

CRM User Forum

April 17, 2019

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WELCOME



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Objectives

- Updating reminders & acknowledgments
- Changing “thank you” letter
- Entering revenue for Events
- Best Practices
 - Designation
 - Duplicate constituent records
 - Batch Entry
 - Query folder
- Questions & Answers



Acknowledgements/Reminders



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Yearly Donor Communication Maintenance

- Updating selections that run
 - Reminders
 - Acknowledgements
- Updating Acknowledgements
 - New Letter
 - Attaching new letter to Assign Letter Process and Acknowledgement Process





Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Home
- Constituents
- 2/29/2016 Payment: \$100.00 - Aaron T. Atsumi
- 8/22/2016 Payment: \$375.00 - Todd E. Reimers
- Capitol Area Council (564) - Appeal Progress Results

Recent searches

- Batch search
- Appeal search
- Appeal progress results
- Appeal progress results
- Constituent search

Recently accessed

- Batch L0375617
- Batch Entry
- Batch L0375537
- 12/31/2018 Payment: \$2,500.00 - Dwight D. Thompson
- Dwight D. Thompson



Marketing and Communications

Appeal

- Appeal search
- Add an appeal
- Appeal mailings
- Appeal progress results

Reports

- BSA Appeal Organization Structure Report
- Appeal profile
- Appeal performance

Donor relations

- Receipts
- Acknowledgements
- Reminders
- Planned gift acknowledgements
- Manage correspondence

Marketing efforts

- Direct marketing efforts
- Marketing plans
- Public media efforts
- Source codes

Pledge card report

- Run pledge cards

Packages

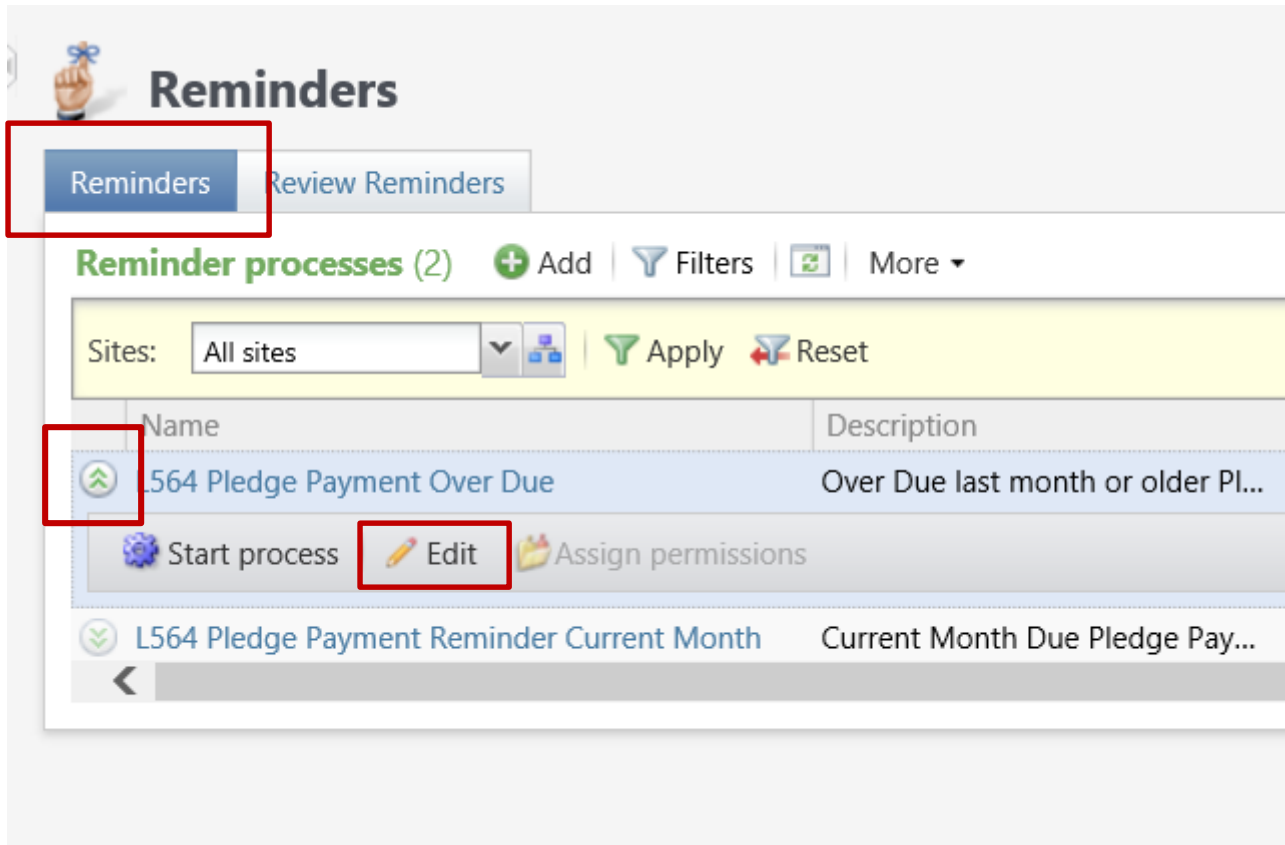
- Creatives
- Export definitions
- Letters and documents
- Materials and expenses
- Packages

