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
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
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
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.
CREDIT CARD PROCESSING
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

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Batch number</th>
</tr>
</thead>
<tbody>
<tr>
<td>L001 Credit Card Processing Process</td>
<td>L001 Greater Alabama Council</td>
<td>L0283758</td>
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<tr>
<td>L003 Credit Card Processing Process</td>
<td>L003 Alabama-Florida Council</td>
<td>L0449736</td>
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<td>L004 Credit Card Processing Process</td>
<td>L004 Mobile Area Council</td>
<td>L0457189</td>
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<td>L005 Tukabatchee Area Council</td>
<td>L0121162</td>
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<td>L006 Black Warrior Council</td>
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<td>L010 Credit Card Processing Process</td>
<td>L010 Grand Canyon Council</td>
<td>L0049531</td>
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<td>L011 Catalina Council</td>
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<td>L013 De Soto Area Council</td>
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<tr>
<td>L016 Credit Card Processing Process</td>
<td>L016 Westark Area Council</td>
<td>L0456020</td>
</tr>
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</table>
RECURRING GIFTS IN CRM
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
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 queue for others, while yours processes
• Occasionally selections need updating
  – Adding in new appeals that need 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
Reminder Selections

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

[Diagram showing a query interface with filters selected for specific criteria related to site ID, report code, transaction type, and balance conditions.]

Prepared. For Life.
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