

CRM User Forum

December 19, 2018

Cornelia Ellis

John Kuehn

Don Day



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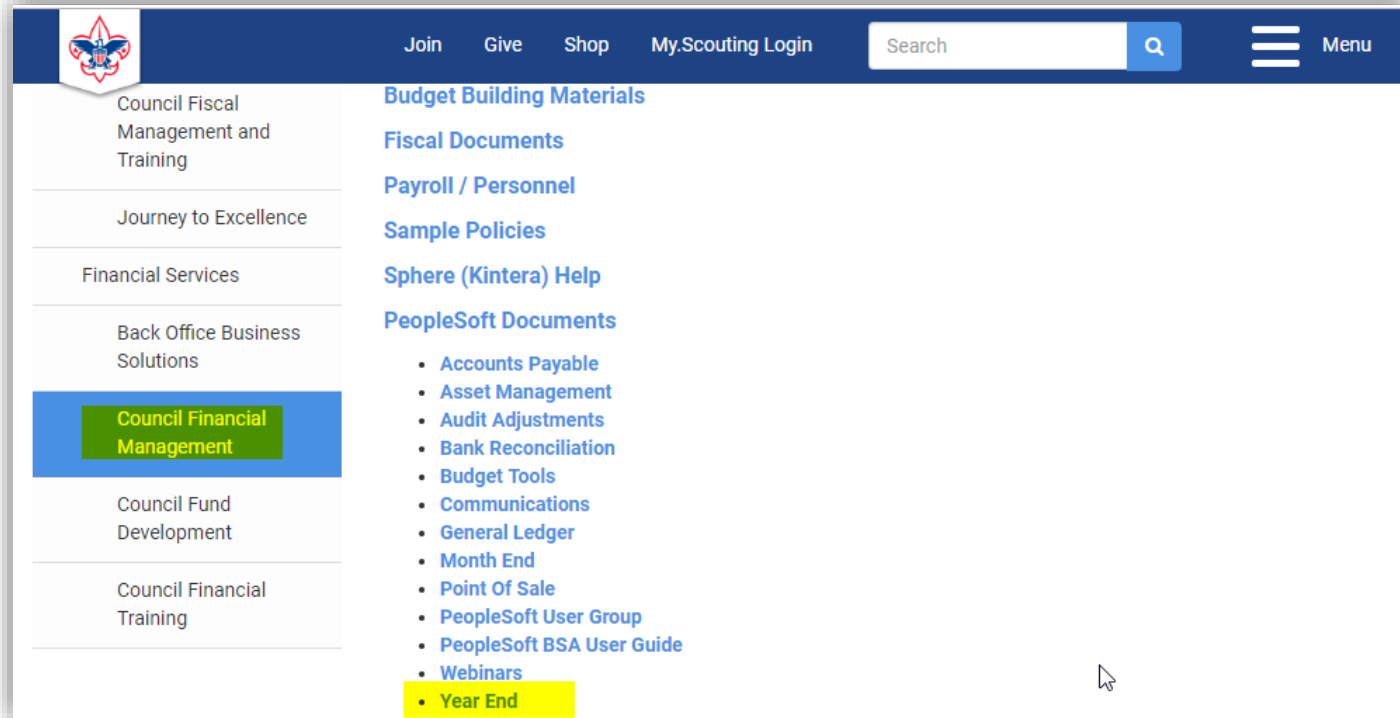
Objectives

- Year-end close
 - Reconcile with General Ledger
 - Pledges aging receivable
 - Write-offs
 - Reports
- Beginning next year
 - Appeal setup
 - Special events setup



Year-End Close

www.scouting.org/financeimpact



The screenshot displays the Scouting.org Finance Impact website. The top navigation bar includes links for Join, Give, Shop, My.Scouting Login, a search bar, and a Menu icon. The left sidebar contains a list of categories: Council Fiscal Management and Training, Journey to Excellence, Financial Services, Back Office Business Solutions, Council Financial Management (highlighted in blue), Council Fund Development, and Council Financial Training. The main content area lists various resources: Budget Building Materials, Fiscal Documents, Payroll / Personnel, Sample Policies, Sphere (Kintera) Help, and PeopleSoft Documents. Under PeopleSoft Documents, a list of topics is shown, with 'Year End' highlighted in yellow.

