

CRM User Forum

March 20, 2019

Cornelia Ellis

John Kuehn

Don Day



WELCOME



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Objectives

- CRM Performance
- Creating auditor reports - 990
- Using Combined Batch Template
- Best Practices
 - Designation
 - Duplicate constituent records
 - Batch Entry
 - Reconciling Cash
 - BSAFR
- Questions & Answers



CRM Performance

- Some users have reported slowness during batch process – **improved**
- We are exploring several possible causes with the software provider
 - Temporary table file size – changed – improved
 - Processes and reports being run without selections
 - Large queries run by users??
- If you are experiencing (system) slowness, call Member Care so we can track



Reports for 990



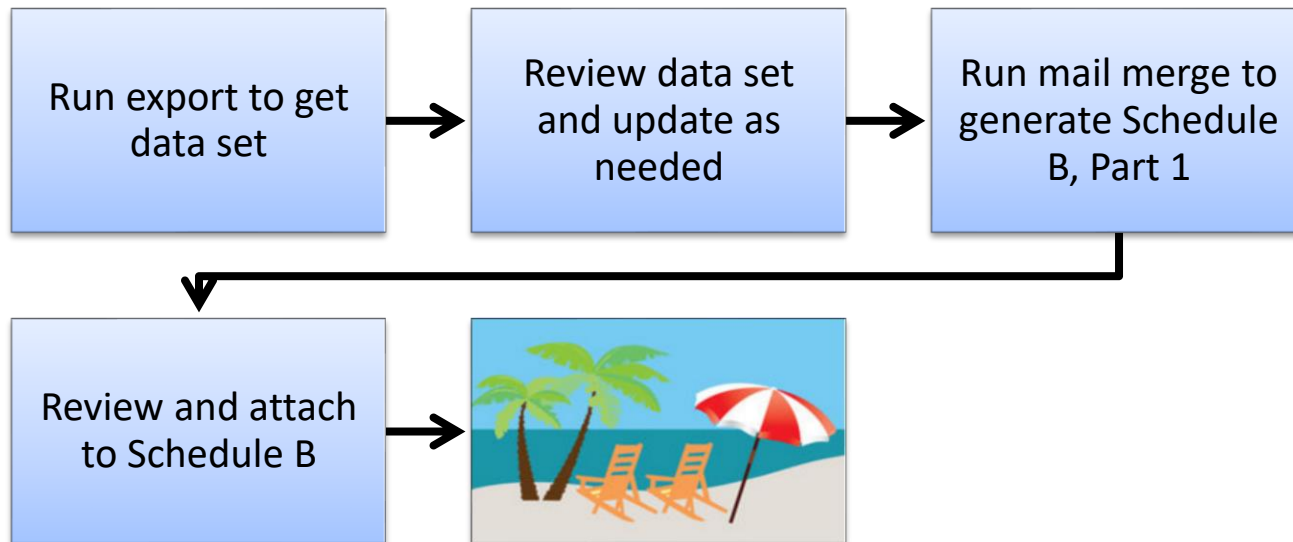
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IRS Form 990, Return of Organization Exempt From Income Tax

- Most organizations exempt from income tax under section 501(a) must file an annual information return (Form 990 or 990-EZ) or submit an annual electronic notice (Form 990-N), depending upon the organization's gross receipts and total assets.
- Schedule B, Part 1 of Form 990 is a list of contributors giving \$5000 or more to the organization

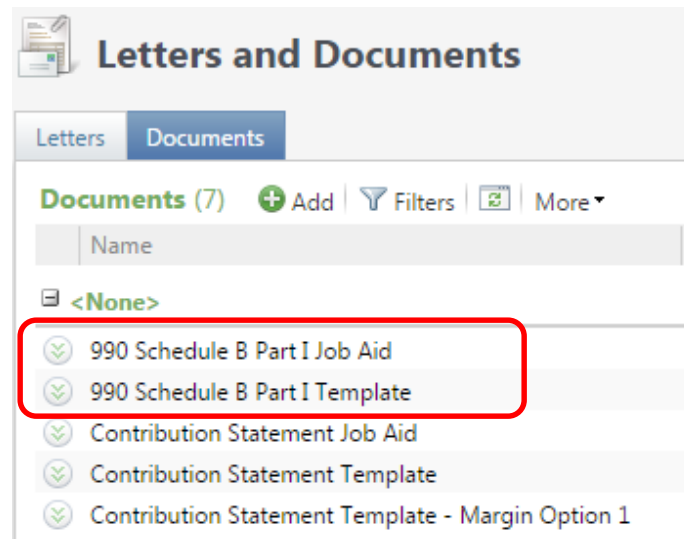


Process Overview



Process Overview

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



Process

- Go to exports and start process “990 Schedule B Part 1 Data”
- Download to Excel – review your data
- Update your template that you downloaded from “Letters and Document”
- Merge your data to your document



