

# CRM User Forum

January 16, 2019

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Don Day



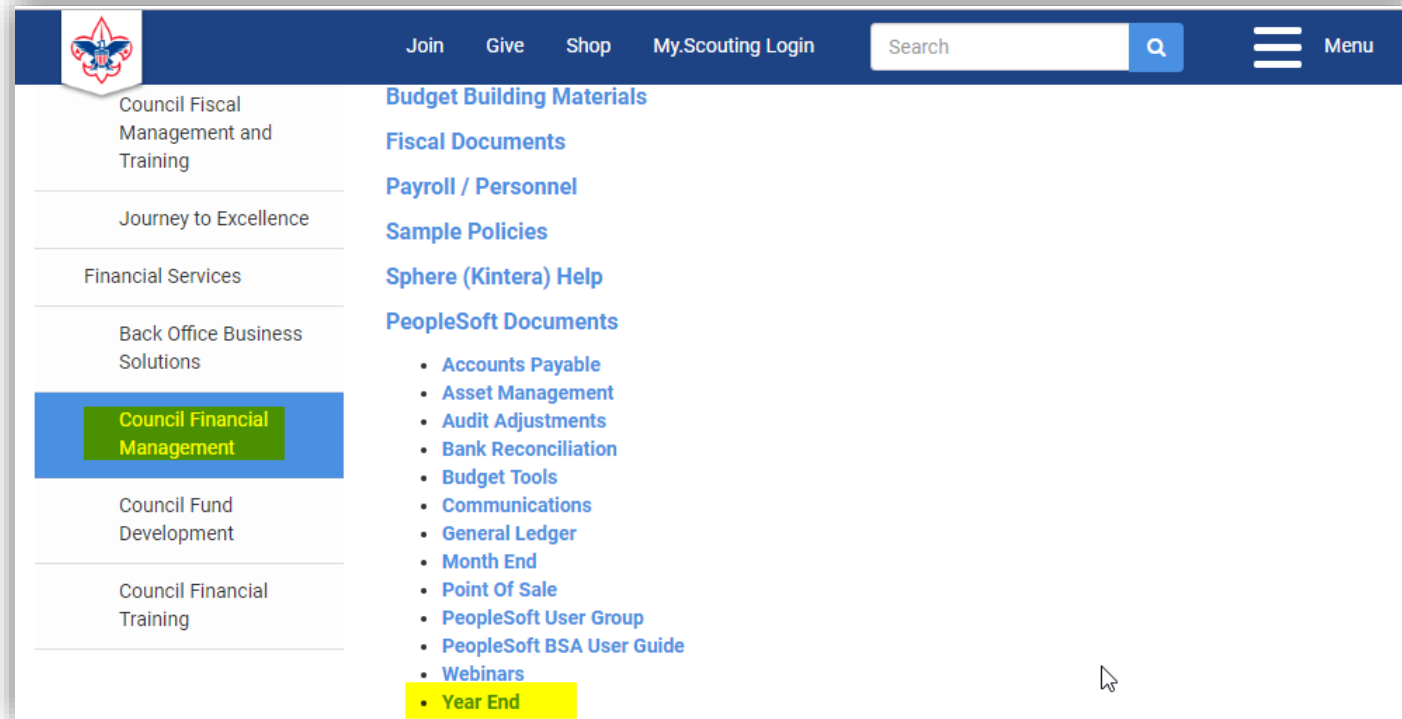
# Objectives

- 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](http://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 with a blue header. The header includes the Scouting logo, navigation links (Join, Give, Shop, My.Scouting Login), a search bar, and a menu icon. The main content area has a left sidebar with 'Council Support' and a main section titled 'Year End'. The 'Year End' section contains a list of links: 'Accounts Payable', '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'. A red arrow points to the 'Fundraising' section, which is highlighted in yellow. The 'Fundraising' section includes 'Fundraising Year-End Procedures'. Below this are 'General Ledger' and 'Membership' sections, each with a link to 'Year-End 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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# 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

The screenshot displays the Blackbaud CRM interface for a specific group. The top navigation bar includes tabs for Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, Volunteers, Foundations, Fundraising, Treasury, Web, Analysis, Administration, and Data Integrity. The main header shows the group name "Post 0888 Lincoln - 324 (164808)" and the lookup ID "8-34628124". Below this, the "BSAFR Fields" section contains a list of fields and their values:

