CRM User Forum

April 17, 2019

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WELCOME

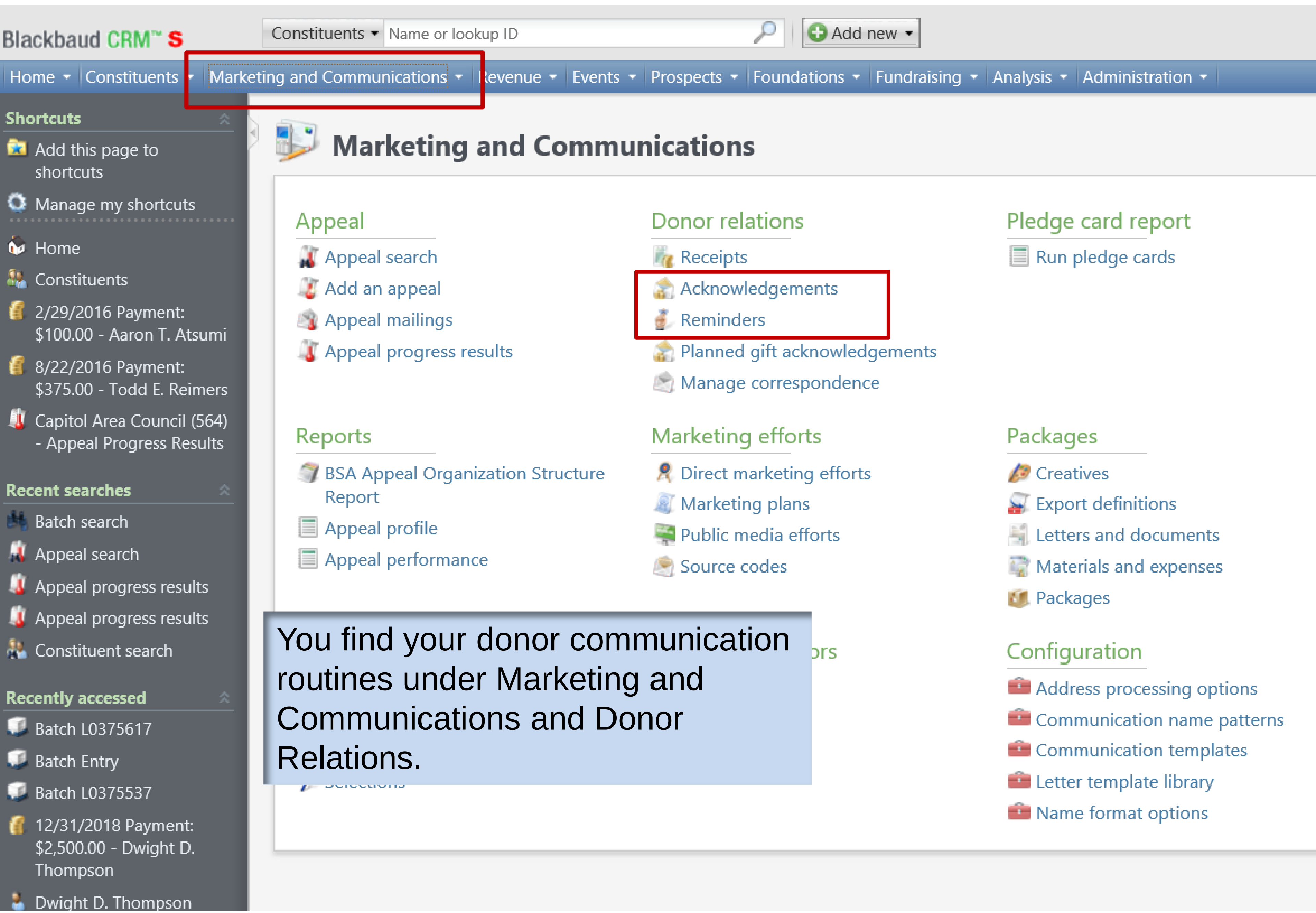
Objectives

- 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

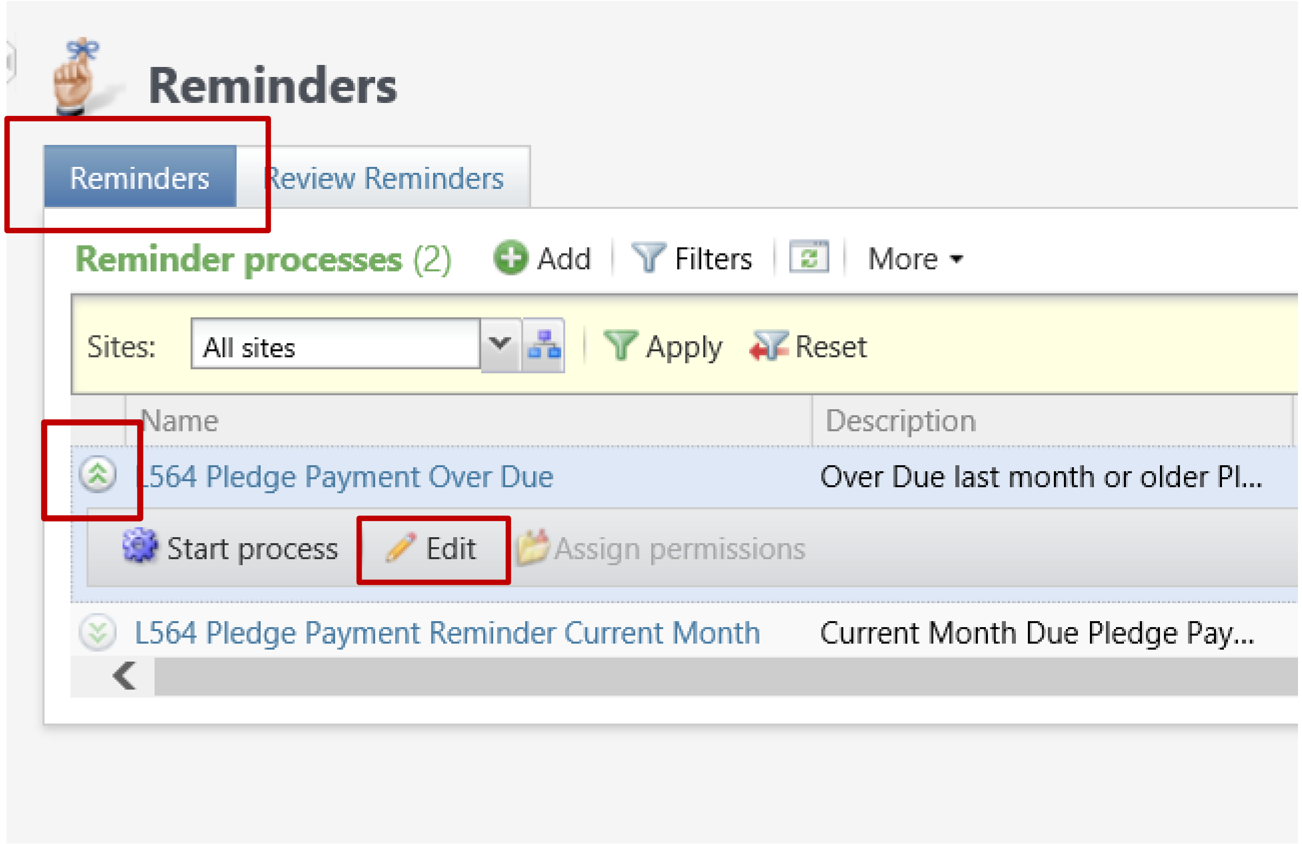
Yearly Donor Communication Maintenance