Configuration

- Address processing options
- Communication name patterns
- Communication templates
- Letter template library
- Name format options

You find your donor communication routines under Marketing and Communications and Donor Relations.

To Find Reminder Selection



The screenshot shows the 'Reminders' interface. At the top, there is a 'Reminders' tab highlighted with a red box. Below it, the 'Reminder processes (2)' section is visible. A filter dropdown is set to 'All sites'. The table below lists two reminder processes. The first process, 'L564 Pledge Payment Over Due', is highlighted with a blue background. A red box highlights the green up arrow icon in the first column of this row. Below the table, the 'Edit' button is also highlighted with a red box. The second process, 'L564 Pledge Payment Reminder Current Month', is listed below the first.

Name	Description
L564 Pledge Payment Over Due	Over Due last month or older Pl...
L564 Pledge Payment Reminder Current Month	Current Month Due Pledge Pay...

To find your selection you need to edit your reminder business processes. They are on the Reminders tab.



The reminder process will not run without a selection. The selection is a query that brings in the records that need to be reminded. Access by clicking the pencil so you can edit it.

Name: X

Description:

Site: ▼ 🔍

Output grouping: ▼

Letter template: L564 Pledge Overdue Reminder Custom 3.28.16.docx [Choose file](#) [Clear file](#)

Label template: <File not specified> [Choose file](#) [Clear file](#)

Output type: ▼

Export definition: 🔍

Criteria

- Generate reminders for
- ☐ All pledges
 - ☐ All recurring gifts
 - ☒ Custom selection

Selection: 🔍 ✎

Results

These options may be modified at run time.

Calculate amounts as of: ▼ 🔍

- ☒ Mark reminders sent when process completes

Sent date: ▼ 🔍

- ☐ Create selection from results

Selection type: ▼

Selection name:

☐ Overwrite existing selection



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Reminder Selections

Include records where:

- Appeal\Site\Site ID is equal to 564
- and Transaction type is equal to Pledge
- and (Pledge/Grant award next installment date is after 12/1/2013
- and Pledge/Grant award next installment date is on or before last mo
- and Pledge/Grant award balance is greater than 0.00
- and Send pledge reminder is equal to Yes
- and Appeal\Report code is one of 2018



Include records where:

- Appeal\Site\Site ID is equal to 564
- and Transaction type is equal to Pledge
- and (Pledge/Grant award next installment date is after 12/1/2013
- and Pledge/Grant award next installment date is on or before last mon
- and Pledge/Grant award balance is greater than 0.00
- and Send pledge reminder is equal to Yes
- and Appeal\Report code is one of 2018, 2019

Results fields to display:

- Amount (Pledge Amount)
- Date (Pledge Date)
- Pledge/Grant award next installment date (Next Installment Due)
- Constituent\Name (Constituent)
- Constituent\Lookup ID (Lookup ID)
- Latest installment payment date (Last Payment Date)
- Latest installment payment amount (Last Payment Amount)
- Pledge/Grant award balance (Balance)
- Appeal\Name

Results fields to display:


- Amount (Pledge Amount)
- Date (Pledge Date)
- Pledge/Grant award next installment date (Next Installment Due)
- Constituent\Name (Constituent)
- Constituent\Lookup ID (Lookup ID)
- Latest installment payment date (Last Payment Date)
- Latest installment payment amount (Last Payment Amount)
- Pledge/Grant award balance (Balance)
- Appeal\Name

Selection on left shows what it looked like in 2018. The report code brings in all appeals for 2018. If it is Nov. or Dec. of 2018 and I am raising money for 2019, I may need to add the 2019 report code so that I am billing 2 appeal years at the same time.