Join Give Shop My.Scouting Login Search Menu

Council Fiscal Management and Training

Journey to Excellence

Financial Services

Back Office Business Solutions

Council Financial Management

Council Fund Development

Council Financial Training

Budget Building Materials

Fiscal Documents

Payroll / Personnel

Sample Policies

Sphere (Kintera) Help

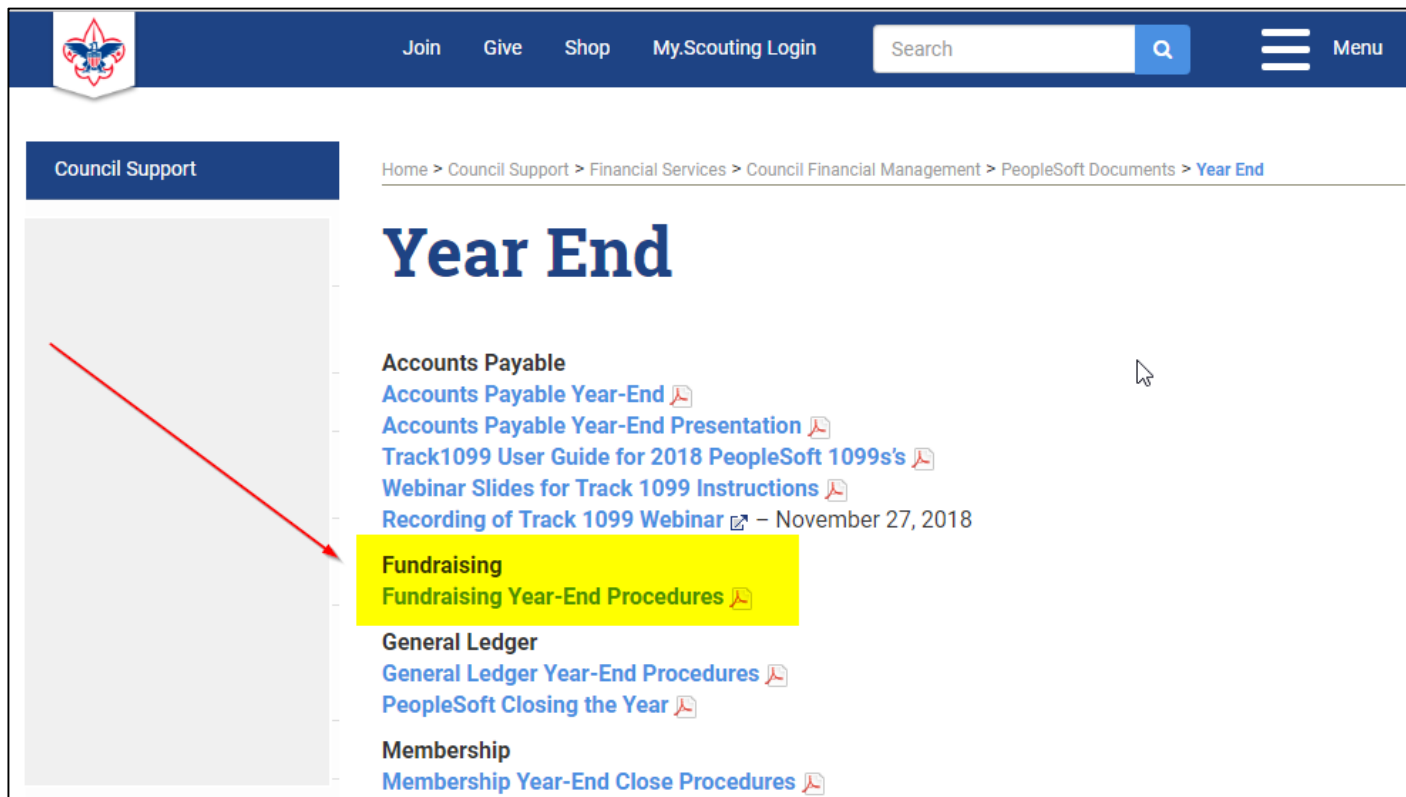
PeopleSoft Documents

- Accounts Payable
- Asset Management
- Audit Adjustments
- Bank Reconciliation
- Budget Tools
- Communications
- General Ledger
- Month End
- Point Of Sale
- PeopleSoft User Group
- PeopleSoft BSA User Guide
- Webinars
- **Year End**