Combined Batch



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The Combined Batch

- Allows you to process
 - Donations and pledges with or without credit card information in the same batch template
- Partial pledge payment would be entered separately
- First installment on recurring gifts and pledges paid by credit card would be picked up by the generate payment routines.



Constituents Name or lookup ID Welcome, John Kuehn BSA-BSA

Marketing and Communications Revenue Events Memberships Prospects Volunteers Foundations Fundraising Treasury Web Analysis Administration Data Integrity Workflow

Batch Entry

Uncommitted Batches **Committed Batches**

Uncommitted batches (0)

Date range: Last 7 days Sites: All sites Show only batches with exceptions

Search

Batch number	Batch template	Owner	Status	Date added	Category	Site	Custom	Description
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To find new batch go to batch entry and click add to add a new batch.



Constituents Name or lookup ID Add new Welcome, John Kuehn BSA-BSA

Batch Entry

Uncommitted Batches Committed Batches

Uncommitted batches (0) Add Batch search More

Date range: Last 7 days Sites: All sites Show only batches with exceptions Apply Reset

Search Columns Clear all filters

Batch number Batch template Owner Status Date added Category Site Custom Description

Add a batch

Batch template: LC Combined Field options

Batch number: Override

Description:

Owner: John Kuehn BSA-BSA

Enable auto-save

Projected #: 0

Projected amount: \$0.00

Help Save Cancel

From your drop down list pick LC Combined. This will open up the combined batch template. Fill in the other items in the “Add a batch” form and click save.



Fields Contained in the Batch

Barcode	Constituent	Lookup ID	Group ID	Amount	Date	GL post date
				\$0.00		

Revenue type	Installation frequency	No. installments	Installation start date	Installation end date	First payment processed	Send reminders
						<input checked="" type="checkbox"/>
						<input type="checkbox"/>

Payment method	Other method	Check number	Card type	Name on card	Card number	Expires on
None						

Authorization code	Rejection message	Application	Appeal	Designation	Inbound channel	Revenue category
					Friends of Scouting	Unrestricted by donor

Giving Category	BSA Structure	Given anonymously	Reference	Do not acknowledge	Acknowledgee	BSA structure for revenue
		<input type="checkbox"/>		<input type="checkbox"/>		
		<input type="checkbox"/>		<input type="checkbox"/>		

Giving category	BSAFR current solicitor

The batch contains all of the fields except for those found in the stock and gift in kind batches.



As you add lines, fields are greyed out unless they are needed. The receipt amount is greyed out for the pledges and recurring gift. The post date I greyed out for the recurring gift.

The second set of lines demonstrates that the pledge information is greyed if it is donation or a pledge payment.

Constituent	Lookup ID	Group ID	Amount	Receipt amount	Date	GL post date	Revenue type
John D. Kuehn	8-14225721	Troop 0149 Bonner Spri...	\$100.00	\$100.00	9/19/2018	9/19/2018	Payment
Bruce Coleman	8-13208128	Troop 0149 Bonner Spri...	\$100.00	\$100.00	9/19/2018	9/19/2018	Payment
John D. Kuehn	8-14225721	Troop 0149 Bonner Spri...	\$100.00	\$100.00	9/19/2018	9/19/2018	Pledge
John D. Kuehn	8-14225721	Troop 0149 Bonner Spri...	\$120.00	\$120.00	10/1/2018	10/1/2018	Pledge
Bruce Coleman	8-13208128	Troop 0149 Bonner Spri...	\$10.00	\$10.00	10/1/2018		Recurring gift
Bruce Coleman	8-13208128	Troop 0149 Bonner Spri...	\$50.00	\$50.00	10/1/2018	10/1/2018	Payment

- Pledge Payment
- Donation
- Pledge
- Pledge with CC
- Recurring Gift
- Donation with CC