Acknowledgement Selections




This council has two processes. Remember all three pieces of the set up use the same selection on each acknowledgement. Changing it once changed it on each process.














Acknowledgements




[Review Acknowledgements](#) | [Acknowledgements](#) | **Letters**



Letters (2)  Add  Filters  More

☐ Include inactive letters | Sites: My site   Apply  Reset

Type	Name	Description	Word temp
 Revenue			
	Revenue	L564 Payment Thank You =<\$499.99	Individual Co... L564 Thank Y... L564 Pledge Payments \$1-\$499.99 (Ad-hoc Query)
	 View template	 Update template	 Edit  Delete  Mark inactive
	Revenue	L564 Payment Thank You Letter 500 and >	Constituent T... L546 Thank y... L564 Pledge Payment = or Greater than \$500 (A...

Assign letters processes (2)  Add  Filters  More


Sites: My site   Apply  Reset

Name	Description	Date last run	Selection
 L564 Payment Thank You Letter 500 and >	Constituent Thank You Letter	3/24/2016	L564 Pledge Payments = or Greater than \$500 (Ad-
 L564 Payment Thank You =<\$499.99	Individual Constituent Tha...	3/28/2016	L564 Pledge Payments \$1-\$499.99 (Ad-hoc Query)

Name: X

Description:

Word template: Choose file Clear file

Selection: 

Output type:

Output format:

You click the pencil next to the selection to open the selection. Once it is open, you can then edit the filter. In this case, it has the report code for 2017. It was changed to include 2017,2018,2019. This will look for any revenue that is currently being attached to appeal in these years.

Include records where:

- Appeal\Site\Site ID is equal to 564
- and Amount is between \$1.00 and \$1000000.00
- and Do not acknowledge is equal to No
- and Transaction type is equal to Payment
- and Application Details\Application is one of Donation, Pledge, I
- and Appeal\Report code is equal to 2017

Include records where:

- Appeal\Site\Site ID is equal to 564
- and Amount is between \$1.00 and \$1000000.00
- and Do not acknowledge is equal to No
- and Transaction type is equal to Payment
- and Application Details\Application is one of Donation, Pledge,
- and Appeal\Report code is one of 2017, 2018, 2019



Updating Letters



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Updating Letters

- Replace the word document in the attached letter process
- Create new letter and attach new letter to Assign Letter process and the Acknowledgement Process.



To download current letter click view template. You can make changes and then upload under the Update Template button.



Acknowledgements

Review Acknowledgements

Acknowledgements

Letters

Letters (2) Add Filters More

☐ Include inactive letters Sites: My site Apply Reset

Type

Name

Description

Word template

Revenue

Revenue L564 Payment Thank You =<\$499.99

Individual Co... L564 Thank Y...

View template Update template Edit Delete Mark inactive

Revenue L564 Payment Thank You Letter 500 and > Constituent T... L546 Thank y...

Assign letters processes (2) Add Filters More

Sites: My site Apply Reset

Name

Description

Date last run

Selection

L564 Payment Thank You Letter 500 and >

Constituent Thank You Letter 3/24/2016

L564 Pledge Payments = or Greater than \$500 (Ad-hoc Query)

L564 Payment Thank You =<\$499.99

Individual Constituent Tha... 3/28/2016

L564 Pledge Payments \$1-\$499.99 (Ad-hoc Query)

Updating Assign Letter and Acknowledgement with new letter

Edit assign letters process

Name: L564 Payment Thank You Letter 500 an

Description: Constituent Thank You Letter

Site: Capitol Area Council

Include: ☐ Assign all letters
☒ Assign selected letters

Letter

L564 Payment Thank You Letter 500 and >

Acknowledges: ☒ Include donor
☐ Include recognition recipients

Criteria

Edit revenue acknowledgement process

Name: L564 Payment Thank You \$500 and >

Description: Constituent Thank You Letter

Site: Capitol Area Council

Mailing label template: <File not specified>

 Choose file
 Clear file

Criteria

Acknowledge revenue with letter: L564 Payment Thank You Letter 500 and >

Acknowledge: ☐ All 'Not acknowledged' revenue
☒ Selected revenue

Selection: L564 Pledge Payments = or Greater than \$500 (Ad-h

Exclusions

Results



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Events



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Event Revenue

- If Event Module is used attach money to event registration
 - Sub Designation required
 - If bill is needed - fees are waived on Event Registration and a pledge is placed into CRM using split designation if benefited
 - If not benefited use revenue category to enter pledge.



