CRM User Forum

February 27, 2019

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Objectives

- Welcome
- System Performance
- Duplicate records
- Documentation Security
- Revenue Updates
- Adding a BSAFR Group
- Designation best practices
- Questions & Answers

System Performance

- Some users have reported slowness during batch process
- If you are experiencing slowness, please file a case with Member Care so we can track
- We are exploring several possible causes with the software provider
- Unsure when systems issues will be resolved

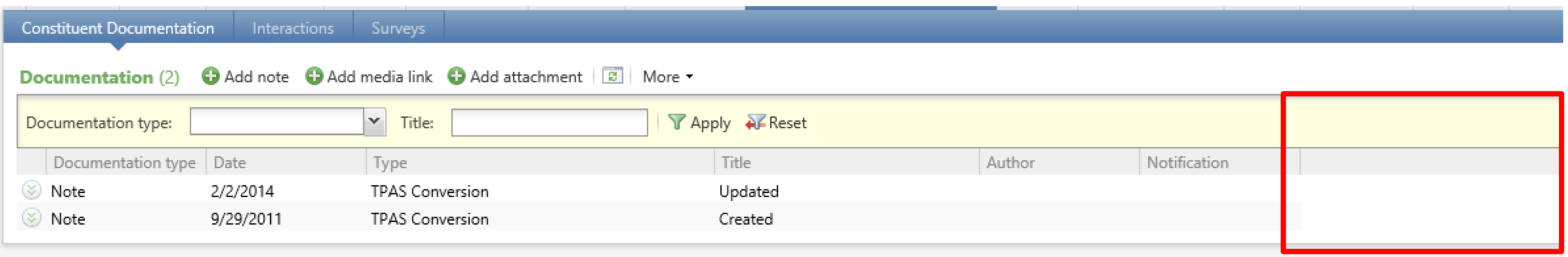
Duplicate Records

- Due to system constraints between CRM & ScoutNET
- Users unable to de-dupe in CRM
- Person merge in ScoutNET is still possible
  - Be careful not to merge Persons with any fundraising history
  - The surviving record in CRM is not always the one you want

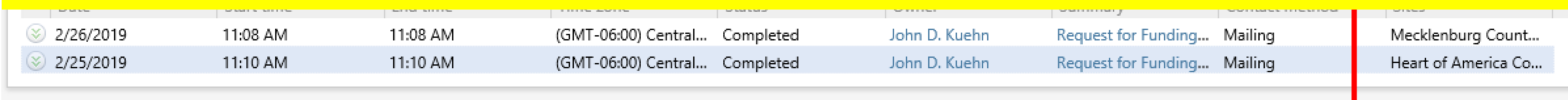
Documentation Security

1. BSA is moving towards a one record per person data base
2. Revenue is site secured via site on the revenue designation
3. Gift Plans are assigned a site when created
4. Interactions (Private Note) assigned a site when created
5. Documentation is not site secured on main constituent record
    1. Attachments
    2. Notes
    3. Media Links

Documentation VS Interaction



The top box is the documentation area on a constituent record. These items do not have a site assigned to them so anyone with access to the constituent can see them. The lower box is the Interactions tab. These have a site, so only the ones that are assigned to your council will be visible to you or members of your council.



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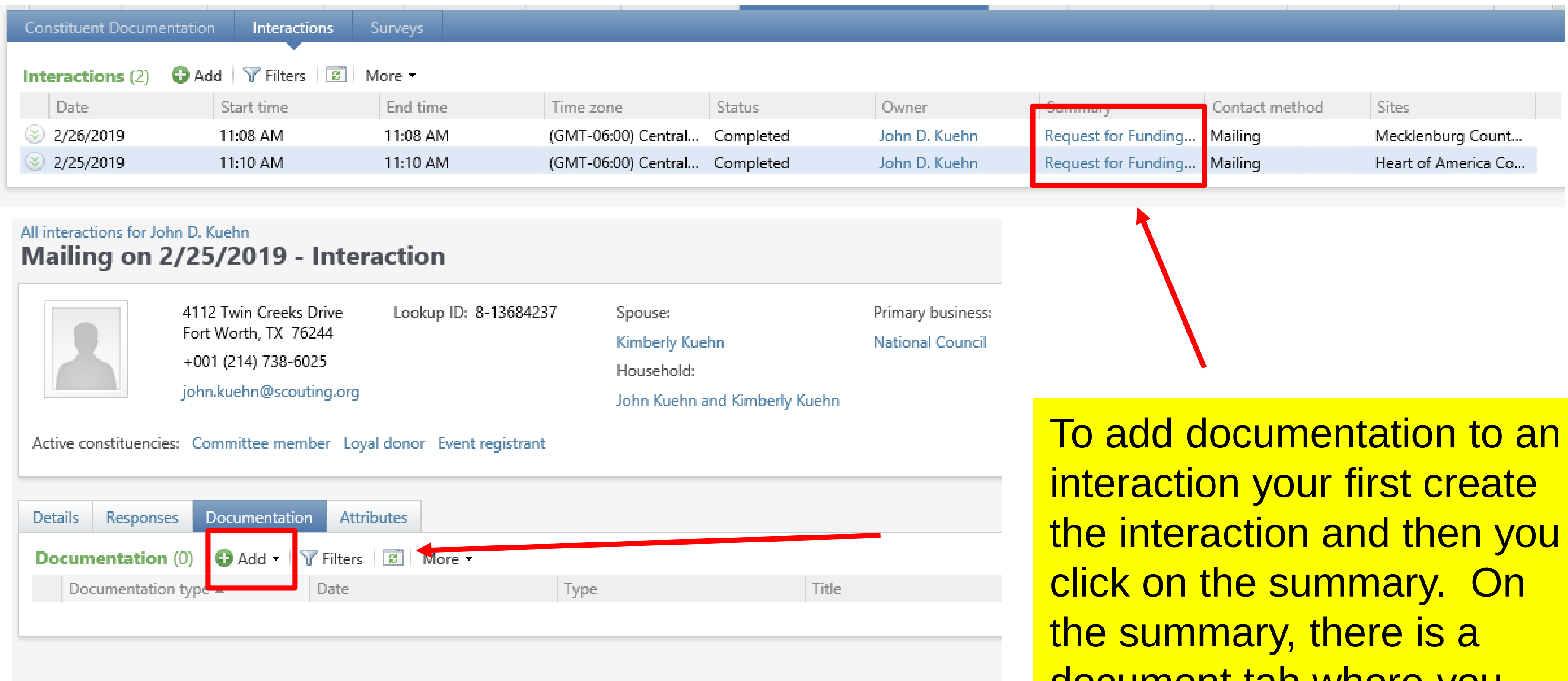
Add Documentation to Interaction