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scouting.org/council-support/finance-impact/council-financial-management/peoplesoft/year-end/









The screenshot shows the Scouting.org website interface. At the top is a dark blue header with the Scouting logo on the left, navigation links (Join, Give, Shop, My.Scouting Login), a search bar, and a menu icon. Below the header is a breadcrumb trail: Home > Council Support > Financial Services > Council Financial Management > PeopleSoft Documents > Year End. The main content area has a large heading 'Year End'. To the left is a sidebar with a 'Council Support' header and a list of links. A red arrow points from the 'Fundraising' link in the sidebar to the 'Fundraising' section in the main content area. The 'Fundraising' section is highlighted with a yellow background and includes the link 'Fundraising Year-End Procedures'. Other sections include 'Accounts Payable' with links for 'Accounts Payable Year-End', 'Accounts Payable Year-End Presentation', 'Track1099 User Guide for 2018 PeopleSoft 1099s', 'Webinar Slides for Track 1099 Instructions', and 'Recording of Track 1099 Webinar' (dated November 27, 2018). The 'General Ledger' section includes 'General Ledger Year-End Procedures' and 'PeopleSoft Closing the Year'. The 'Membership' section includes 'Membership Year-End Close Procedures'.



Council Support


Home > Council Support > Financial Services > Council Financial Management > PeopleSoft Documents > Year End

Year End

Accounts Payable
[Accounts Payable Year-End](#) 
[Accounts Payable Year-End Presentation](#) 
[Track1099 User Guide for 2018 PeopleSoft 1099s](#) 
[Webinar Slides for Track 1099 Instructions](#) 
[Recording of Track 1099 Webinar](#)  – November 27, 2018

Fundraising
[Fundraising Year-End Procedures](#) 

General Ledger
[General Ledger Year-End Procedures](#) 
[PeopleSoft Closing the Year](#) 

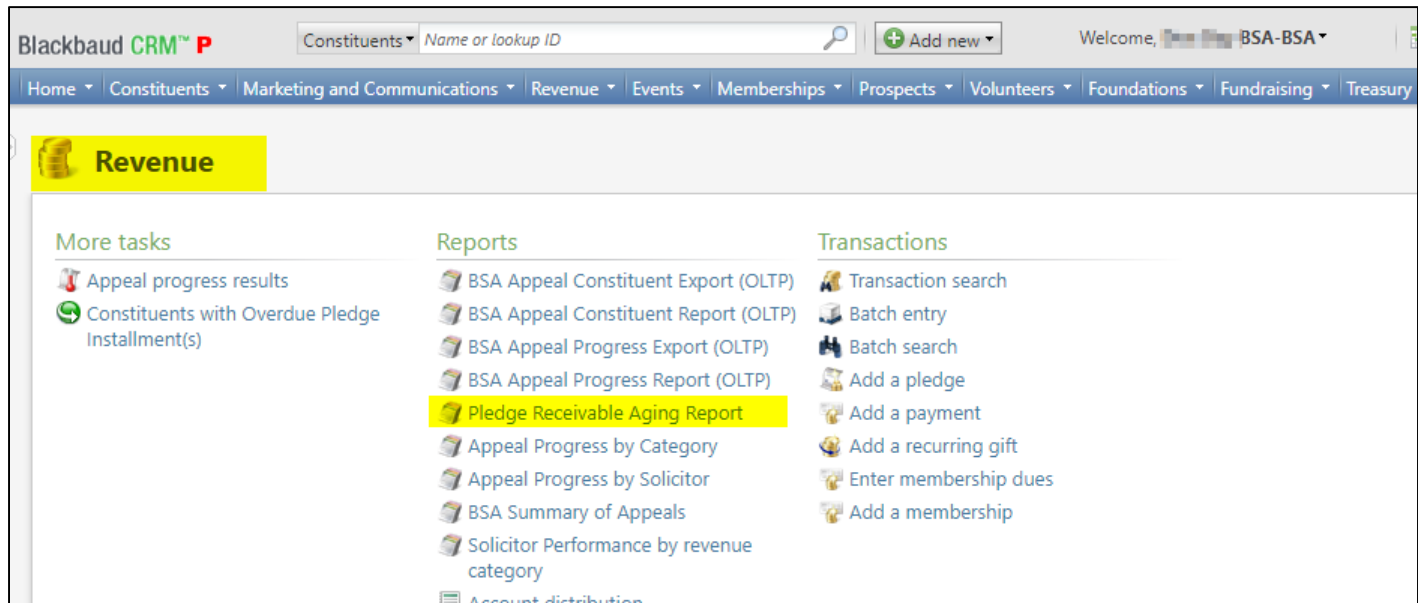
Membership
[Membership Year-End Close Procedures](#) 