Event Creation Sub-Designation



L368 2018 Delahanna DCAD

Event date: 1/1/2018 Status: 100%
Site: Baden-Powell Council Active
Location: Lookup ID: 50%
Room/Unit: 8-10000607
Contact: Joshua L. Hanes 0%
Coordinator:
Category: Special Fundraising Event

If you use the events module, you will need to have sub-designation created for Participant Tickets or Sponsorship, Advertising and Fees. Some councils may and need to request Taxes. This councils revenue default is Sponsorships 4201, because they have a sub-designations of 4202, 4204 and 4250 created for them.

Registrations Tasks/Coordinators Speakers Expenses Options Invitations Designations Appeals

Designations (4) More ▾

Designation ▲	Default
36800761 Delahanna DCA - Operating	
36800761 Delahanna DCA - Operating \ 36800761-4202 Delahanna DCA - Operating (Ticket)	
36800761 Delahanna DCA - Operating \ 36800761-4204 Delahanna DCA - Operating (Advertising)	
36800761 Delahanna DCA - Operating \ 36800761-4250 Delahanna DCA - Operating (Fees)	



Payment on Event Registration

Registrant ID:	evreg-10040484	Total registration fees:	\$460.00
Type:	Preregistration	Total paid:	\$0.00
Status:	Registered	Balance:	\$460.00
No. of guests:	7	Total receipt amount:	\$356.00

The registration is designed to spilt the payment between account 4250 and (4201,4202 4204) when applied in batch.

Constituent	Lookup ID	Amount	Receipt amount	Date	GL post da...	Application	Appeal	Designation	Inbound channel	Revenue category
John D. Kuehn	8-13684237	→ \$460.00	\$356.00	4/16/2019	4/16/2019	L368 2018 Delahanna D...	368 D318 Delahanna DC...		Special Event Fundraising	

The batch lines above shows the payment applied to the event registration in a LC Payment batch. Note: that the receipt amount is the same from the registration and the amount is equal to the registration amount. The designation cannot be changed in a batch. You should switch the inbound channel to Special Event Fundraising. Revenue Category is not a choice on a registration.



Event Registration that needs to be bill.

- Create the event registration and wave the fees.
- Create pledge in a pledge commitment batch splitting the designation if needed. Inbound channel would be Special Event Fundraising
- Create Pledge and use revenue category drop down in no split needed.



Pledge Entry for Events

Main Revenue

Payment Pledge & recurring gift Credit card reader Revenue details Note

Apply Edit installments Split designations Capture card info Tributes Matching gifts Add note

Payment Benefits Solicitors Delete note

Recognitions Business units

Properties

	Constituent	Lookup ID	Amount	Date	GL post date	Revenue type	Installment frequency	Appeal	Designation	Inbound channel	Revenue category
1	John D. Kuehn	8-13684237	\$460.00	4/16/2019	4/16/2019	Pledge	Single Installment	368 D318 Delahanna DC...	<split>	Special Event Fundraising	Unrestricted by donor
2	John D. Kuehn	8-13684237	\$460.00	4/16/2019	4/16/2019	Pledge	Single Installment	368 D318 Delahanna DC...	36800761 Delaha...	Special Event Fundraising	Event - Participant/Ticket
*											

Split designations

Total amount: \$460.00

Unapplied amount: \$0.00

Apply by: ☒ Amount ☐ Percent

Designation	Amount	Percent	Campaigns
36800761-4202 Delahanna...	\$356.00	77.39	
36800761-4250 Delahanna...	\$104.00	22.61	

Line 1 of the batch is a registration that needs to be billed. A pledge is placed into the system by batch. The inbound channel is Special Event FR with revenue category unrestricted. To divided the amount between contributions and fees you split the designations using the sub-designation split on the batch revenue tab.