Installment frequency	No. installments	Installment start date	Installment end date	First payment processed	Send reminders
					<input checked="" type="checkbox"/>
					<input checked="" type="checkbox"/>
Monthly	1	9/19/2018			<input checked="" type="checkbox"/>
Monthly	2	10/1/2018			<input checked="" type="checkbox"/>
Monthly		10/1/2018			<input checked="" type="checkbox"/>
					<input checked="" type="checkbox"/>

- Pledge Payment
- Donation
- Pledge
- Pledge with CC
- Recurring Gift
- Donation with CC
- CC



As you select different payment methods the field remain grey or are exposed to type information into. Check number, CC information and other method.

The application changes based on the type of transactions One always need to assure an Appeal, Designation, Giving Category and BSA structure.

Payment method	Other method	Check number	Card type	Name on card	Card number	Expires on
Check		888				
Credit card			Visa	bruce coleman	*****1111	9/19/2018
None	▼					
Credit card			Visa	John Kuehn	*****1111	10/1/2018
None						
Other	Wire Transfer					

Authorization code	Rejection message	Application	Appeal	Designation	Inbound channel	Revenue category
		Pledge for John D. Kueh...	(307) A18 - 2018 Annual...		Friends of Scouting	
		Donation	(307) A18 - 2018 Annual...	30708011 Invest in Char...	Friends of Scouting	Unrestricted by donor
			(307) A18 - 2018 Annual...	30708011 Invest in Char...	Friends of Scouting	Unrestricted by donor
			(307) A18 - 2018 Annual...	30708011 Invest in Char...	Friends of Scouting	Unrestricted by donor
			(307) A18 - 2018 Annual...	30708011 Invest in Char...	Friends of Scouting	Unrestricted by donor
		Donation	(307) A18 - 2018 Annual...	30708011 Invest in Char...	Friends of Scouting	Unrestricted by donor

Giving Category	BSA Structure	Given anonymously	Reference	Do not acknowledge	Acknowledgee
Family	Kaw	<input type="checkbox"/>		<input type="checkbox"/>	
Family	Kaw	<input type="checkbox"/>		<input type="checkbox"/>	
Family	Kaw	<input type="checkbox"/>		<input type="checkbox"/>	
Family	Kaw	<input type="checkbox"/>		<input type="checkbox"/>	
Family	▼ Kaw	<input type="checkbox"/>		<input type="checkbox"/>	
Family	Kaw	<input type="checkbox"/>		<input type="checkbox"/>	

- Pledge Payment
 - Donation
 - Pledge
 - Pledge with CC
 - Recurring Gift
 - Donation with CC
-
- Pledge Payment
 - Donation
 - Pledge
 - Pledge with CC
 - Recurring Gift
 - Donation with CC
-
- Pledge Payment
 - Donation
 - Pledge
 - Pledge with CC
 - Recurring Gift
 - Donation with CC

Important

- Use GIK batch when appropriate
- Use Stock batch when appropriate
- Use Recurring Batch to set up recurring gifts



Important

- Appeal added to: New Pledges, Donations
- Revenue Attributes of Giving Category and BSA Structure added to: New Pledges, Donations
- You will need to populate the inbound channel, transaction types, payment methods – batch does not default these.



Credit card processing process list
L307 Credit Card Processing Process

Name: L307 Credit Card Processing Process
Batch: L0191430
Account: BSA Demo
Description: L307 Heart of America Council

Recent status | History | Job schedules

Recent status | Exception report | Results report

Status: **Completed**
Status message: Completed
Started by: netbsajkuehn Server name:
Started: 9/19/2018 11:12:03 AM Number of att:
Ended: 9/19/2018 11:12:34 AM Maximum num:
Duration: 31 seconds

Transaction outcomes

Payments processed:	1	View results rep
Authorizations:	1	Batch number L
Rejections:	0	
Provisional rejections:	0	
Permanent rejections:	0	

Run credit card processing process

Name: L307 Credit Card Processing Process
Description: L307 Heart of America Council

Where are the credit card transactions coming from?

Batch:

Validate projected totals before processing transactions

Help Start Cancel

Because the batch has a contribution that has credit card information we need to run it through our credit card processor before we commit the batch.



