Objectives

• Welcome
• Year-End materials
• Contribution Statements – How To
• BSAFR Basics
• New Year Procedures
  – Adding an appeal
  – Adding a special event
  – Assigning designations
• Questions & Answers
Year-End Close

www.scouting.org/financeimpact
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

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

• A customization to CRM for Local Councils
• After conversion, your Annual Campaign “FOS” history was reviewed and put into this format
• The process looked at revenue and workers
• Was done several weeks after you converted
BSAFR

• Every fundraising position in ScoutNET was converted into a group/committee in CRM
• Each one is listed on the BSAFR Query
  – LXXX Example Council Folder
    • Search for BSAFR Groups query
      – Modify for your council
      – Export to excel
      – Sort by BSAFR Reporting Level
BSAFR Groups Query Fields

• Group Name & Lookup ID
• Hierarchy by level
• Member Count
• Reporting parent group
• Structure for revenue
• Giving category for revenue
• Current Solicitor
• Presenter
• Reporting level
BSAFR

- Modifying BSAFR
  - Look up group or committee
Modifying BSAFR
BSAFR Notes

• This was done at conversion
• Any new units won’t be set up for BSAFR
• Each local council has to setup BSAFR for new units
• Top Level positions were created for Community & Family
Contribution Statements

CRM User Forum Presentation
IRS Publication 1771, Charitable Contributions—Substantiation and Disclosure Requirements

• A donor must have a bank record or written communication from a charity for any monetary contribution before the donor can claim a charitable contribution on his/her federal income tax return

• A donor is responsible for obtaining a written acknowledgment from a charity for any single contribution of $250 or more

• A charitable organization is required to provide a written disclosure to a donor who receives goods or services in exchange for a single payment in excess of $75

• Recipient organizations typically send written acknowledgments to donors no later than January 31 of the year following the donation.
Process Overview

1. Run export to get data set
2. Review data set and update as needed
3. Run mail merge to generate statements

Review and mail statements
Process Overview

- Marketing and Communications>Packages>Letters and documents>View letters and documents>Documents tab
- Job aids have detailed, step-by-step instructions
To Download Document

• Click the Chevron

• Either click “View document” or click the document hyperlink to download.

• Do not edit and change the site for LC Global to your council.
Run Export

• 3 Choices
  – Cumulative contributions > $0
    • All donors get statements
  – Cumulative contributions >= $250 or Benefited
    • Donors that give $250 or more, cumulatively, and any donors that received benefits get statements
  – Single contribution >= $250 or Benefited
    • Donors that give a single gift of $250 or more and any donors that received benefits get statements
Run Export

- Administration>Tools>Export
Run Export
• Because you are site secured only your records will be returned when you run this.

1. Start process
2. Completed
3. Download output
Review and Update

- Review your data and make updates as needed
- Add a dummy record at end of the file
Review and Update

• Review Columns V and W
  – Possible benefit issue
  – Possible receipt amount issue
  – These error depend on how you have been using the system
  – Giving category column is on the sheet to help with benefits in column S
### Review and Update

<table>
<thead>
<tr>
<th>#</th>
<th>Item</th>
<th>Sponsor</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>089</td>
<td>S17</td>
<td>$250.00</td>
<td>$250.00</td>
</tr>
<tr>
<td>089</td>
<td>S17</td>
<td>$250.00</td>
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<tr>
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</tr>
<tr>
<td>89</td>
<td>S1</td>
<td>$500.00</td>
<td>$500.00</td>
</tr>
</tbody>
</table>

### Additional Notes:
- **Table Sponsor:** rev-34061
- **Table Sponsors:** rev-34061
- **1/2 PAGE AD:** rev-34061
- **Family:** rev-34061
- **Community - DCA:** PAS-13985
- **Sebring:** 61788
- **Family:** 60848
- **Community - DCA:** PAS-13969
- **Mexico Trip:** rev-41589
- **Kendra Scott Necklace:** rev-41598
- **Golf Clubs and Bag:** rev-41598
- **Play and Music Lesson:** rev-41599
- **Community - DCA:** PAS-13985
- **Citrus County:** PAS-13985
- **Board Division:** PAS-13955

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Prepared. For Life.
Run Mail Merge