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



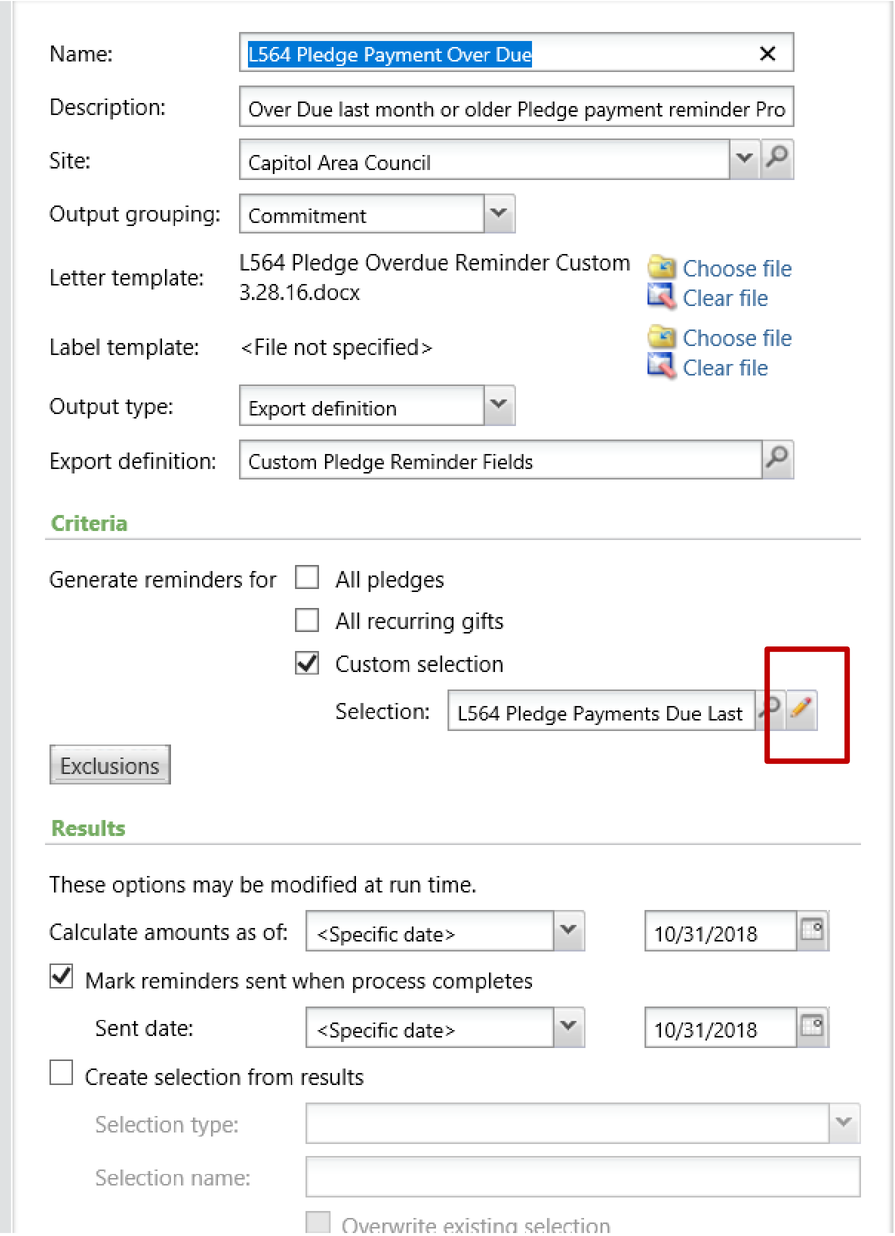
You find your donor communication routines under Marketing and Communications and Donor Relations.

To Find Reminder Selection



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.



