

# 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

Constituent Documentation Interactions Surveys

**Documentation (2)** + Add note + Add media link + Add attachment | More ▾

Documentation type:  Title:  Apply Reset

Documentation type	Date	Type	Title	Author	Notification
Note	2/2/2014	TPAS Conversion	Updated		
Note	9/29/2011	TPAS Conversion	Created		

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.

Date	Event time	Site time	Time zone	Status	Owner	Summary	Event method	Site
2/26/2019	11:08 AM	11:08 AM	(GMT-06:00) Central...	Completed	John D. Kuehn	Request for Funding...	Mailing	Mecklenburg Count...
2/25/2019	11:10 AM	11:10 AM	(GMT-06:00) Central...	Completed	John D. Kuehn	Request for Funding...	Mailing	Heart of America Co...



# Add Documentation to Interaction

The screenshot displays a software interface with a top navigation bar containing 'Constituent Documentation', 'Interactions', and 'Surveys'. Below this, a section titled 'Interactions (2)' includes '+ Add', 'Filters', and 'More' options. A table lists two interactions:

Date	Start time	End time	Time zone	Status	Owner	Summary	Contact method	Sites
2/26/2019	11:08 AM	11:08 AM	(GMT-06:00) Central...	Completed	John D. Kuehn	Request for Funding...	Mailing	Mecklenburg Count...
2/25/2019	11:10 AM	11:10 AM	(GMT-06:00) Central...	Completed	John D. Kuehn	Request for Funding...	Mailing	Heart of America Co...

Below the table, a section titled 'All interactions for John D. Kuehn' shows 'Mailing on 2/25/2019 - Interaction'. It includes a profile picture, address (4112 Twin Creeks Drive, Fort Worth, TX 76244), phone (+001 (214) 738-6025), email (john.kuehn@scouting.org), and other details like 'Spouse: Kimberly Kuehn' and 'Primary business: National Council'. Active constituencies are listed as 'Committee member', 'Loyal donor', and 'Event registrant'.

At the bottom, a 'Documentation' tab is active, showing '+ Add', 'Filters', and 'More' options. A table below it has columns for 'Documentation type', 'Date', 'Type', and 'Title'. Red arrows highlight the '+ Add' button in the 'Documentation' section and the 'Summary' column in the 'Interactions' table.

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 Entry**

Uncommitted Batches | Committed Batches

Uncommitted batches (93) + Add [grid icon] More ▾

Date range: Last 7 days ▾ Batch template: ▾ Category: ▾  
 Owner: ▾ Sites: All sites ▾  Show only batches with exceptions  Apply  Reset

Batch number	Batch template	Status	Date added
L0009573	LC Pledge Commitment	1. Data Entry	3/19/2015
L0009581	LC Cash/Check Payment	3. Approve	3/19/2015
L0009670	LC Pledge Commitment	1. Data Entry	3/19/2015
L0009678	LC Pledge Commitment	1. Data Entry	3/19/2015
A0001024	LC Revenue Update Batch	1. Data Entry	3/19/2015
L0009773	LC Cash/Check Payment	3. Approve	3/20/2015
L0009802	LC Pledge Commitment	1. Data Entry	3/20/2015
L0009820	LC Credit Card Payment	1. Data Entry	3/20/2015
L0009877	LC Cash/Check Payment	1. Data Entry	3/20/2015
LW000076	LC Pledge Write-Off (will not post)	1. Data Entry	3/20/2015
L0009896	LC Import of Recurring Credit Card S	Data Entry and Commit	3/20/2015
L0009939	LC Import of Recurring Credit Card S	Data Entry and Commit	3/20/2015
L0010018	LC Pledge Commitment	2. Review	3/23/2015

**Add a batch** [close icon]

Batch template: ▾

Batch number:   Override

Description:

Owner: ▾  Enable auto-save

Projected #:

Projected amount:

**Batch template: Select LC Revenue Update Batch**  
**Click Save**



Home | Constituents | Marketing and Communications | Revenue | Events | Prospects | Foundations | Fundraising | Treasury | Analysis | Administration | Data Integrity | Workflow

**Batch Entry**

Uncommitted Batches | Committed Batches

**Uncommitted batches (5)** + Add | M

Date range: Last 7 days | Batch

Owner: | Sites:

Batch number	Batch template
L0006184	LC Pledge Comm
A0000860	LC Revenue Upda
GLAcct_00078x1	Account by Accou
L0006185x1	LC Pledge Comm
A0000861	LC Revenue Upda

Edit | Update status | Commit

Batch type: Revenue Update Batch  
Date changed: 3/31/2015

**Batch A0000861**

Main | Revenue

Batch | Constituent | Configuration | Processes | Mer

Save | Save and close | Export | Edit | Go to | Properties | Validate | Update projected totals | Clear rc

Customize fields | Update status | Set row message | Clear al | Show a

Properties

Owner: Chuck Kehoe BSA | Projected No: 1 | Current No: 1  
Projected total: 76.0000 | Current total: 0.0000