To add documentation to an interaction your first create the interaction and then you click on the summary. On the summary, there is a document tab where you can add your documentation. This secures your document because the interaction is

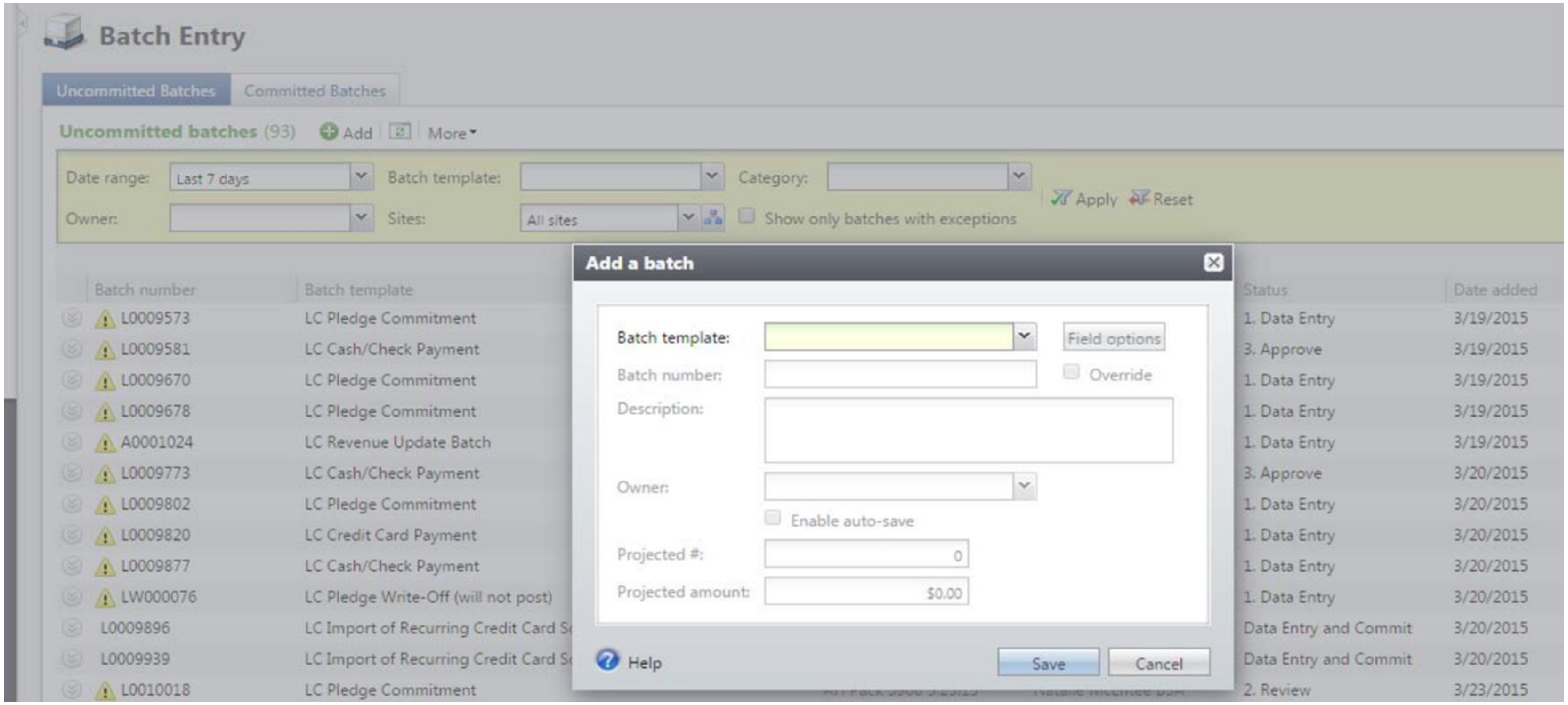
Adjusting Revenue

LC Revenue Update Batch

- **GL-Triggering Adjustments**
  - Changes to the following fields trigger an adjustment in the GL:
    - Amount
    - Application
    - Benefits
    - Revenue - Constituent (Not *Recognition credit* constituent)
    - Designation - generates a reversal and updated GL distribution
    - Events
    - Inbound Channels
    - Payment method
    - Payment method subtypes
    - Revenue category