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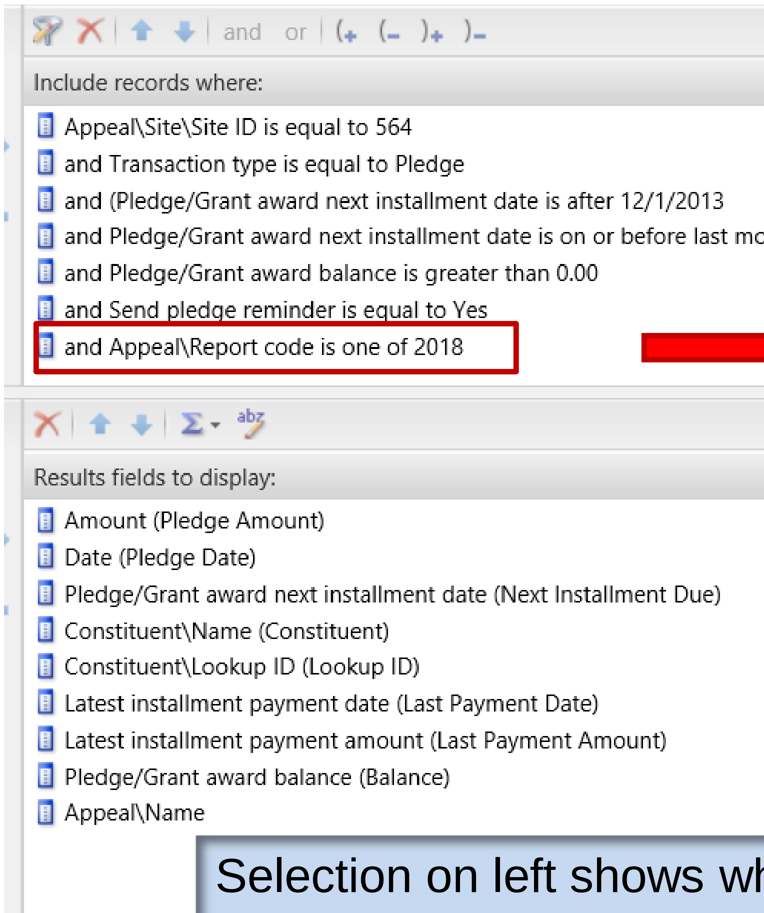
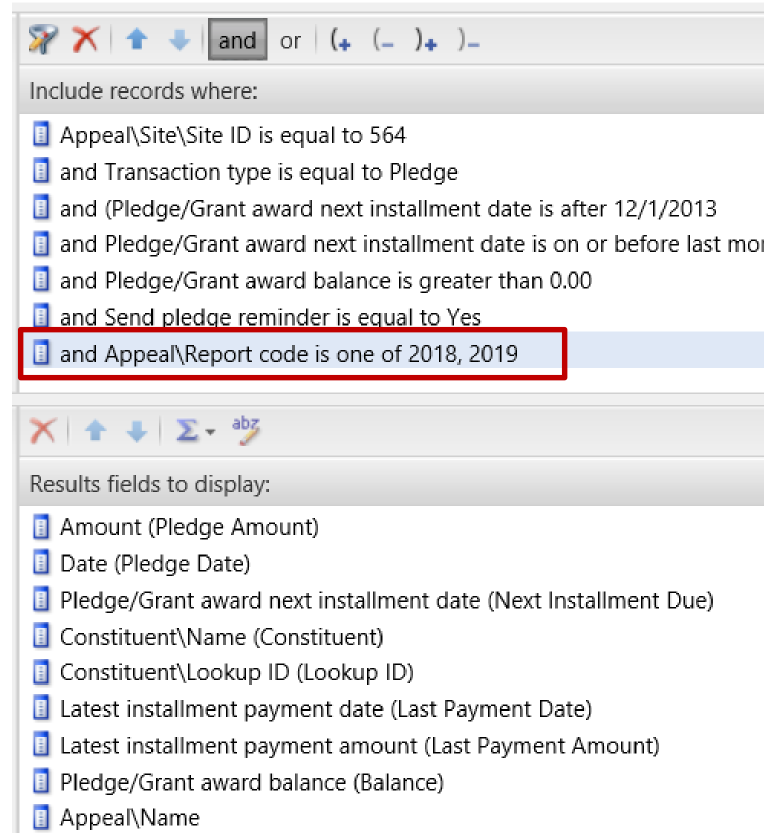
Reminder Selections

