

CRM User Forum

August 22, 2019



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WELCOME

John Kuehn
Don Day



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Objectives

- Review Recent Changes to Appeal Reports
- Review Scouting Gives batches
- Understanding Wealth & Ratings
- Review Future year activities.
 - Creating appeals
 - Creating special events
 - Correct inbound channel usage
 - Mapping special events for 2020



Changes to Appeals Reports

- BSA Appeal Progress Export (OLTP)
- BSA Appeal Progress Report (OLTP)
- BSA Appeal Constituent Export (OLTP)
- BSA Appeal Constituent Report (OLTP)



Changes to Appeals Reports

- The ability to select multiple appeals instead of just one
- Annual and multi-year appeals may be selected
- For annual appeals, the desired report code (year) can be selected
- All checkbox options are now off by default and there is an “All” checkbox that can be used to toggle all Include/Breakdown options on/off



Changes to Appeals Reports

- The filter fields for BSA Structure, Giving Category and Solicitor now accept wildcards (BSA Appeal Constituent Export/Report only)

Symbol	Description	Example
%	Represents zero or more characters	bl% finds bl, black, blue, and blob
_	Represents a single character	h_t finds hot, hat, and hit
[]	Represents any single character within the brackets	h[oa]t finds hot and hat, but not hit
^	Represents any character not in the brackets	h[^oa]t finds hit, but not hot and hat
-	Represents a range of characters	c[a-b]t finds cat and cbt

- If the report generates no data (e.g., when it is run for an appeal that does not yet have any revenue), the selected appeal is still displayed in the report header (previously it would not appear)



Scouting Gives

- Note – if a donor has agreed to pay the fees, this is still part of his/her donation



Wealth & Ratings in CRM



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Wealth and Ratings

- Screening
- Verification of returned data
- Biographical Information Verification
- Experian Data
 - Ignore verses Save
 - Ignore will confirm the data returned



Experian Data

- Be sure to ignore the data as accepting will change data.
 - Clifford would change to Cliff
- It will create a fuzzy birthdate changing the real birth date
 - 12/06/1966 will change to 12/1966
 - This will remove the birth date from the Akela/ScoutNet record



Accessing Wealth and Ratings

Tasks

Add payment

Add pledge

Add recurring gift

Add membership

Add John Boy D. Kuehn to a group or household

Edit lookup ID

Edit link to user

Remove spouse

Add FOS pledge card constituent appeal

Write a letter

Delete John Boy D. Kuehn

Renew volunteer constituency

Schedule volunteer

View volunteer schedule

View as

Application user

More information

Wealth and ratings

Web dashboard pages

Reports

Pledge card

Shortcuts

Add this page to shortcuts

Manage my shortcuts

John Boy D. Kuehn

Lookup ID: 8-13684237

Notifications: "Recent Address Change". Click here for more information.

Individual

Constituencies: Committee member Fundraiser Loyal donor Giving Prospect Event registrant

Personal Information

Contact Information

Addresses

John Boy D Kuehn

Nickname: Kuehn

Maiden:

Primary phone

+001 (214) 738-6025 (Mobile)

Primary email

john.kuehn@scouting.org (Home Email)

4112 Twin Creeks Drive

Keller, TX 76244

Home (Current)

Show less

Personal Info

Revenue

Security

Contact

Memberships

Attributes

Relationships

Documentation and Interactions

Personal

Constituencies

Expand all

Collapse all

Personal information

Edit

Mark deceased

Mark inactive

First name: John Boy

Middle name: D

Last name: Kuehn

Title:

Suffix:

Nickname:

Marital status: Married

Birth date: 12/6/1966

Age: 52

Title 2:

Suffix 2:

Gender: Male

Maiden name:

Gives anonymously:

Website:

John Boy D. Kuehn

4112 Twin Creeks Drive

Keller, TX 76244

+001 (214) 738-6025

john.kuehn@scouting.org

Spouse: Kimberly Kuehn

Household: John Boy Kuehn and Kimberly Kuehn

Primary business: National Council

View as

Constituent

Giving Prospect

Fundraiser

Volunteer

Committee member

Event registrant

Application user

More information

Revenue and recognition

Communications

Interactions

Surveys

Documentation summary

Web dashboard pages

John Boy D. Kuehn - Wealth and Ratings

Link Tank

Notifications: "Recent Address Change". Click here for more information.

Wealth Summary

Model Scores

Assets

Giving

Affiliations

Biographical Information

Social Summary

Wealth summary (Screened: 8/22/2019)

Get WealthPoint screening

Disable WealthPoint

View Data Refreshed

Assets

Real estate:

Businesses:

Securities:

Income/compensation:

Other assets:

Total assets:

Giving capacity (System)

Confirm and lock

Edit

Capacity formula:

Major giving capacity basis:

Estimated wealth:

Major giving capacity:

Overall rating:

Research details

Edit

Flag prospect

Research status:

Prospect manager:

Lists associated to:

Research summary

Total Identified	Confirmed
\$266,293	\$266,293
\$266,293	\$266,293
5% of confirmed assets	
Assets	
\$100,001 - \$250,000 (\$133,146)	
\$5,001 - \$10,000 (\$6,657)	
Not confirmed	
<unassigned>	
BSAF Central Wyoming Council	
\$1,500+ for WealthPoint Screen	
L638 Prospect List	

Constituent View

Wealth and Ratings View



Validation of Returned Data

John Boy D. Kuehn - Wealth and Ratings [Link Tank](#)

Notifications: "Recent Address Change". [Click here for more information.](#)

[Wealth Summary](#) [Model Scores](#) [Assets](#) [Giving](#) [Affiliations](#) **[Biographical Information](#)** [Social Summary](#)

Biographical data (1) [+ Add](#) [Filters](#) [More](#)

<input type="checkbox"/>	Name	Birth date	Source	Confidence
<input checked="" type="checkbox"/>	JOHN D KUEHN	12/1966	Experian	4

☒ Confirm ☐ Reject [Clear status](#) [Edit](#) [Delete](#)

Prospect demographics

Name: JOHN D KUEHN
Birth date: 12/1966 Age: 52
Marital status: Married
Occupation: Unknown

