CRM User Forum

December 19, 2018

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Don Day
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
scouting.org/council-support/finance-impact/council-financial-management/peoplesoft/year-end/
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
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
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 to 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 shows 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.
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.

<table>
<thead>
<tr>
<th>Appeal\Name</th>
<th>Pledge/Grant award balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$250.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$600.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$500.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$40.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$30.00</td>
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<tr>
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<td>$20.00</td>
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<tr>
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<td>$1,200.00</td>
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<td>$75.00</td>
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<tr>
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</tr>
</tbody>
</table>
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
Add an Appeal

• Link to prior-year appeal
Link to prior appeal
Setup Special Events – Add New
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

1. Name: L307 Pumpkin Pie Eating Contest
2. Description: State Fair Pie Eating Contest
3. Category: Special Fundraising Event
4. Sites: Heart of America Council
5. Details:
   - Start date: 10/29/2019
   - End date: 10/29/2019
   - Start time: hh:mm AM
   - End time: hh:mm AM
6. Location information:
   - Location: Wyandotta County Fair Grounds
   - Room/Unit: Exhibit Hall
   - Capacity: 300
   - Contact: Robert Hamlin

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
- Category: Special Fundraising Event

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

- Type: [Dropdown]
- Status: [Dropdown]
- Registrant: [Input]
- Attended: [Dropdown]

Add, More
Fill out Event Mapping – Create Jira ticket

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
Questions & Answers