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Determine collectible value

- Create the Pledges Receivable Aging Report
- Blackbaud CRM ~ Revenue ~



Determine collectible value

Create the Report

1. BSA Organization – your council
2. Report Code – year
3. Appeal – must be run for each open appeal with outstanding donor pledge values
4. Click “View Report”
5. Wait...



Pledge Receivable Aging Report

Blackbaud CRM™ P

Constituents Add new

Welcome, BSA-BSA

Home ▾ Constituents ▾ Marketing and Communications ▾ **Revenue ▾** Events ▾ Memberships ▾ Prospects ▾ Volunteers ▾ Foundations ▾ Fundraising ▾ Treasury ▾

Pledge Receivable Aging Report

BSA Organization Council 1 Report Code 3

Appeal 2 4



Pledge Aging Receivable Report

- Print report and give to management to review:
 - All open pledges
 - Determine who will still pay
 - Sign and date
- After management review, proceed to Pledge Write-Off process



Pledge Write-off Procedure

- Determine when your council needs to write-off pledges.
- Pledges written off by appeal
- You will use your current Global Pledge Write-off business process
- You will edit the selection in your current business process



Global Pledge Write-off

edge write-off processes (276) + Add

Name	Description
L144	Pledge Write-Off Proc
L144 Abraham Linco...	Just change the select
L003	Pledge Write-Off Proc
L022	Pledge Write-Off Proc
L583	Pledge Write-Off Proc
L382	Pledge Write-Off Proc
Start process	
Edit	
Delete	
As	
L618	Pledge Write-Off Proc
L104	Pledge Write Off Proc
L303	Pledge Write-Off Proc
L157	Pledge Write-Off Proc
L468	Pledge Write-Off Proc
L092	Pledge Write-Off Proc
L368	Conversion Pledge W
L220	Pledge Write-Off Proc
L574	Pledge Write-Off Proc
L635	Pledge Write-Off Proc
L695	Global Write-Off
L449	Pledge Write-Off Proc
L006	Pledge Write-Off Proc

