CRM User Forum

August 22, 2019

WELCOME

John Kuehn
Don Day

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

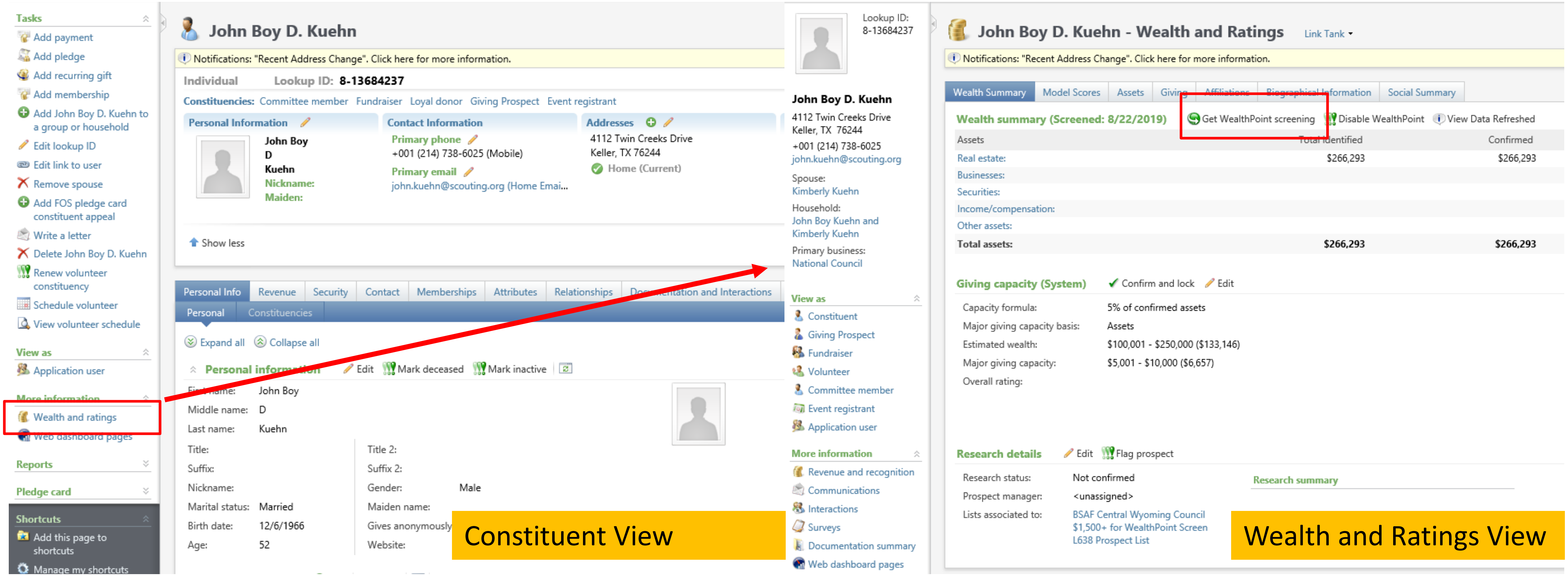
Wealth and Ratings

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

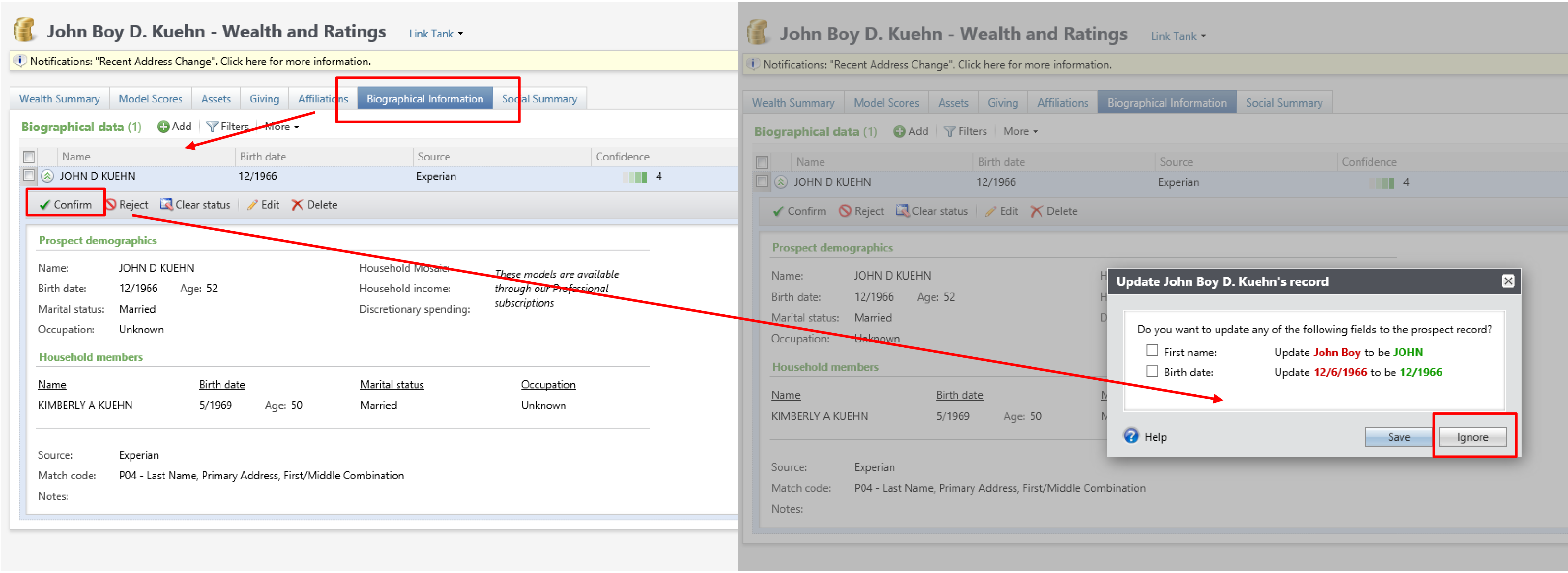
Experian Data

- 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



Validation of Returned Data



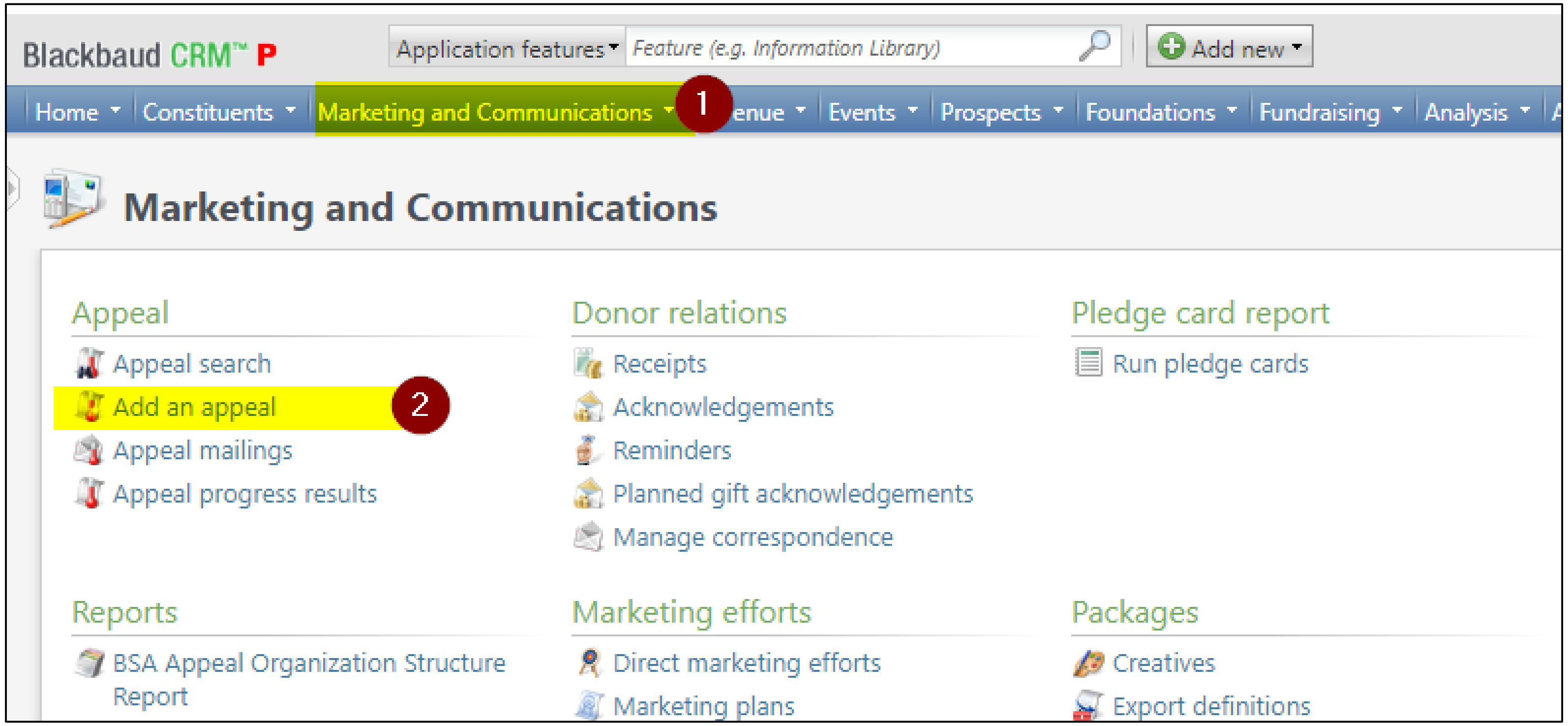
Thinking ahead to Next Year

Next Year Setup

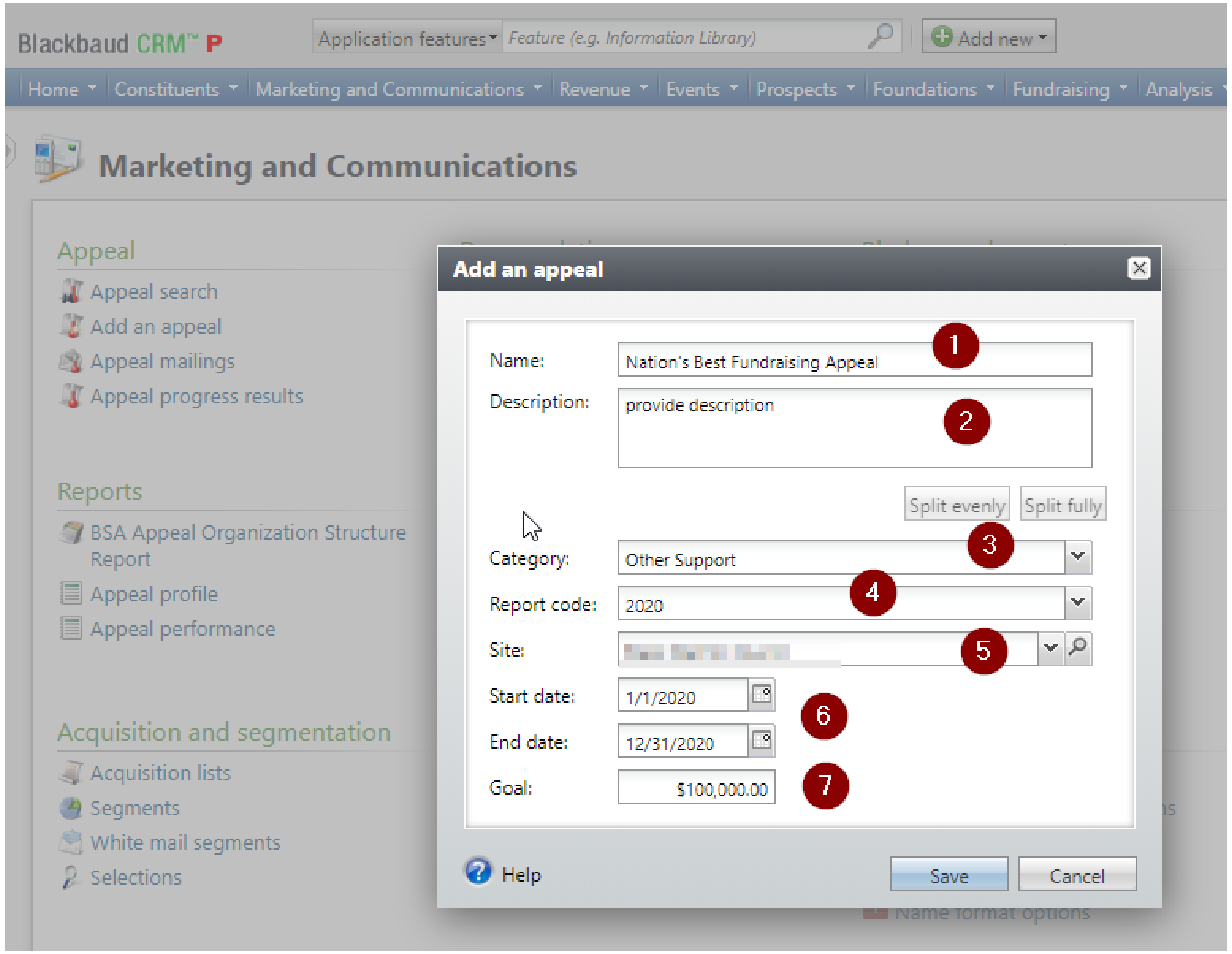
- Creating appeals
- Creating special events
- Correct inbound channel usage
- Mapping special events for 2020

