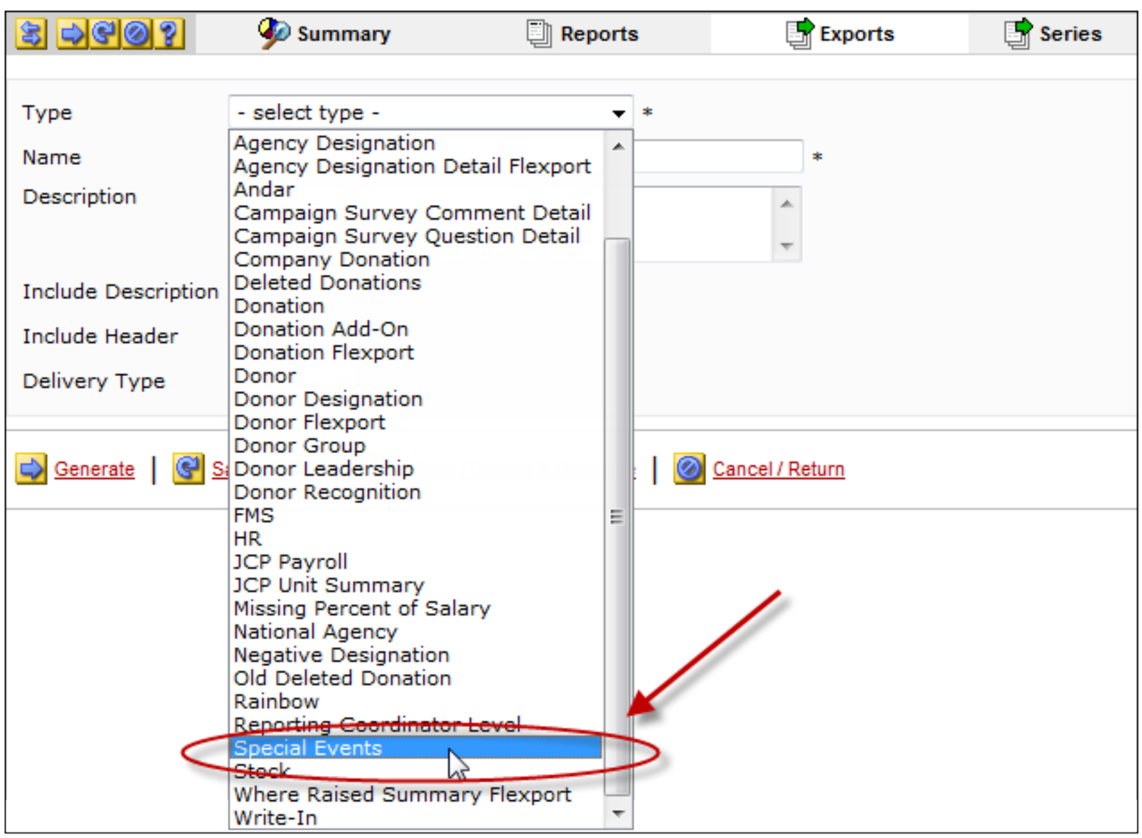
Step 2

Click Create new Export Criteria.

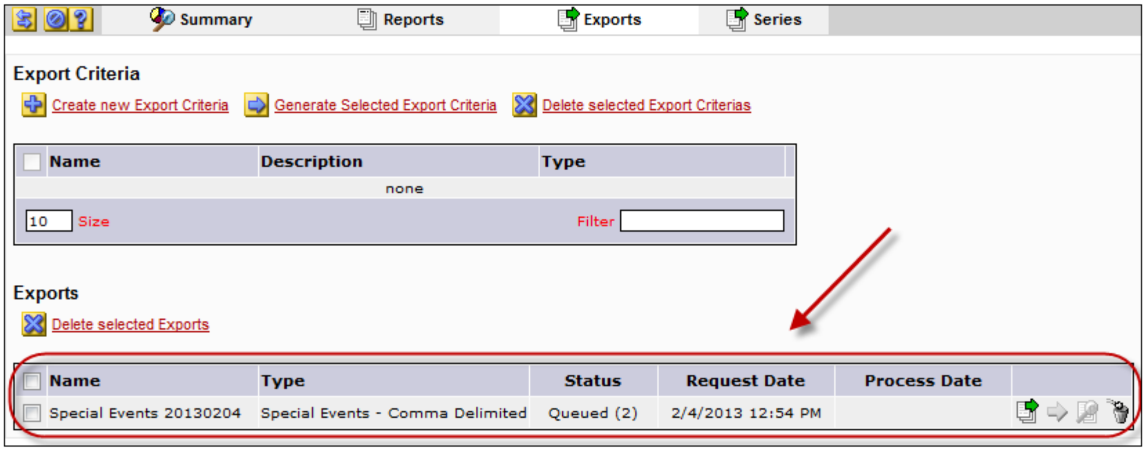


Step 3

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.



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.