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Event Pledge with no split needed

Main Revenue

Payment Pledge & recurring gift Credit card reader

Apply Edit installments Split designations Payment Capture card info

Revenue details Note

Tributes Matching gifts Add note

Benefits Solicitors Delete note

Recognitions Business units

Properties

	Constituent	Lookup ID	Amount	Date	GL post date	Revenue type	Installment frequency	Appeal	Designation	Inbound channel	Revenue category
1	John D. Kuehn	8-13684237	\$460.00	4/16/2019	4/16/2019	Pledge	Single Installment	368 D318 Delahanna DC...	<split>	Special Event Fundraising	Unrestricted by donor
2	John D. Kuehn	8-13684237	\$460.00	4/16/2019	4/16/2019	Pledge	Single Installment	368 D318 Delahanna DC...	36800761 Delaha...	Special Event Fundraising	vent - Participant/Tic x
*											

Unrestricted by donor

Temporarily restricted by...

Permanently restricted by...

Event - Advertising

Event - Auction item don...

Event - Participant/Ticket

Event - Program item

Event - Concessions

Event - Sponsorship

Event - Other revenue

Event - Fees

Tax - State Sales Tax

If there is no need to split the transaction, the best practice is to assign the pledge to the main designation and then pick the correct revenue category to associate it with. Inbound channel is Special Event Fundraising. Line 2 represents this. Your main designation may not be configured to work with each of the event contribution accounts. You would need to fill out a designation form and request that it be permission for the other accounts.



Query Folders



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Maintenance of Query Folders

- Local Admin or designee appointed to review and clean query folds on occasion.
- Delete queries no longer needed, used or out dated
- Edit current queries and make sure yours are site secured and stored in your folder.



Importance of Site Security

Information Library

Query list Manage folders

View by: Folder

Expand all Collapse all

Favorites (2)

- All queries (2176)
 - <none> (3)
 - Central Region (382)
 - Northeast Region (423)
 - Southern Region (352)
 - L713 - Sequoyah (59)
 - Jane's Favorites (13)
 - Silver EAgle Queries (9)
 - Thank you queries (3)
 - billing queries (3)
 - capital campaign (1)
 - L001 - Greater Alabama (0)
 - L003 - Alabama-Florida (0)
 - L004 - Mobile Area (0)
 - L005 - Tukabatchee Area (1)
 - L006 - Black Warrior (8)

Queries (1) Add an ad-hoc query Add a smart query More

Sites: All sites Apply Reset

Search Columns Clear all filters

Name	Folder	Owner	Created on	Last run on	Category	Has se...	Site
★ L005 CY Worked and Already Gi...	L005 - Tukabat...	Denise Miller B...	4/10/2018			Yes	LC Global

I'm emulating an employee from 713. She should be able to see the queries in her folder with her site assigned to them. This shows that she can see other queries in other site. This is because when the person created the queries they saved them to the LC Global site verses their site. Review queries in your folder to make sure they have your site on them and not LC Global. The only queries that should have LC Global on them are the sample queries that you can copy.



Sites:

All sites

Apply

Reset

Search

Columns

Clear all filters

< 1 2 >

<div></div>	Name	Folder	Owner	Created on	Last run on	Category	Has se...	Site
<div></div>	★ L713 CY Worked and Already Gi...	L713 - Sequoya...	Jane Birchfield...	1/3/2019			Yes	Sequoyah Coun...
<div></div>	★ List of non donors in Appeal 20...	L713 - Sequoya...	Jane Birchfield...	10/30/2018		Prospect List	No	Sequoyah Coun...
<div></div>	★ L713 2018 Silver Eagle for Cards...	L713 - Sequoyah	Michael Wolfe...	10/22/2018			Yes	All sites
<div></div>	★ Silver Eagle Prospect Committee	L713 - Sequoya...	Jane Birchfield...	10/19/2018			No	Sequoyah Coun...
<div></div>	★ Copy of Copy of LVVV All Donor...	L713 - Sequoya...	Jane Birchfield...	10/19/2018			No	All sites
<div></div>	★ L713 Donors for Specific Appeal...	L713 - Sequoya...	Jane Birchfield...	10/19/2018			No	All sites
<div></div>	★ Silver Eagle Export with Structure	L713 - Sequoya...	Michael Wolfe...	10/18/2018			No	Sequoyah Coun...
<div></div>	★ export for running Silver Eagle C...	L713 - Sequoyah	Michael Wolfe...	10/18/2018			No	Sequoyah Coun...
<div></div>	★ Copy of Copy of 2018 Silver Eag...	L713 - Sequoya...	Jane Birchfield...	9/17/2018			No	Sequoyah Coun...
<div></div>	★ 2019 Silver Eagle Prospect List	L713 - Sequoya...	Jane Birchfield...	8/28/2018			No	Sequoyah Coun...
<div></div>	★ Copy of Copy of LXXX BSAFR Gr...	L713 - Sequoya...	Arnel Jaime BS...	8/15/2018	9/12/2018		No	LC Global
<div></div>	★ \$1000 & Above	L713 - Sequoyah	Jane Birchfield...	4/9/2018	8/29/2018		No	Sequoyah Coun...
<div></div>	★ Copy of L713 Fundraising Activit...	L713 - Sequoyah	Jane Birchfield...	3/9/2018			No	Sequoyah Coun...
<div></div>	★ Copy of L713 ScoutNET Prospec...	L713 - Sequoyah	Jane Birchfield...	2/27/2018			No	All sites
<div></div>	★ L713 Contribution Totals for Au...	L713 - Sequoyah	Kathe Broyles B...	1/24/2018			No	Sequoyah Coun...
<div></div>	★ Pledge History for Auditors	L713 - Sequoyah	Jane Birchfield...	1/24/2018			Yes	LC Global
<div></div>	★ L713 Silver Eagle List 2017	L713 - Sequoyah	Kathe Broyles B...	1/23/2018		Prospect List	No	Sequoyah Coun...
<div></div>	★ L713 BSAFR Groups	L713 - Sequoya...	Jane Birchfield...	12/12/2017			No	LC Global
<div></div>	★ Copy of Capital Campaign Listing	L713 - Sequoyah	Jane Birchfield...	12/8/2017			No	Sequoyah Coun...
<div></div>	★ Pledge Payments Due Now	L713 - Sequoyah	Jane Birchfield...	12/8/2017	7/24/2018		Yes	LC Global
<div></div>	★ 2018 Silver Eagle List	L713 - Sequoya...	Jane Birchfield...	12/5/2017	9/6/2018		No	Sequoyah Coun...

This is Sequoyah folder, you can see that a number of the queries in there actual folder are not site secured. This should be updated.

Query Review

Queries (59) + Add an ad-hoc query + Add a smart query More ▾

Sites: All sites Apply Reset

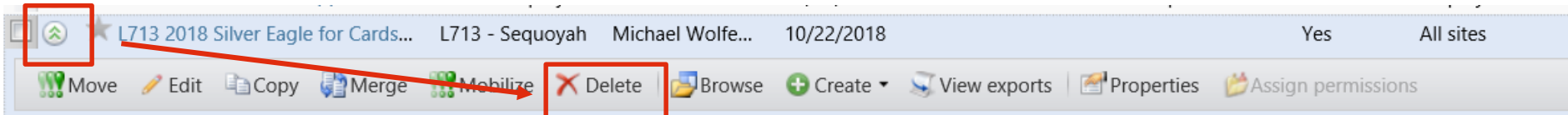
Search Columns Clear all filters < 1 2 >