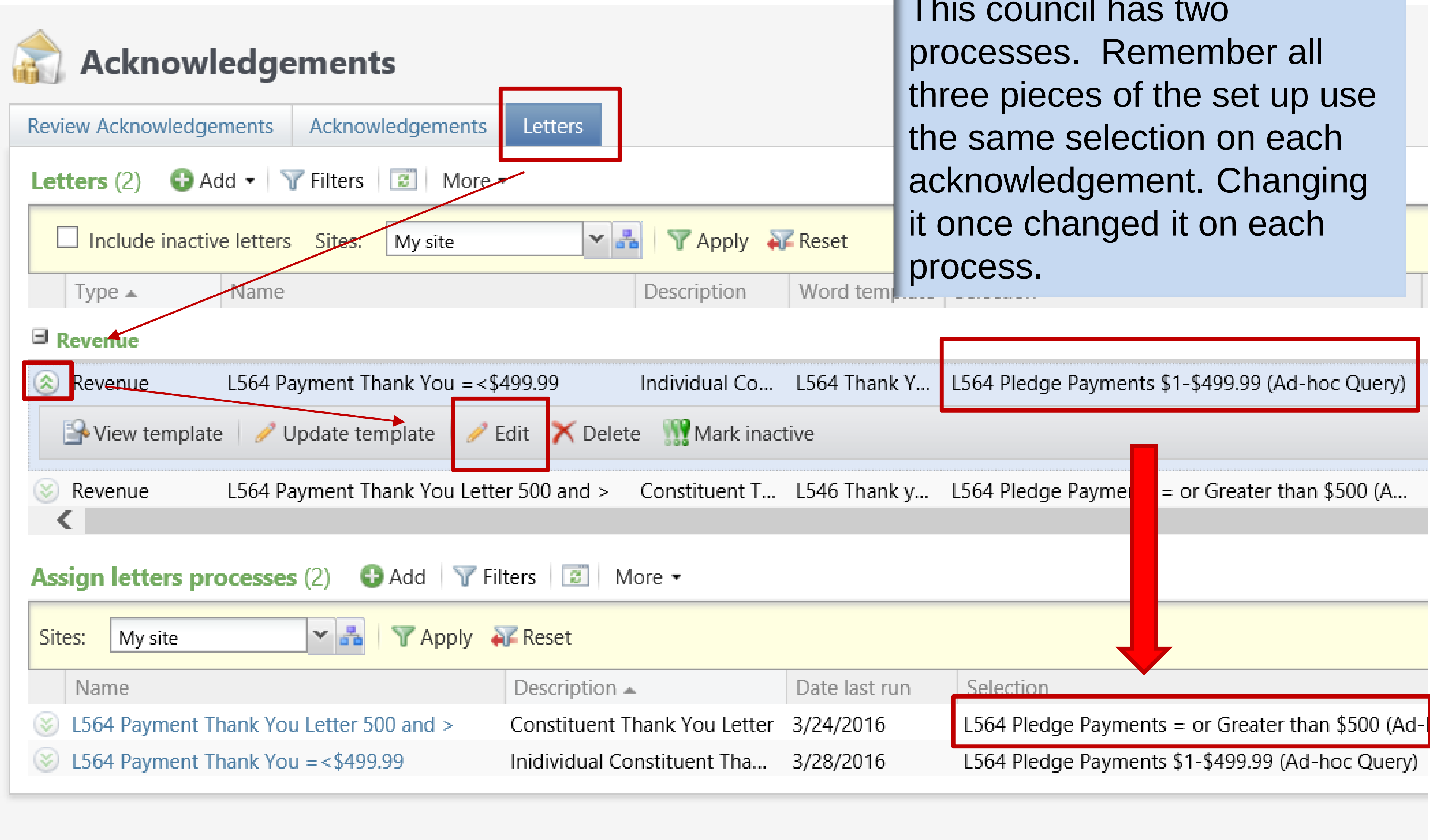


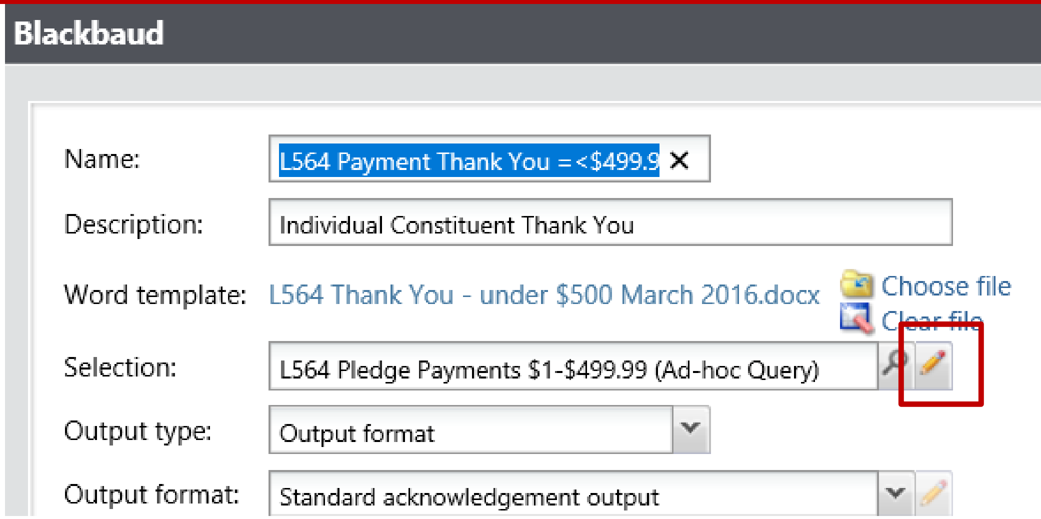


Selection on left shows what it looked like in 2018. The report code brings in all appeals for 2018. If it is Nov. or Dec. of 2018 and I am raising money for 2019, I may need to add the 2019 report code so that I am billing 2 appeal years at the same time.

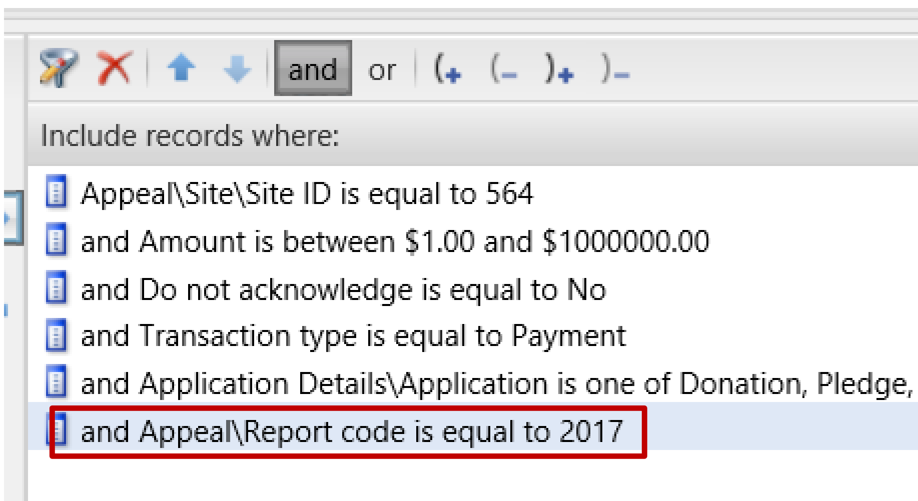
Acknowledgement Selections

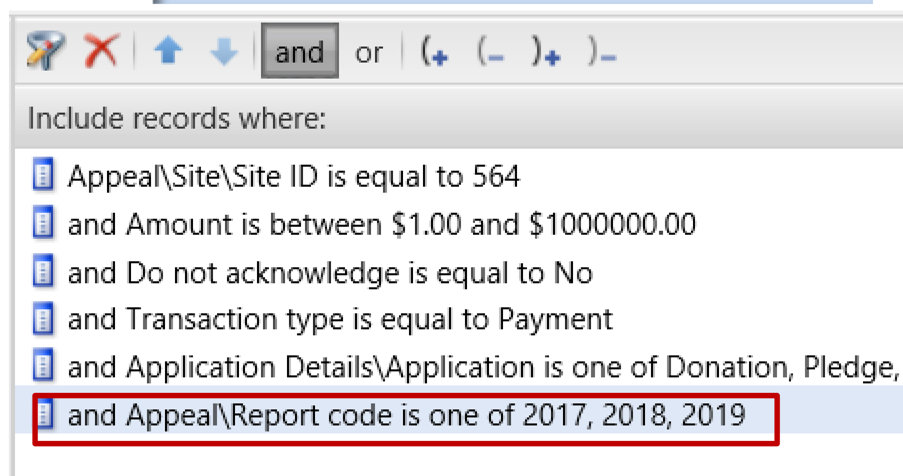
This council has two processes. Remember all three pieces of the set up use the same selection on each acknowledgement. Changing it once changed it on each process.





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.