Credit card processing process list

L307 Credit Card Processing Process

Name: L307 Credit Card Processing Process
 Batch: L0191426
 Account: BSA Demo
 Description: L307 Heart of America Council

Recent status | History | Job schedules

Recent status [Exception report](#) [Results report](#) [Download rejection file](#)

Status: ✔ **Completed**
 Status message: Completed

Started by:	netbsa\jkuehn	Server name:	D2SBBISEC10BV
Started:	10/1/2018 2:11:31 PM	Number of attempts for these transactions:	Not applicable
Ended:	10/1/2018 2:12:03 PM	Maximum number of allowed attempts:	Not applicable
Duration:	32 seconds		

Transaction outcomes

Payments processed:	1	View results report
└─ Authorizations:	1	Batch number L0191426
└─ Rejections:	0	
└─ Provisional rejections:	0	
└─ Permanent rejections:	0	

The one transaction was taken and we are now ready to review our batch and then commit it. This took the money for the donation but it did not take the first payment from the pledge or recurring gift.



Card type	Name on card	Card number	Expires on	Authorization code	Rejection message	Application
Visa	bruce coleman	*****1111	9/19/2018	000000		Pledge for John D. Kueh... (
Visa	John Kuehn	*****1111	10/1/2018			Donation (

You have two lines with credit information. The donation has an authorization code and the pledge line does not. This illustrates that you need to know the type of transactions you place in the batch.





Enhanced Revenue Batch Control Report

Enhanced Revenue Batch Control Report

Batch number: L0191426	Projected #:	6	Projected total:	\$480.00
Status: Committed	Committed #:	6	Current total:	\$480.00
Owner: John Kuehn BSA-BSA - netbsa\jkuehn				
Exception batch number:	Payments:	3	Total payments:	\$250.00
	Pledges:	2	Total pledges:	\$220.00
	Recurring gifts:	1	Total recurring gifts:	\$10.00
	MG claims:	1	Total MG claims:	\$100.00

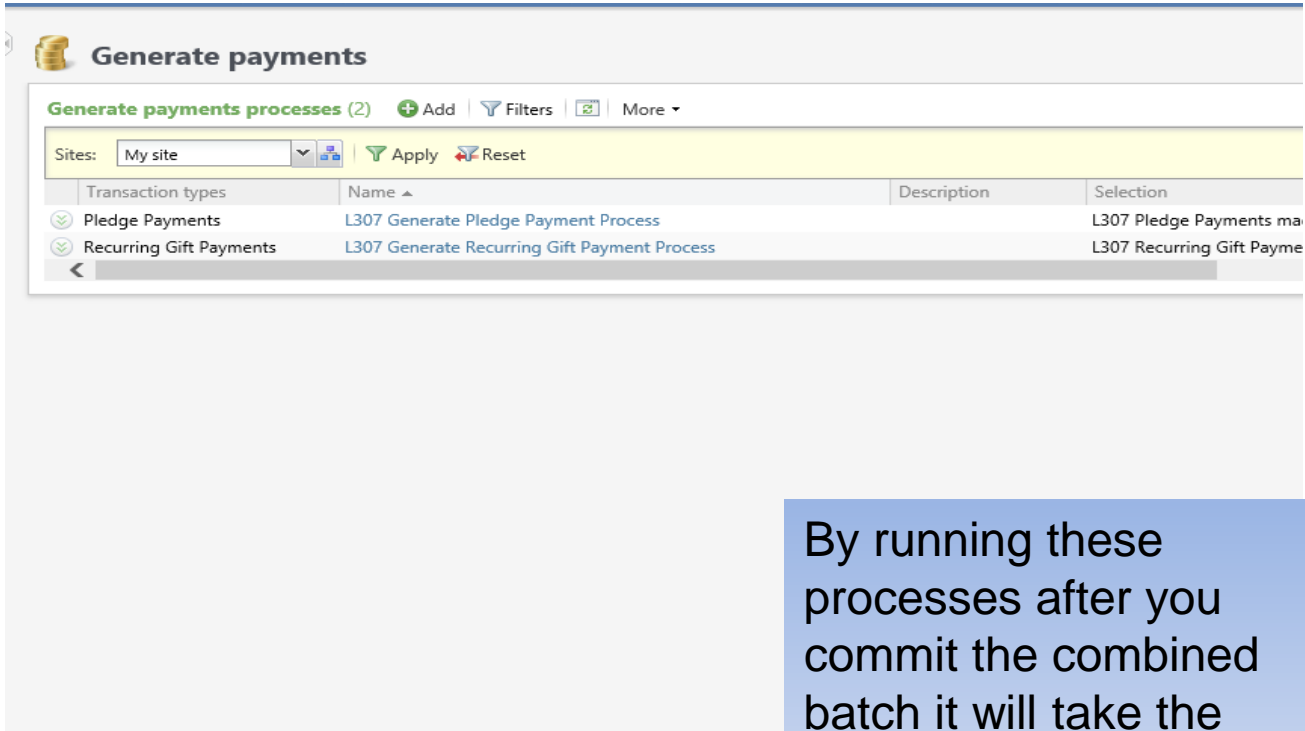
Constituent Name	Constituent Lookup ID	Date	Revenue Type	Amount	Payment Method	Appeal	Designation / Event
John D. Kuehn	8-14225721	9/19/2018	Payment (pledge)	\$100.00	Check	(307) A18 - 2018 Annual Giving Campaign	30708011 Invest in Charactor-Counci - Operating
Bruce Coleman	8-13208128	9/19/2018	Payment (donation)	\$100.00	Credit card	(307) A18 - 2018 Annual Giving Campaign	30708011 Invest in Charactor-Counci - Operating
John D. Kuehn	8-14225721	9/19/2018	Pledge	\$100.00	None	(307) A18 - 2018 Annual Giving Campaign	30708011 Invest in Charactor-Counci - Operating