Edit pledge write-off process

General

Name: L382

Description: Pledge Write-Off Process

Selection: L382 Global Write Off Query (Ad

Post status: Do not post

Post date: mm/dd/yyyy

Site: Allegheny Highlands Council

Write-off reason

Reason code: UNC - Uncollectable

Details: 2017 Write Off

Output

☐ Create output selection

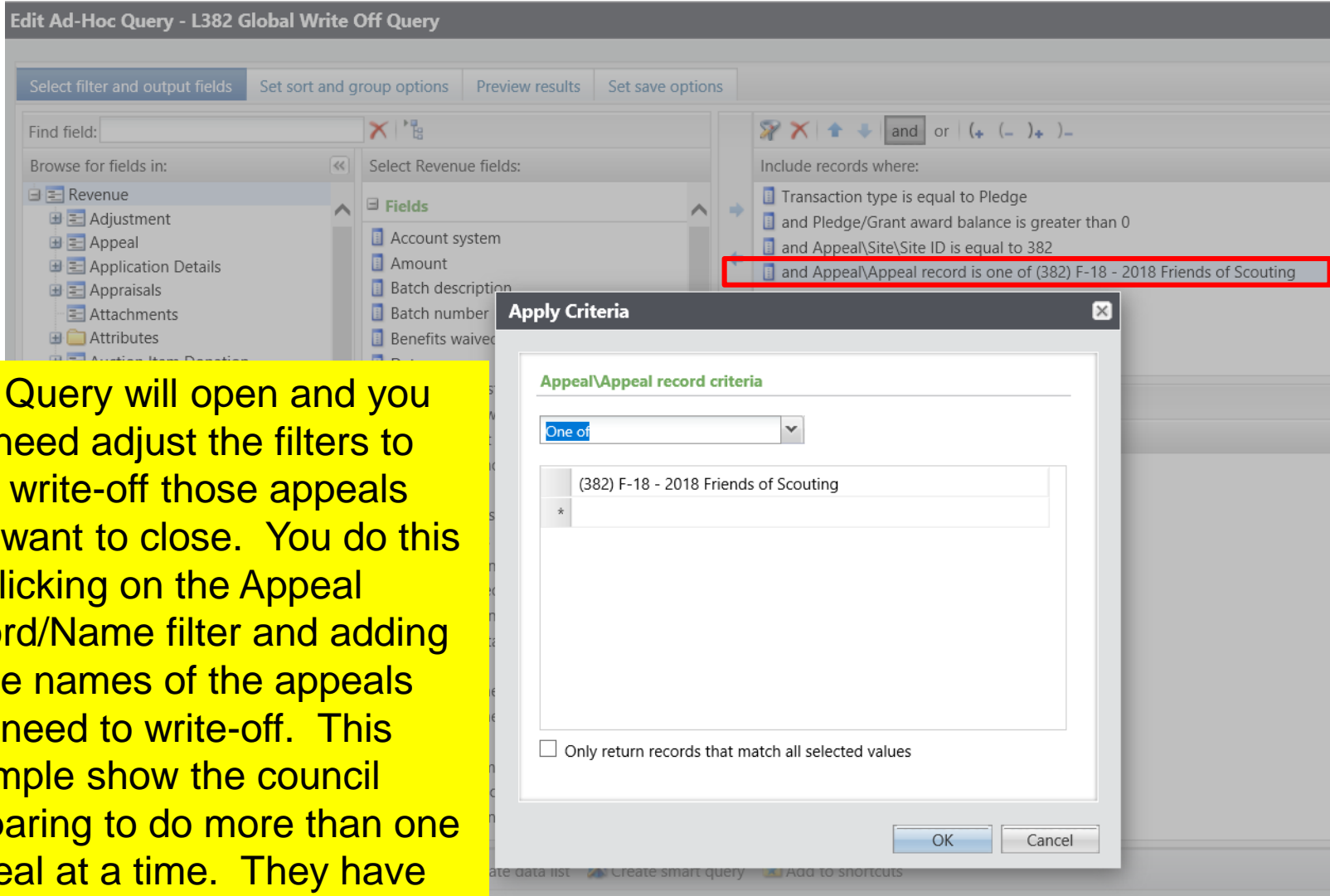
☐ Overwrite existing selection

Selection name:

Help Save

Go to the Global Pledge Write-off processes and edit your routine. No need to create a new routine. When the edit window opens click the pencil to edit the query attached as the selection.





The Query will open and you will need adjust the filters to only write-off those appeals you want to close. You do this by clicking on the Appeal record/Name filter and adding in the names of the appeals you need to write-off. This example show the council preparing to do more than one appeal at a time. They have changed the filter to “one of” and then can now list multiple appeals.

Edit Ad-Hoc Query - L382 Global Write Off Query

Select filter and output fields

Set sort and group options

Preview results

Set save options

Results (78 records found)

Appeal\Name	Pledge/Grant award balance
(382) F-18 - 2018 Friends of Scout...	\$250.00
(382) F-18 - 2018 Friends of Scout...	\$600.00
(382) F-18 - 2018 Friends of Scout...	\$500.00
(382) F-18 - 2018 Friends of Scout...	\$40.00
(382) F-18 - 2018 Friends of Scout...	\$30.00
(382) F-18 - 2018 Friends of Scout...	\$20.00
(382) F-18 - 2018 Friends of Scout...	\$1,200.00
(382) F-18 - 2018 Friends of Scout...	\$1,000.00
(382) F-18 - 2018 Friends of Scout...	\$95.00
(382) F-18 - 2018 Friends of Scout...	\$30.00
(382) F-18 - 2018 Friends of Scout...	\$60.00
(382) F-18 - 2018 Friends of Scout...	\$100.00
(382) F-18 - 2018 Friends of Scout...	\$720.00
(382) F-18 - 2018 Friends of Scout...	\$45.45
(382) F-18 - 2018 Friends of Scout...	\$75.00
(382) F-18 - 2018 Friends of Scout...	\$20.00

Always preview your query before saving it and running your routine to make sure only your appeals are showing and that only the appeals you want to write-off are listed.