Household Mosaic: *These models are available through our Professional subscriptions*

Household income:
Discretionary spending:

Household members

Name	Birth date	Marital status	Occupation
KIMBERLY A KUEHN	5/1969 Age: 50	Married	Unknown

Source: Experian
Match code: P04 - Last Name, Primary Address, First/Middle Combination
Notes:

John Boy D. Kuehn - Wealth and Ratings [Link Tank](#)

Notifications: "Recent Address Change". [Click here for more information.](#)

[Wealth Summary](#) [Model Scores](#) [Assets](#) [Giving](#) [Affiliations](#) **[Biographical Information](#)** [Social Summary](#)

Biographical data (1) [+ Add](#) [Filters](#) [More](#)

<input type="checkbox"/>	Name	Birth date	Source	Confidence
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☒ Confirm ☐ Reject [Clear status](#) [Edit](#) [Delete](#)

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Household Mosaic: *These models are available through our Professional subscriptions*

Household income:
Discretionary spending:

Household members

Name	Birth date	Marital status	Occupation
KIMBERLY A KUEHN	5/1969 Age: 50	Married	Unknown

Source: Experian
Match code: P04 - Last Name, Primary Address, First/Middle Combination
Notes:

Update John Boy D. Kuehn's record

Do you want to update any of the following fields to the prospect record?

☐ First name: Update **John Boy** to be **JOHN**

☐ Birth date: Update **12/6/1966** to be **12/1966**

[Help](#) [Save](#) [Ignore](#)



Thinking ahead to Next Year



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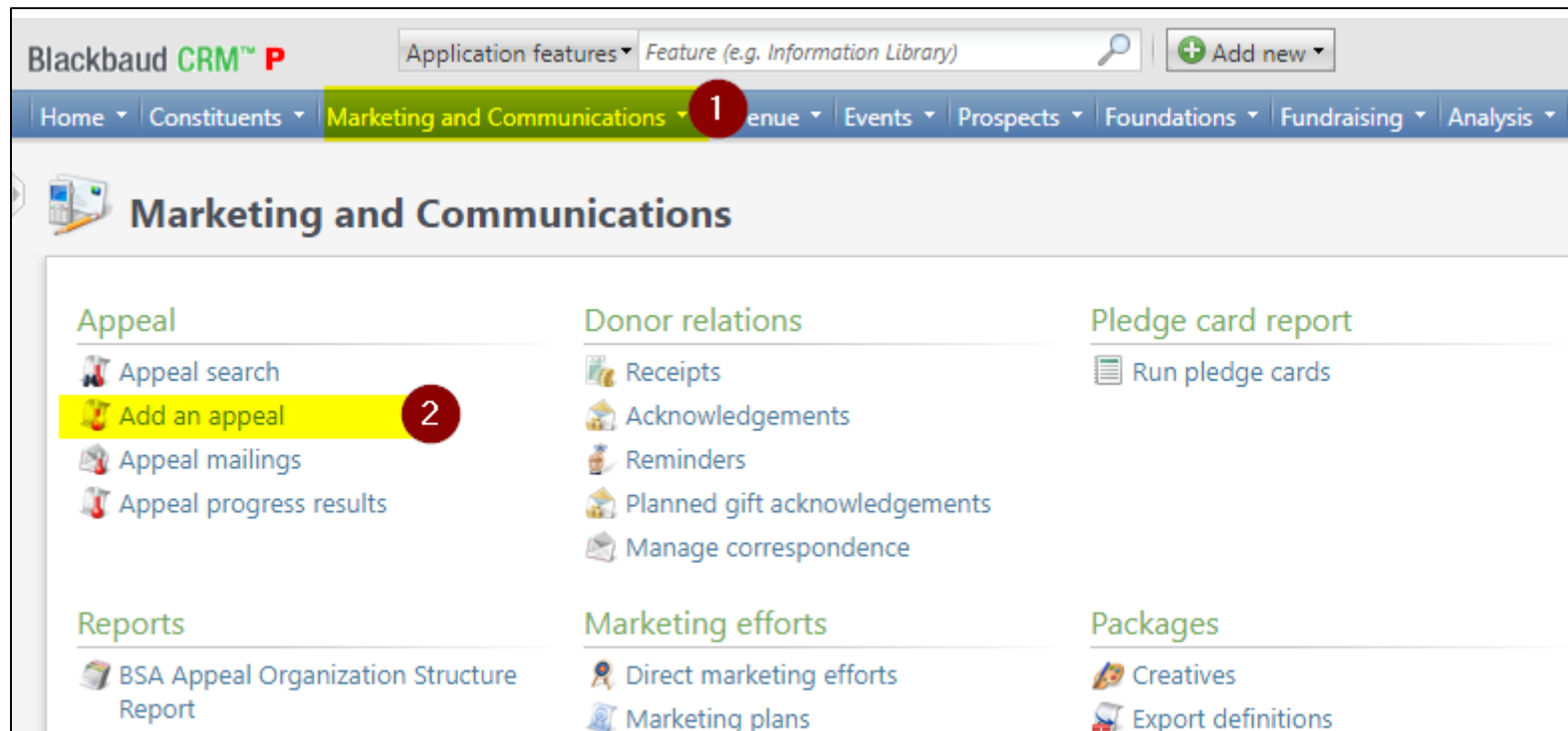
Next Year Setup

- Creating appeals
- Creating special events
- Correct inbound channel usage
- Mapping special events for 2020



Creating An Appeal

- Marketing and Communications – Add an Appeal



Add an Appeal

Blackbaud CRM™ P Application features ▾ Feature (e.g. Information Library) 🔍 + Add new ▾

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Prospects ▾ Foundations ▾ Fundraising ▾ Analysis ▾

Marketing and Communications

Appeal

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

Reports

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

Acquisition and segmentation

- Acquisition lists
- Segments
- White mail segments
- Selections

Add an appeal

Name: Nation's Best Fundraising Appeal 1

Description: provide description 2

Split evenly Split fully

Category: Other Support 3

Report code: 2020 4

Site: 5

Start date: 1/1/2020 6

End date: 12/31/2020

Goal: \$100,000.00 7

? Help Save Cancel

Name format options



Assign Designation & Prior Appeal (if one)