John D. Kuehn	8-1
Bruce Coleman	8-1
Bruce Coleman	8-1
10/18/2018 at 11:58 AM	

The batch committed. Note that pledges and payments equal \$470. This is the amount that will come into PeopleSoft. The recurring gift established does not. I would recommend setting up a recurring gift in its own template since it does not create GL movement. Also, noticed there is a \$100 matching gift claim that was created by this batch.



Run Generate Payments



The screenshot shows a web interface for generating payments. At the top, there is a header with a gold coin icon and the text "Generate payments". Below this, there is a sub-header "Generate payments processes (2)" with options for "Add", "Filters", and "More". A search bar labeled "Sites:" contains the text "My site" and has "Apply" and "Reset" buttons. Below the search bar is a table with the following data:

Transaction types	Name	Description	Selection
Pledge Payments	L307 Generate Pledge Payment Process		L307 Pledge Payments ma
Recurring Gift Payments	L307 Generate Recurring Gift Payment Process		L307 Recurring Gift Payme

By running these processes after you commit the combined batch it will take the first pledge installment and also the first recurring gift installment.



Review LC Import Batches

Batch Entry

Uncommitted Batches | Committed Batches

Uncommitted batches (4) + Add Batch search More

Date range: Sites: All sites Show only batches with exceptions Apply

Search Columns Clear all filters

Batch number	Batch template	Owner	Status	Date added
L0191423	LC Import of Pledge Payments Credit Card S...	John Kuehn BSA-BSA	1. Data Entry	8/30/2018
L0191450	LC Import of Pledge Payments Credit Card S...	John Kuehn BSA-BSA	1. Data Entry	10/3/2018
L0191457	LC Import of Pledge Payments Credit Card S...	John Kuehn BSA-BSA	1. Data Entry	10/18/2018
L0191458	LC Import of Recurring Credit Card Schedule...	John Kuehn BSA-BSA	1. Data Entry	10/18/2018

The generate payment process generated two batches for 10/18/2018. I would need to open and add the inbound channel in each batch, run them through the credit card processor and then review and commit them



Third Batch LC Pledge Payment

- This batch would be used to record a partial payment that came in with a pledge.
- For example – John Doe wants to pledge \$100 and sent in \$20 cash and want to be billed for the rest.
- A payment can't be added to a pledge unless it has been added to the system first. Hence payment in separate batch.



Three Batches Used

- LC Combined
- LC Imports – Gathers first CC payment
- LC Pledge Payment – Process partial pledge payment – could use combined batch also to do pledge payment



Best Practices



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Designations

- 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



Batch Entry

- Never use batch entry data list filters
- Post all batches weekly – review on Friday
- Clean out “old” batches – delete
- Be sure to have a “default” designation on appeals
- Use * when searching to find appeal faster



Duplicate Constituent Records

- As an alternative to merging in ScoutNET:
 - Select desired constituent
 - Move revenue from others
 - Use Revenue Update Batch
 - Mark others constituent records inactive



Reconciling Cash

- The use of the deposit reference field helps to reconcile cash.
- Remember to use the field and keep it the same in all batches that you are tying to a single deposit.