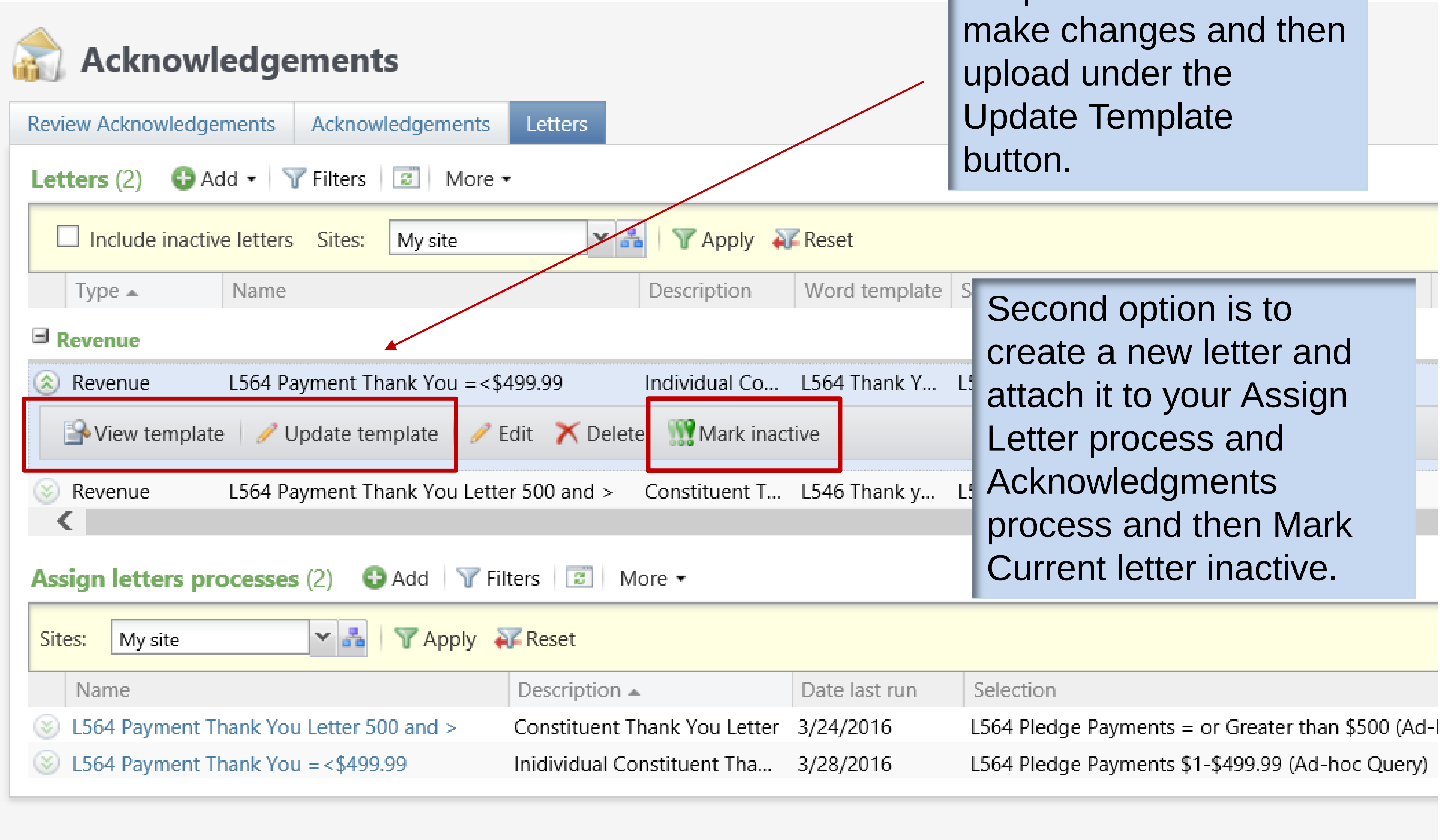


Updating Letters

Updating Letters

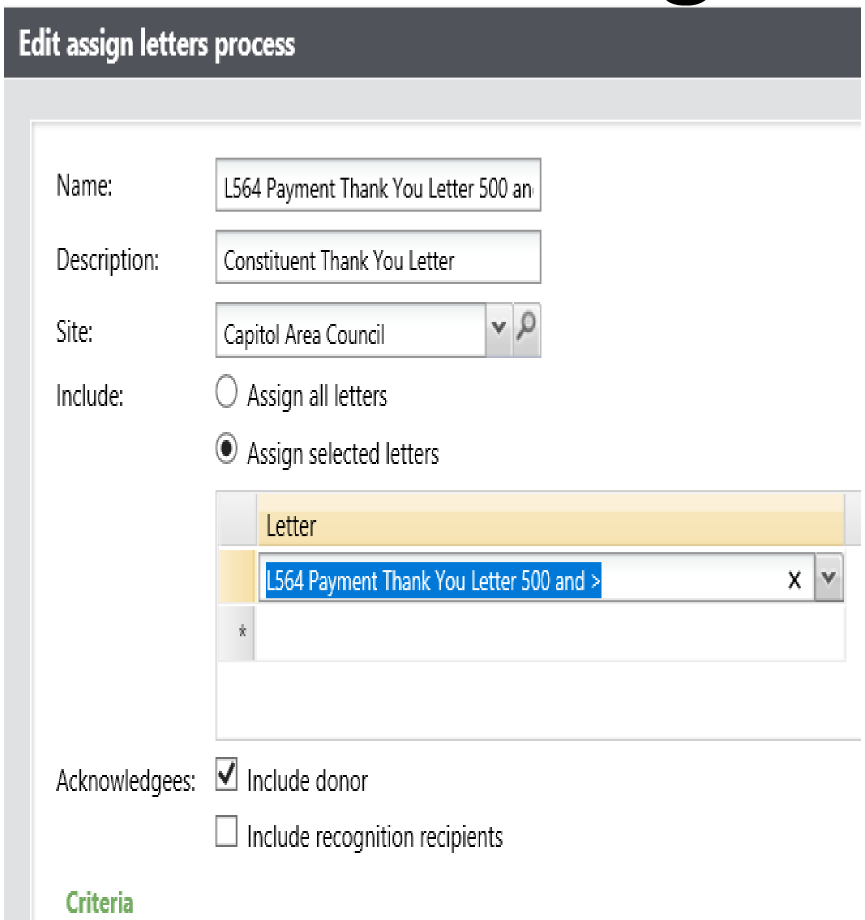
- Replace the word document in the attached letter process
- Create new letter and attach new letter to Assign Letter process and the Acknowledgement Process.