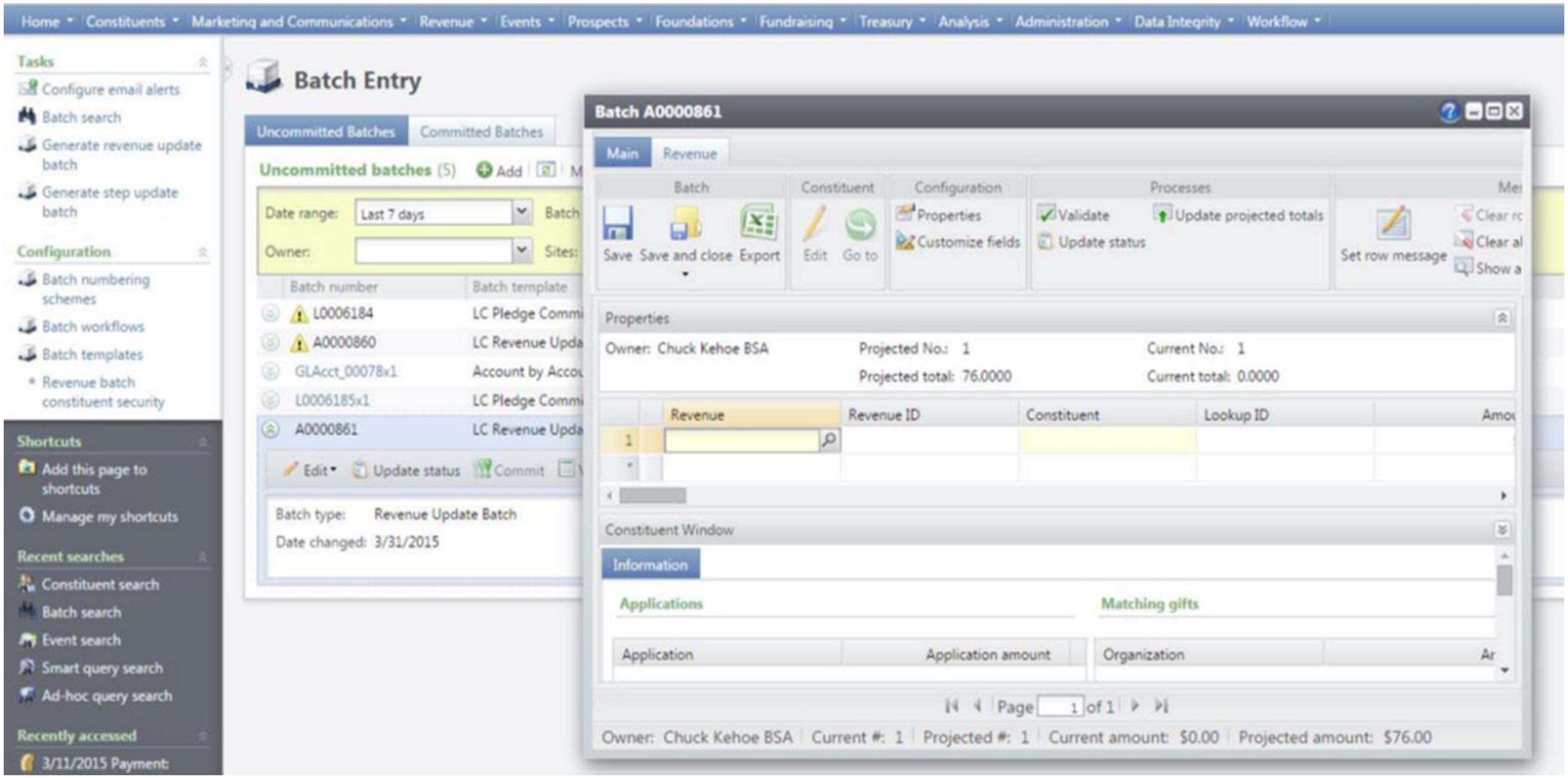
LC Revenue Update Batch

- Pledge
  - ** When you adjust the designations on a pledge, you are prompted to adjust the installment schedule
- Pledge Payment
- Recurring Gift
- Recurring Gift Payment
- Matching Gift Payment
- Event Registration Payment
- Auction Purchase Payment
- Any other Payment