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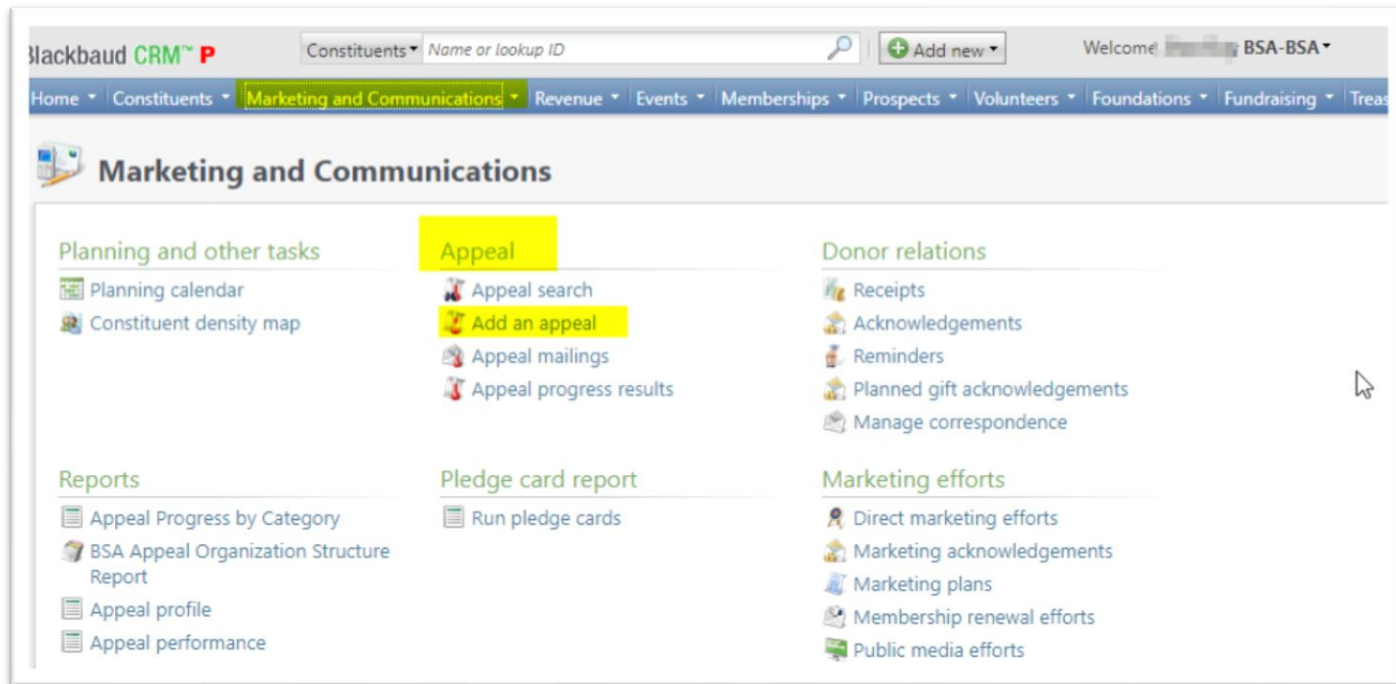
Create Year-End Reports

- Your auditor will want reports
 - Pledge Receivable Aging as of 12/31/2018
 - List of pledges written-off
 - List of pledges not written-off
 - Summary of Appeals – all appeals as of 12/31/2018
 - Appeal Progress Report – all appeals as of 12/31/2018



Starting next year

- Add your appeal(s)



Add an Appeal

1. Name – be sure to include council number in parentheses
2. Description – what you want to show on documents
3. Category – choose from list
4. Report Code – calendar year of the appeal
5. Site – your council
6. Start date – when you start the appeal
7. Link to prior-year appeal



Add an Appeal

The screenshot shows the Blackbaud CRM interface with the 'Add an appeal' dialog box open. The dialog box contains the following fields and options, each marked with a red circle and a number:

- 1. Name: (000) X19 Friends of Scouting Appeal
- 2. Description: Friends of Scouting
- 3. Category: Annual Giving (Friends of Scouting)
- 4. Report code: 2019
- 5. Site: Boy Scouts of America
- 6. Start date: 12/17/2018

