

CRM User Forum

May 15, 2019

WELCOME

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Objectives

- Recurring Gifts and Allowances
- Blackbaud Merchant Services Deposit Frequency Change
- Calculating Allowances for Pledge Receivables
- Selecting the correct Credit Card Processing routine
- Using Reminders /Updating selections



Allowance for Uncollectable Pledges



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Allowance for Uncollectable Pledges

- Calculating the Allowance for Uncollectable Pledges are done by most councils at the end of the year.
- Booking the value can be done every month.
- Calculate the percentage of pledges that are not collectible. Use the Allowance and Provision accounts.
- Use the number that is in the Contributions Receivable – FOS CY account (1301) to do the calculation.



Allowance for Uncollectable Pledges

The entry will be:

- FOS - Debit 4069 and Credit 1371

Allowance for Uncollectable Accounts

- 1371 – FOS
- 1372 – Project Sales
- 1373 – Capital Campaign
- 1374 – Special Events
- 1377 – United Way DDesg
- 1378 – United Way Allocation



BLACKBAUD MERCHANT SERVICES



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Blackbaud Merchant Services Changes

- Frequency of Deposit
 - Current: Once Per Week
 - New: Daily
- Fees on Transactions
 - Current Fees: 2.598% + \$0.26 per credit card transaction
 - New fees: 2.798% + \$0.26 per credit card transaction
- Fraud Management
 - Current: Not turned on - you are not connected to online forms
 - Future: Turned on – limited derived benefit



Blackbaud Merchant Services Changes

- Blackbaud Mobile Pay
 - Current: You would need to pay for readers at \$29.95 per reader
 - Future: No Change – Free reader are give at the Blackbaud Payment Services account and not to each Blackbaud Merchant Service account. All BSA BBMS accounts are connected to one BBPS account.
- Credit Card Updater
 - Current: Already Active
 - Future: No Change



Blackbaud Merchant Services Home

i Your account is eligible for [daily disbursement of funds](#).

System messages 5 Chargebacks pending review 0 Suspec

5 System messages

5/7/2019 Update for Accounts Processing in Canadian Do

To read more about it and to upgrade, log into your BBMS account and look for the blue line that says your account is eligible and click the link. The box on the right will appear. You can click the upgrade now box to accept the new fees and change your deposit cycle.

12/19/2018 Disbursement Schedule - 2019 **i**

8/28/2018 Welcome to the Blackbaud Merchant Services Portal **i**

Upgrade to daily disbursements ✕

Receive disbursements every business day* **and** take advantage of these value-added services – all at one, low rate:

- Credit Card Updater**
- Premium Fraud Management
- Blackbaud MobilePay

2.798% + \$0.26 per credit card transaction

To upgrade, please confirm that you agree to the rate above, have reviewed the [Blackbaud Payment Services Terms and Conditions](#), and understand that Blackbaud will debit your bank account for the full amount of any negative or debit balances (including any chargebacks and reversals).

Yes, I agree and have reviewed the updated Terms and Conditions! *

*Excluding bank holidays.

**Credit Card Updater is available in Blackbaud Altru®, Blackbaud CRM™, Blackbaud Luminate Online®, and Blackbaud Raiser's Edge NXT®/Raiser's Edge®.

Upgrade now

Learn more



CREDIT CARD PROCESSING




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Credit Card Processing Business Process



- Found at Revenue/EFT/Credit Card Processing
- There are 269 Credit Card Processing business processes in CRM
- These business processes are not filtered by site
 - You can see each councils' processes
 - Each start with your council number proceeded by an L.
 - The description contains your council's name
- **When running the Credit Card Process, please ensure that you pick your council's process.**












Credit Card Processing Business Process



Credit Card Processing

Credit card processing (269)  Add  | More ▾

Name ▲	Description	Batch number
 L001 Credit Card Processing Process	L001 Greater Alabama Council	L0283758
 L003 Credit Card Processing Process	L003 Alabama-Florida Council	L0449736
 L004 Credit Card Processing Process	L004 Mobile Area Council	L0457189
 L005 Credit Card Processing Process	L005 Tukabatchee Area Council	L0121162
 L006 Credit Card Processing Process	L006 Black Warrior Council	L0455942
 L010 Credit Card Processing Process	L010 Grand Canyon Council	L0049531
 L011 Credit Card Processing Process	L011 Catalina Council	L0456768
 L013 Credit Card Processing Process	L013 De Soto Area Council	L0419697
 L016 Credit Card Processing Process	L016 Westark Area Council	L0456020