Creating An Appeal

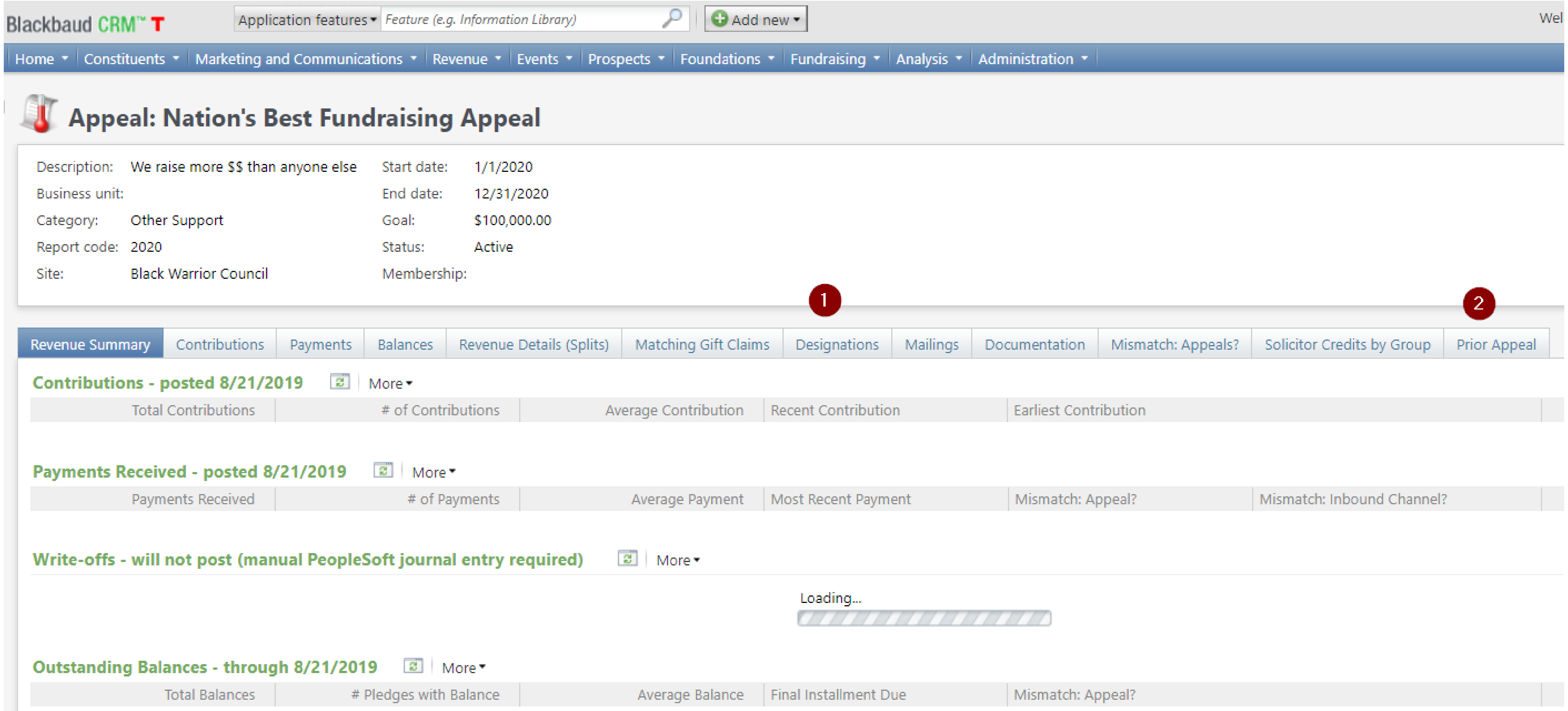
- Marketing and Communications – Add an Appeal



Add an Appeal

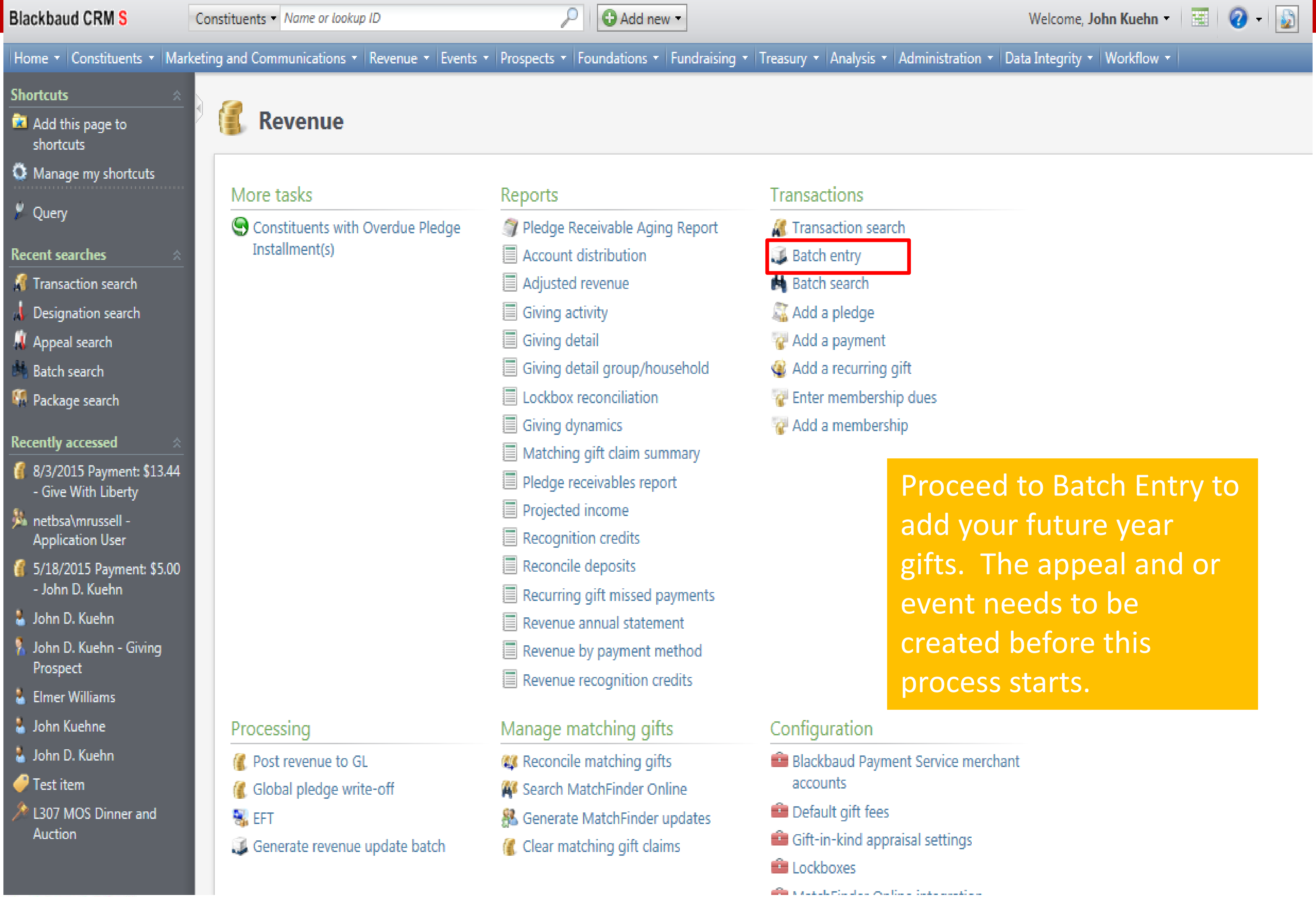


Assign Designation & Prior Appeal (if one)



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.