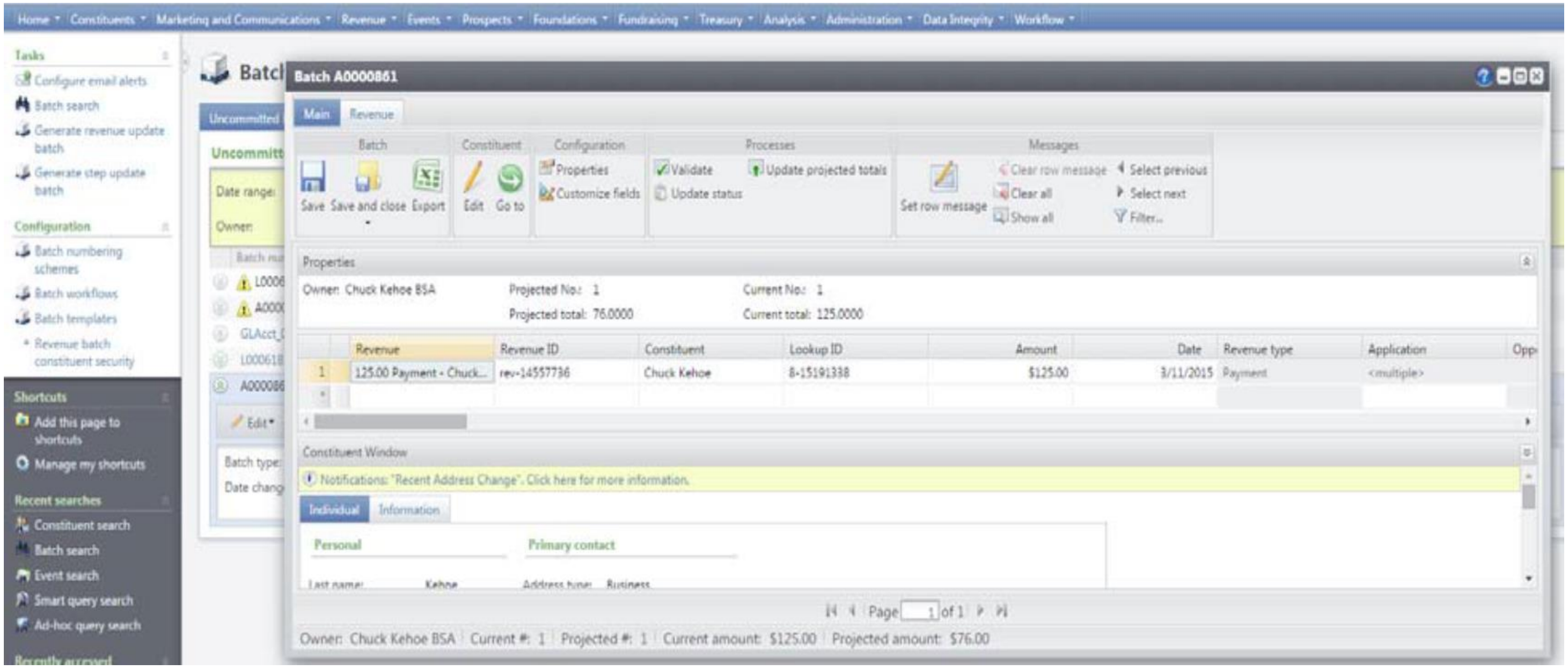


Batch template: Select LC Revenue Update Batch

Click *Save*



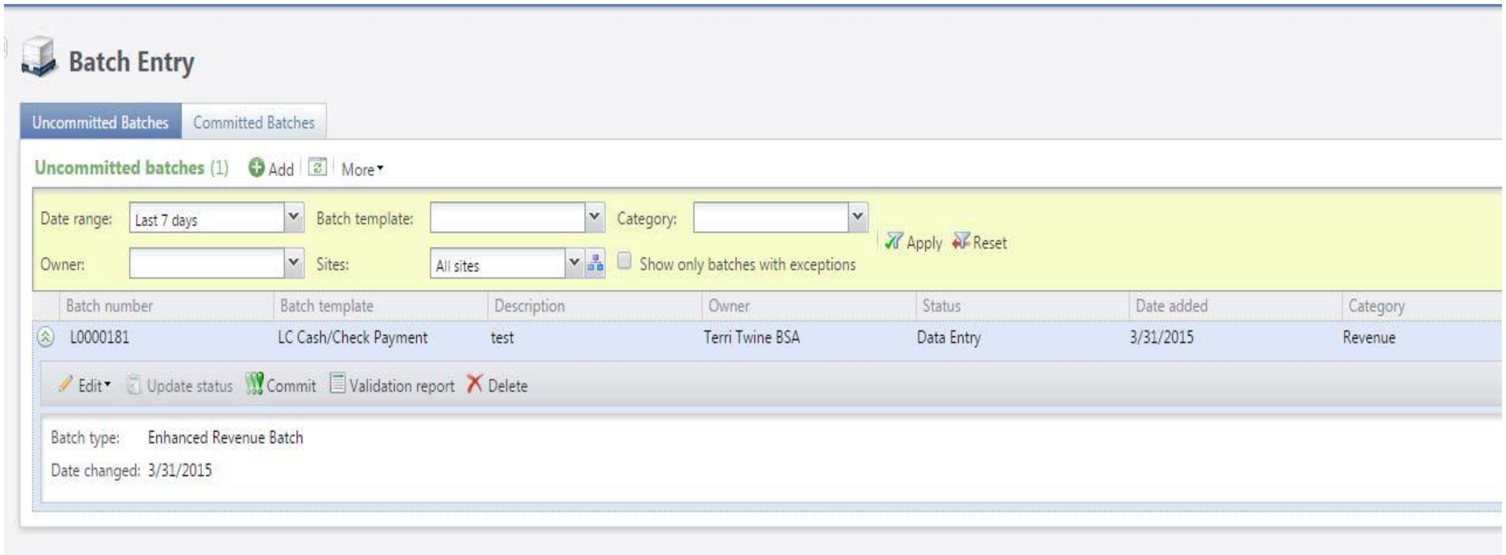
Search for the *Revenue* record to be adjusted; the fields will automatically fill in the batch



Update the transaction as needed

a. If the entire transaction was entered in error, change the *Amount* to $0.00 and fill out any other fields that are highlighted as required

b. It is important to use the correct adjustment *GL Postdate* because postdate changes made in batch can affect a closed accounting period in PeopleSoft



In the batch header, click *Update projected totals* in the Processes section, and click *OK*

In the batch header, click *Validate* in the Processes section, and click *OK*

Click Commit

In the Commit parameters screen, click Start

Adjustment History

To review GL-triggering adjustments on the transaction, navigate to the *Adjustment History* tab:

1. Login to CRM, and navigate to the Revenue area

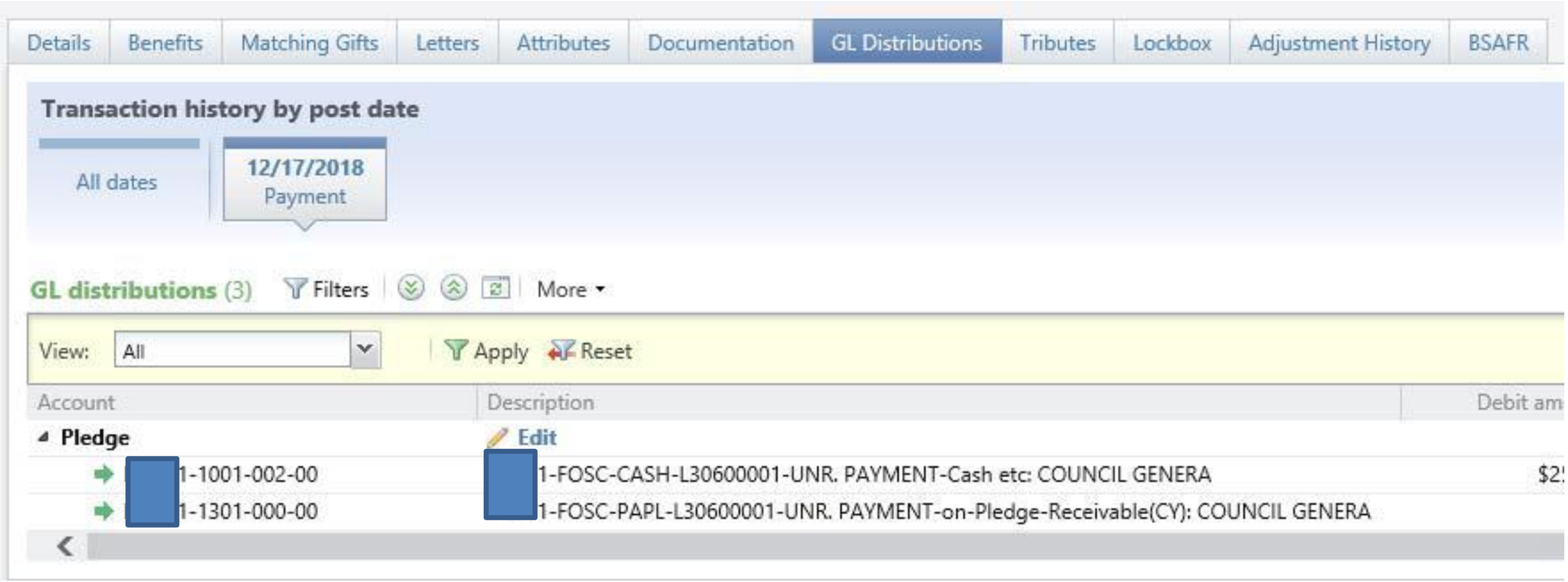
2. Click *Transaction search*
   a. Search for the transaction that has been adjusted
   b. Click the transaction row to select