Field	Value
Group public name:	
Is BSAFR group:	Yes
Solicit for BSAFR:	Yes
BSA structure for revenue:	SV Traditional
Giving category for revenue:	Family Division
BSAFR solicitor current:	Post 0888 Lincoln - 324 (164808)
BSAFR presenter current:	
BSAFR reporting parent group:	Salt Valley - Family Division - S0
BSAFR reporting level:	Unit
BSAFR reporting hierarchy by name:	324 Council F O S Chair Salt Valley - District F O S Chair Salt Valley - Family Division - S0 Post 0888 Lincoln - 324 (164808)
BSAFR reporting hierarchy by level:	Council District District Unit
Can solicit revenue and set fundraising goals:	Yes
Can set committee goals:	Yes
Can coordinate events:	Yes

A red arrow points to the "BSAFR" tab in the navigation bar, which is highlighted in blue.





# Modifying BSAFR

**Edit BSAFR constituent group** [X]

Group public name:	<input type="text"/>
Is BSAFR group:	Yes [v]
Solicit for BSAFR:	Yes [v]
BSA structure for revenue:	SV Traditional [v]
Giving category for revenue:	Family Division [v]
BSAFR solicitor current:	Post 0888 Lincoln - 324 (164808) [m]
BSAFR presenter current:	<input type="text"/> [m]
BSAFR reporting parent group:	Salt Valley - Family Division - 50 [m]
BSAFR reporting level:	Unit [v]

[Save] [Cancel]



# 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



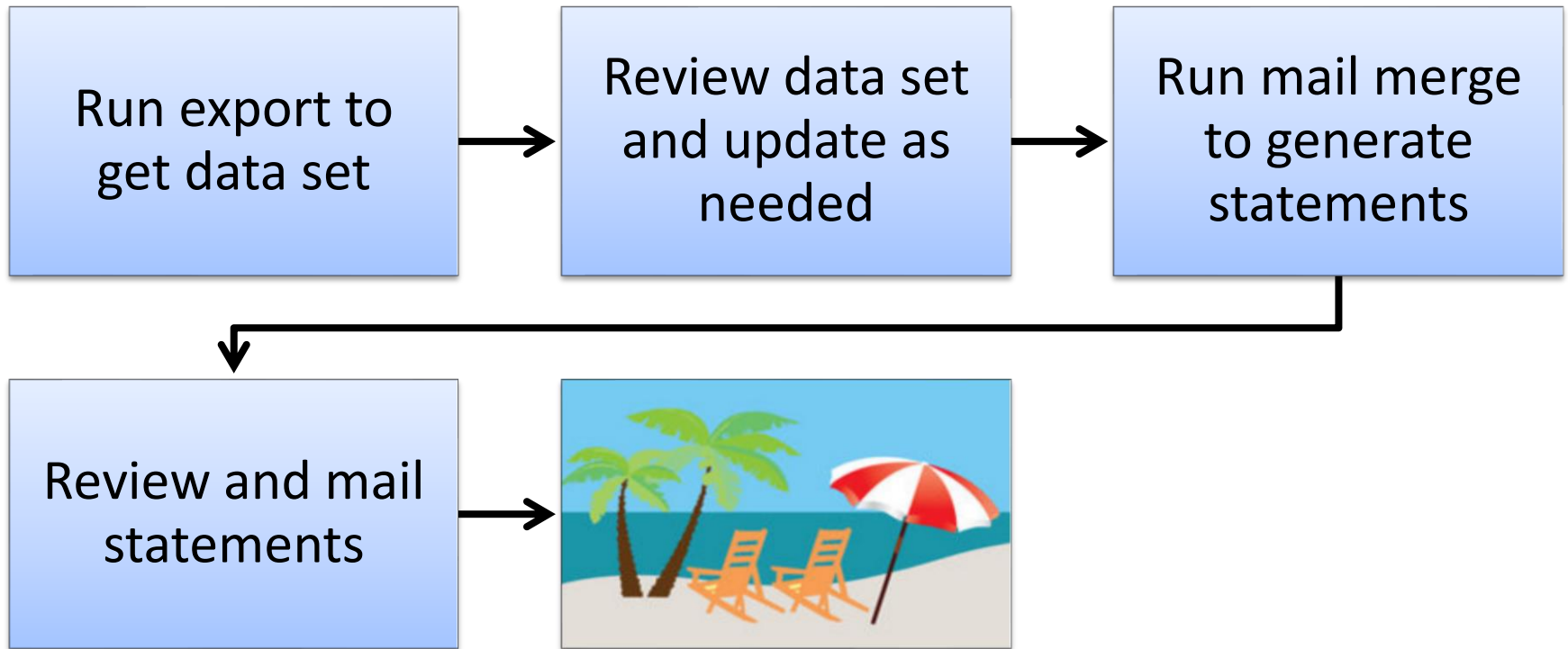
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# IRS Publication 1771, Charitable Contributions— Substantiation and Disclosure Requirements