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

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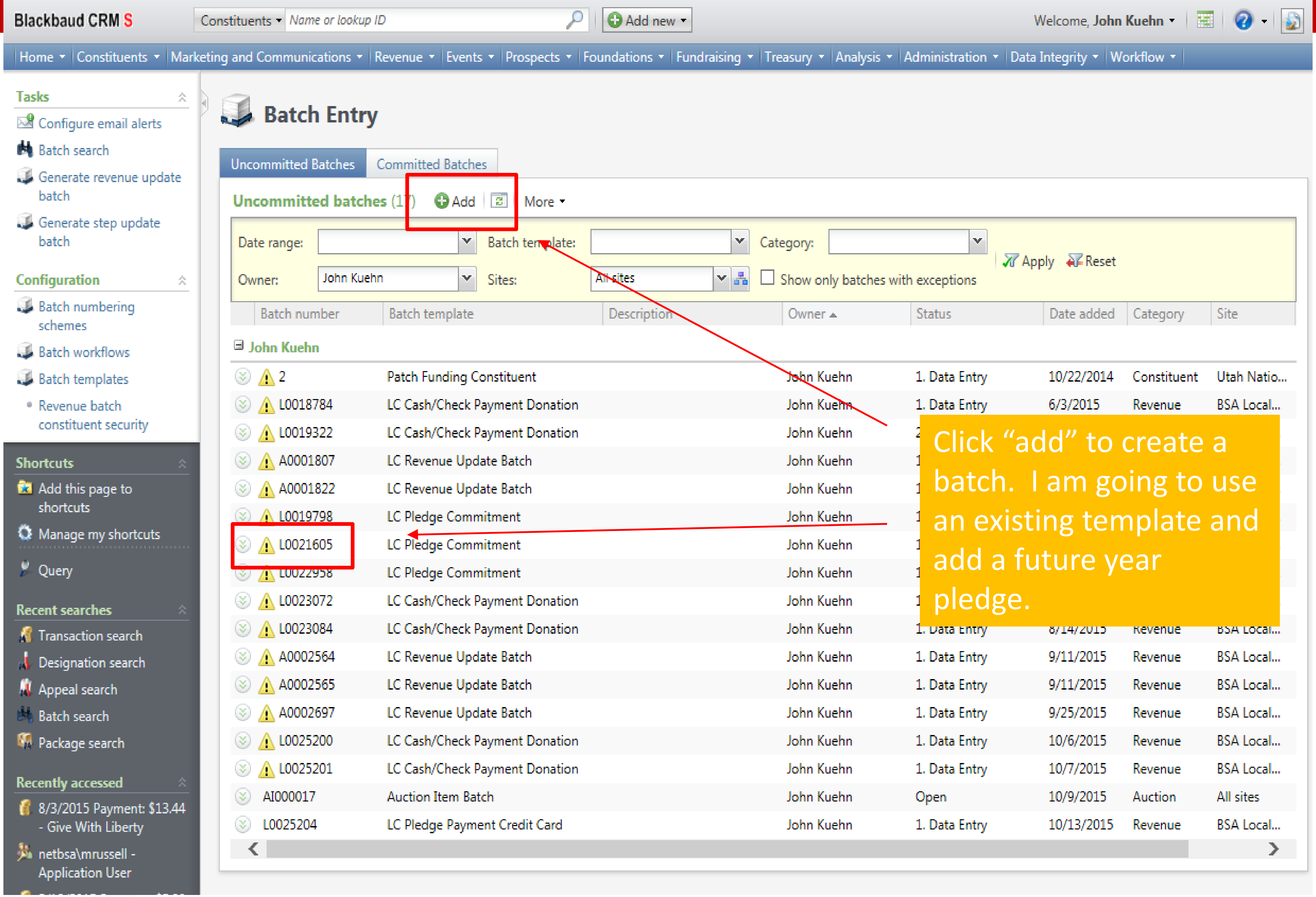
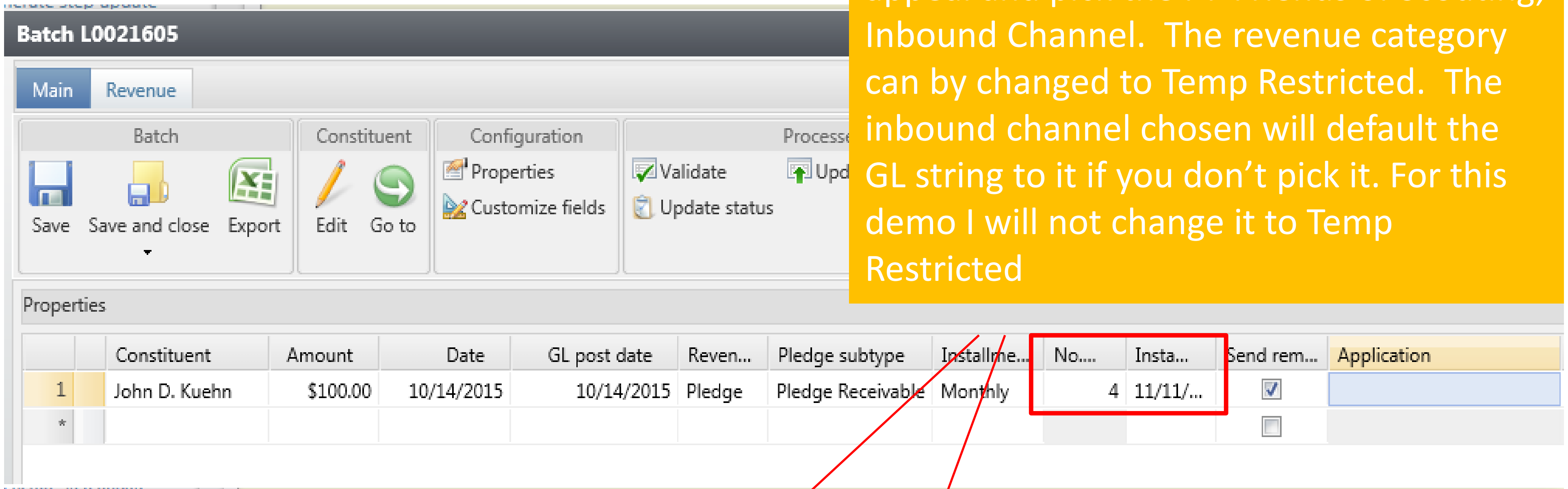
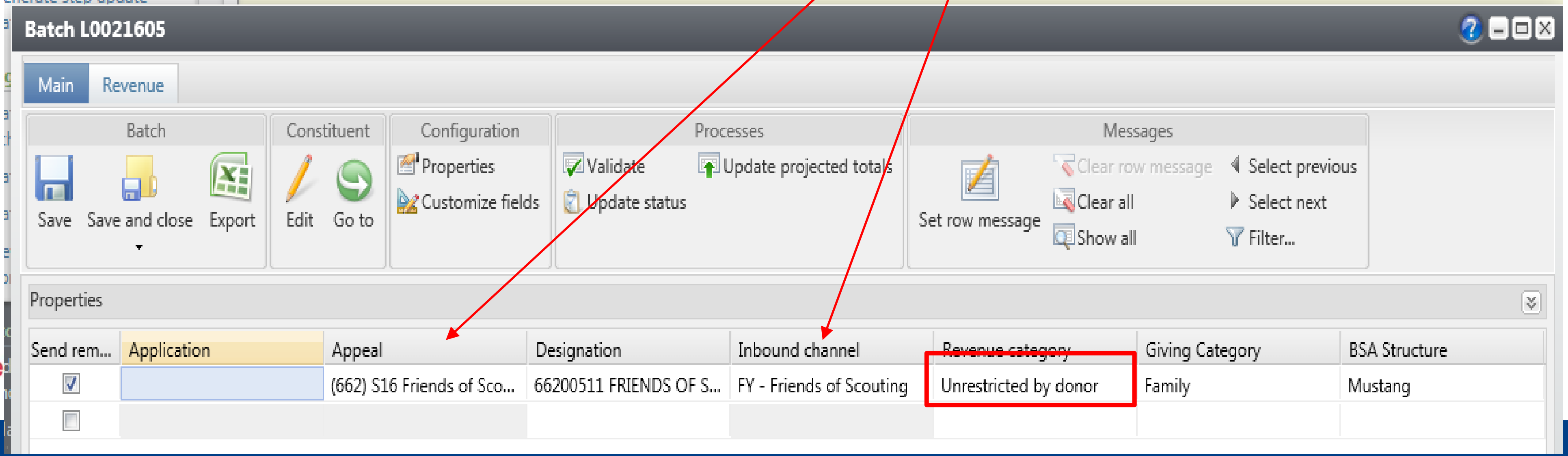


Click “add” to create a batch. I am going to use an existing template and add a future year pledge.

Pledge

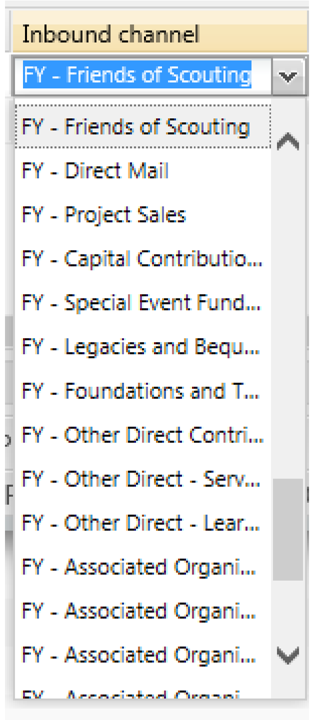
Fill in your batch row. I am entering a new pledge of $100 with 4 installments starting on 11/11/2015. I attach it to a 2016 appeal and pick the FY-Friends of Scouting, Inbound Channel. The revenue category can by changed to Temp Restricted. The inbound channel chosen will default the GL string to it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

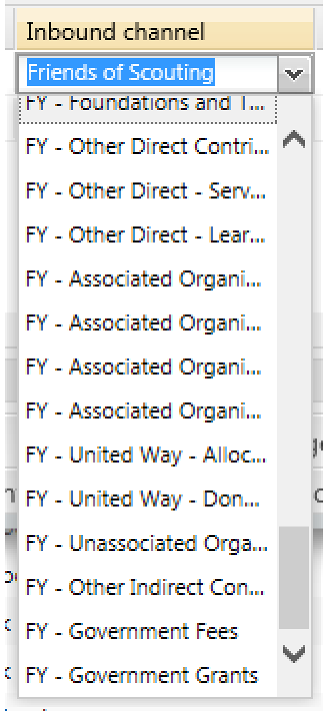




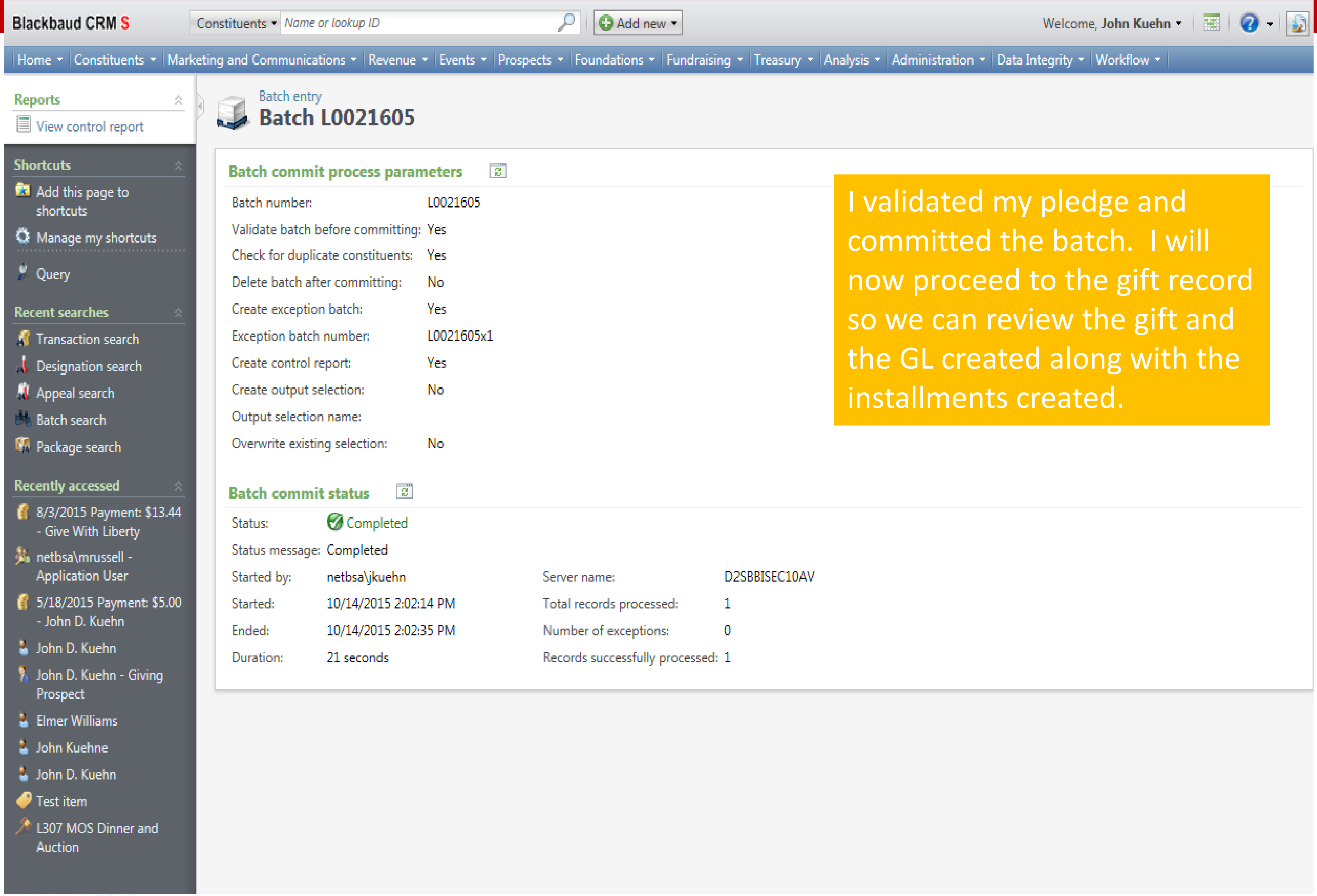
Prepare

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.