Revenue	Revenue ID	Constituent	Lookup ID	Amo
1				

Constituent Window

Information

Applications | Matching gifts

Application	Application amount	Organization	Ar

Page 1 of 1

Owner: Chuck Kehoe BSA | Current #: 1 | Projected #: 1 | Current amount: \$0.00 | Projected amount: \$76.00

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



Home > Constituents > Marketing and Communications > Revenue > Events > Prospects > Foundations > Fundraising > Treasury > Analysis > Administration > Data Integrity > Workflow

Tasks

- Configure email alerts
- Batch search
- Generate revenue update batch
- Generate step update batch

Configuration

- Batch numbering schemes
- Batch workflows
- Batch templates
- Revenue batch constituent security

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts

Recent searches

- Constituent search
- Batch search
- Event search
- Smart query search
- Ad-hoc query search

Recently approved

Batch A0000861

Uncommitted

Uncommitted

Date range:

Owner: L000618

Batch type: Date change

Main Revenue

Batch: Save Save and close Export

Constituent: Edit Go to

Configuration: Properties Validate Update status

Processes: Update projected totals

Messages: Clear row message Clear all Show all Select previous Select next Filter..

Properties

Owner: Chuck Kehoe BSA Projected No: 1 Current No: 1  
Projected total: 76.0000 Current total: 125.0000

Revenue	Revenue ID	Constituent	Lookup ID	Amount	Date	Revenue type	Application	Opp
1	125.00 Payment - Chuck...	rev-14557796	Chuck Kehoe	8-15191388	\$125.00	3/11/2015	Payment	<multiple>

Constituent Window

Notifications: "Recent Address Change". Click here for more information.

Individual Information

Personal Primary contact

Last name: Kehoe Address type: Business

Page 1 of 1

Owner: Chuck Kehoe BSA | Current #: 1 | Projected #: 1 | Current amount: \$125.00 | Projected amount: \$76.00

Update the transaction as needed

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



**Batch Entry**

Uncommitted Batches | Committed Batches

Uncommitted batches (1) + Add | More

Date range: Last 7 days | Batch template: | Category: | Apply | Reset

Owner: | Sites: All sites |  Show only batches with exceptions

Batch number	Batch template	Description	Owner	Status	Date added	Category
L0000181	LC Cash/Check Payment	test	Terri Twine BSA	Data Entry	3/31/2015	Revenue

Edit | Update status | Commit | Validation report | Delete

Batch type: Enhanced Revenue Batch  
Date changed: 3/31/2015

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

**Commit parameters**

**Batch number: L0006162**

**Batch commit instructions**

- Validate batch before committing
- Check for duplicate constituents
- Delete batch after committing

Exception batch number:

Override

**Results**

- Create control report
- Create output selection

Selection name:

Overwrite existing selection

Help



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## 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

Transaction history by post date

All dates | 12/17/2018 Payment

GL distributions (3) | Filters | More ▾

View: All | Apply | Reset

Account	Description	Debit am
▾ Pledge	<a href="#">Edit</a>	
→ 1-1001-002-00	1-FOSC-CASH-L30600001-UNR. PAYMENT-Cash etc: COUNCIL GENERA	\$21
→ 1-1301-000-00	1-FOSC-PAPL-L30600001-UNR. PAYMENT-on-Pledge-Receiveable(CY): COUNCIL GENERA	



## 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

The screenshot displays the 'Installment/Write-off Activity' tab. At the top, there are navigation tabs: 'Details', 'Installment/Write-off Activity' (selected), 'Attributes', 'Benefits', 'Letters', 'Documentation', and 'GL'. Below the tabs, there is a header for 'Installment activity (2)' with options to 'Reschedule installments', 'Filters', and 'More'. A filter bar shows 'Payments/Write-offs only' (unchecked), 'Apply', and 'Reset'. The main table has columns: 'Activity', 'Date', 'Amount', 'Receipt amount', and 'Paid by'. The data rows are:

Activity	Date	Amount	Receipt amount	Paid by
Installment 1	12/1/2015	\$50,000.00	\$0.00	
Write-off	1/24/2019	\$50,000.00		

Below the table, there is a section for 'Write-offs (1)' with '+ Add' and 'More' options. The write-off table has columns: 'Date', 'Amount', and 'Post status'. The data row is:

Date	Amount	Post status
1/24/2019	\$50,000.00	Do not post

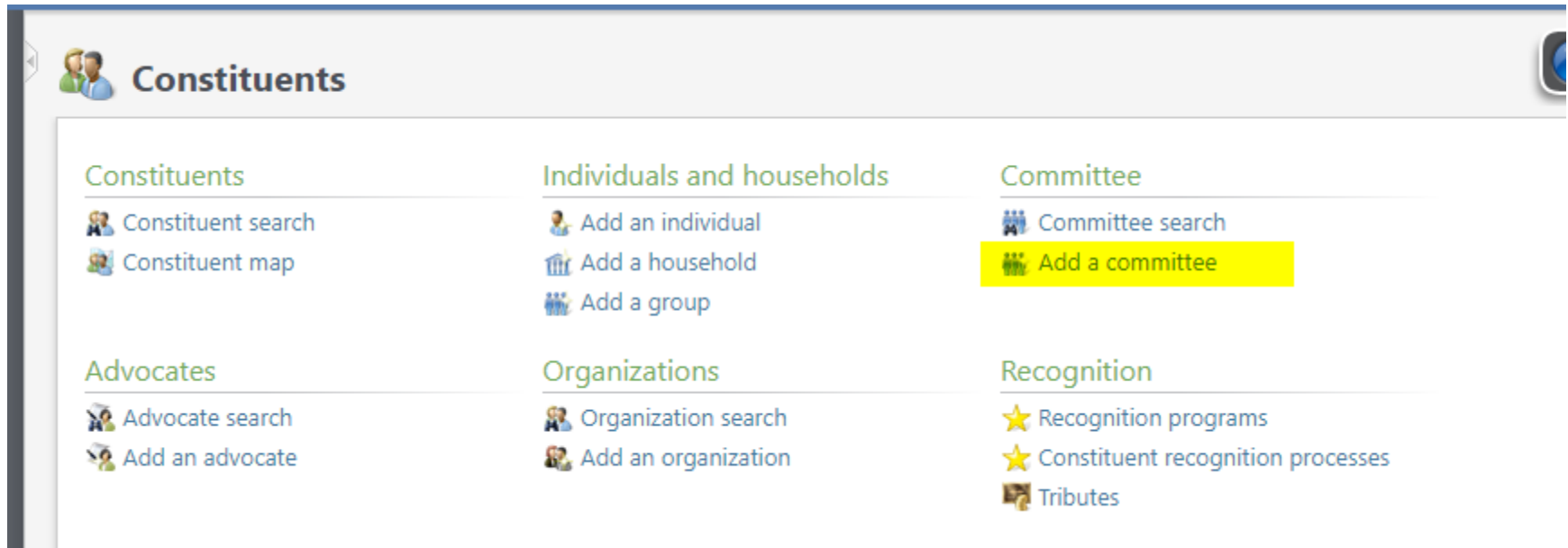


# BSAFR

- 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)



The screenshot displays the 'Constituents' management interface. The header shows a navigation arrow, a 'Constituents' title with a person icon, and a search icon. The main content is organized into a grid of categories and actions:

- Constituents**
  - Constituent search
  - Constituent map
- Individuals and households**
  - Add an individual
  - Add a household
  - Add a group
- Committee**
  - Committee search
  - Add a committee** (highlighted in yellow)
- Advocates**
  - Advocate search
  - Add an advocate
- Organizations**
  - Organization search
  - Add an organization
- Recognition**
  - Recognition programs
  - Constituent recognition processes
  - Tributes



# Add a committee

### Add a committee

Details Members

Name:

Description:

Group type:

- Group gives anonymously
- Can coordinate events
- Can solicit revenue and set fundraising goals
- Can set committee goals

Member data:

- Consolidate member data as of
- Consolidate all member data

Primary contact:

#### Primary contact information

Address type:

Country:

Address:

City:

State:   Omit from validation

ZIP:

- Do not send mail to this address

Reason:

Phone type:

Phone number:

- Do not call this phone number

Reason:

Email type:

Email address:

- Do not send email to this address

Website:

Information source:

#### Group Attributes

Group Public Name:

FOS Note:



# Be sure to complete

**Add a committee** [Close]

Details | Members

Name:

Description:

Group type:

- Group gives anonymously
- Can coordinate events
- Can solicit revenue and set fundraising goals
- Can set committee goals

Member data:

- Consolidate member data as of  [Calendar]
- Consolidate all member data

Primary contact:  [Search]

**Primary contact information**

---



# Be sure to complete

**Primary contact information**

Copy from primary contact

Address type:	<input type="text"/>	Phone type:	<input type="text"/>
Country:	<input type="text"/>	Phone number:	<input type="text"/>
Address:	<input type="text"/>	<input type="checkbox"/> Do not call this phone number	
City:	<input type="text"/>	Reason:	<input type="text"/>
State:	<input type="text"/> <input type="checkbox"/> Omit from validation	Email type:	<input type="text"/>
ZIP:	<input type="text"/> <input type="button" value="Validate"/>	Email address:	<input type="text"/>
<input type="checkbox"/> Do not send mail to this address		<input type="checkbox"/> Do not send email to this address	
Reason:	<input type="text"/>	Website:	<input type="text"/>
		Information source:	<input type="text"/>

**Group Attributes**

Group Public Name:

FOS Note:



# After creating committee

– Look up constituent

The screenshot displays the Blackbaud CRM interface for a specific group. The group name is "Post 0888 Lincoln - 324 (164808)" with a lookup ID of "8-34628124". The interface shows various tabs for navigation, including "BSAFR", which is highlighted with a red arrow. Below the tabs, the "BSAFR Fields" section is visible, containing a list of fields and their values.

Field Name	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





# 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
- 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



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