Blackbaud CRM™ T Application features ▾ Feature (e.g. Information Library) 🔍 + Add new ▾ Wel

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Prospects ▾ Foundations ▾ Fundraising ▾ Analysis ▾ Administration ▾

🔔 Appeal: Nation's Best Fundraising Appeal

Description: We raise more \$\$ than anyone else Start date: 1/1/2020
Business unit: End date: 12/31/2020
Category: Other Support Goal: \$100,000.00
Report code: 2020 Status: Active
Site: Black Warrior Council Membership:

1 2

Revenue Summary Contributions Payments Balances Revenue Details (Splits) Matching Gift Claims Designations Mailings Documentation Mismatch: Appeals? Solicitor Credits by Group Prior Appeal

Contributions - posted 8/21/2019 📄 More ▾

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
---------------------	--------------------	----------------------	---------------------	-----------------------

Payments Received - posted 8/21/2019 📄 More ▾

Payments Received	# of Payments	Average Payment	Most Recent Payment	Mismatch: Appeal?	Mismatch: Inbound Channel?
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Write-offs - will not post (manual PeopleSoft journal entry required) 📄 More ▾

Loading...

Outstanding Balances - through 8/21/2019 📄 More ▾

Total Balances	# Pledges with Balance	Average Balance	Final Installment Due	Mismatch: Appeal?
----------------	------------------------	-----------------	-----------------------	-------------------






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Future Year - Next Year's Gifts






- ◎ Create next years Appeal
 - ◎ Name, Category, Code, Year, etc
- Use Future Year Inbound Channels
 - Accountant / Controller and office procedure helps determine transition during first week of Jan of what is current, future or prior year.













Shortcuts

 Add this page to shortcuts Manage my shortcuts Query

Recent searches

 Transaction search Designation search Appeal search Batch search Package search

Recently accessed



 8/3/2015 Payment: \$13.44
- Give With Liberty netbsa\mrussell -
Application User 5/18/2015 Payment: \$5.00
- John D. Kuehn John D. Kuehn John D. Kuehn - Giving
Prospect Elmer Williams John Kuehne John D. Kuehn Test item L307 MOS Dinner and
Auction

Revenue

More tasks

 Constituents with Overdue Pledge
Installment(s)


Reports

 Pledge Receivable Aging Report Account distribution Adjusted revenue Giving activity Giving detail Giving detail group/household Lockbox reconciliation Giving dynamics Matching gift claim summary Pledge receivables report Projected income Recognition credits Reconcile deposits Recurring gift missed payments Revenue annual statement Revenue by payment method Revenue recognition credits





Processing

 Post revenue to GL Global pledge write-off EFT Generate revenue update batch

Manage matching gifts



 Reconcile matching gifts Search MatchFinder Online Generate MatchFinder updates Clear matching gift claims

Transactions

 Transaction search Batch entry Batch search Add a pledge Add a payment Add a recurring gift Enter membership dues Add a membership

Proceed to Batch Entry to add your future year gifts. The appeal and or event needs to be created before this process starts.

Configuration

 Blackbaud Payment Service merchant
accounts Default gift fees Gift-in-kind appraisal settings Lockboxes MatchFinder Online integration

Tasks

- Configure email alerts
- Batch search
- Generate revenue update batch
- Generate step update batch

Configuration

- Batch numbering schemes
- Batch workflows
- Batch templates
 - Revenue batch constituent security

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query

Recent searches

- Transaction search
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- Appeal search
- Batch search
- Package search

Recently accessed

- 8/3/2015 Payment: \$13.44 - Give With Liberty
- netbsa\mrussell - Application User



Batch Entry

Uncommitted Batches

Committed Batches

Uncommitted batches (1)

Date range: Batch template: Category:
Owner: Sites: ☐ Show only batches with exceptions

Batch number	Batch template	Description	Owner	Status	Date added	Category	Site
John Kuehn							
2	Patch Funding Constituent		John Kuehn	1. Data Entry	10/22/2014	Constituent	Utah Natio...
L0018784	LC Cash/Check Payment Donation		John Kuehn	1. Data Entry	6/3/2015	Revenue	BSA Local...
L0019322	LC Cash/Check Payment Donation		John Kuehn	2			
A0001807	LC Revenue Update Batch		John Kuehn	1			
A0001822	LC Revenue Update Batch		John Kuehn	1			
L0019798	LC Pledge Commitment		John Kuehn	1			
L0021605	LC Pledge Commitment		John Kuehn	1			
L0022958	LC Pledge Commitment		John Kuehn	1			
L0023072	LC Cash/Check Payment Donation		John Kuehn	1			
L0023084	LC Cash/Check Payment Donation		John Kuehn	1. Data Entry	8/14/2015	Revenue	BSA Local...
A0002564	LC Revenue Update Batch		John Kuehn	1. Data Entry	9/11/2015	Revenue	BSA Local...
A0002565	LC Revenue Update Batch		John Kuehn	1. Data Entry	9/11/2015	Revenue	BSA Local...
A0002697	LC Revenue Update Batch		John Kuehn	1. Data Entry	9/25/2015	Revenue	BSA Local...
L0025200	LC Cash/Check Payment Donation		John Kuehn	1. Data Entry	10/6/2015	Revenue	BSA Local...
L0025201	LC Cash/Check Payment Donation		John Kuehn	1. Data Entry	10/7/2015	Revenue	BSA Local...
A0000017	Auction Item Batch		John Kuehn	Open	10/9/2015	Auction	All sites
L0025204	LC Pledge Payment Credit Card		John Kuehn	1. Data Entry	10/13/2015	Revenue	BSA Local...

Click "add" to create a batch. I am going to use an existing template and add a future year pledge.



Pledge

Fill in your batch row. I am entering a new pledge of \$100 with 4 installments starting on 11/11/2015. I attach it to a 2016 appeal and pick the FY-Friends of Scouting, Inbound Channel. The revenue category can be changed to Temp Restricted. The inbound channel chosen will default the GL string to it if you don't pick it. For this demo I will not change it to Temp Restricted

Batch L0021605

Main Revenue

Batch: Save, Save and close, Export

Constituent: Edit, Go to

Configuration: Properties, Customize fields

Processes: Validate, Update status, Update projected totals

Messages: Set row message, Clear row message, Clear all, Show all, Select previous, Select next, Filter...