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.

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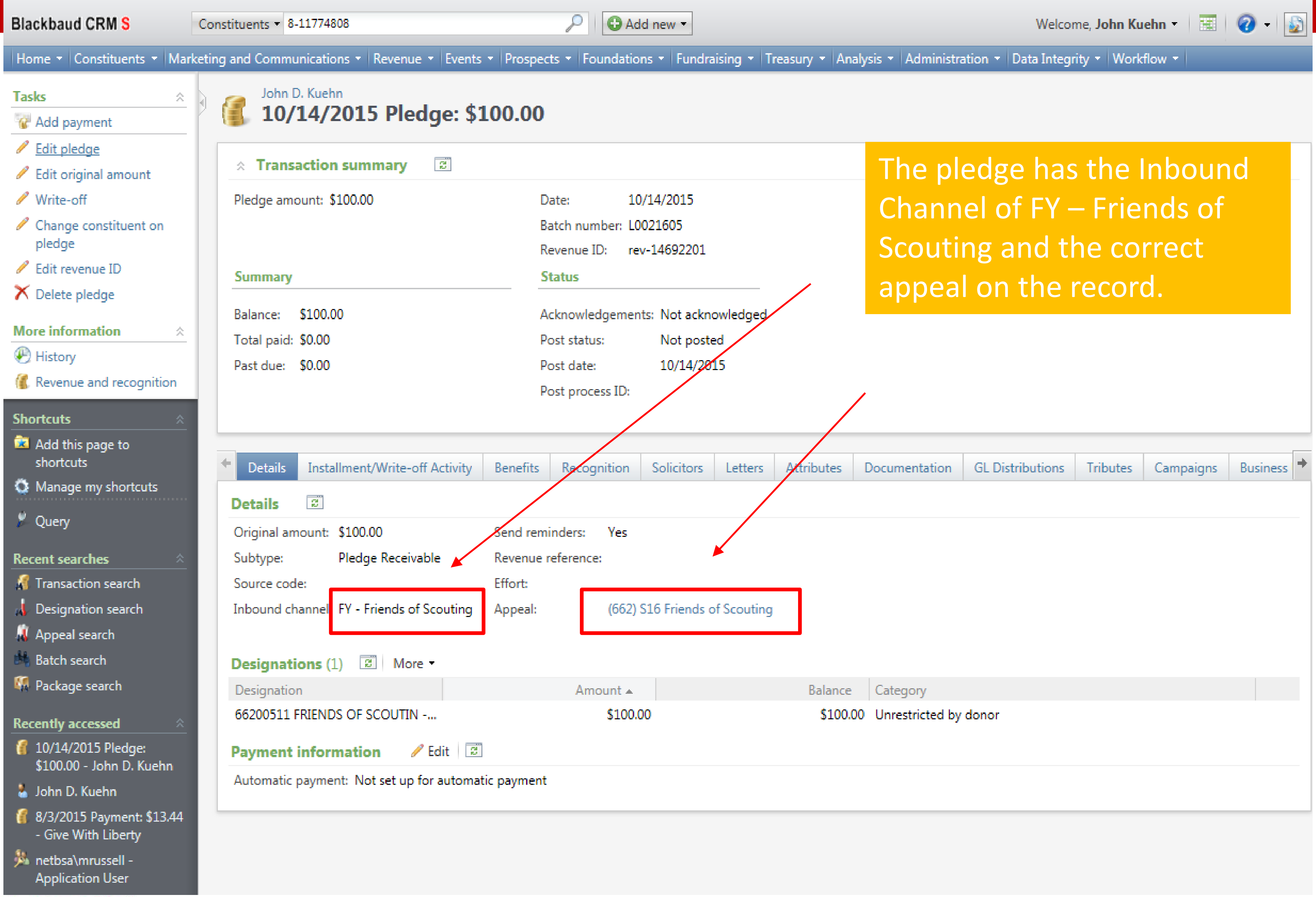
The pledge has the Inbound Channel of FY – Friends of Scouting and the correct appeal on the record.



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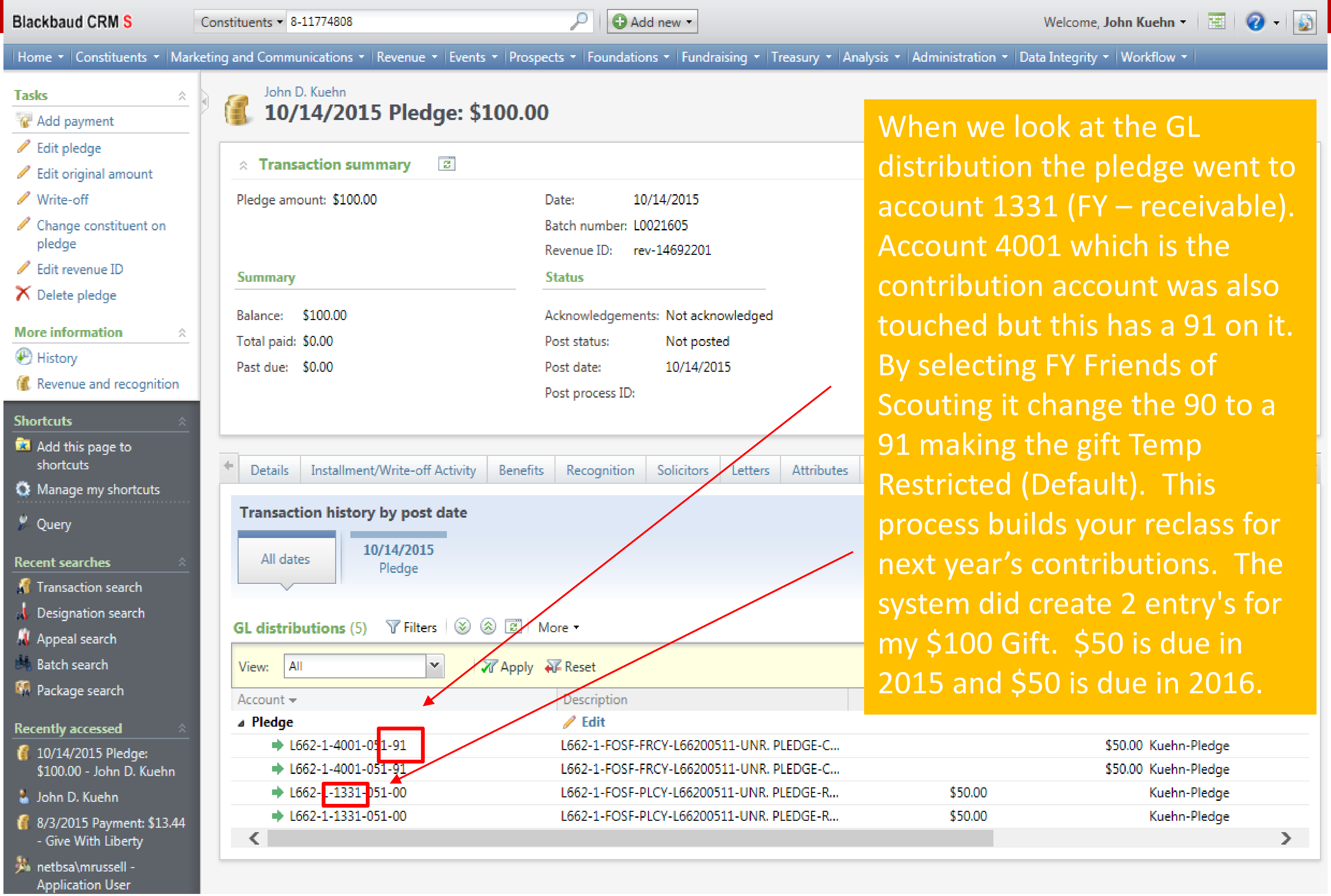
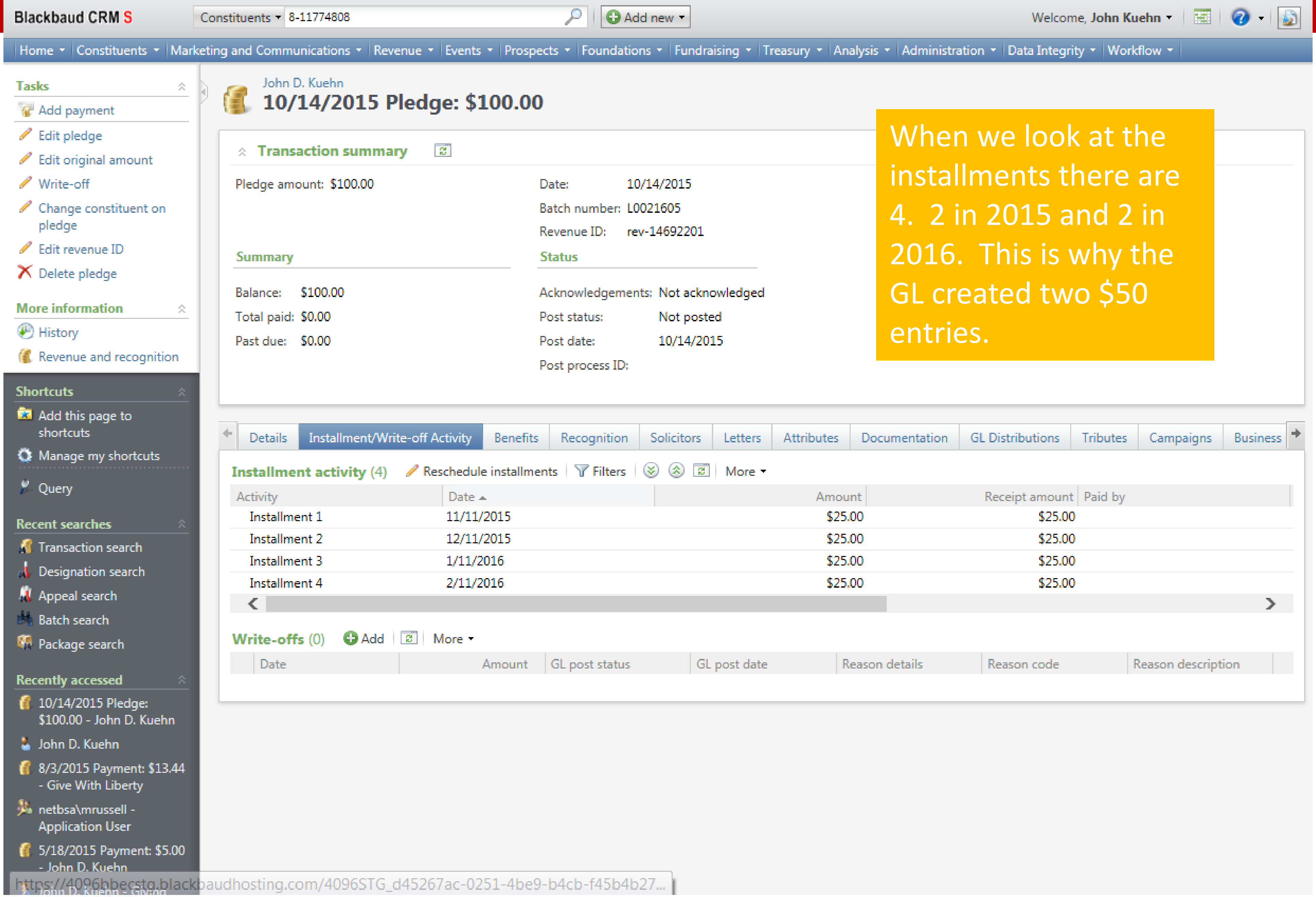


