October 16, 2019

Eagle Scout List in Blackbaud CRM

2020 Revenue Entry
Eagle Scout List in CRM
Year End Reminder(s)

Welcome
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Today’s webinar will be accessible on the Scouting.org website under Council Support / Financial Services / Council Financial Management / CRM Resources:
Objectives

Council Eagle Scout List

• Located on the Analysis Tab in CRM
• Running your Council’s list
  o Filtering
  o Limits
• Distinguished Eagle Scout Award List
• National Outstanding Eagle Scout Award List
• LXXX Query if necessary

2020 Data Entry
CRM Eagle Scout List

Notes:

- The Eagle Scout list is site secured for your council
- Use available filters to help segment / prioritize your list
- Access constituent record directly from the data list
- Export your list to excel
- Data list has a limit of 10,000 constituents returned
- If you need to see more than the 10,000 constituents, you can run a Query (LXXX Query Folder)
- Returns Eagle Scouts who have your Council ID on their constituent record site security
Local Council User Role(s)

For a user to be able to view the Eagle Scout list, they will need the following system role and site security on the role:

- BSA Query Add/Edit role with your Council & LC Global on Site Security

If you already have the Query Add/Edit role, you will not need to do anything. If it is not already assigned to the user, then your council’s local admin will need to add the Query Add/Edit role to the application user’s system roles.

Constituent Security should be set to ‘Records with no security group assigned’.
Navigating to the Eagle Scout List

- Navigate to the *Analysis* tab in CRM
- Click on the *Eagle Scout Lists* under the More Tasks section
Running Your Eagle Scout List

• Click on Eagle Scout Lists
• Enter your Council ID (3 Digits) into the Site ID
• Click Search
• Select your Council
Your Eagle Scout List

There are 3 tabs for your Eagle Scout List

• Eagle Scout List
• Distinguished Eagle Scout Award list
• National Outstanding Eagle Scout Award list
Filtering Your Eagle Scout List

- There are five filters you can apply to your Eagle Scout list
  - City
  - State
  - Zip Code
  - Eagle Unit
  - Eagle Board of Review Date

Remember, the data list will only return up to 10,000 records
Filtering Your Eagle Scout List

• Enter your filter in the field
• Click Apply

By filtering for the primary address city, the number of Eagle Scouts returned dropped from 8,311 to 1,342
Sorting Your Eagle Scout List

• You can sort your list by clicking on one of the header fields
  • The list sort default is by Lookup ID
  • Click on the header you want to sort by

I want to sort by last name. I click on the Last Name header and it sorts from A to Z.
Exporting Your Eagle Scout List

• You can export your Eagle Scout list
  • Click on the “More” drop down
  • Select how you want to export the file to Excel
Viewing Constituent Records from Your Eagle Scout List

- Click on the chevron next to the Eagle Scout you want to view
- Click the *Go to constituent* button

*Clicking on the *Go to Constituent* button will take you directly to the constituent’s record. To return to your Eagle Scout list, click your browser’s back button.*
Viewing Your DESA & NOESA List

• Click on the Distinguished Eagle Scout Award List
  • You will see those Eagle Scouts who have received the Distinguished Eagle Scout Award that have your council on their constituent record site (security)

• Click on the National Outstanding Eagle Scout Award list
  • You will see those Eagle Scouts who have received the National Outstanding Eagle Scout Award that have your council on their constituent record site (security).

• The DESA & NOESA list is based on the Volunteer Award on their constituent record. You can find this on the Volunteer tab and the Awards sub tab.
Eagle Scout LXXX Query(s)

Navigate to the Analysis Tab / Information Library and the LXXX – Example Council query folder

- In the LC Eagle Scout Queries subfolder, on the chevron for the **LXXX Eagle Scouts in a specified Council**; Click on Copy
- Add your Council Site ID (*Sites/.Side ID* in the criteria) to the query (move it to the top of the *Include records where:* filter criteria
- Click on the *Set Save options* tab
- Rename the copy of the query for your Council
- In the Site Field, change to your Council
- Select the folder you want to save the query in (your folder or council’s folder)
- Click Save and Close
- Open your newly saved query and edit/run it

Remember – Copy then edit the copy of the query and save in your query folder
FAQ: Eagle Scout List

• The Eagle Scout data list is based on a query that pulls from the constituent record Attribute fields – Eagle Flag (Category) = Yes

• What field is the Board of Review date? The BOD field is based on the start date of the Eagle Flag / Eagle Council Name. The integration process with Akela brings the BOD date over as the start date.

• How do I know which council the constituent received their Eagle in? The data list displays the value for the Constituent Attribute of Eagle Council Name on the constituent’s record.

• How often is the Eagle Scout data updated in CRM? Currently new Eagle Scouts and their Eagle Flag / BOD date is updated frequently through the integration with Akela. The Eagle Council Name and Unit are currently updated Monthly.
FAQ: Eagle Scout List

- DESA & NOESA list doesn’t show all my Eagle Scouts who have earned the award? We are currently working on updating the DESA & NOESA awardees. There was some confusion in the past of who was/is responsible for entering this in ScoutNet and some awards may not have been recorded in ScoutNet/Akela. A clarified process will be announced soon.

- Where can I find additional information on my Eagle Scout(s)? If information such as Business/Employer; Job Title; etc. has been entered in CRM you can view this information on the constituent record.

- Where is the Eagle Unit City or State? We are currently exploring ways to integrate this information in our data feed from ScoutNet/Akela. We do not have a timeline as of yet.
Year End Reminder

• 2020 Appeal Creation
• Use of correct *Inbound Channel* in batch entry
• Check your work before your controller closes the book
• Events *Category* should be ‘Future Year’ until year end close
Year End Reminder

Appeal Creation

- Keep naming convention like prior appeal
  
  (307) A17 - 2017 Annual Giving Campaign
  (307) A18 - 2018 Annual Giving Campaign
  (307) A19 - 2019 Annual Giving Campaign
  (307) A20 - 2020 Annual Giving Campaign

- Add your designation to your designation tab

  Designations (39)

  30700001 NO NAM - Operating
  30700401 Cncl Membershi - Operating
  30700411 Membership - Fall Roundu - Operating

- Add your prior year appeal to the Prior Year Appeal tab

  Prior Appeal: (307) A19 - 2019 Annual Giving Campaign
Year End Reminder

Batch Entry *Inbound Channel*

- For your 2020 appeal use Future Year Inbound channels
  - Use on Pledges and Payments
  - Use until controller begins the process of their 2019 close in PeopleSoft in January of 2020

- Once PeopleSoft is closed for 2019, your 2020 inbound channel would revert to the current year inbound channel.

- Payments for 2019 appeals would revert to the Prior Year Inbound Channels.
Year End Reminder

Check Your Work

• Ensure that you have used *Future Year* on your 2020 appeal revenue
• Before the books are closed, review the *Revenue Details (Splits) tab* on your 2020 appeals
• All *inbound channels* on this tab should show *future year*. If this is not the case, you need to correct the revenue transaction before your 2019 books are closed
Webinar Slide Deck & Recording

Questions & Answers