Properties

	Constituent	Amount	Date	GL post date	Reven...	Pledge subtype	Installme...	No....	Insta...	Send rem...	Application
1	John D. Kuehn	\$100.00	10/14/2015	10/14/2015	Pledge	Pledge Receivable	Monthly	4	11/11/...	<input checked="" type="checkbox"/>	
*										<input type="checkbox"/>	

Batch L0021605

Main Revenue

Batch: Save, Save and close, Export

Constituent: Edit, Go to

Configuration: Properties, Customize fields

Processes: Validate, Update status, Update projected totals

Messages: Set row message, Clear row message, Clear all, Show all, Select previous, Select next, Filter...

Properties

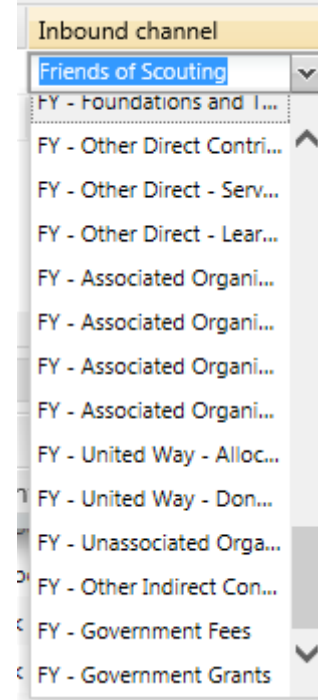
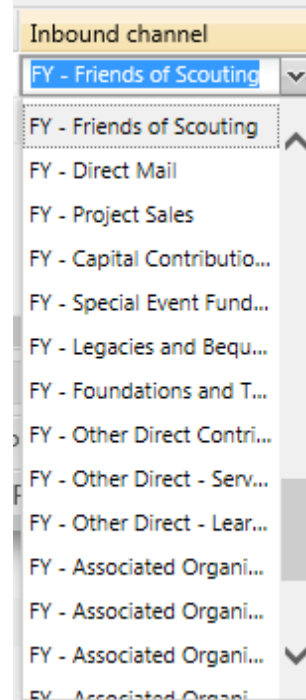
Send rem...	Application	Appeal	Designation	Inbound channel	Revenue category	Giving Category	BSA Structure
<input checked="" type="checkbox"/>		(662) S16 Friends of Sco...	66200511 FRIENDS OF S...	FY - Friends of Scouting	Unrestricted by donor	Family	Mustang
<input type="checkbox"/>							



Prepare

Inbound Channels

These are your Future Year Inbound Channels. They mirror the same inbound channels you use most of the year. Pick accordingly to the type of revenue you are putting into the system.



Reports

View control report

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query

Recent searches

- Transaction search
- Designation search
- Appeal search
- Batch search
- Package search

Recently accessed

- 8/3/2015 Payment: \$13.44 - Give With Liberty
- netbsa\mrussell - Application User
- 5/18/2015 Payment: \$5.00 - John D. Kuehn
- John D. Kuehn
- John D. Kuehn - Giving Prospect
- Elmer Williams
- John Kuehne
- John D. Kuehn
- Test item
- L307 MOS Dinner and Auction

 Batch entry
Batch L0021605

Batch commit process parameters

Batch number: L0021605
Validate batch before committing: Yes
Check for duplicate constituents: Yes
Delete batch after committing: No
Create exception batch: Yes
Exception batch number: L0021605x1
Create control report: Yes
Create output selection: No
Output selection name:
Overwrite existing selection: No

Batch commit status

Status: Completed
Status message: Completed
Started by: netbsa\jkuehn Server name: D2SBBISEC10AV
Started: 10/14/2015 2:02:14 PM Total records processed: 1
Ended: 10/14/2015 2:02:35 PM Number of exceptions: 0
Duration: 21 seconds Records successfully processed: 1

I validated my pledge and committed the batch. I will now proceed to the gift record so we can review the gift and the GL created along with the installments created.



Tasks

- Add payment
- Edit pledge
- Edit original amount
- Write-off
- Change constituent on pledge
- Edit revenue ID
- Delete pledge

More information

- History
- Revenue and recognition

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query

Recent searches

- Transaction search
- Designation search
- Appeal search
- Batch search
- Package search

Recently accessed

- 10/14/2015 Pledge: \$100.00 - John D. Kuehn
- John D. Kuehn
- 8/3/2015 Payment: \$13.44 - Give With Liberty
- netbsa\mrussell - Application User

John D. Kuehn
10/14/2015 Pledge: \$100.00

Transaction summary

Pledge amount: \$100.00

Date: 10/14/2015

Batch number: L0021605

Revenue ID: rev-14692201

Summary

Balance: \$100.00

Total paid: \$0.00

Past due: \$0.00

Status

Acknowledgements: Not acknowledged

Post status: Not posted

Post date: 10/14/2015

Post process ID:

The pledge has the Inbound Channel of FY – Friends of Scouting and the correct appeal on the record.

Details | Installment/Write-off Activity | Benefits | Recognition | Solicitors | Letters | Attributes | Documentation | GL Distributions | Tributes | Campaigns | Business

Details

Original amount: \$100.00

Send reminders: Yes

Subtype: Pledge Receivable

Revenue reference:

Source code:

Effort:

Inbound channel: FY - Friends of Scouting

Appeal: (662) S16 Friends of Scouting

Designations (1) | More

Designation	Amount	Balance	Category
66200511 FRIENDS OF SCOUTIN -...	\$100.00	\$100.00	Unrestricted by donor

Payment information

Automatic payment: Not set up for automatic payment





Tasks

- Add payment
- Edit pledge
- Edit original amount
- Write-off
- Change constituent on pledge
- Edit revenue ID
- Delete pledge

More information

- History
- Revenue and recognition

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query

Recent searches

- Transaction search
- Designation search
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- Batch search
- Package search

Recently accessed

- 10/14/2015 Pledge: \$100.00 - John D. Kuehn
- John D. Kuehn
- 8/3/2015 Payment: \$13.44 - Give With Liberty
- netbsa\mrussell - Application User



John D. Kuehn

10/14/2015 Pledge: \$100.00

Transaction summary

Pledge amount: \$100.00

Date: 10/14/2015

Batch number: L0021605

Revenue ID: rev-14692201

Summary

Balance: \$100.00

Total paid: \$0.00

Past due: \$0.00

Status

Acknowledgements: Not acknowledged

Post status: Not posted

Post date: 10/14/2015

Post process ID:

- Details
- Installment/Write-off Activity
- Benefits
- Recognition
- Solicitors
- Letters
- Attributes

Transaction history by post date

All dates

10/14/2015
Pledge

GL distributions (5)



More

View: All



Apply



Reset

Account

Description

Pledge

Edit

→ L662-1-4001-051-91

L662-1-FOSF-FRCY-L66200511-UNR. PLEDGE-C...