- 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.

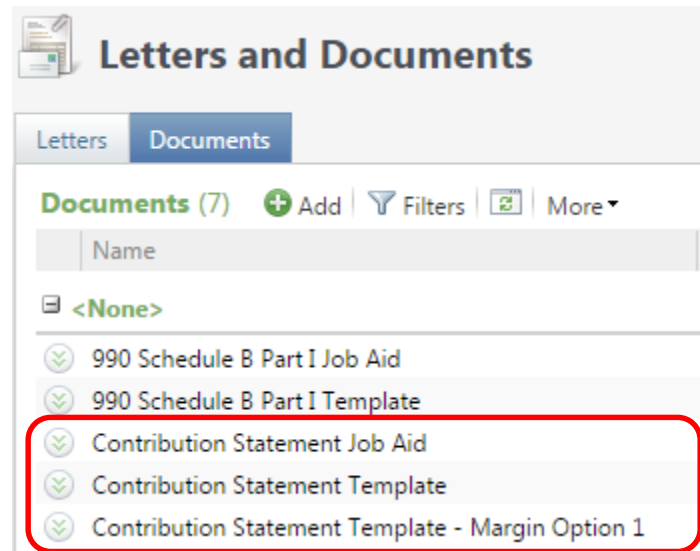


# Process Overview



# 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.

<None>

990 Schedule B Part I Job Aid	LC Global
990 Schedule B Part I Template	LC Global
<b>Contribution Statement Job Aid</b>	LC Global

**View document** Edit Delete

Name: Contribution Statement Job Aid Cc

Site: LC Global

Type: De

Attachment: **Blackbaud\_CRM\_4\_Contribution\_Statement\_Job\_Aid\_1\_9\_17.pdf**

Contribution Statement Template	LC Global
Contribution Statement Template - Margin Option 1	LC Global



# Run Export

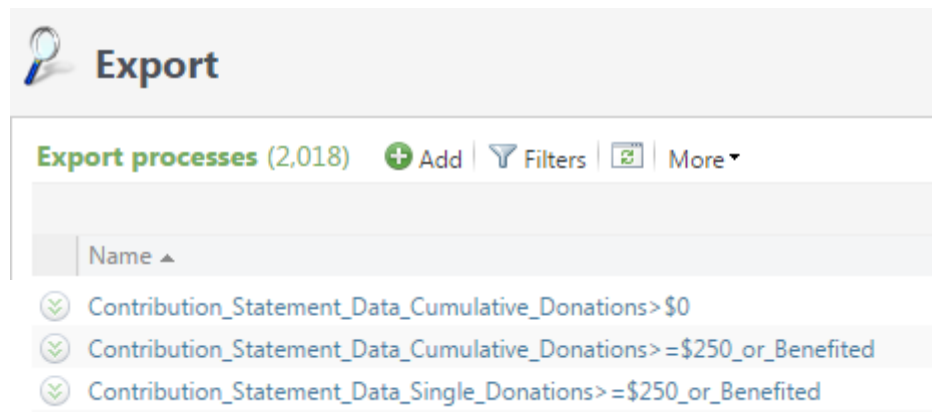
- 3 Choices
  - Cumulative contributions  $> \$0$ 
    - All donors get statements
  - Cumulative contributions  $\geq \$250$  or Benefited
    - Donors that give \$250 or more, cumulatively, and any donors that received benefits get statements
  - Single contribution  $\geq \$250$  or Benefited
    - 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.