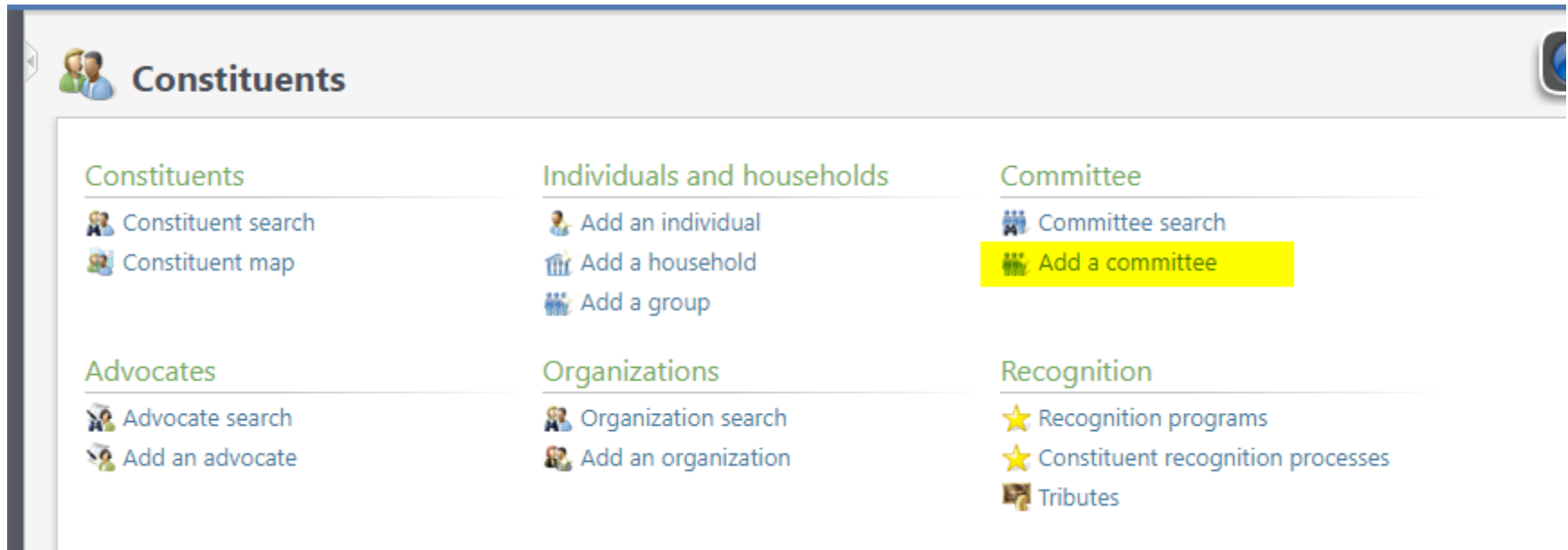


BSAFR

- 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 and created “committees”



Add BSAFR Group (committee)



The screenshot displays the 'Constituents' management interface. The top navigation bar includes a 'Constituents' header with a group icon. The main content area 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: [v]

- 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



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]





Council Support

Strategic Performance Office

Contact Strategic Performance

Council Assessments

Council Board Resources

Council Business Practices

Council Fiscal Management and Training

Journey to Excellence

Financial Services

Back Office Business Solutions

Council Financial Management

Council Fund Development

Council Financial Training

Home > Council Support > Financial Services > Council Fund Development

Council Fund Development

Council Fund Development is comprised of volunteers & staff with proven track records of raising operating, capital, and endowment councils of all sizes and demographic makeup. The team assists local councils with all phases of fundraising planning and execution and volunteer training, campaign planning, feasibility studies, and campaign discipline coaching.

[Operating](#)

[Capital](#)

[Major Gifts & Endowment](#)

[CRM Resources](#)

2

[Best Practices](#)

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[FOS Planning Kit](#)

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www.scouting.org/financeimpact



Next CRM User Forum

Wednesday, April 17, 2019

10:00 am & 2:00 pm CT



Questions & Answers



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