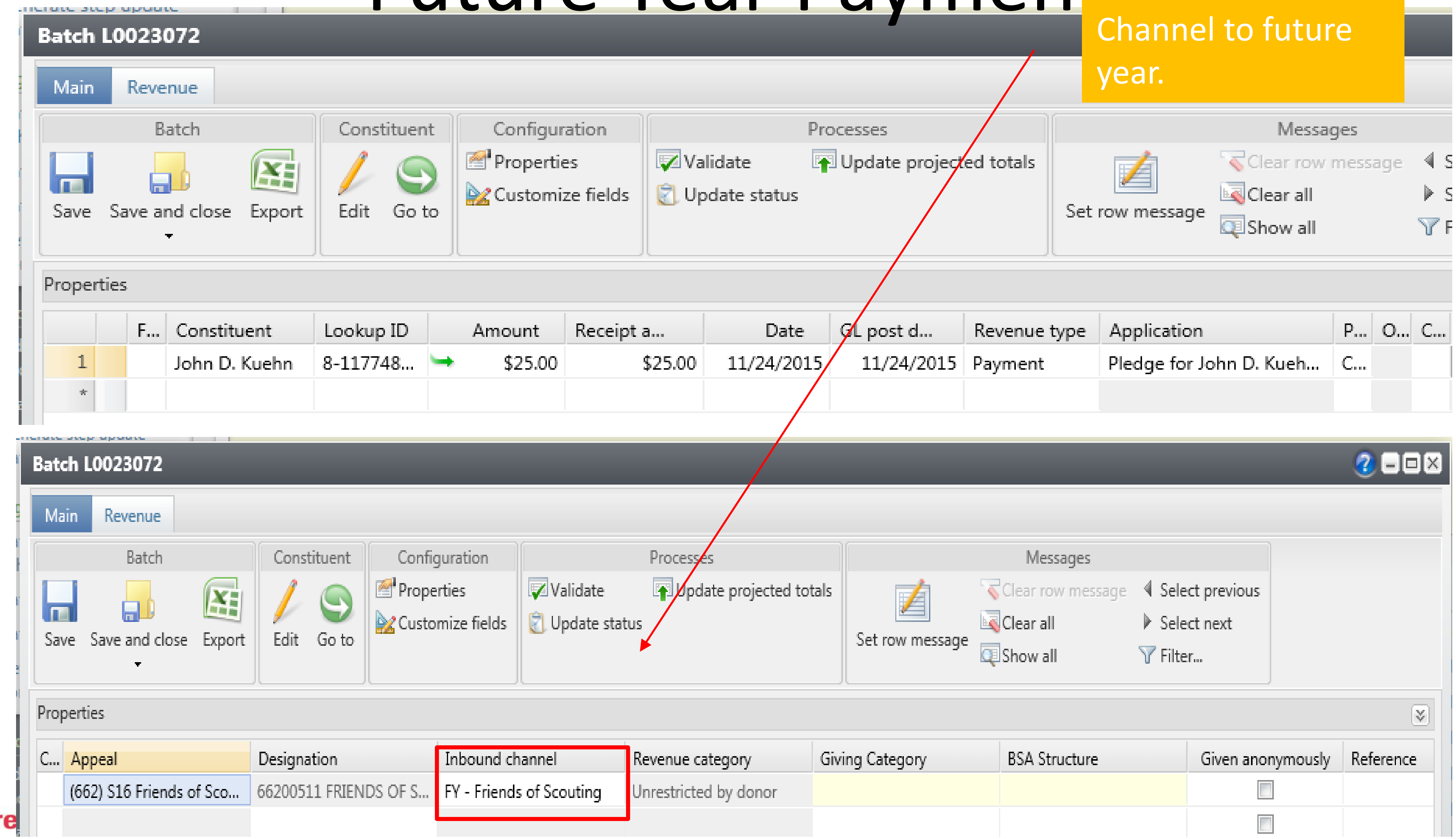
When we look at the GL distribution the pledge went to account 1331 (FY – receivable). Account 4001 which is the contribution account was also touched but this has a 91 on it. By selecting FY Friends of Scouting it change the 90 to a 91 making the gift Temp Restricted (Default). This process builds your 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.

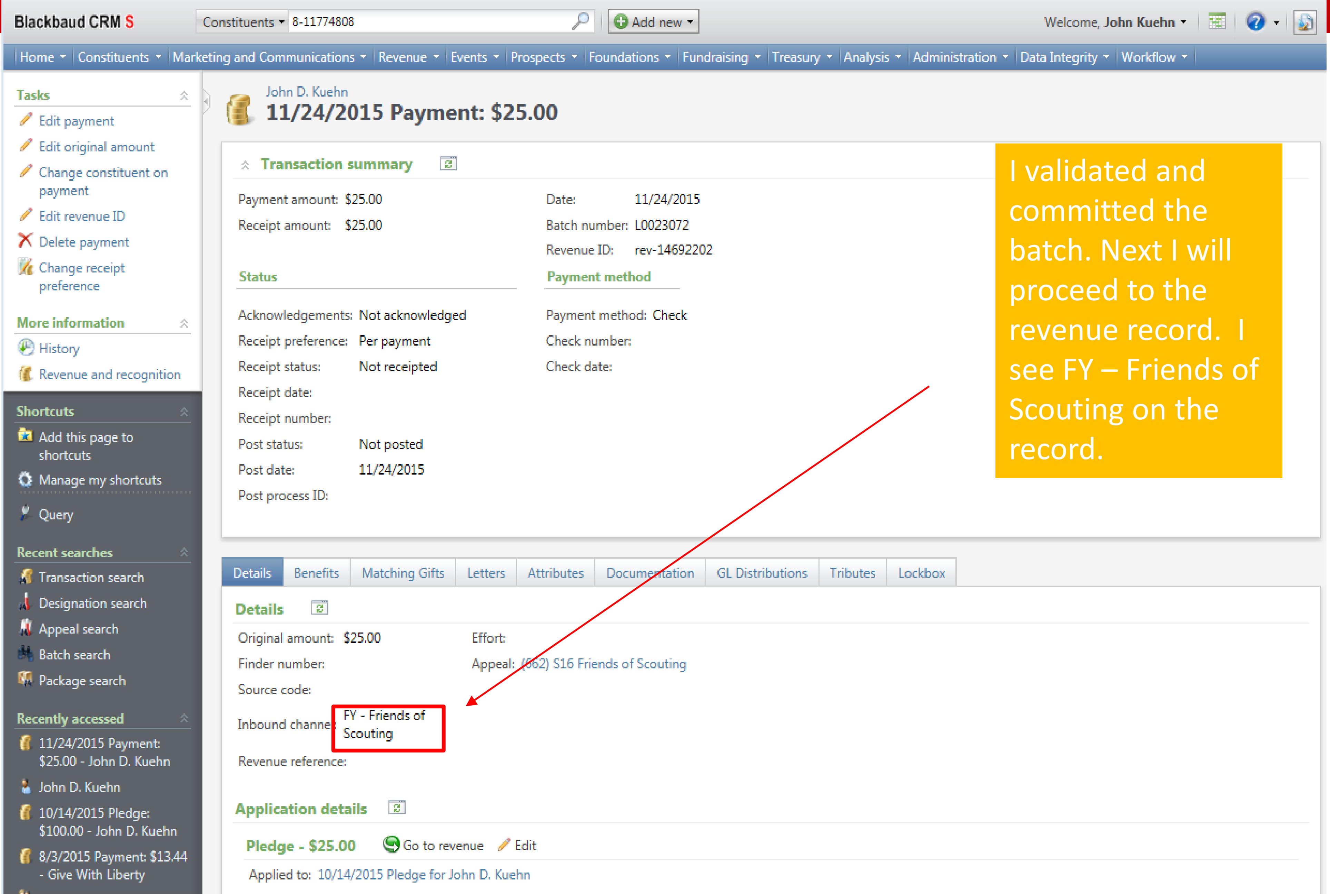


When we look at the installments there are 4. 2 in 2015 and 2 in 2016. This is why the GL created two $50 entries.

Future Year Payment

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





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

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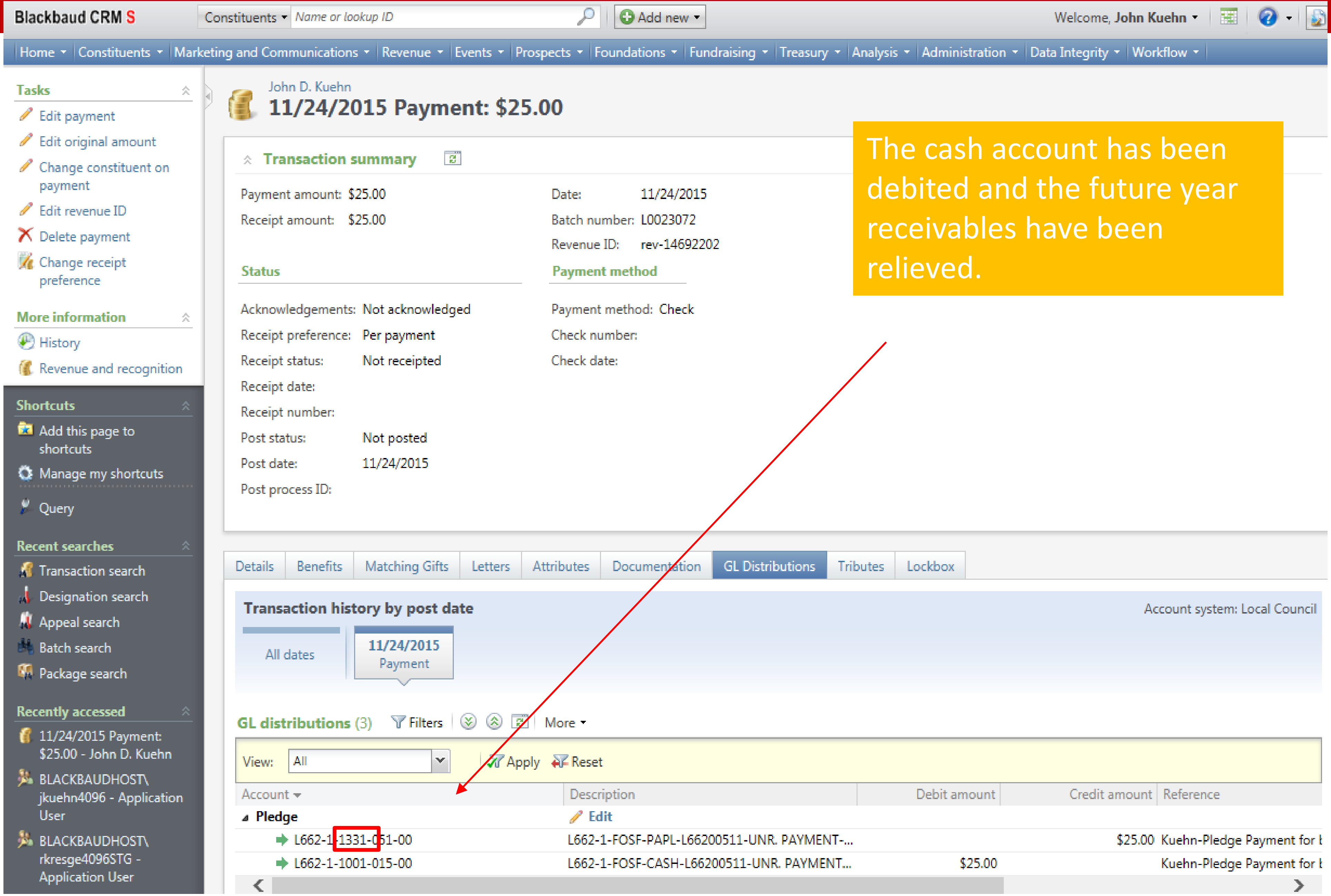
The cash account has been debited and the future year receivables have been relieved.