Additional fields and options in the dialog box include:

- Split evenly / Split fully buttons
- End date: mm/dd/yyyy
- Goal: \$0.00
- Help button (bottom left)
- Save button (bottom right)
- Cancel button (bottom right)



Add an Appeal

- Link to prior-year appeal

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Constituents Welcome, [User] BSA- [Council]

Home | Constituents | Marketing and Communications | Revenue | Events | Prospects | Foundations | Fundraising | Analysis | Administration

Appeal: ([Council]) FS19 - 2019 Friends of Scouting

Description: 2019 Friends of Scouting Start date: 1/1/2019
Business unit: End date: 12/31/2019
Category: Annual Giving (Friends of Scouting) Goal: \$0.00
Report code: 2019 Status: Active
Site: [Council] Council Membership:

Navigation: [Home](#) | [Revenue Details \(Splits\)](#) | [Matching Gift Claims](#) | [Designations](#) | [Mailings](#) | [Documentation](#) | [Mismatch: Appeals?](#) | [Solicitor Credits by Group](#) | [Prior Appeal](#)

Contributions - posted 12/16/2018

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
<div></div>				

Payments Received - posted 12/16/2018

Payments Received	# of Payments	Average Payment	Most Recent Payment	Mismatch: Appeal?
<div></div>				



Link to prior appeal

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Constituents [+ Add new](#)

Welcome, BSA-

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Prospects ▾ Foundations ▾ Fundraising ▾ Analysis ▾ Administration ▾

Appeal: (702) FS19 - 2019 Friends of Scouting

Description: 2019 Friends of Scouting Start date: 1/1/2019
Business unit: End date: 12/31/2019
Category: Annual Giving (Friends of Scouting) Goal: \$0.00
Report code: 2019 Status: Active
Site: Council Membership:

← hces Revenue Details (Splits) Matching Gift Claims Designations Mailings Documentation Mismatch: Appeals? Solicitor Credits by Group **Prior Appeal**

Prior Appeal

Prior Appeal: (702) FS18 - 2018 Friends of Scouting

Prior Year Appeal History [More ▾](#)

PY1 Year	PY1 Appeal	PY1 Description	PY2 Year	PY2 Appeal	PY2 Description	PY3 Year	PY3 Appeal	PY3 Description	PY4 Year
2018	(702) FS18 - 20...	2018 Friends o...	2017	FS17 - 20...	2017 FRIENDS ...	2016	FS16 - 20...	2016 FRIENDS ...	2015

◀ ▶



Setup Special Events – Add New

The screenshot displays the Scout24 Events management interface. The top navigation bar includes tabs for Home, Constituents, Marketing and Communications, Revenue, **Events**, Memberships, Prospects, Volunteers, and Families. The 'Events' tab is selected and highlighted with a red box. Below the navigation bar, the 'Events' section is visible, featuring a search bar and a red box around the '+ Add new' button. The main content area shows an 'Event calendar' for December 2018, with a list of events including (087) SL18 ScoutReach Sports Luncheon, (087) ED18 - Over The Edge 2018, (177) Woodland Trails Golf 2018, L011 Campfires and Candlelights Gala 2018, (577) F18 - Fishing Tournament, L028 AU18 Gala and Auction 2018, and L028 Scouting Class 2018.

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ **Events ▾** Memberships ▾ Prospects ▾ Volunteers ▾ Families ▾

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query
- GL Accounts
- John D. Kuehn
- Council Import of Outside Records Payments - Import
- Council Import of Outside Records Pledges - Import
- Pseudo-Posting of Special Transaction(s)
- L224
- Ad-hoc Query: L662 Eagle Scouts with Attribute flag
- Application Users

Events

Enter the name of an event

Event calendar

Jump to date: 12/17/2018

Group by: Category ▾

Events

Sites:

All sites ▾

Locations:

All locations ▾

December 2018

Sunday	Monday
25	26
(087) SL18 ScoutReach Sports Luncheon	
(087) ED18 - Over The Edge 2018	
(177) Woodland Trails Golf 2018	
L011 Campfires and Candlelights Gala 2018	
(577) F18 - Fishing Tournament	
L028 AU18 Gala and Auction 2018	
L028 Scouting Class 2018	