\$50.00 Kuehn-Pledge

→ L662-1-4001-051-91

L662-1-FOSF-FRCY-L66200511-UNR. PLEDGE-C...

\$50.00 Kuehn-Pledge

→ L662-1-1331-051-00

L662-1-FOSF-PLCY-L66200511-UNR. PLEDGE-R...

\$50.00

Kuehn-Pledge

→ L662-1-1331-051-00

L662-1-FOSF-PLCY-L66200511-UNR. PLEDGE-R...

\$50.00

Kuehn-Pledge

When we look at the GL distribution the pledge went to account 1331 (FY – receivable). Account 4001 which is the contribution account was also touched but this has a 91 on it. By selecting FY Friends of Scouting it change the 90 to a 91 making the gift Temp Restricted (Default). This process builds your reclass for next year's contributions. The system did create 2 entry's for my \$100 Gift. \$50 is due in 2015 and \$50 is due in 2016.



- Tasks**
- Add payment
 - Edit pledge
 - Edit original amount
 - Write-off
 - Change constituent on pledge
 - Edit revenue ID
 - Delete pledge
- More information**
- History
 - Revenue and recognition

- Shortcuts**
- Add this page to shortcuts
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- Recent searches**
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 - Package search

- Recently accessed**
- 10/14/2015 Pledge: \$100.00 - John D. Kuehn
 - John D. Kuehn
 - 8/3/2015 Payment: \$13.44 - Give With Liberty
 - netbsa\mrussell - Application User
 - 5/18/2015 Payment: \$5.00 - John D. Kuehn

John D. Kuehn
10/14/2015 Pledge: \$100.00

Transaction summary

Pledge amount: \$100.00	Date: 10/14/2015
	Batch number: L0021605
	Revenue ID: rev-14692201

Summary	Status
Balance: \$100.00	Acknowledgements: Not acknowledged
Total paid: \$0.00	Post status: Not posted
Past due: \$0.00	Post date: 10/14/2015
	Post process ID:

When we look at the installments there are 4. 2 in 2015 and 2 in 2016. This is why the GL created two \$50 entries.

Details **Installment/Write-off Activity** Benefits Recognition Solicitors Letters Attributes Documentation GL Distributions Tributes Campaigns Business

Installment activity (4) Reschedule installments Filters More

Activity	Date	Amount	Receipt amount	Paid by
Installment 1	11/11/2015	\$25.00	\$25.00	
Installment 2	12/11/2015	\$25.00	\$25.00	
Installment 3	1/11/2016	\$25.00	\$25.00	
Installment 4	2/11/2016	\$25.00	\$25.00	

Write-offs (0) Add More

Date	Amount	GL post status	GL post date	Reason details	Reason code	Reason description
------	--------	----------------	--------------	----------------	-------------	--------------------



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https://4096bbaecsto.blackbaudhosting.com/4096STG_d45267ac-0251-4be9-b4cb-f45b4b27...

Future Year Payment

Selected a pledge payment batch. Set the Inbound Channel to future year.

Batch L0023072

Main Revenue

Batch: Save, Save and close, Export

Constituent: Edit, Go to

Configuration: Properties, Customize fields

Processes: Validate, Update projected totals, Update status

Messages: Set row message, Clear row message, Clear all, Show all

Properties

	F...	Constituent	Lookup ID	Amount	Receipt a...	Date	GL post d...	Revenue type	Application	P...	O...	C...
1		John D. Kuehn	8-117748...	\$25.00	\$25.00	11/24/2015	11/24/2015	Payment	Pledge for John D. Kueh...	C...		
*												

Batch L0023072

Main Revenue

Batch: Save, Save and close, Export

Constituent: Edit, Go to

Configuration: Properties, Customize fields

Processes: Validate, Update projected totals, Update status

Messages: Set row message, Clear row message, Clear all, Show all, Select previous, Select next, Filter...

Properties

C...	Appeal	Designation	Inbound channel	Revenue category	Giving Category	BSA Structure	Given anonymously	Reference
(662)	S16 Friends of Sco...	66200511 FRIENDS OF S...	FY - Friends of Scouting	Unrestricted by donor			<input type="checkbox"/>	
							<input type="checkbox"/>	



Prepare



Tasks

- Edit payment
- Edit original amount
- Change constituent on payment
- Edit revenue ID
- Delete payment
- Change receipt preference

More information

- History
- Revenue and recognition

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query

Recent searches

- Transaction search
- Designation search
- Appeal search
- Batch search
- Package search

Recently accessed

- 11/24/2015 Payment: \$25.00 - John D. Kuehn
- John D. Kuehn
- 10/14/2015 Pledge: \$100.00 - John D. Kuehn
- 8/3/2015 Payment: \$13.44 - Give With Liberty



John D. Kuehn

11/24/2015 Payment: \$25.00

Transaction summary

Payment amount: \$25.00 Date: 11/24/2015
Receipt amount: \$25.00 Batch number: L0023072
Revenue ID: rev-14692202

Status

Acknowledgements: Not acknowledged
Receipt preference: Per payment
Receipt status: Not receipted

Receipt date:

Receipt number:

Post status: Not posted

Post date: 11/24/2015

Post process ID:

Payment method

Payment method: Check
Check number:
Check date:

I validated and committed the batch. Next I will proceed to the revenue record. I see FY – Friends of Scouting on the record.