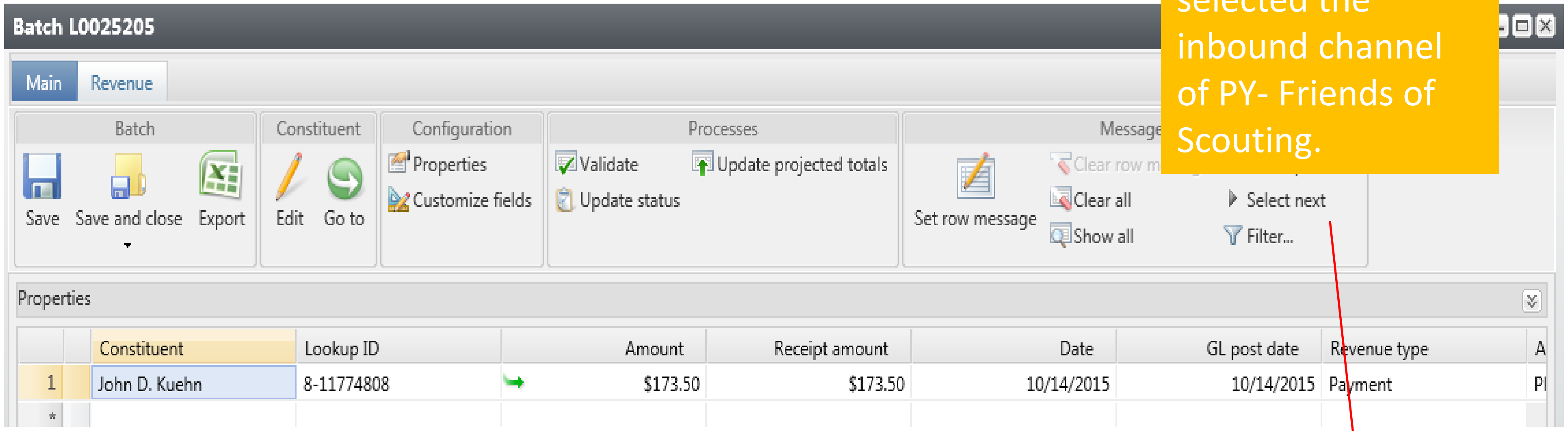


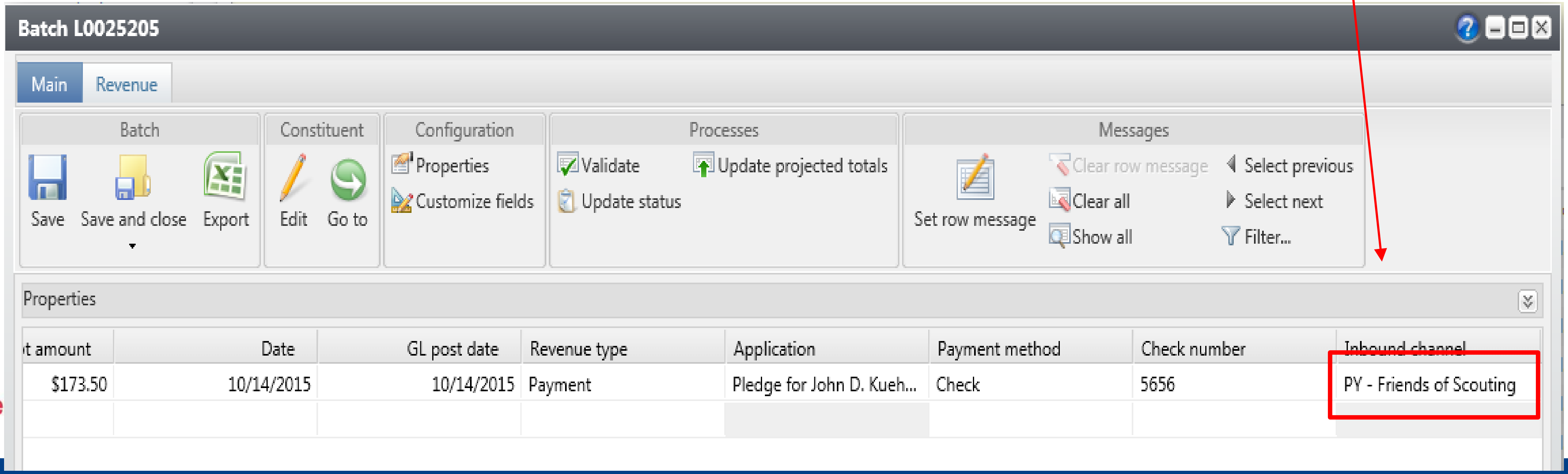
Prior Year Payments

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

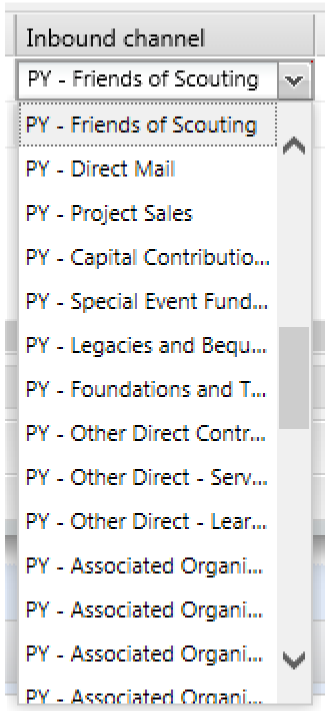
Prior Year Payment

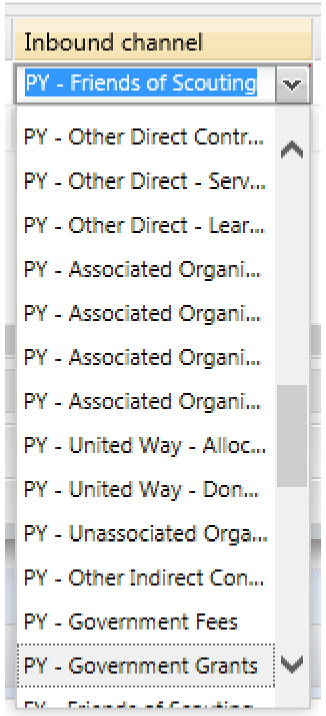
Here is a sample payment paying off a pledge in 2019. I selected the inbound channel of PY- Friends of Scouting.



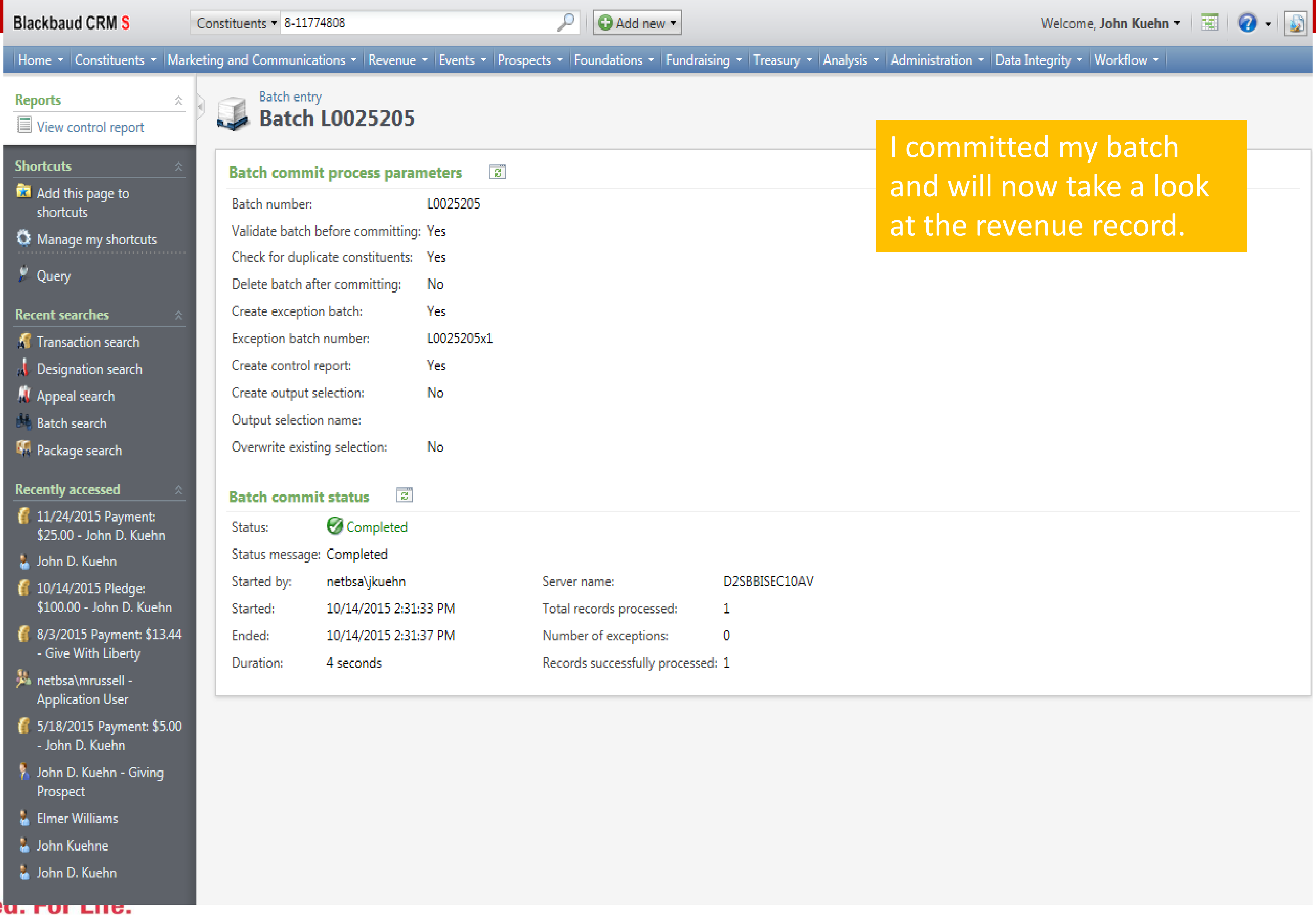


Prior Year Inbound Channels





These are your inbound channel choices for prior year payments.