RECURRING GIFTS IN CRM



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Recurring Gifts in CRM

- Recurring gifts establish a process for the donor to make a repeat gift at regular intervals without an end date.
- Payment method is set up with a credit card
- System looks for recurring gifts with activity schedule due and created a new donation batch for processing at the correct time based on the recurring gift schedule
- When the batch is processed, they come into CRM as new contributions and cash.



Recurring Gifts in CRM

- New gift opportunity for donors
 - No total amount known
 - No end date for giving
 - Donor could stop gift at any time
- These are pledges
 - Pledges require total gift amount, indicated by donor
 - Defined payment schedule
 - End date



Recurring Gifts in CRM

- Place these in a separate multi-year appeal.
- Once recurrence is created, redact the donors credit card info from your paper files. You should not store a donors credit card for future use. This is not PCI compliant.
- Ensure that your recurring generate payment routine has been updated and placed on a job schedule to run daily after business hours
- Check the Generate Payment Routine to make sure it ran overnight
- The routine will create a batch for you to process when a recurrence has schedule activity on it.



REMINDERS



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Reminder Processes

- Determine your business cycle for running reminders
- If running reminders during the last week of the month, use the “Next Month Reminders” with the last day of the next month as the run date.
- If running reminders during the first week of the month, use the “Current month Reminders” using the last day of the month as the run date.
- If running “Overdue Reminders,” always use the last day of the last month for the run date.












Reminder Selections

- Reminders will not run without a selection
- Selections determine which pledges should be brought in for billing
- A bad selection can hold the que for others, while yours processes
- Occasionally selections need updating
 - Adding in new appeals that needs billed
 - Changing appeal report codes at year end to include next year
 - Making your reminders appeal specific.



Reminder Selections

- Go to Reminders
- Most council have 4 options to choice from for billing
- Use the ones that fit your reminder cycle
- Click edit to open the business process

 L104 Pledge Payment Overdue	Last month or older pledge reminders
 Start process  Set format options  Edit  Delete  Assign permissions	
 L104 Pledge Payment Reminder Current Month	Current Month Pledge Reminder
 L104 Pledge Payments Due Next Month	Next Month Pledge Reminders
 L104 Pledge Payments New This Month	Used to bill new pledges put in this mont...



Reminder Selections

- The Business Process opens
- The selection is in the middle and can be edited by clicking the pencil.

Edit reminder process

Name: L104 Pledge Payment Overdue
Description: Last month or older pledge reminders
Site: Aloha Council
Output grouping: Commitment
Letter template: L104 Reminders_ScoutNET_Like_Pledge_Overdue.docx
Label template: <File not specified>
Output type: Export definition
Export definition: Custom Pledge Reminder Fields

Criteria

Generate reminders for All pledges
 All recurring gifts
 Custom selection
Selection: L104 Pledge Payments Due Last

Exclusions

Results

These options may be modified at run time.
Calculate amounts as of: <Specific date> 3/31/2019
 Mark reminders sent when process completes
Sent date: Today
 Create selection from results
Selection type:
Selection name:
 Overwrite existing selection

Help Save Cancel



Reminder Selections

- A selection is just a query that needs to be updated.
- The one shown is secured to site 104 and is looking for pledges in 2019 appeals