Details Benefits Matching Gifts Letters Attributes Documentation GL Distributions Tributes Lockbox

Details

Original amount: \$25.00 Effort:
Finder number: Appeal: (662) S16 Friends of Scouting
Source code:
Inbound channel: **FY - Friends of Scouting**
Revenue reference:

Application details

Pledge - \$25.00 Go to revenue Edit

Applied to: 10/14/2015 Pledge for John D. Kuehn



Tasks

- Edit payment
- Edit original amount
- Change constituent on payment
- Edit revenue ID
- Delete payment
- Change receipt preference

More information

- History
- Revenue and recognition

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query

Recent searches

- Transaction search
- Designation search
- Appeal search
- Batch search
- Package search

Recently accessed

- 11/24/2015 Payment: \$25.00 - John D. Kuehn
- BLACKBAUDHOST\jkuehn4096 - Application User
- BLACKBAUDHOST\rkresge4096STG - Application User

John D. Kuehn
11/24/2015 Payment: \$25.00

Transaction summary

Payment amount: \$25.00 Date: 11/24/2015
Receipt amount: \$25.00 Batch number: L0023072
Revenue ID: rev-14692202

Status
Acknowledgements: Not acknowledged
Receipt preference: Per payment
Receipt status: Not receipted
Receipt date:
Receipt number:
Post status: Not posted
Post date: 11/24/2015
Post process ID:

Payment method
Payment method: Check
Check number:
Check date:



The cash account has been debited and the future year receivables have been relieved.


- Details
- Benefits
- Matching Gifts
- Letters
- Attributes
- Documentation
- GL Distributions
- Tributes
- Lockbox

Transaction history by post date Account system: Local Council

- All dates
- 11/24/2015 Payment

GL distributions (3) Filters More

View:  Apply  Reset

Account ▾	Description	Debit amount	Credit amount	Reference
▲ Pledge  Edit				
➔ L662-1-1331-051-00	L662-1-FOSF-PAPL-L66200511-UNR. PAYMENT-...		\$25.00	Kuehn-Pledge Payment for t
➔ L662-1-1001-015-00	L662-1-FOSF-CASH-L66200511-UNR. PAYMENT...	\$25.00		Kuehn-Pledge Payment for t



Prior Year Payments

- Payment made next year on this year's pledges.
- Occurs on payments that are postmark after January 1.



Prior Year Payment

Here is a sample payment paying off a pledge in 2019. I selected the inbound channel of PY- Friends of Scouting.

Batch L0025205

Main Revenue

Batch: Save, Save and close, Export

Constituent: Edit, Go to

Configuration: Properties, Customize fields

Processes: Validate, Update projected totals, Update status

Messages: Set row message, Clear row message, Clear all, Show all, Select next, Filter...

Properties

	Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type	
1	John D. Kuehn	8-11774808	\$173.50	\$173.50	10/14/2015	10/14/2015	Payment	PI

Batch L0025205

Main Revenue

Batch: Save, Save and close, Export

Constituent: Edit, Go to

Configuration: Properties, Customize fields

Processes: Validate, Update projected totals, Update status

Messages: Set row message, Clear row message, Clear all, Show all, Select previous, Select next, Filter...

Properties

Amount	Date	GL post date	Revenue type	Application	Payment method	Check number	Inbound channel
\$173.50	10/14/2015	10/14/2015	Payment	Pledge for John D. Kueh...	Check	5656	PY - Friends of Scouting



Prepare

Prior Year Inbound Channels

These are your inbound channel choices for prior year payments.

Inbound channel

PY - Friends of Scouting

PY - Friends of Scouting

PY - Direct Mail

PY - Project Sales

PY - Capital Contributio...

PY - Special Event Fund...

PY - Legacies and Bequ...

PY - Foundations and T...

PY - Other Direct Contr...

PY - Other Direct - Serv...

PY - Other Direct - Lear...

PY - Associated Organi...

PY - Associated Organi...

PY - Associated Organi...

PY - Associated Organi...

PY - Associated Organi...

Inbound channel

PY - Friends of Scouting

PY - Other Direct Contr...

PY - Other Direct - Serv...

PY - Other Direct - Lear...

PY - Associated Organi...

PY - Associated Organi...

PY - Associated Organi...

PY - Associated Organi...

PY - United Way - Alloc...

PY - United Way - Don...

PY - Unassociated Orga...

PY - Other Indirect Con...

PY - Government Fees

PY - Government Grants

PY - Friends of Scouting





Reports

[View control report](#)

Shortcuts

- [Add this page to shortcuts](#)
- [Manage my shortcuts](#)
- [Query](#)

Recent searches

- [Transaction search](#)
- [Designation search](#)
- [Appeal search](#)
- [Batch search](#)
- [Package search](#)

Recently accessed

- [11/24/2015 Payment: \\$25.00 - John D. Kuehn](#)
- [John D. Kuehn](#)
- [10/14/2015 Pledge: \\$100.00 - John D. Kuehn](#)
- [8/3/2015 Payment: \\$13.44 - Give With Liberty](#)
- [netbsa\mrussell - Application User](#)
- [5/18/2015 Payment: \\$5.00 - John D. Kuehn](#)
- [John D. Kuehn - Giving Prospect](#)
- [Elmer Williams](#)
- [John Kuehne](#)
- [John D. Kuehn](#)



Batch entry

Batch L0025205

Batch commit process parameters

Batch number: L0025205
Validate batch before committing: Yes
Check for duplicate constituents: Yes
Delete batch after committing: No
Create exception batch: Yes
Exception batch number: L0025205x1
Create control report: Yes
Create output selection: No
Output selection name:
Overwrite existing selection: No

Batch commit status

Status: ✔ Completed
Status message: Completed
Started by: netbsa\jkuehn Server name: D2SBBISEC10AV
Started: 10/14/2015 2:31:33 PM Total records processed: 1
Ended: 10/14/2015 2:31:37 PM Number of exceptions: 0
Duration: 4 seconds Records successfully processed: 1

I committed my batch
and will now take a look
at the revenue record.