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

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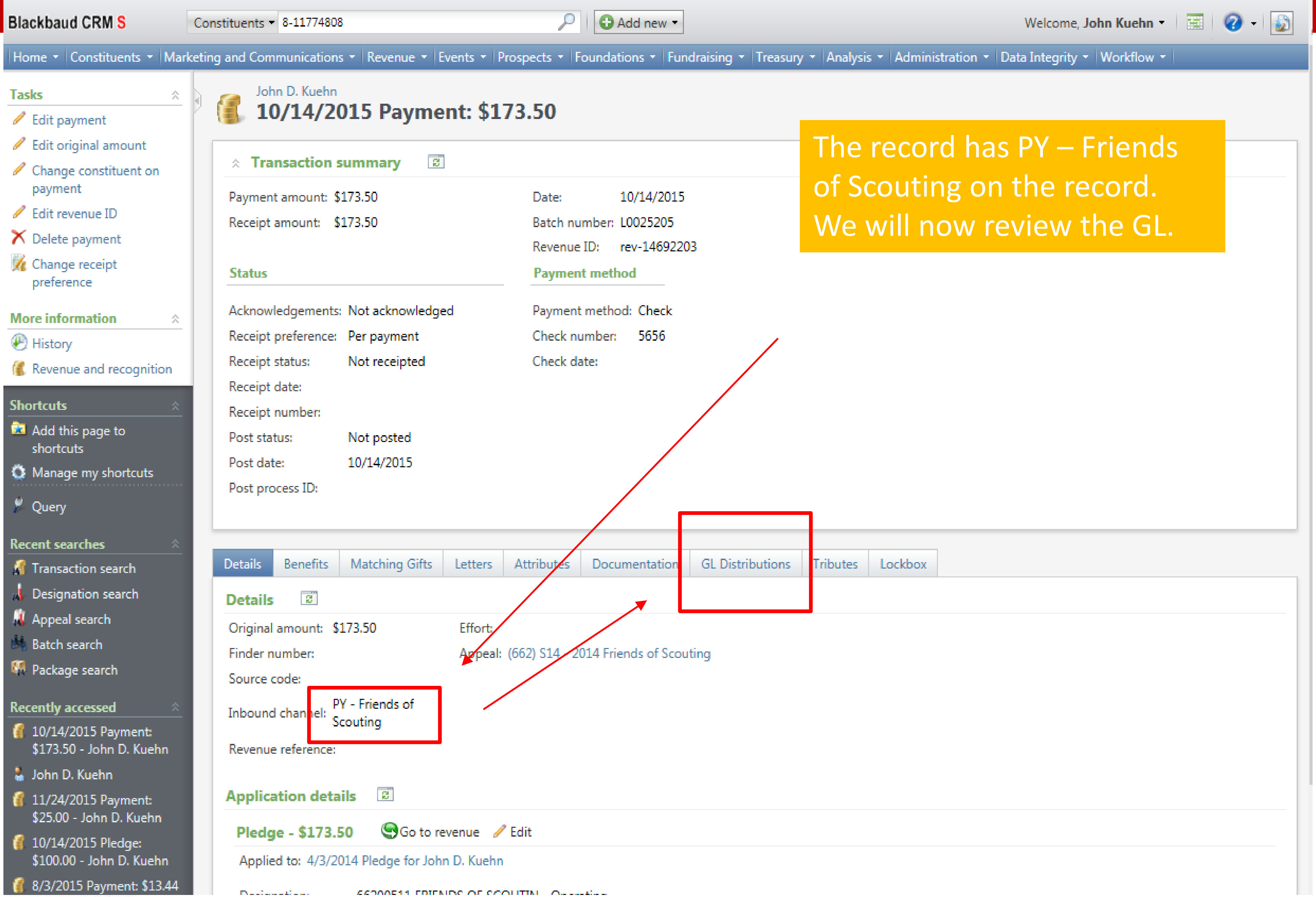
The record has PY – Friends of Scouting on the record. We will now review the GL.



Blackbaud CRM S | Constituents 8-11774808 | Add new | Welcome, John Kuehn

Home | Constituents | Marketing and Communications | Revenue | Events | Prospects | Foundations | Fundraising | Treasury | Analysis | Administration | Data Integrity | Workflow

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
- 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
Receipt amount: $173.50

Date: 10/14/2015
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:

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) Filters More

View: All Apply Reset

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

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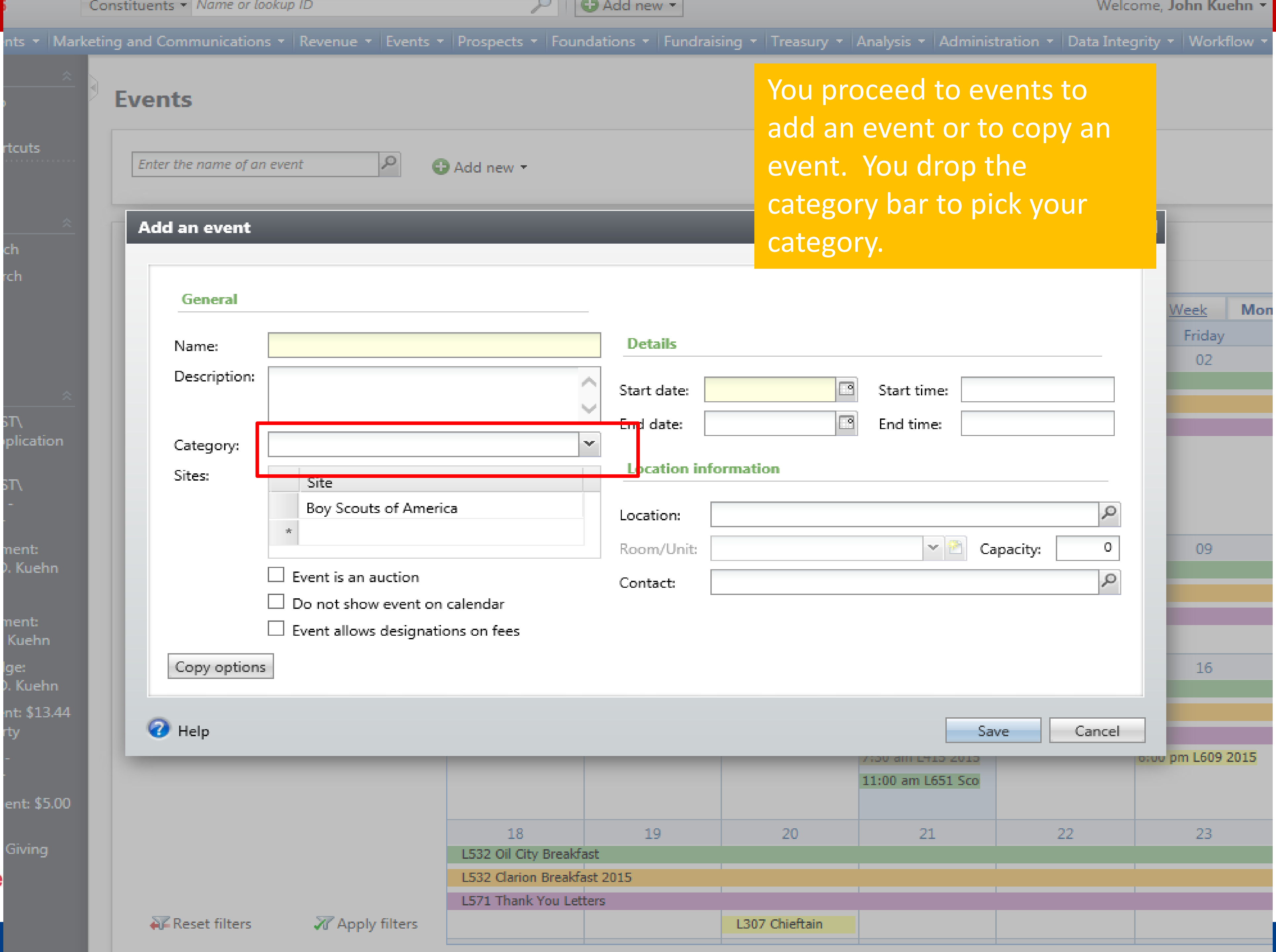
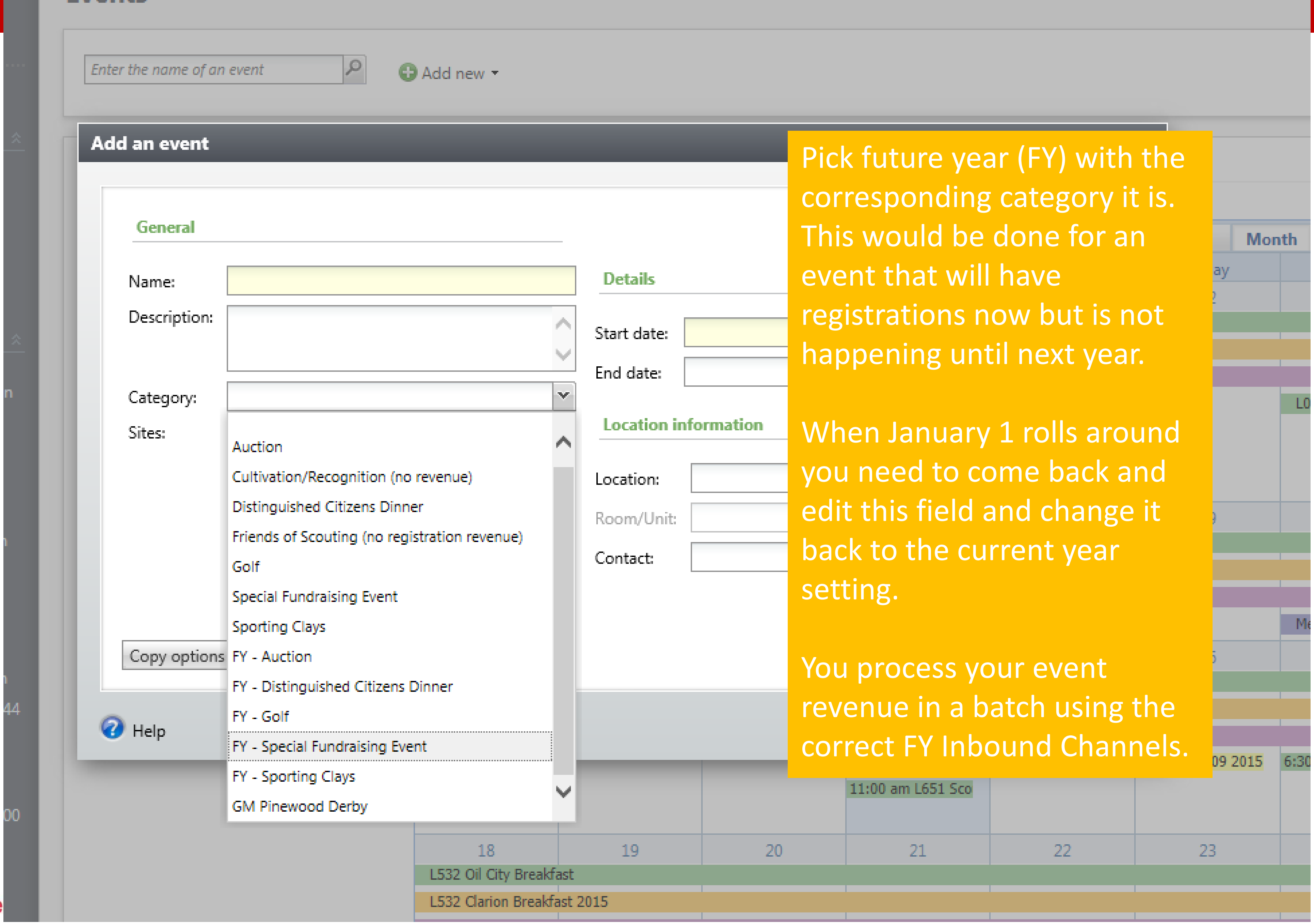
Special Event – Future Year

- 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 roles around you need to edit your event and change this to just “Choice”



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



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

Prepare

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”