3. On the Transaction summary page, click on the *Adjustment History* tab that is next to Business Units tab.

4. Click *View report* in the top right corner of the tab
   a. The report will display Adjustment details including date, field that was adjusted, and the values before and after the adjustment was made
   b. Click the *Save icon* in the toolbar to export the report to Excel
   c. Click the *Print icon* in the toolbar to print the report

View GL Distribution activity

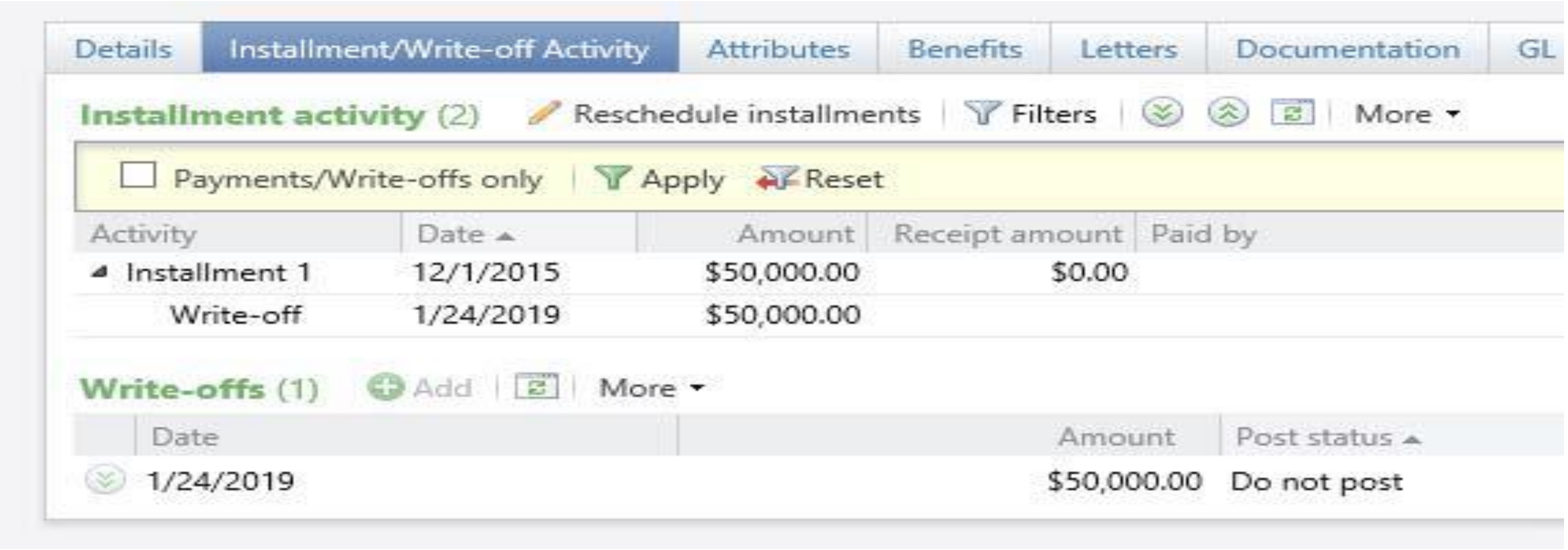
1. On the Transaction page, click the *GL Distributions* tab
2. The tab displays the debit and credit accounts associated with this transaction



View Write-off activity

1. On the Transaction page, click the *Installment/Write-off Activity* tab

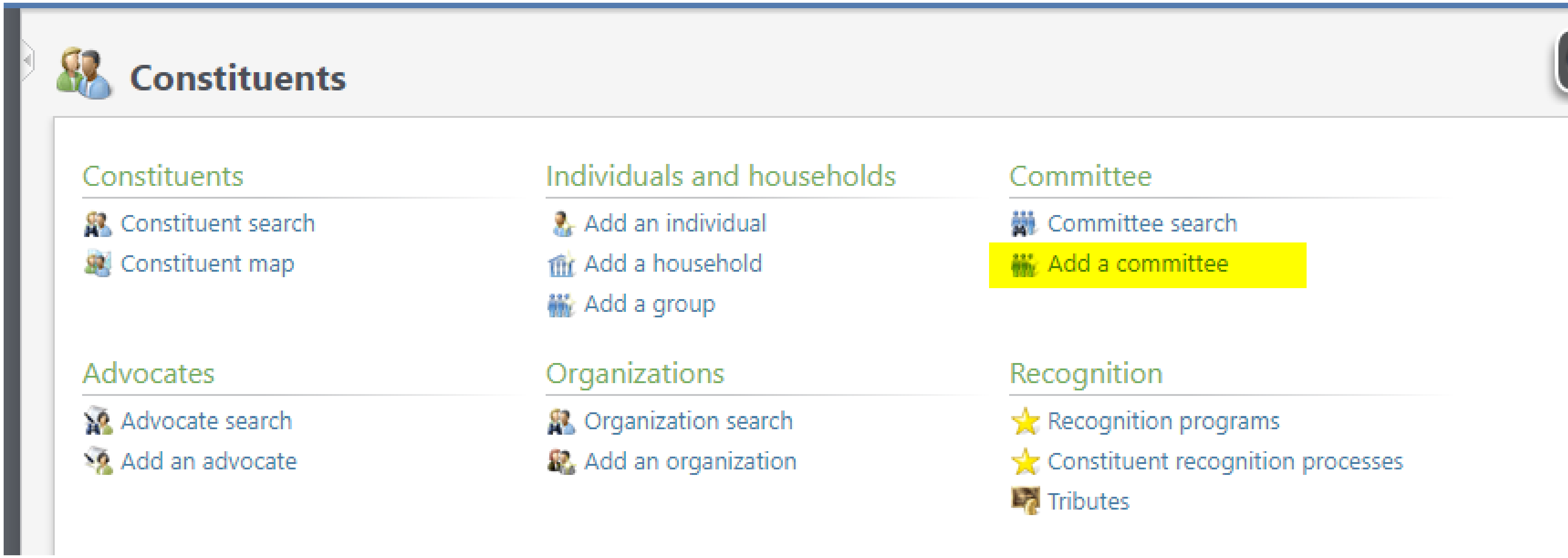
2. The tab displays the Write-offs associated with this transaction, including Reason code, Reason details, and Reason description