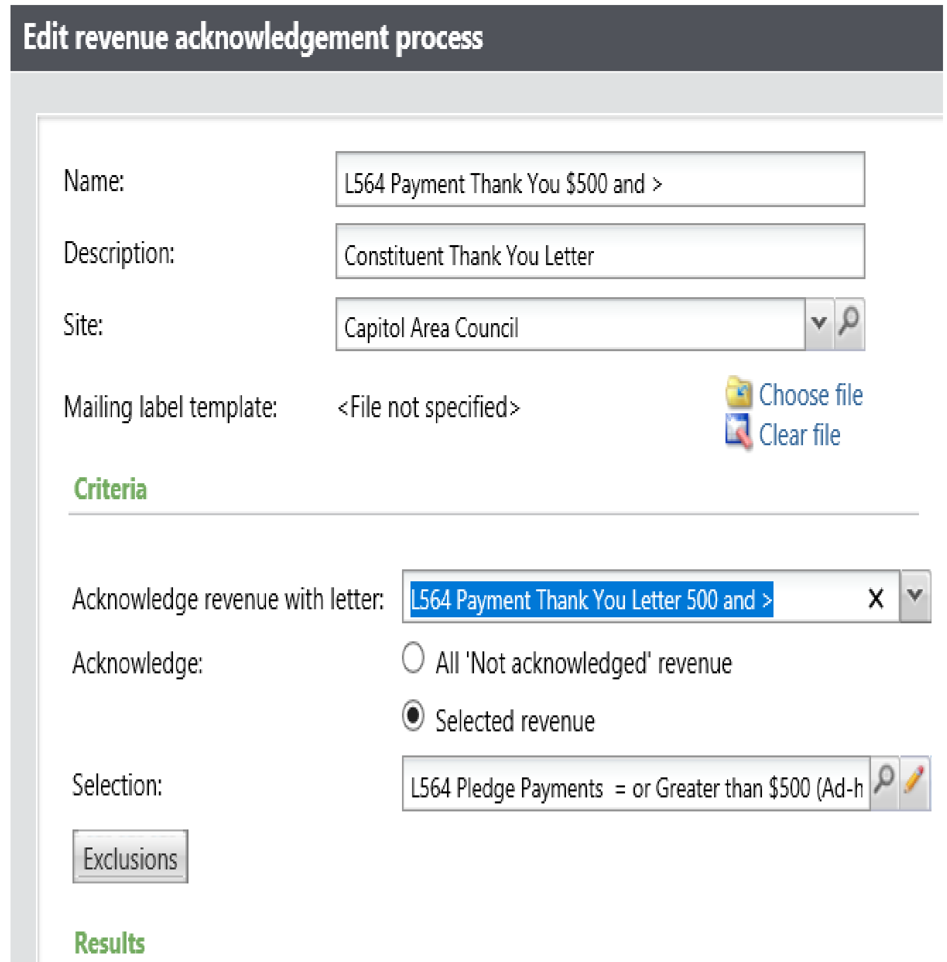
To download current letter click view template. You can make changes and then upload under the Update Template button.



Second option is to create a new letter and attach it to your Assign Letter process and Acknowledgments process and then Mark Current letter inactive.

Updating Assign Letter and Acknowledgement with new letter



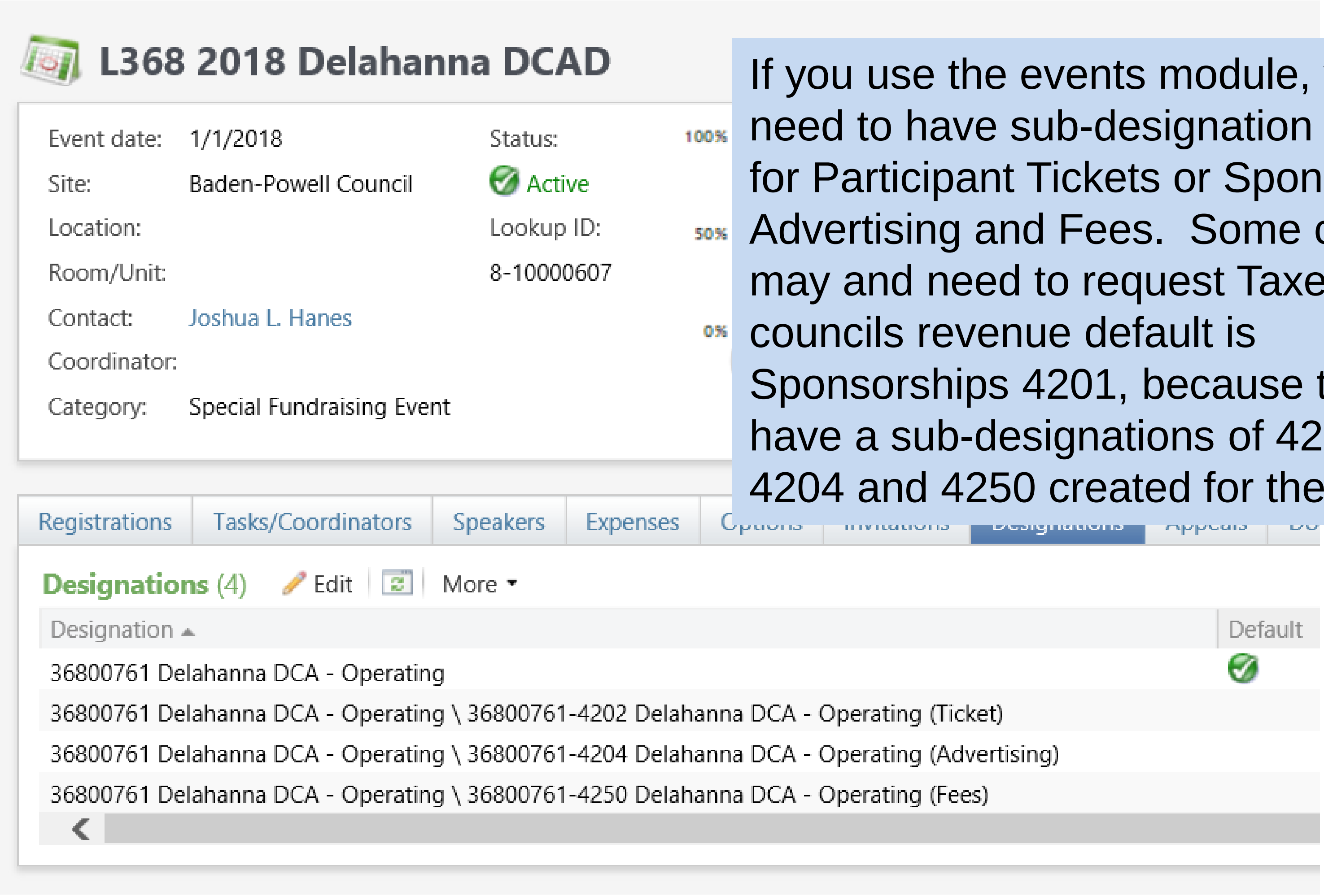


Events

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



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.

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.