	Name	Folder	Owner	Created on	Last run on	Category	Has se...	Site
<input checked="" type="checkbox"/>	★ L713 CY Worked and Already Gi...	L713 - Sequoya...	Jane Birchfield...	1/3/2019			Yes	Sequoyah Coun...
<input checked="" type="checkbox"/>	★ List of non donors in Appeal 20...	L713 - Sequoya...	Jane Birchfield...	10/30/2018		Prospect List	No	Sequoyah Coun...
<input checked="" type="checkbox"/>	★ L713 2018 Silver Eagle for Cards...	L713 - Sequoyah	Michael Wolfe...	10/22/2018			Yes	All sites
<input checked="" type="checkbox"/>	★ Silver Eagle Prospect Committee	L713 - Sequoya...	Jane Birchfield...	10/19/2018			No	Sequoyah Coun...
<input checked="" type="checkbox"/>	★ Copy of Copy of LVVV All Donor...	L713 - Sequoya...	Jane Birchfield...	10/19/2018			No	All sites
<input checked="" type="checkbox"/>	★ L713 Donors for Specific Appeal...	L713 - Sequoya...	Jane Birchfield...	10/19/2018			No	All sites
<input checked="" type="checkbox"/>	★ Silver Eagle Export with Structure	L713 - Sequoya...	Michael Wolfe...	10/18/2018			No	Sequoyah Coun...
<input checked="" type="checkbox"/>	★ export for running Silver Eagle C...	L713 - Sequoyah	Michael Wolfe...	10/18/2018			No	Sequoyah Coun...
<input checked="" type="checkbox"/>	★ Copy of Copy of 2018 Silver Eag...	L713 - Sequoya...	Jane Birchfield...	9/17/2018			No	Sequoyah Coun...
<input checked="" type="checkbox"/>	★ 2019 Silver Eagle Prospect List	L713 - Sequoya...	Jane Birchfield...	8/28/2018			No	Sequoyah Coun...
<input checked="" type="checkbox"/>	★ Copy of Copy of LXXX BSAFR Gr...	L713 - Sequoya...	Arnel Jaime BS...	8/15/2018	9/12/2018		No	LC Global
<input checked="" type="checkbox"/>	★ \$1000 & Above	L713 - Sequoyah	Jane Birchfield...	4/9/2018	8/29/2018		No	Sequoyah Coun...

Check to see when last ran. If blank, you should review to see if you still need them. If it was created by an owner that shows as inactive you should review and delete if not needed. If the query is being used by a selection in a business process or in another query it will not allow you to delete it. For instance, the queries attached to your reminders and acknowledgements will not delete because they are in use.

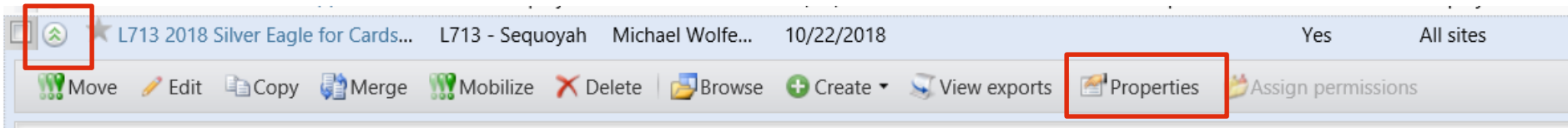


Deleting

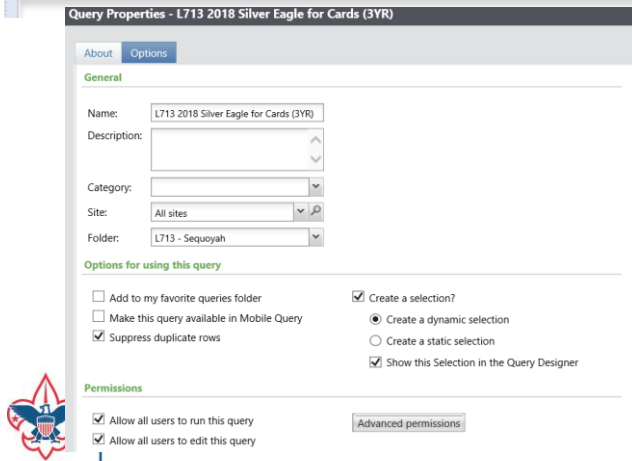


Drop the chevron on the left and click delete. If used as a selection in a business process or in query, an error message will occur and it will not delete.

Maintaining



If you want to change the name, the site on the query or the folder that it is in click "Properties". The window on the left will open and you can edit those fields on the Options Tab without editing the query.



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

- Grab Alt ID's out of CRM and provide to registrar to help determine which record to merge into. One merged becomes in active in CRM
- As an alternative to merging in ScoutNET:
 - Select desired constituent
 - Move revenue from others
 - Use Revenue Update Batch
 - Mark others constituent records inactive



Query Folder

- Make sure queries in your folder are assigned to your site.
- Delete old queries that have not been run and are no longer needed.
- Run and review queries that have not been used for some time to see if outcomes are still need. If not delete.
- Review queries that have inactive employees on them.





Council Support

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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.

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Next CRM User Forum

Wednesday, May 15, 2019

10:00 am & 2:00 pm Central Time



Questions & Answers



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