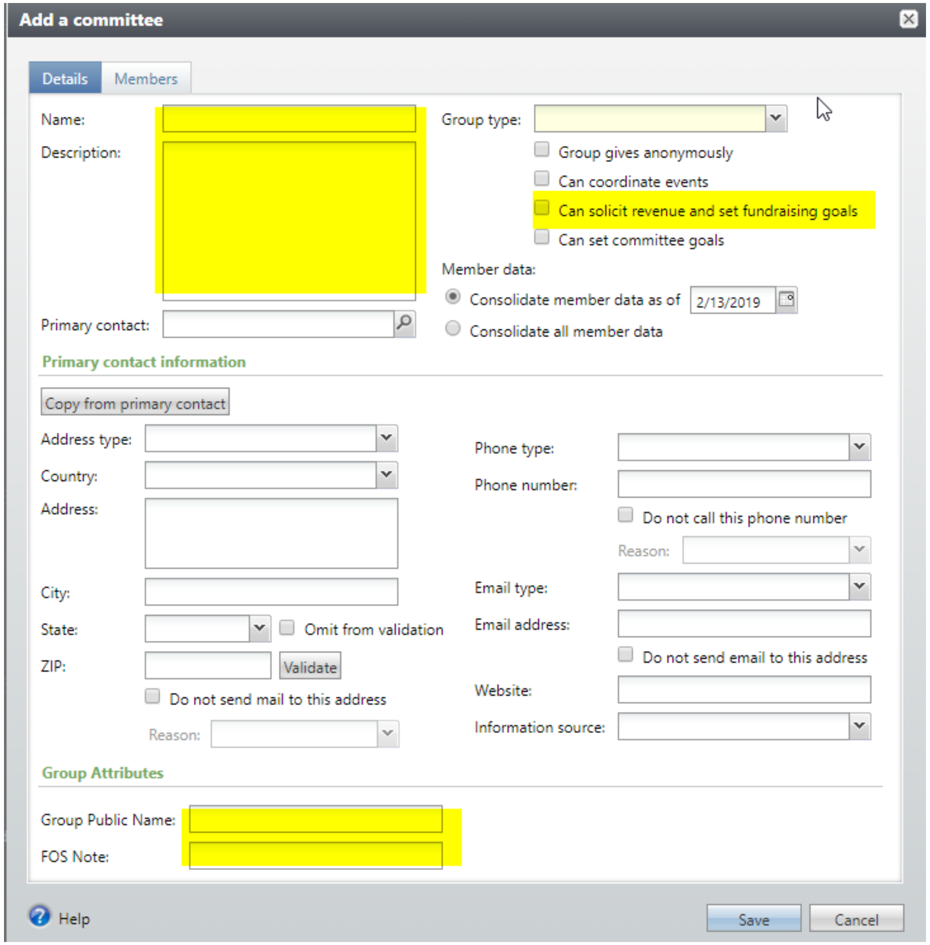
BSAFR

- 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

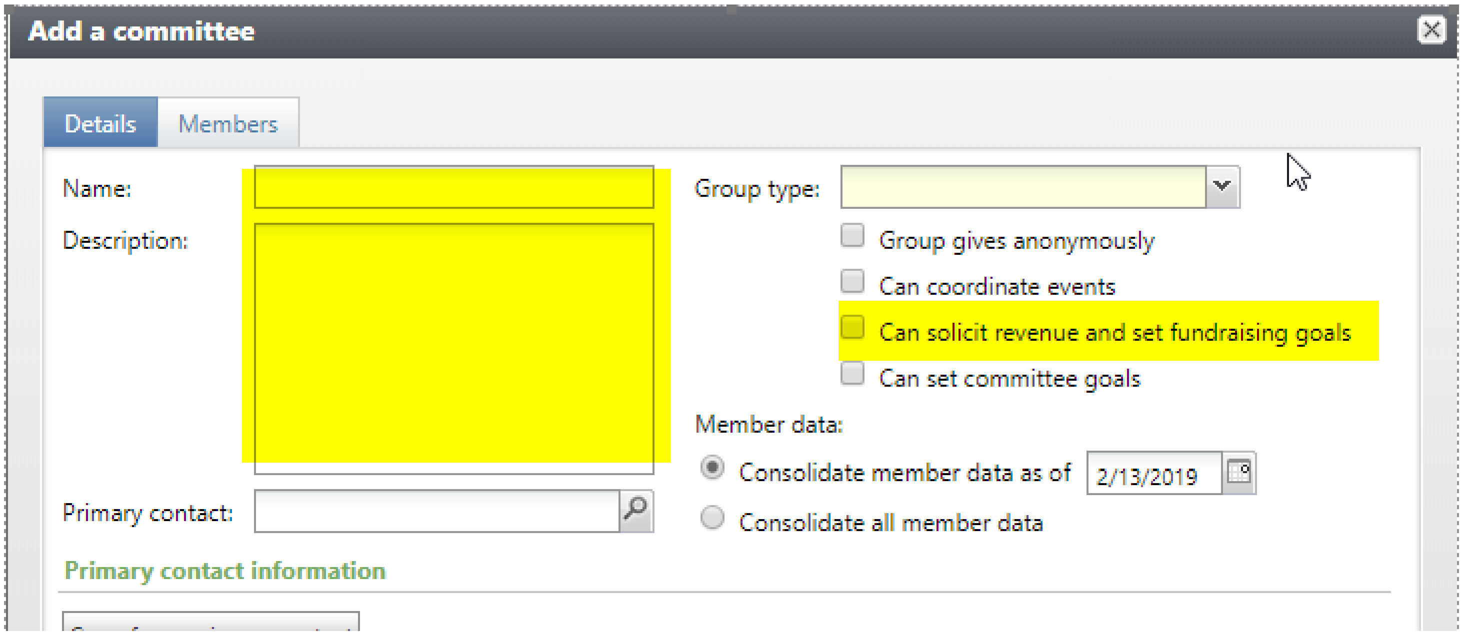
Add BSAFR Group (committee)