The screenshot displays the 'Export list' interface. On the left, a 'Tasks' sidebar contains a list of actions: 'Start process' (highlighted with a red box and the number 1), 'Edit process', 'Set format options', 'Generate WSF', 'Create job schedule', and 'Delete process'. Below this is a 'Shortcuts' section with links like 'Add this page to shortcuts', 'Manage my shortcuts', and 'Post Revenue to GL'. The main area shows the details for an export job titled 'Contribution\_Statement\_Data\_Cumulative\_Donations>\$0 - Export'. It includes fields for 'Name', 'Description', 'Query name\Export definition', and 'Export type'. Below this, there are tabs for 'Recent Status', 'History', and 'Job Schedules'. The 'Recent status' tab is active, showing a 'Recent status' section with a green checkmark and the word 'Completed' (highlighted with a red box and the number 2). A 'Download output' button is also visible (highlighted with a red box and the number 3). At the bottom, a table provides details about the job's execution.

Recent Status		History	Job Schedules
<b>Recent status</b>			
Status:	Completed		
Status message:	Completed		
Started by:	netbsa\rwhite	Server name:	D2PBBISEC10BV
Started:	1/8/2016 1:05:09 PM	Total records processed:	92438
Ended:	1/8/2016 1:20:32 PM	Number of exceptions:	0
Duration:	15 minutes 23 seconds	Records successfully processed:	92438



# Review and Update

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

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	BUSINESS	Site ID	ID	Last	First	Address	City	State	ZIP	Date	Transactio	Appeal	Amount	Receipt A	Benefit V	Benefit D	Revenue I
2		1	42 8-1009096	Genentech		1 Dna Way	South San	CA	94080-491	#####	Payment	(042) S15 -	\$900.00	\$900.00			rev-14573
3		2	42 8-1215544	Domingue	Francisco	3985 Lyma	Oakland	CA	94602-185	#####	Payment	(042) S16 -	\$300.00	\$300.00			rev-14697
4		3	42 8-1215650	Peterson	Andrew	103 Monti	Piedmont	CA	94611-392	#####	Payment	(042) S16 -	\$250.00	\$250.00			rev-14689
5		4	42 8-1217480	Kuesel	Christoph	3829 Rand	Oakland	CA	94602-120	#####	Payment	(042) S16 -	\$500.00	\$500.00			rev-14709
6		5	42 8-1217491	Kim	Kenneth	240 Estate	Piedmont	CA	94611-331	#####	Payment	(042) S16 -	\$100.00	\$100.00			rev-14688
7		6	42 8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	#####	Payment	(042) 150I	\$260.00	\$260.00			rev-14692
8		7	42 8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	#####	Payment	(042) 150I	\$400.00	\$0.00			rev-14700
9		8	42 8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	#####	Payment	(042) 150I	#####	#####			rev-14700
10		9	42 8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	#####	Payment	(042) S16 -	#####	#####			rev-14701
11		10	42 8-1228420	Pierce	Christoph	4085 Whit	Oakland	CA	94602-243	4/6/2015	Payment	(042) S15 -	\$100.00	\$100.00			rev-14601
591		590	42 8-1571911	Cheung	Daniel	125 Ronac	Piedmont	CA	94611	#####	Payment	(042) S16 -	\$100.00	\$100.00			rev-14711
592			Dummy	Dummy	Discard												



# 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

(089) S17	\$250.00	\$250.00			rev-37512	440403	FALSE	FALSE	Sebring		
(089) S17	\$250.00	\$250.00			PAS-13985	61788	FALSE	FALSE	Sebring		
(089) S17	\$250.00	\$250.00			PAS-13975	60848	FALSE	FALSE	Family		
(089) S17	\$250.00	\$250.00			PAS-13965	60470	FALSE	FALSE	Community - DCA		
(089) A17	#####	\$0.00			rev-41589	491027	TRUE	TRUE	Mexico Trip		
(089) A17	\$120.00	\$0.00			rev-41598	497003	TRUE	TRUE	Kendra Scott Necklace a		
(089) A17	\$500.00	\$0.00			rev-41598	497682	TRUE	TRUE	Golf Clubs and Bag		
(089) A17	\$100.00	\$100.00			rev-41598	498645	FALSE	FALSE	Sponsor		
(089) A17	\$40.00	\$0.00			rev-41599	499007	TRUE	TRUE	Play and Music Lesson		
(089) S17	\$250.00	\$250.00			PAS-13985	61326	FALSE	FALSE	Community - DCA		
(089) S17	#####	#####			PAS-13985	61364	FALSE	FALSE	Citrus County		