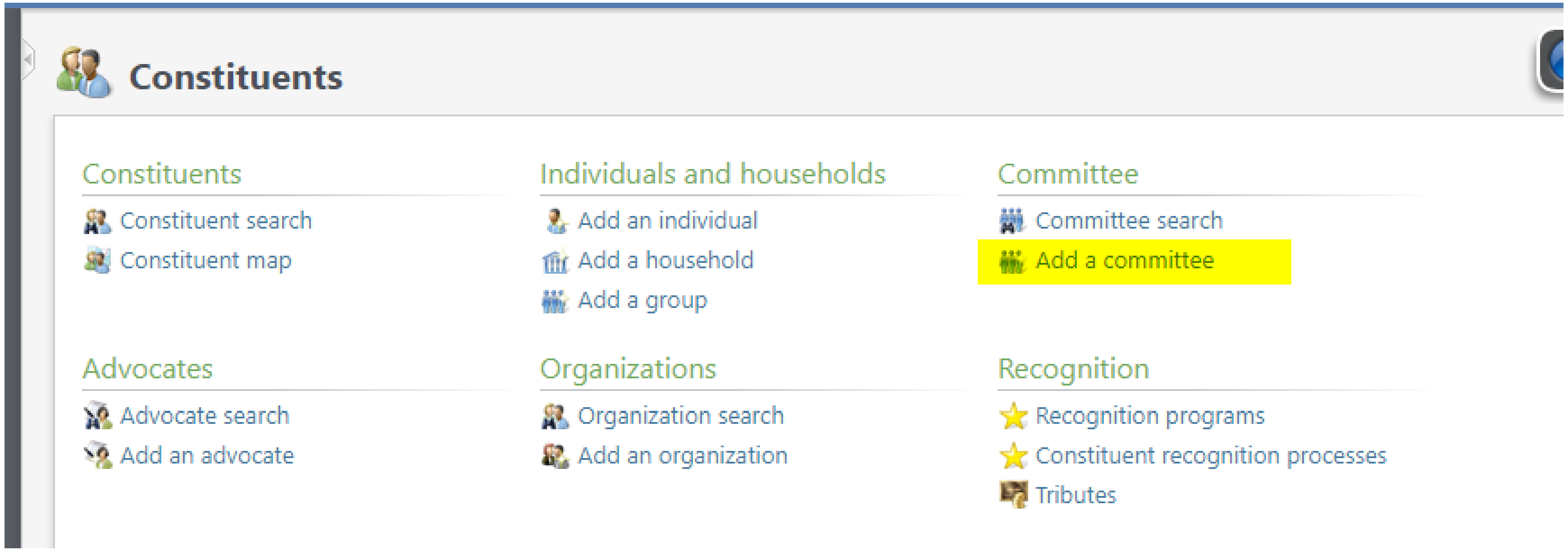
BSAFR Tune-up

- 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

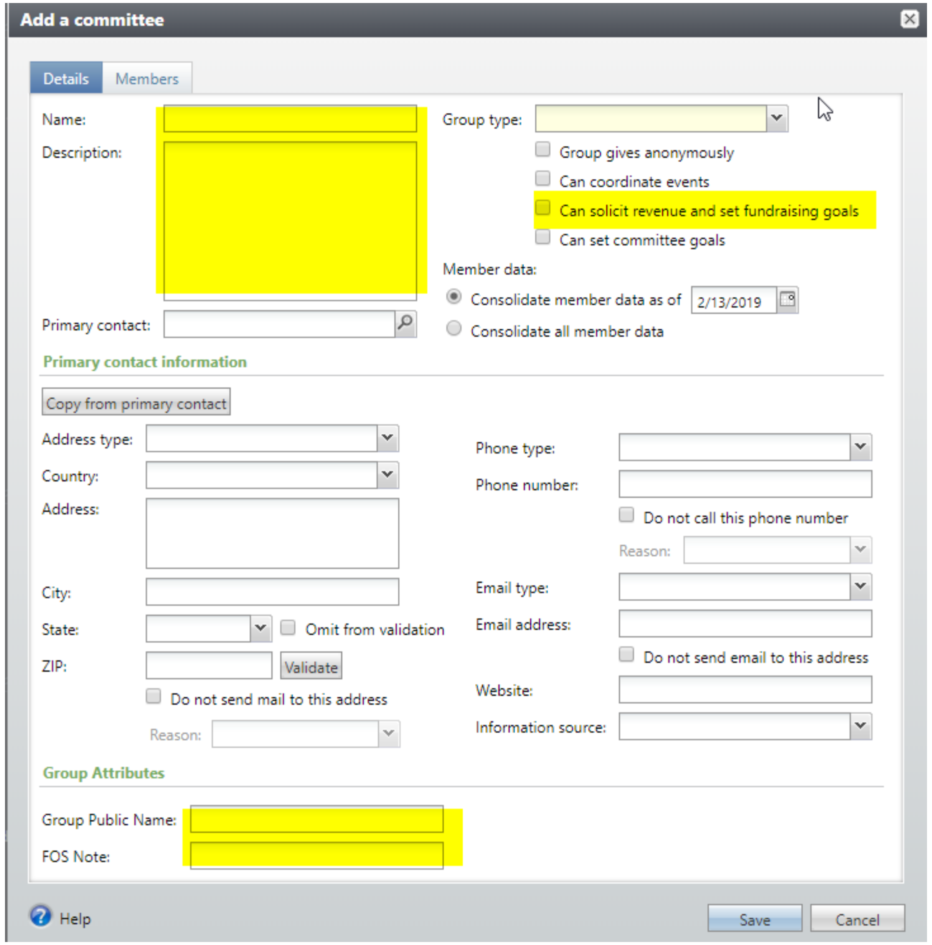
BSAFR Tune-up

- 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

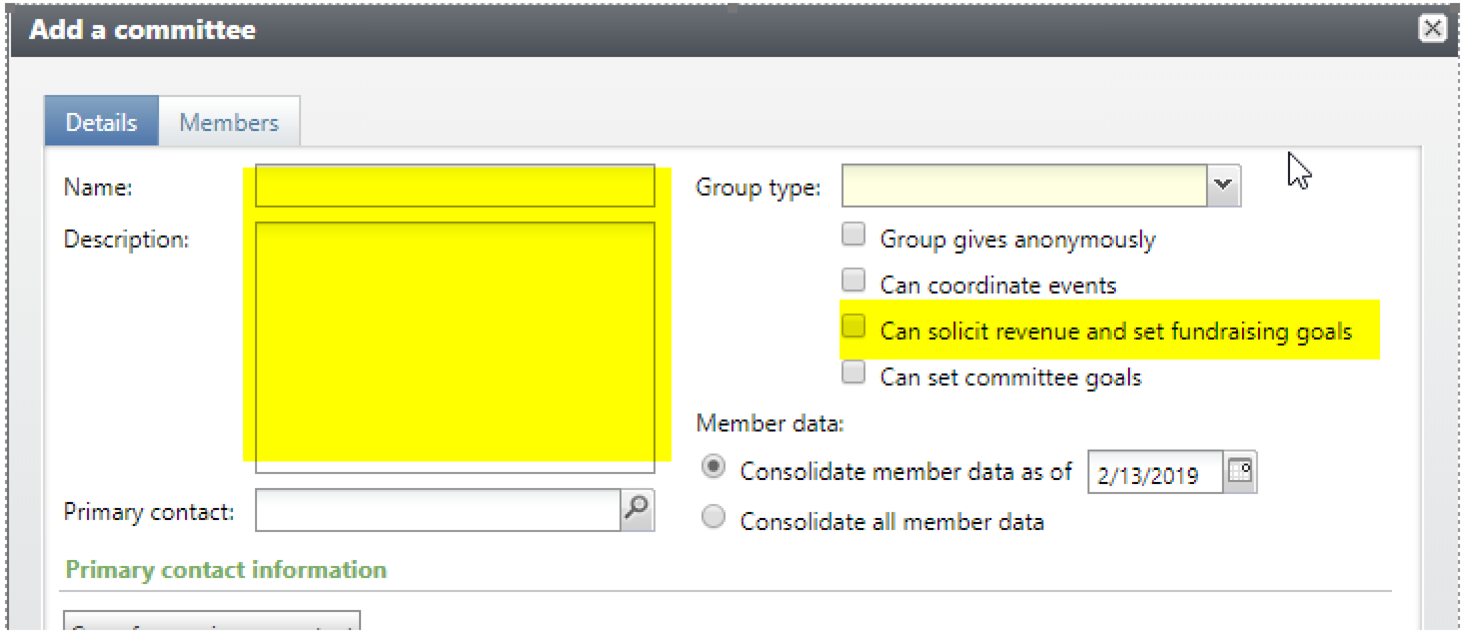
Add BSAFR Group (committee)



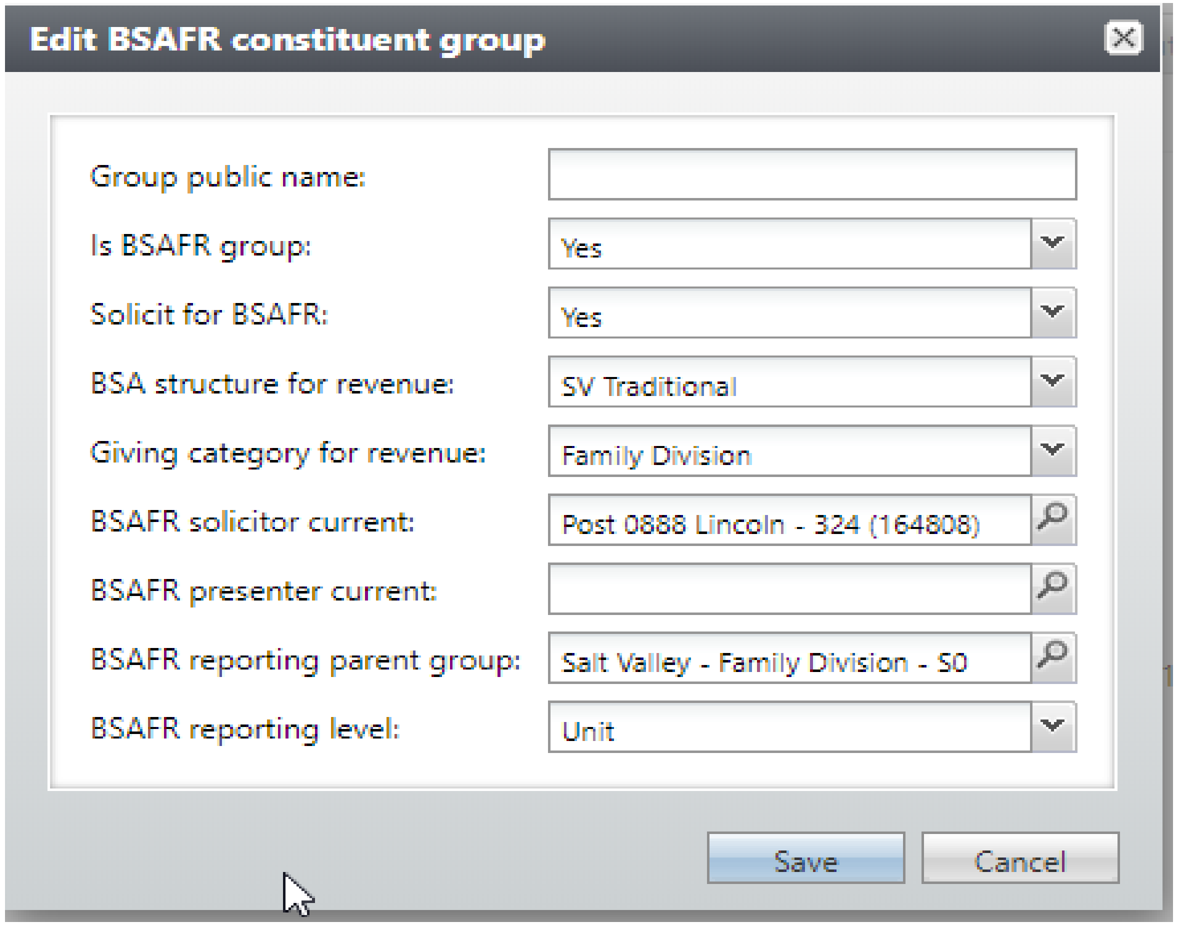
Add a committee



Be sure to complete



Modifying BSAFR



Next Forum

September 18, 2019

10:00 am & 2:00 pm CST

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 2
- CRM Resources
- Best Practices
- Document Library
- Donor Research
- FOS Planning Kit
- Sample Grant Proposals

www.scouting.org/financeimpact

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Questions & Answers