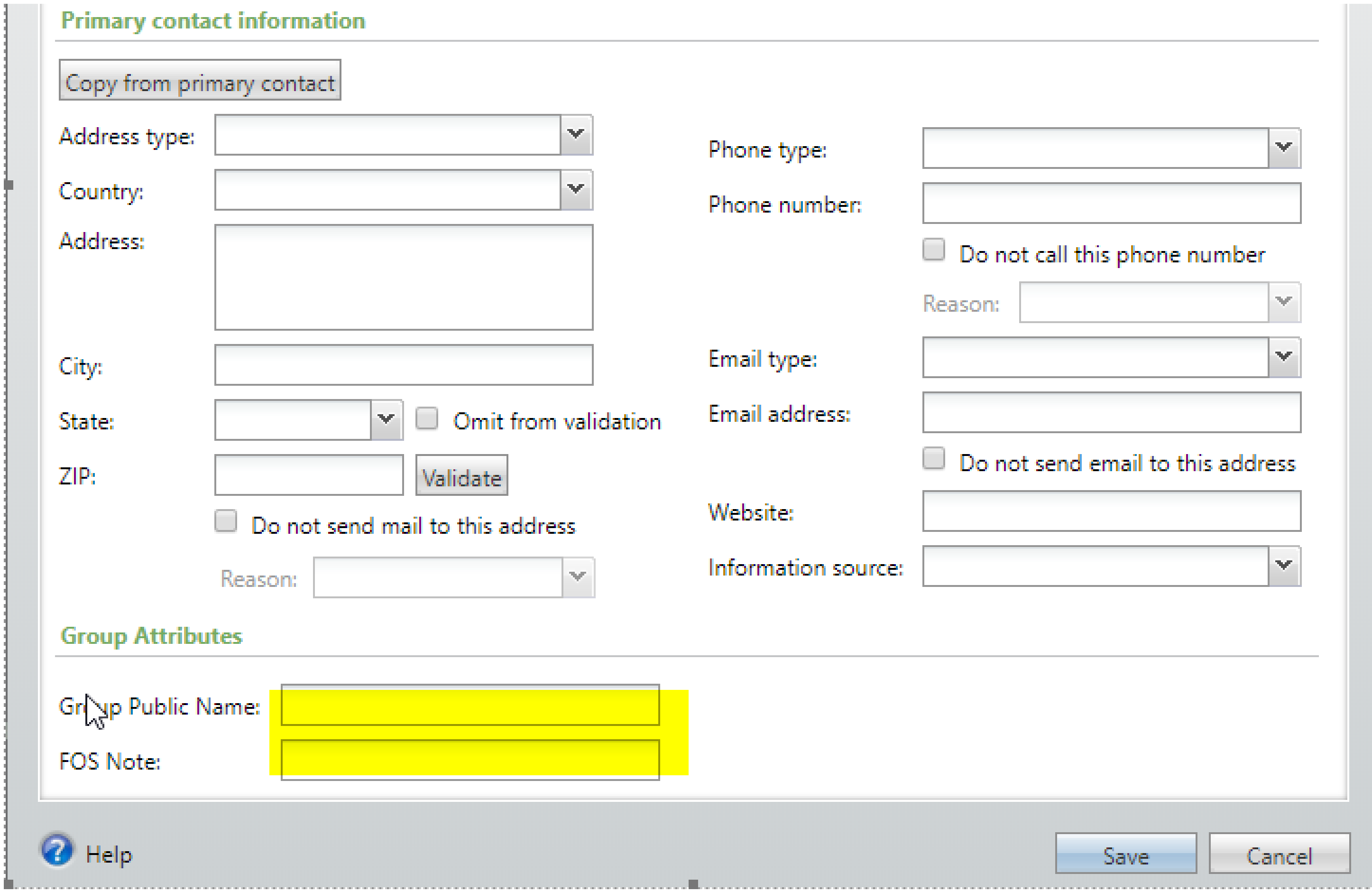
Add a committee



Be sure to complete

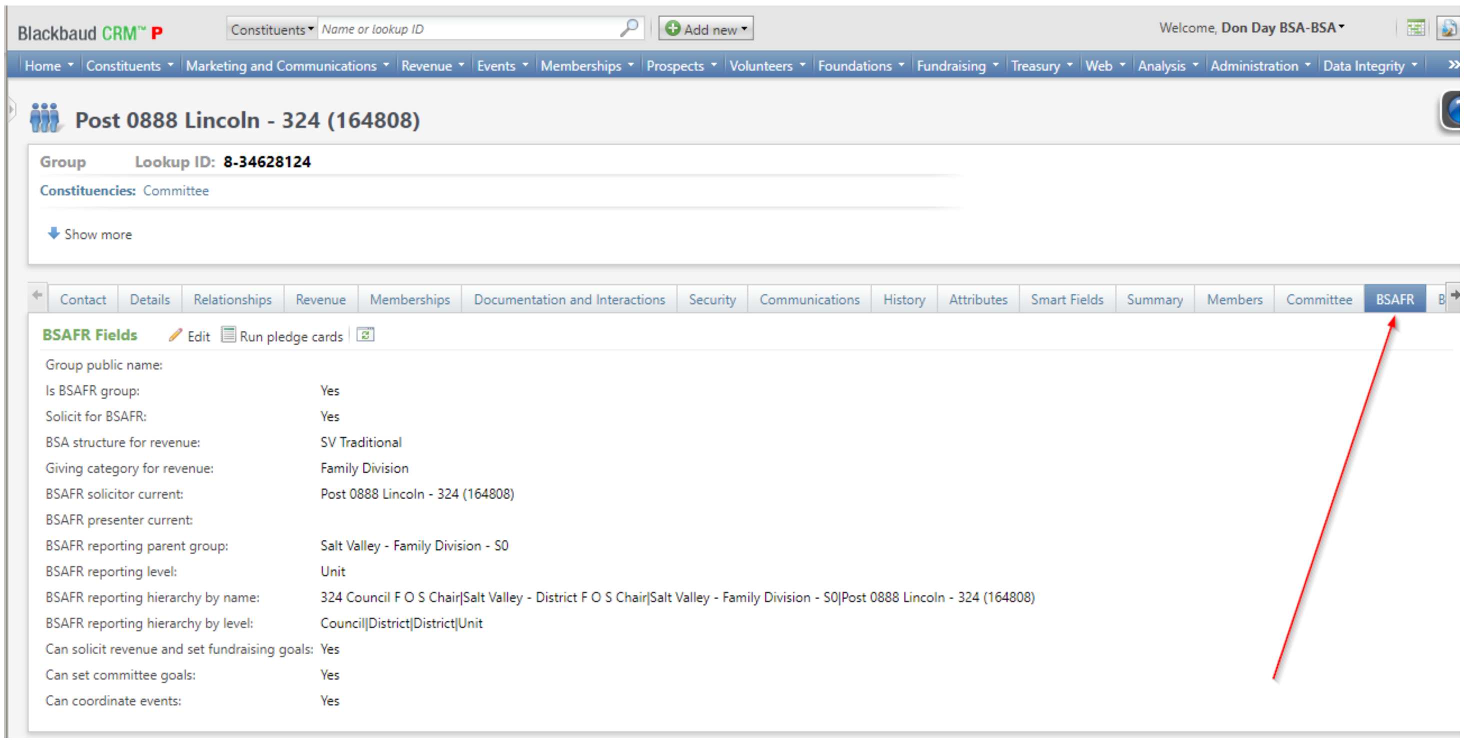


Be sure to complete

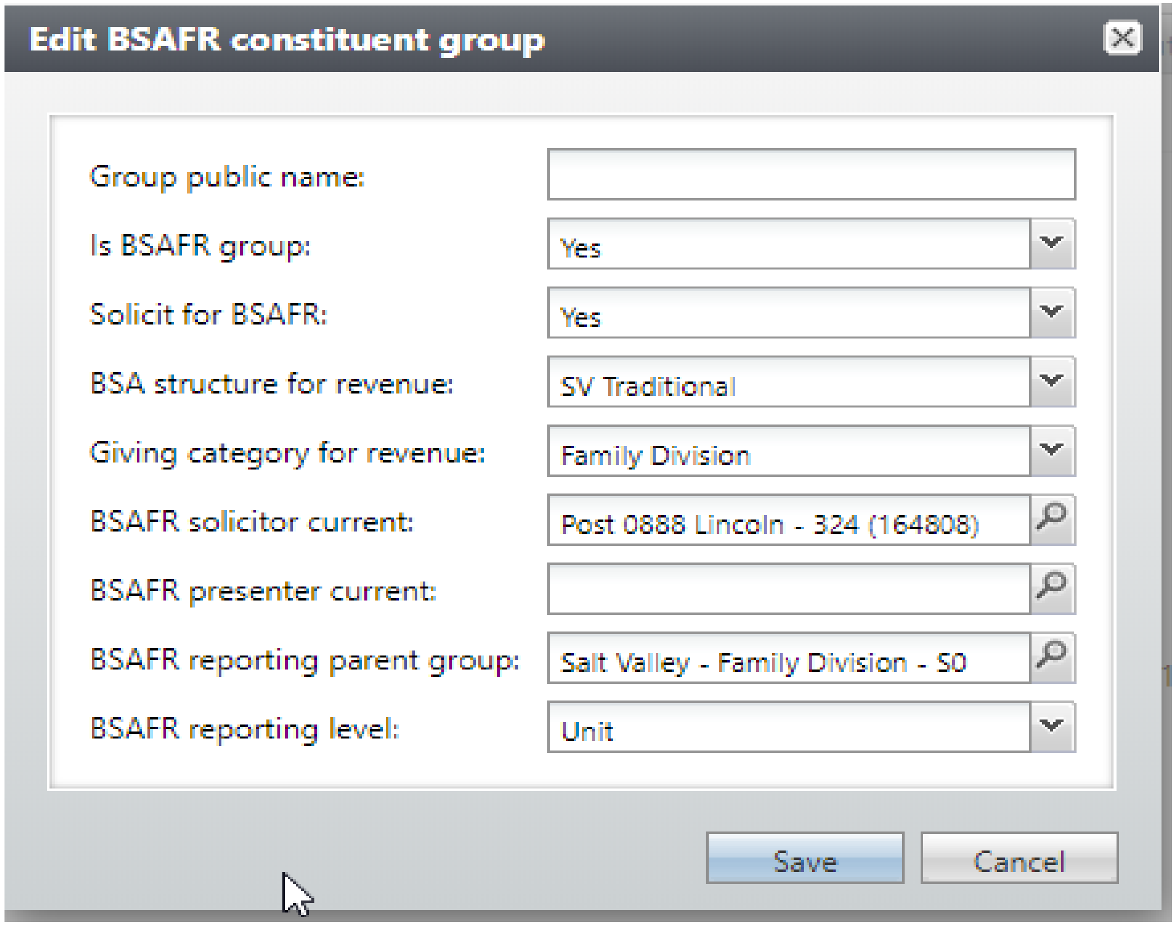


After creating committee

– Look up constituent



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
- Additional positions need to be created

Designation Best Practices

- Only create new ones for new GL mapping
- Check to make be sure designation is not already setup under a different name
- Request new designations through Member Care Contact Center

Next CRM User Forum

Wednesday, March 20, 2019

10:00 am & 2:00 pm CT

Questions & Answers