CRM User Forum

April 17, 2019
Cornelia Ellis
John Kuehn
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 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.
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.
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

**Edit assign letters process**

- Name: L564 Payment Thank You Letter 500 an
- Description: Constituent Thank You Letter
- Site: Capitol Area Council
- Include: Assign selected letters
- Acknowledges: Include donor

**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>
- Acknowledge revenue with letter: L564 Payment Thank You Letter 500 and 
- Acknowledge: Selected revenue
- Selection: L564 Pledge Payments = or Greater than $500 (Ad-h)

*Prepared. For Life.*
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.
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 council's revenue default is Sponsorships 4201, because they have a sub-designations of 4202, 4204 and 4250 created for them.
Payment on Event Registration

<table>
<thead>
<tr>
<th>Registrant ID: evreg-10040484</th>
<th>Total registration fees: $460.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type: Preregistration</td>
<td>Total paid: $0.00</td>
</tr>
<tr>
<td>Status: Registered</td>
<td>Balance: $460.00</td>
</tr>
<tr>
<td>No. of guests: 7</td>
<td>Total receipt amount: $356.00</td>
</tr>
</tbody>
</table>

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

The batch lines above show 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 billed.

- 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 divide the amount between contributions and fees you split the designations using the sub-designation split on the batch revenue tab.

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

**Split designations**

- **Total amount:** $460.00
- **Unapplied amount:** $0.00

<table>
<thead>
<tr>
<th>Designation</th>
<th>Amount</th>
<th>Percent</th>
<th>Campaigns</th>
</tr>
</thead>
<tbody>
<tr>
<td>36800761-4202 Delahanna...</td>
<td>$356.00</td>
<td>77.39</td>
<td></td>
</tr>
<tr>
<td>36800761-4250 Delahanna...</td>
<td>$104.00</td>
<td>22.61</td>
<td></td>
</tr>
</tbody>
</table>
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
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.
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

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 needed. If not delete.
• Review queries that have inactive employees on them.
Council Fund Development

Council Fund Development is comprised of volunteers & staff with proven track records of raising operating, capital, and endowment council 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
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