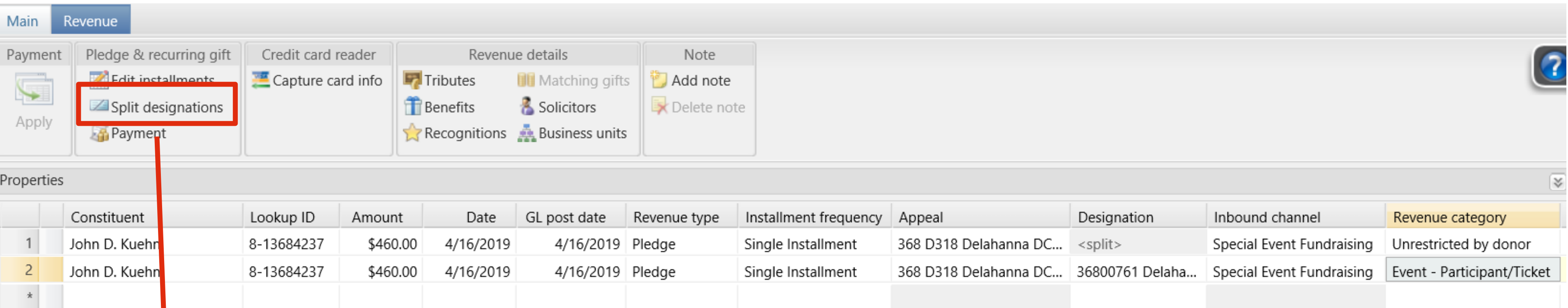
Constituent	Lookup ID	Amount	Receipt amount	Date	GL post da...	Application	Appeal	Designation	Inbound channel	Revenue category
John D. Kuehn	8-13684237	$460.00	$356.00	4/16/2019	4/16/2019	L368 2018 Delahanna D...	368 D318 Delahanna DC...		Special Event Fundraising	

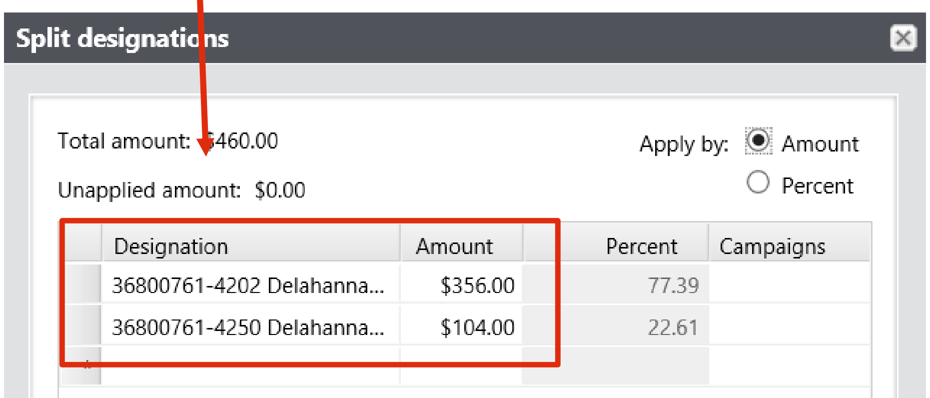
The batch lines above shows the payment applied to the event registration in a LC Payment batch. Note: that the receipt amount is the same from the registration and the amount is equal to the registration amount. The designation cannot be changed in a batch. You should switch the inbound channel to Special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

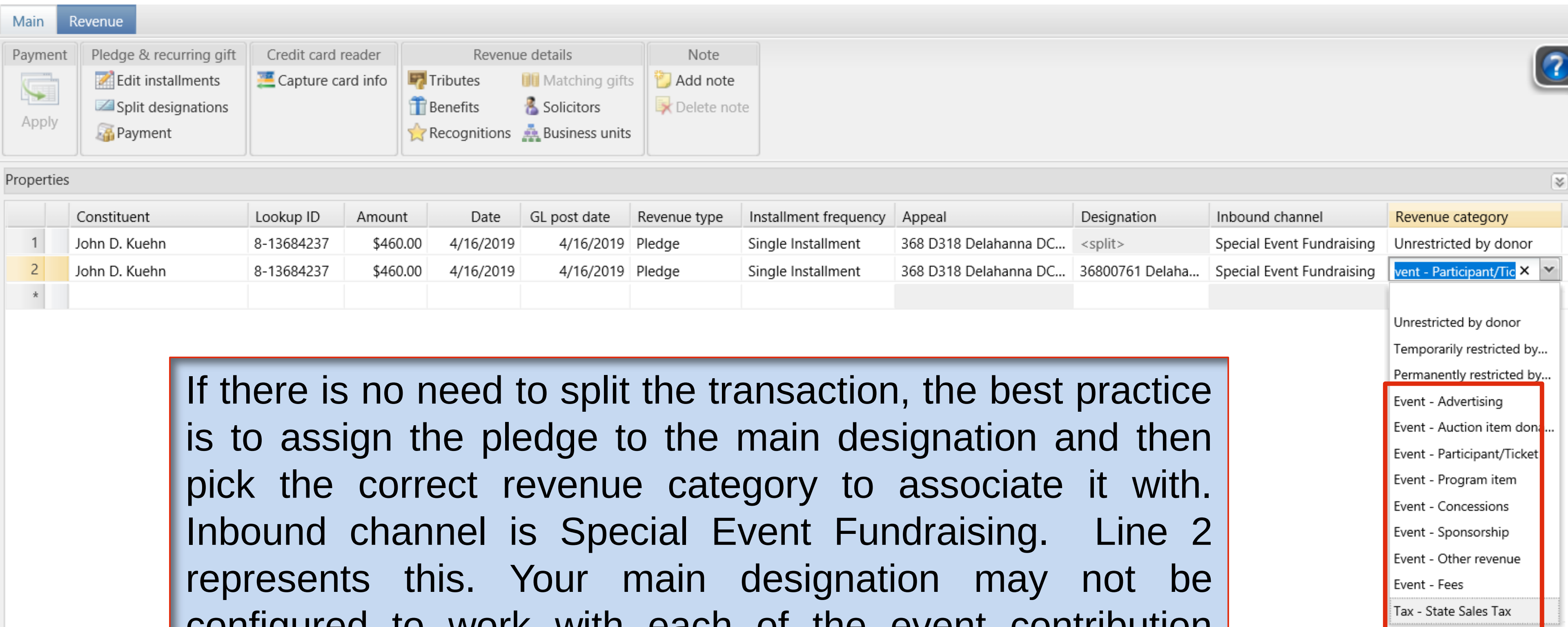
Pledge Entry for Events





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.

Event Pledge with no split needed



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.