(089) S1	\$50.00	\$50.00			rev-41706	585076	FALSE	FALSE	Community - DCA		
(89) X1	\$500.00	\$500.00			rev-34061	431701	FALSE	FALSE	1/2 PAGE AD		
(89) X1	\$1,300.00	\$980.00	\$320.00	Table Sponsor	rev-34061	431585	FALSE	FALSE	Table Sponsors		
(89) S1	\$500.00	\$500.00			rev-41640	533302	FALSE	FALSE	Family		
(89) S1	\$500.00	\$500.00			PAS-13955	59990	FALSE	FALSE	Board Division		
(089) S1	\$250.00	\$250.00			PAS-13965	60470	FALSE	FALSE	Community - DCA		



# 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

Contribution\_Statement\_Template\_v1.8.2015.docx - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT Rich White

Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Preview Results Find Recipient Check for Errors Finish Merge Merge to Adobe PDF

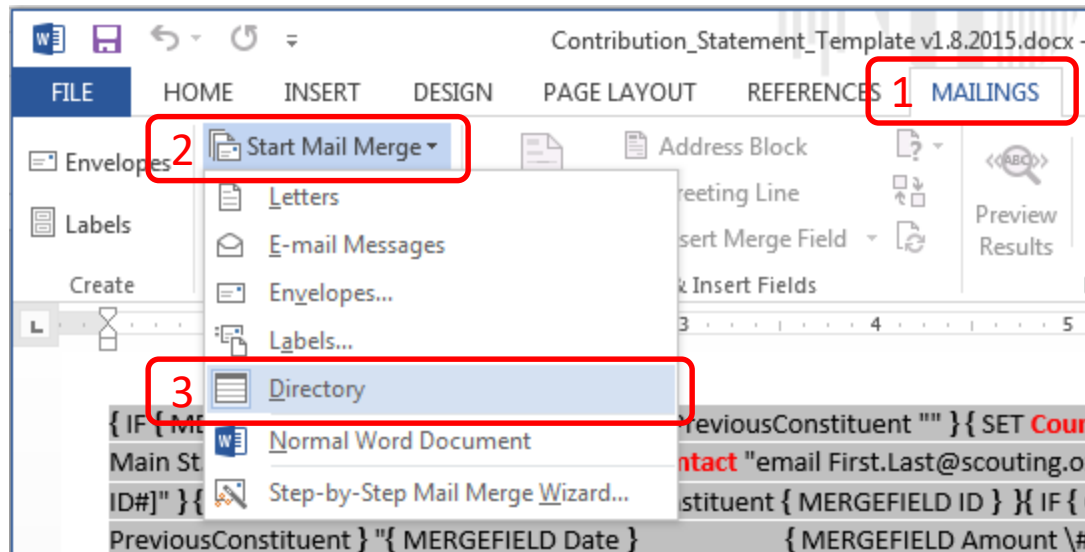
Create Start Mail Merge Write & Insert Fields Preview Results Finish Acrobat

1 2 3 4 5 6 7

```
{ 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 } } { BenefitValue \# "$#,###,###0.00" } { SET NetContribution { = { MERGEFIELD Amount } - {
BenefitValue } } } { NetContribution \# "$#,###,###0.00" } { SET TotalPaid { = TotalPaid + { MERGEFIELD Amount } } } { SET
TotalContribution { = TotalContribution + { NetContribution } } } { SET TotalBenefitValue { = TotalBenefitValue + {
BenefitValue } } } ""
Total:{ TotalPaid \# "$#,###,###0.00" } { TotalBenefitValue
\# "$#,###,###0.00" } { TotalContribution \# "$#,###,###0.00" } { SET TotalPaid 0 } { SET TotalContribution 0 } { SET
TotalBenefitValue 0 }
```