Tasks

- Edit payment
- Edit original amount
- Change constituent on payment
- Edit revenue ID
- Delete payment
- Change receipt preference

More information

- History
- Revenue and recognition

Shortcuts

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- Transaction search
- Designation search
- Appeal search
- Batch search
- Package search

Recently accessed

- 10/14/2015 Payment: \$173.50 - John D. Kuehn
- John D. Kuehn
- 11/24/2015 Payment: \$25.00 - John D. Kuehn
- 10/14/2015 Pledge: \$100.00 - John D. Kuehn
- 8/3/2015 Payment: \$13.44



John D. Kuehn

10/14/2015 Payment: \$173.50

Transaction summary

Payment amount: \$173.50 Date: 10/14/2015
Receipt amount: \$173.50 Batch number: L0025205
Revenue ID: rev-14692203

Status

Acknowledgements: Not acknowledged

Receipt preference: Per payment

Receipt status: Not receipted

Receipt date:

Receipt number:

Post status: Not posted

Post date: 10/14/2015

Post process ID:

Payment method

Payment method: Check

Check number: 5656

Check date:

The record has PY – Friends of Scouting on the record.
We will now review the GL.

Details | Benefits | Matching Gifts | Letters | Attributes | Documentation | GL Distributions | Tributes | Lockbox

Details

Original amount: \$173.50 Effort:
Finder number: Appeal: (662) S14 - 2014 Friends of Scouting
Source code:
Inbound channel: PY - Friends of Scouting
Revenue reference:

Application details

Pledge - \$173.50

Go to revenue Edit

Applied to: 4/3/2014 Pledge for John D. Kuehn

Designation: 6620511 FRIENDS OF SCOUTING - Contribution



Tasks

- Edit payment
- Edit original amount
- Change constituent on payment
- Edit revenue ID
- Delete payment
- Change receipt preference

More information

- History
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- 10/14/2015 Payment: \$173.50 - John D. Kuehn
- John D. Kuehn
- 11/24/2015 Payment: \$25.00 - John D. Kuehn
- 10/14/2015 Pledge: \$100.00 - John D. Kuehn
- 8/3/2015 Payment: \$13.44 - Give With Liberty
- netbsa\mrussell -



John D. Kuehn

10/14/2015 Payment: \$173.50

Transaction summary

Payment amount: \$173.50	Date: 10/14/2015
Receipt amount: \$173.50	Batch number: L0025205
	Revenue ID: rev-14692203
Status	Payment method
Acknowledgements: Not acknowledged	Payment method: Check
Receipt preference: Per payment	Check number: 5656
Receipt status: Not received	Check date:
Receipt date:	
Receipt number:	
Post status: Not posted	
Post date: 10/14/2015	
Post process ID:	

Our cash account was debited with the payment and our prior year receivable account 1321 was credited for the amount to relieve.

Details | Benefits | Matching Gifts | Letters | Attributes | Documentation | GL Distributions | Tributes | Lockbox

Transaction history by post date

Account system: Local Council

All dates

10/14/2015
Payment

GL distributions (3)



More

View: All



Apply



Reset

Account	Description	Debit amount	Credit amount	Reference
Pledge				
→ L662-1-1321-051-00	L662-1-FOSP-PAPL-L66200511-UNR. PAYMENT...		\$173.50	Kuehn-Pledge Payment for t
→ L662-1-1001-015-00	L662-1-FOSP-CASH-L66200511-UNR. PAYMENT...	\$173.50		Kuehn-Pledge Payment for t



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Special Event – Future Year

- When setting up an event you will put money in this year for next year the event category needs to be FY – “Choice”
- When January 1 rolls around you need to edit your event and change this to just “Choice”



Events

Enter the name of an event

+ Add new ▾

Add an event

General

Name:

Description:

Category:

Sites:

Site

Boy Scouts of America

- ☐ Event is an auction
- ☐ Do not show event on calendar
- ☐ Event allows designations on fees

Copy options

Details

Start date:

Start time:

End date:

End time:

Location information

Location:

Room/Unit:

Capacity:

0

Contact:

? Help

Save

Cancel

You proceed to events to add an event or to copy an event. You drop the category bar to pick your category.



Prepare

Reset filters

Apply filters

			7:30 am L415 2015		6:00 pm L609 2015
			11:00 am L651 Sco		
18	19	20	21	22	23
L532 Oil City Breakfast					
L532 Clarion Breakfast 2015					
L571 Thank You Letters					
		L307 Chieftain			

Enter the name of an event



+ Add new

Add an event

General

Name:

Description:

Category:

Sites:

- Auction
- Cultivation/Recognition (no revenue)
- Distinguished Citizens Dinner
- Friends of Scouting (no registration revenue)
- Golf
- Special Fundraising Event
- Sporting Clays
- FY - Auction
- FY - Distinguished Citizens Dinner
- FY - Golf
- FY - Special Fundraising Event
- FY - Sporting Clays
- GM Pinewood Derby

Copy options



Help

Details

Start date:

End date:

Location information

Location:

Room/Unit:

Contact:

Pick future year (FY) with the corresponding category it is. This would be done for an event that will have registrations now but is not happening until next year.

When January 1 rolls around you need to come back and edit this field and change it back to the current year setting.

You process your event revenue in a batch using the correct FY Inbound Channels.



Prepare

The Inbound Channel type (CY/FY/PY) used for new revenue in BCRM should always align with what your Controller considers CY/FY/PY in PeopleSoft.

At the beginning of January, continue using the same BCRM Inbound CY/FY/PY you used in December ... as long as your Controller still considers the recently completed year to be “Current” in PeopleSoft. This is very important to keep CY/FY/PY balances aligned between BCRM and PeopleSoft.

For example, on 1/1/2020, when your Controller still considers “2019” to be “Current”, use:

- PY = 2018 and earlier appeal years pledge payment
- CY = 2019 appeal year
- FY = 2020 appeal year

A few days later, when your Controller “closes” the 2019 fiscal year in PeopleSoft, she also manually transfers all year-end CY receivables to PY (and all year-end FY receivables to CY). When these receivable balances are moved in PeopleSoft, at that point in BCRM you begin using updated Inbound types for new revenue to post to GL.