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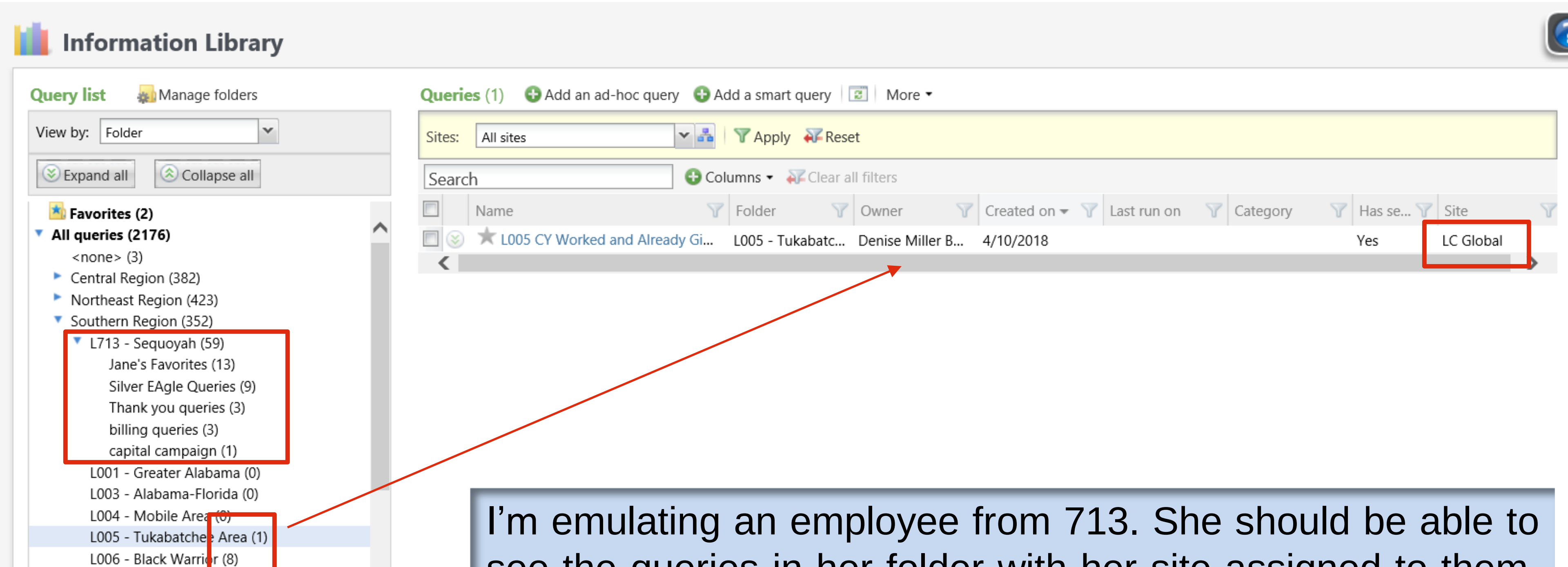
Query Folders

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



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.

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

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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
L713 CY Worked and Already Gi...	L713 - Sequoya...	Jane Birchfield...	1/3/2019			Yes	Sequoyah Coun...
List of non donors in Appeal 20...	L713 - Sequoya...	Jane Birchfield...	10/30/2018		Prospect List	No	Sequoyah Coun...
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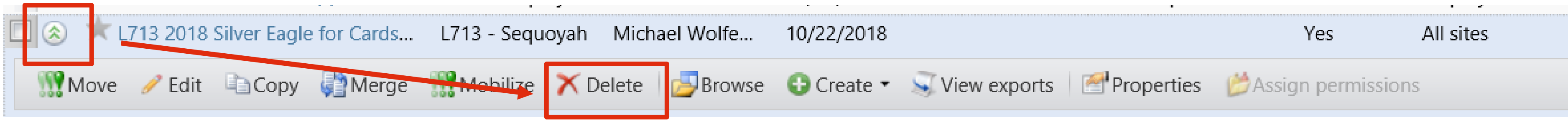
$1000 & Above	L713 - Sequoyah	Jane Birchfield...	4/9/2018	8/29/2018		No	Sequoyah Coun...

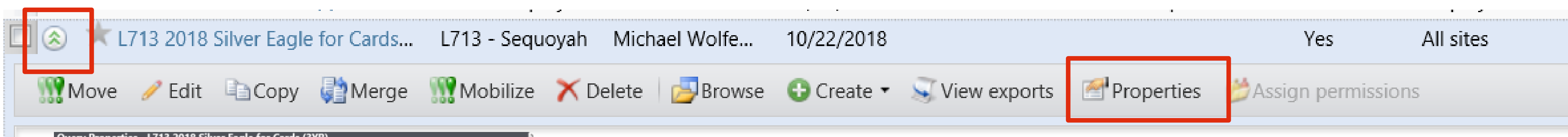
Check to see when last ran. If blank, you should review to see if you still need them. If it was created by an owner that shows as inactive you should review and delete if not needed. If the query is being used by a selection in a business process or in another query it will not allow you to delete it.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

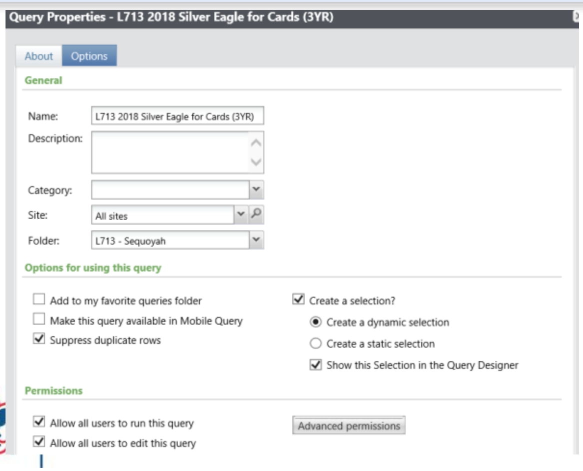
Deleting



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

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.

BOY SCOUTS OF AMERICA

Join Give Shop My.Scouting Login

Search

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 1
  - 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 endowmen councils of all sizes and demographic makeup. The team assists local councils with all phases of fundraising planning and executio and volunteer training, campaign planning, feasibility studies, and campaign discipline coaching.

Operating

Capital

Major Gifts & Endowment

CRM Resources 2

Best Practices

Document Library

Donor Research

FOS Planning Kit

Sample Grant Proposals

www.scouting.org/financeimpact

Next CRM User Forum

Wednesday, May 15, 2019

10:00 am & 2:00 pm Central Time

Questions & Answers