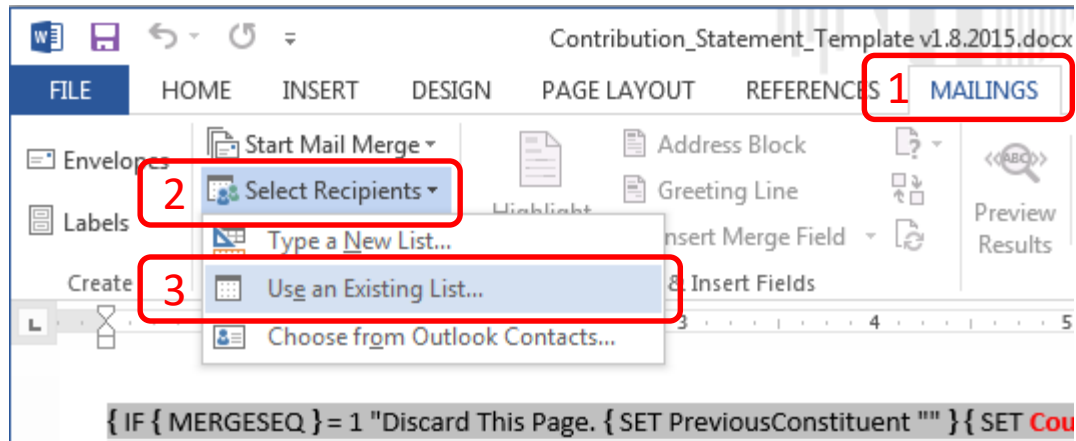


# Run Mail Merge





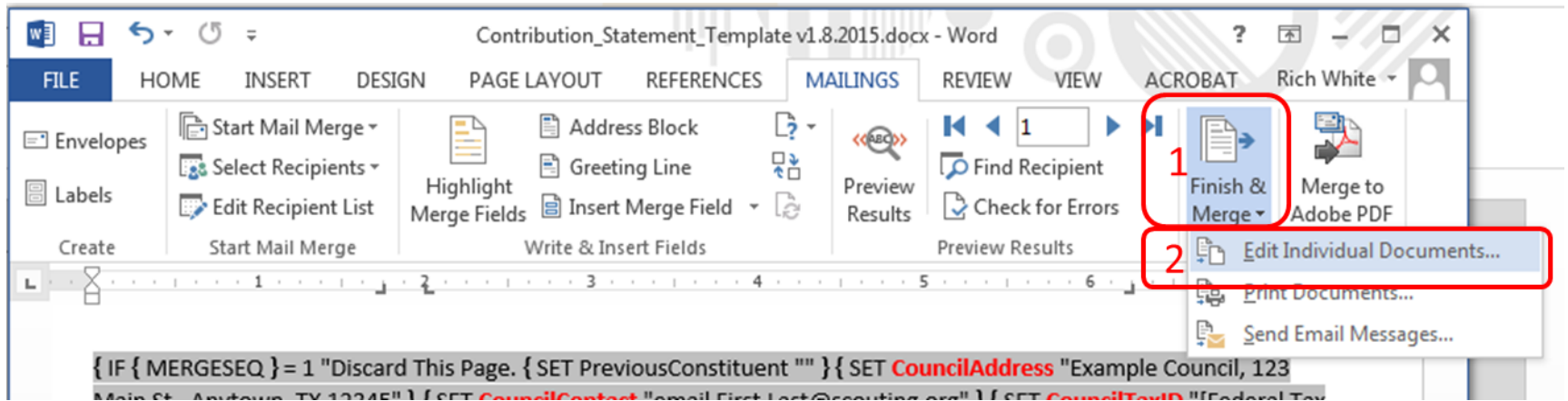
# Run Mail Merge



- Navigate to your downloaded data file and select it



# Run Mail Merge



# Run Mail Merge

Directory6 - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT Rich White

Calibri (Body) 11 A A Aa

B I U abc x<sub>2</sub> x<sup>2</sup> A a b A

AaBbCcDc AaBbCcDc AaBbCcDc

Normal No Spac... Heading 1

Editing

Clipboard

Font Paragraph Styles

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 Example 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.

Date	Amount Paid	Appeal Name	Benefit Value	Net Contribution
10/14/2015	150.00	(042) S16 - 2016 Friends of Scouting <i>Benefit: Something cool!</i>	100.00	50.00
12/21/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/22/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/23/2015	150.00	(042) S16 - 2016 Friends of Scouting <i>Benefit: Something awesome!</i>	100.00	50.00
12/24/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/25/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/26/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/27/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/28/2015	150.00	(042) S16 - 2016 Friends of Scouting <i>Benefit:</i>	100.00	50.00
<b>Total:</b>	<b>\$ 1,350.00</b>		<b>\$ 300.00</b>	<b>\$ 1,050.00</b>