• Download mail merge template
• Edit merge field values for your council
• Start a Directory mail merge
• Select the contribution statement data file
• Finish the merge
Run Mail Merge

```plaintext
{ IF { MERGESEQ } = 1 "Discard This Page. { SET PreviousConstituent "" }{ SET CouncilAddress "Example Council, 123 Main St., Anytown, TX 12345" }{ SET CouncilContact "email First.Last@scouting.org" }{ SET CouncilTaxID "[Federal Tax ID#]" }{ SET Year "2015" }" }{ SET CurrentConstituent { MERGEFIELD ID } }{ IF { CurrentConstituent } = { PreviousConstituent } }{ MERGEFIELD Date }{ MERGEFIELD Amount \# "$#,###,###,###\$0.00 }{ MERGEFIELD Appeal }{ IF { MERGEFIELD Benefit_Value } <> "" { SET BenefitValue { MERGEFIELD Benefit_Value } \# "$#,###,###,###\$0.00 } }{ SET BenefitValue \# "$#,###,###,###\$0.00 }{ SET NetContribution { = { MERGEFIELD Amount } - { BenefitValue } }{ NetContribution \# "$#,###,###,###\$0.00 }{ SET TotalPaid { = TotalPaid + { MERGEFIELD Amount } } }{ SET TotalContribution { = TotalContribution + { NetContribution } } }{ SET TotalBenefitValue { = TotalBenefitValue + { BenefitValue } } } }{ TotalPaid \# "$#,###,###,###\$0.00 }{ TotalBenefitValue \# "$#,###,###,###\$0.00 }{ SET TotalPaid 0 }{ SET TotalContribution 0 }{ SET TotalBenefitValue 0 }
```
Run Mail Merge
Run Mail Merge

1. Navigate to your downloaded data file and select it.
Run Mail Merge
Run Mail Merge

Clifford Wang
603 Blair Ave
Piedmont, CA 94611-3405

Dear Clifford Wang,

The following is a list of paid contributions for the calendar year 2015 recorded by Exemple Council, 123 Main St., Anytown, TX 12345 (Federal Tax ID [Federal Tax ID]). Thank you for your generous support of Scouting! If you have any questions or concerns, please email First.Last@scouting.org.

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount Paid</th>
<th>Appeal Name</th>
<th>Benefit Value</th>
<th>Net Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/14/2015</td>
<td>150.00</td>
<td>(042) S16 - 2016 Friends of Scouting</td>
<td>100.00</td>
<td>50.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Benefit: Something cool!</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/21/2015</td>
<td>150.00</td>
<td>(042) S16 - 2016 Friends of Scouting</td>
<td>0.00</td>
<td>150.00</td>
</tr>
<tr>
<td>12/22/2015</td>
<td>150.00</td>
<td>(042) S16 - 2016 Friends of Scouting</td>
<td>0.00</td>
<td>150.00</td>
</tr>
<tr>
<td>12/23/2015</td>
<td>150.00</td>
<td>(042) S16 - 2016 Friends of Scouting</td>
<td>100.00</td>
<td>50.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Benefit: Something awesome!</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/24/2015</td>
<td>150.00</td>
<td>(042) S16 - 2016 Friends of Scouting</td>
<td>0.00</td>
<td>150.00</td>
</tr>
<tr>
<td>12/25/2015</td>
<td>150.00</td>
<td>(042) S16 - 2016 Friends of Scouting</td>
<td>0.00</td>
<td>150.00</td>
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<tr>
<td>12/26/2015</td>
<td>150.00</td>
<td>(042) S16 - 2016 Friends of Scouting</td>
<td>0.00</td>
<td>150.00</td>
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<tr>
<td>12/27/2015</td>
<td>150.00</td>
<td>(042) S16 - 2016 Friends of Scouting</td>
<td>0.00</td>
<td>150.00</td>
</tr>
<tr>
<td>12/28/2015</td>
<td>150.00</td>
<td>(042) S16 - 2016 Friends of Scouting</td>
<td>100.00</td>
<td>50.00</td>
</tr>
</tbody>
</table>

Total: $1,350.00

$300.00

$1,050.00

Prepared. For Life.
Review and Mail

- Print, fold, stuff and mail per your council’s usual procedure
- Discard the first and last pages from the merge file
New Year Procedures

• 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

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: 12/17/2016
   End date: mm/dd/yyyy
7. Goal: $0.00
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

Add an event

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
   - Start time: hh:mm AM
   - End date: 10/29/2019
   - End time: hh:mm AM
6. Location information:
   - Location: Wyandotte County Fair Grounds
   - Room/Unit: Exhibit Hall
   - Capacity: 300
   - Contact: Robert Hamlin

Copy options

Help

Save Cancel

Prepared. For Life.
Add your Appeal and Designation
Fill out Event Mapping – Create Jira ticket

 ![Image of a table]

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:
- 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, February 20, 2019

10:00 am & 2:00 pm CT
Questions & Answers