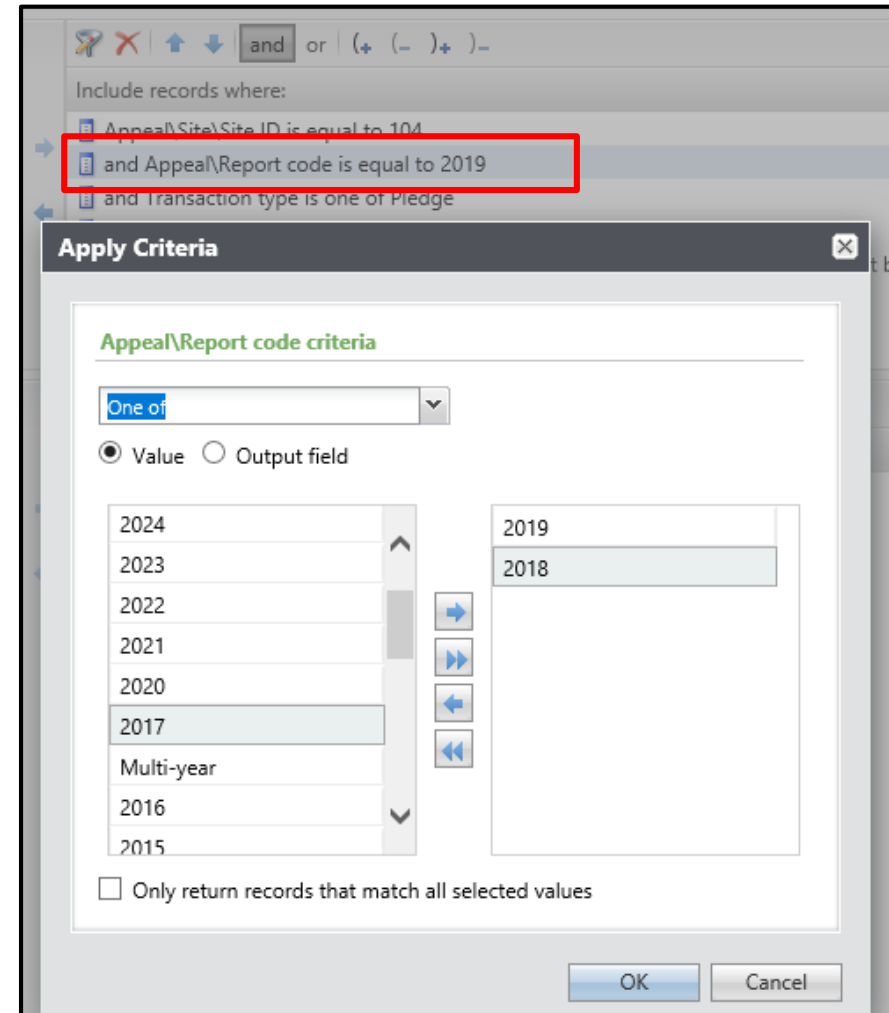
The screenshot displays a query builder interface with the following components:

- Find field:** A search bar with a red 'X' icon and a magnifying glass icon.
- Browse for fields in:** A tree view showing a hierarchy of categories. The 'Revenue' category is expanded, showing sub-items like Adjustment, Appeal, Application Details, Appraisals, Attachments, Attributes, Auction Item Donation, BSAFR, BSAFR Snapshot, Constituent, Credit Card Refund, Credit Card Updates, Direct Debit Account, Donor Challenge Matched Revenue, Donor Challenge Payments, Gift Fee Adjustments, Gift Status, Gift-in-Kind Sale, and GL Distribution.
- Select Revenue fields:** A list of fields under the heading 'Fields', including Account system, Amount, Batch description, Batch number, Benefits waived, Date, Designation list, Do not acknowledge, Do not receipt, Given anonymously, GL post date, GL post process, GL post status, Inbound channel, Installment frequency, Installments end date, and Installments start date.
- Include records where:** A list of filter conditions. The first three conditions are highlighted with a red box:
 - Appeal\Site\Site ID is equal to 104
 - and Appeal\Report code is equal to 2019
 - and Transaction type is one of PledgeOther conditions include:
 - and Pledge/Grant award balance is greater than 0
 - and Pledge/Grant award next installment date is on or before last month and is not blank
 - and BSA Structure Attribute\Value is not equal to Maui or is blank
- Results fields to display:** A list of fields to be shown in the results, including 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), and Pledge/Grant award balance (Balance).



Reminder Selections

- Add next year appeals by adding in the 2020 appeal report code
- Double click the report code line in the filter.
- Change it to **one of**
- Add the additional appeal years into the filter.
- Each council's selections may look different.



Next Forum

June 19, 2019

10:00 am & 2:00 pm CST



Questions & Answers



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