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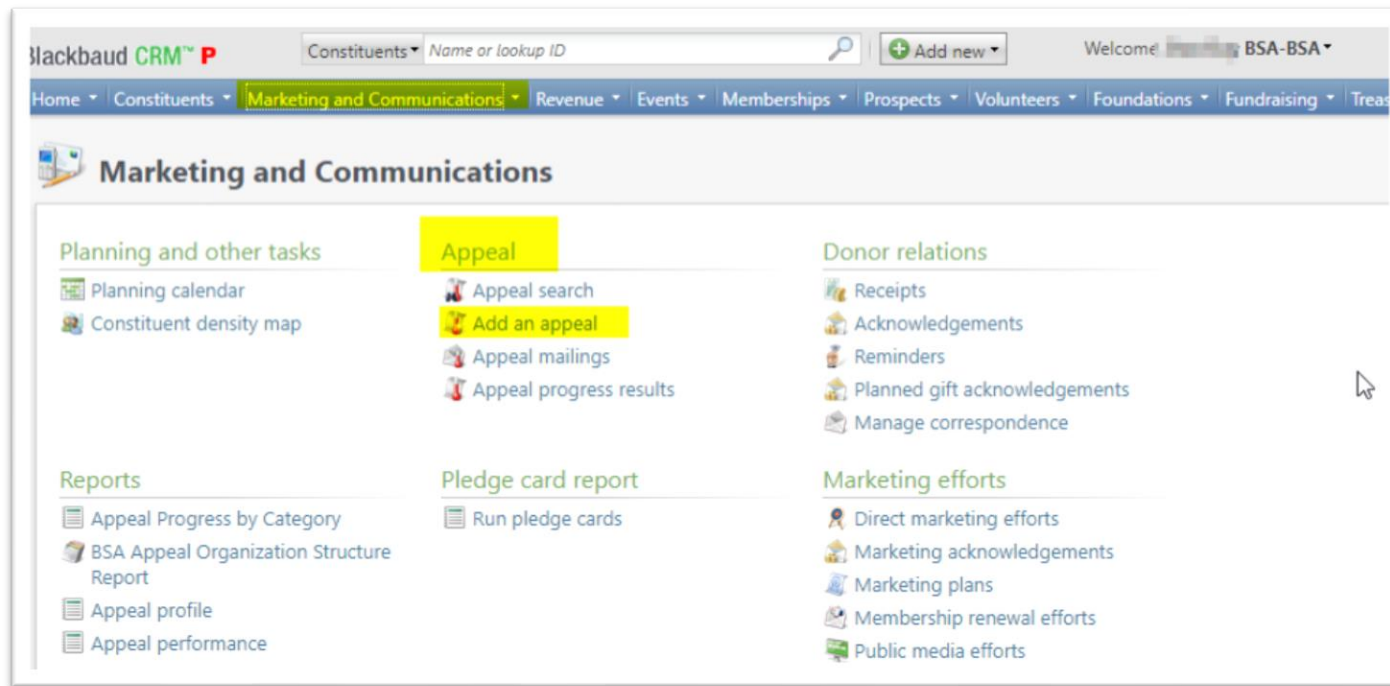
# Review and Mail

- 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

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
- Save button
- Cancel button



# Add an Appeal

- Link to prior-year appeal

Blackbaud CRM™ P

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:

hces | 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

Blackbaud CRM™ P

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 shows the ScoutLink web interface. The top navigation bar includes links for Home, Constituents, Marketing and Communications, Revenue, Events (highlighted with a red box), Memberships, Prospects, Volunteers, and Families. On the left, a 'Shortcuts' sidebar lists various administrative tasks. The main content area is titled 'Events' and features a search bar with the placeholder text 'Enter the name of an event' and a magnifying glass icon. To the right of the search bar is a red-bordered button with a green plus icon and the text '+ Add new'. Below the search bar is the 'Event calendar' section, which includes a 'Jump to date' field set to '12/17/2018' and a 'Group by' dropdown menu set to 'Category'. The calendar view shows a grid for December 2018, with events listed for the 25th and 26th. The events listed are: (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:

Group by:  ▾

Events

Sites:

▾

Locations:

▾

Calendar List

**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 ▲
-------------------------------------	------------	------	--------	----------	------	---------	--------



# 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-&amp;-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-&amp;-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 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



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