For example, if your Controller “closes” the 2019 fiscal year in PeopleSoft on 1/8/2020, and now considers 2020 to be the “Current” year, then you start using Inbound types:

- PY = 2019, 2018 and earlier appeal years pledge payments
- CY = 2020 appeal year
- FY = 2021 appeal year



Summary

- Gifts for next year need to be placed into the system using FY inbound channels
- Events need to be tweaked for FY and current year at Jan 2 before additional registrations are added.
- Payment for Prior Year pledges should use PY inbound channels.



BSAFR

- A customization to CRM for Local Councils
- After conversion, your Annual Campaign “FOS” history was reviewed and put into this format
- The process looked at revenue and workers and created “committees”



BSAFR Tune-up

- This is the best time of the year to review your BSAFR setup
- Run query – LXXX BSAFR Groups
- Review Output
- Determine if group names need changes

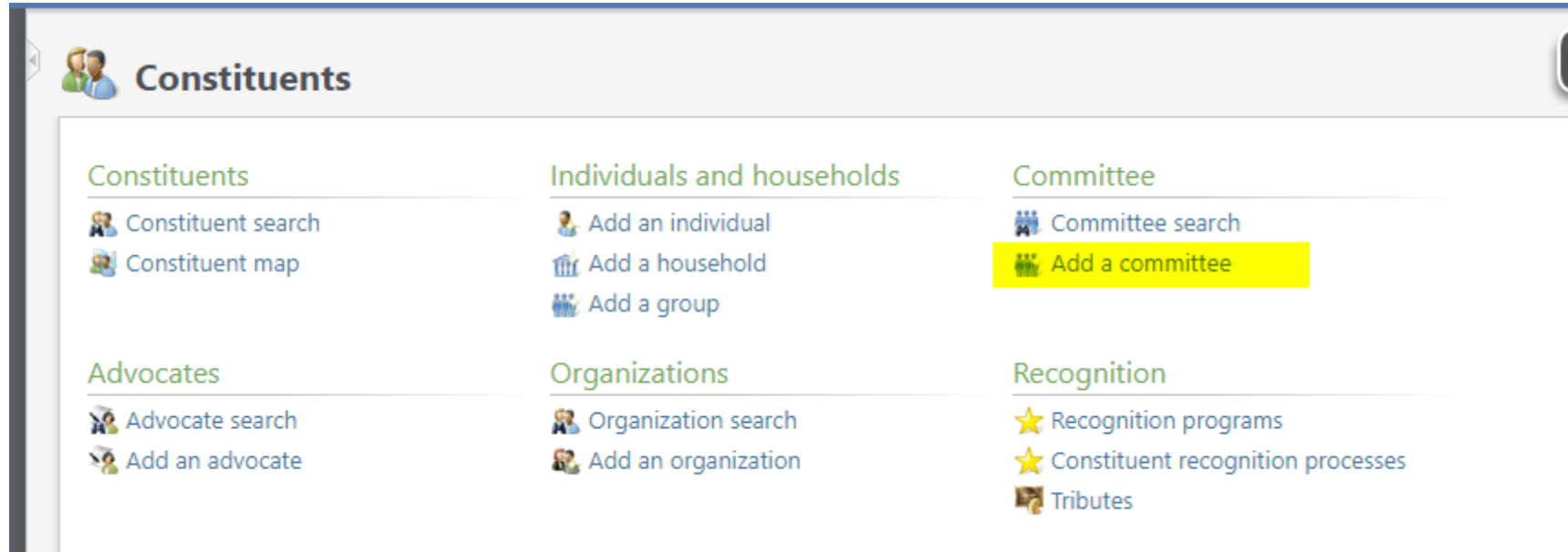


BSAFR Tune-up

- Cleanup which can be done by Member Care
 - Switching group from one structure to another
 - Changing giving category of group
 - Change parent group
 - Change reporting level – unit, district, subdistrict, council
 - Changing revenue history



Add BSAFR Group (committee)



Add a committee

Add a committee

DetailsMembers

Name:

Description:

Primary contact:

Group type:

☐ Group gives anonymously

☐ Can coordinate events

☒ Can solicit revenue and set fundraising goals

☐ Can set committee goals

Member data:

☒ Consolidate member data as of 2/13/2019

☐ Consolidate all member data

Primary contact information

Copy from primary contact

Address type:

Country:

Address:

City:

State:

ZIP:

☐ Do not send mail to this address

Reason:

Phone type:

Phone number:

☐ Do not call this phone number

Reason:

Email type:

Email address:

☐ Do not send email to this address

Website:

Information source:

Group Attributes

Group Public Name:

FOS Note:

?

 Help

SaveCancel

The logo of the Boy Scouts of America, featuring a blue and red fleur-de-lis with a white shield in the center containing a red and white striped field and a blue chief with stars.

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Be sure to complete

Add a committee [X]

Details Members

Name: [Redacted]

Description: [Redacted]

Primary contact: [Redacted]

Group type: [Redacted]

- ☐ Group gives anonymously
- ☐ Can coordinate events
- ☒ Can solicit revenue and set fundraising goals
- ☐ Can set committee goals

Member data:

- ☒ Consolidate member data as of 2/13/2019 [Calendar icon]
- ☐ Consolidate all member data

Primary contact information

[Redacted]



Modifying BSAFR

Edit BSAFR constituent group [X]

Group public name:	<input type="text"/>
Is BSAFR group:	Yes [v]
Solicit for BSAFR:	Yes [v]
BSA structure for revenue:	SV Traditional [v]
Giving category for revenue:	Family Division [v]
BSAFR solicitor current:	Post 0888 Lincoln - 324 (164808) [m]
BSAFR presenter current:	<input type="text"/> [m]
BSAFR reporting parent group:	Salt Valley - Family Division - 50 [m]
BSAFR reporting level:	Unit [v]

[Save] [Cancel]



Next Forum

September 18, 2019
10:00 am & 2:00 pm CST



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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](#)[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 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.

[Operating](#)[Capital](#)[Major Gifts & Endowment](#)[CRM Resources](#)

2

[Best Practices](#)[Document Library](#)[Donor Research](#)[FOS Planning Kit](#)[Sample Grant Proposals](#)www.scouting.org/financeimpact

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Questions & Answers



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