Setup Special Events

1. Name the event beginning with L(Council#)
2. Provide Description
3. Select Category
 - FY if putting in Future Revenue
 - Edit event to current year category after Jan 1.
4. Allow designation on fees and mark as auction if needed
5. Start and end date should be the same day
6. Add location



Setup Special Events

Add an event

General

1 Name: L307 Pumpkin Pie Eating Contest

2 Description: State Fair Pie Eating Contest

3 Category: Special Fundraising Event

Sites:

Site
Heart of America Council
*

4 ☒ Event is an auction
☐ Do not show event on calendar
☒ Event allows designations on fees

Copy options

Details

5 Start date: 10/29/2019 Start time: hh:mm AM
End date: 10/29/2019 End time: hh:mm AM


Location information

6 Location: Wyandotte County Fair Grounds
Room/Unit: Exhibit Hall Capacity: 300
Contact: Robert Hamlin

Help Save Cancel



Add your Appeal and Designation

 **L307 Pumpkin Pie Eating Contest**

Event date: 10/29/2019

Site: Heart of America Council

Location: Wyandotte County Fair Grounds

Room/Unit: Exhibit Hall

Contact: [Robert Hamlin](#)

Coordinator:

Category: Special Fundraising Event

Status: ✓ Active

Lookup ID: 8-10000840

Event expenses

Expense budget: \$0.00

Agreed expenses: \$0.00

Amount paid: \$0.00

0% of budget

Event capacity

Event capacity: 300

Will attend: 0

Will not attend: 0

0% of capacity

Registrations

Tasks/Coordinators

Speakers

Expenses

Options

Invitations

Designations

Appeals

Documentation

Job Occurrences

Registrations (0) [+ Add](#) [📄](#) [More ▾](#)

Type:

Registrant:

Status:

Attended:

[Apply](#) [Reset](#)

<input checked="" type="checkbox"/>	Registrant	Type	Status	Atten...	O...	Balance	Host ▲
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Fill out Event Mapping – Create Jira ticket

4201	= Default Event Contribution Account		First Create Records in Blackbaud CRM. Then Copy-&-Paste Record Names Below.			Revenue Contribution Account			
New Event Row	Business Unit	Event Start Date	Event Name <small>First create each Event in BCRM. Then copy-&-paste each Event name here. Use 2 rows if an Event needs 2 Designations.</small>	Appeal Name <small>First create each Appeal record in BCRM. Then copy-&-paste each Appeal name here. An Appeal can only be linked to 1 Event.</small>	Designation Name <small>Designations should already exist in BCRM. Use the exact same Designations as last year. Request new Designations for any new Projects.</small>	Fund Type <small>Auto-generated</small>	4201 <small>Sponsorship/ Donation</small>	4202 <small>Participant/ Ticket</small>	4203 <small>Program Item</small>
Ex:	L999	10/10/2018	L999 Sporting Clays 2018 (example)	L999 R18 - Sporting Clays 2018 (example)	99907771 Sporting Clays - Operating (example)	1	YES	no	no
4	L###						no	no	no
5	L###						no	no	no
6	L###						no	no	no
7	L###						no	no	no
8	L###						no	no	no
9	L###						no	no	no
10	L###						no	no	no
11	L###						no	no	no
12	L###						no	no	no
13	L###						no	no	no
14	L###						no	no	no
15	L###						no	no	no
16	L###						no	no	no
17	L###						no	no	no
18	L###						no	no	no
19	L###						no	no	no
20	L###						no	no	no
21	L###						no	no	no
22	L###						no	no	no
23	L###						no	no	no

Down load off of MyBSA under Blackbaud CRM

New_EventsInstructions (printable)Composite_SegmentsReference

Down load off of MyBSA under Blackbaud CRM Resources.
The document is called Event Revenue Setup Request. Read direction tab first then fill in New Events



Future CRM User Forums

Topics for future sessions:

- Creating contribution statements
- Printing BSAFR Pledge cards
- Maximizing BSAFR organization
- Managing constituents
- User security – role templates
- Managing Prospects
- Auctions
- Using BSAFR barcode on other items (payment reminders)



Next CRM User Forum

Wednesday, January 16, 2019

10:00 am & 2:00 pm



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Questions & Answers



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