

# CRM User Forum

October 16, 2019

**Eagle Scout List in Blackbaud CRM  
2020 Revenue Entry**



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# Eagle Scout List in CRM Year End Reminder(s)

**Welcome**

**John Kuehn**

**Chuck Kehoe**

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

<https://www.scouting.org/council-support/finance-impact/council-financial-management/crm-resources/>



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# Objectives

## Council Eagle Scout List

- **Located on the Analysis Tab in CRM**
- **Running your Council's list**
  - **Filtering**
  - **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.

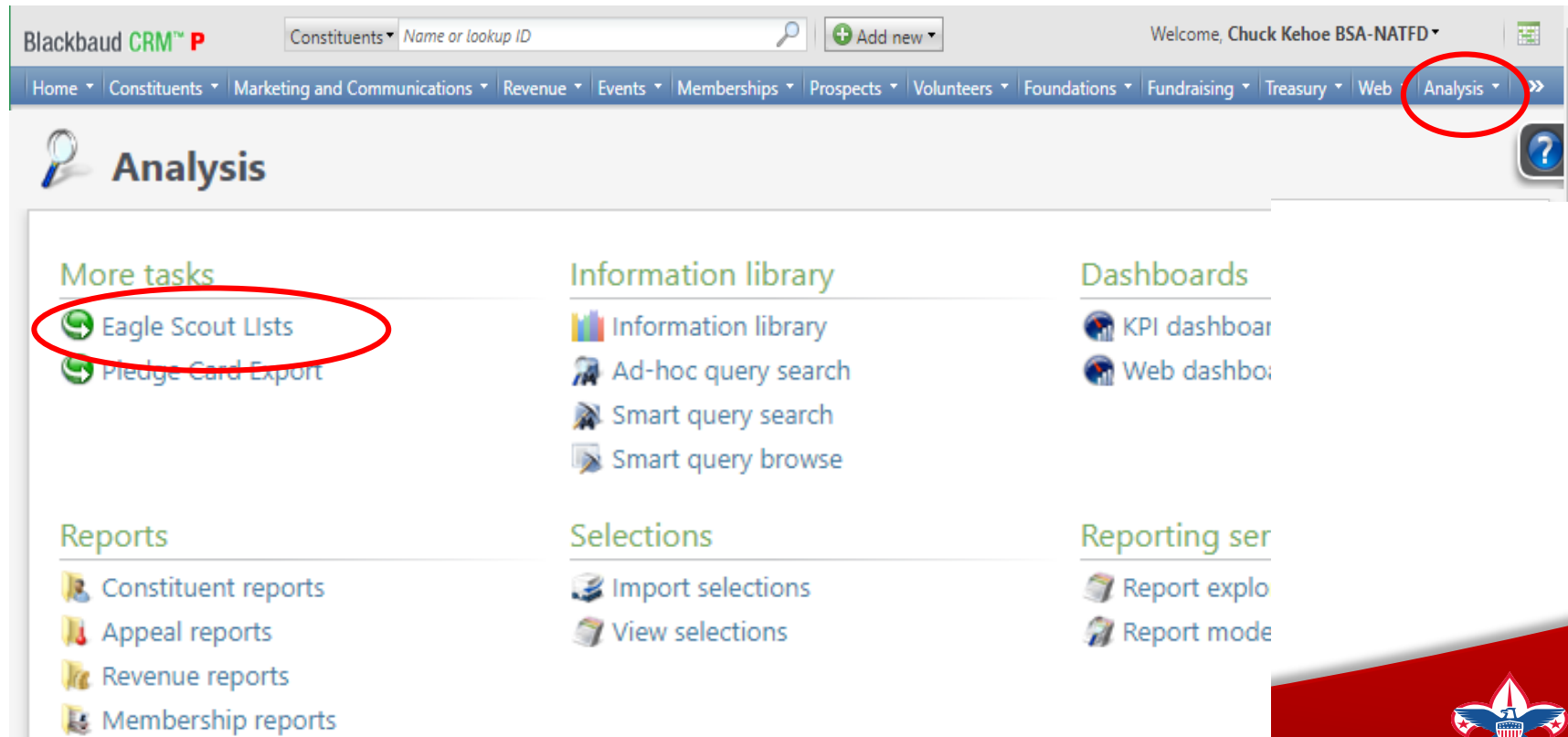
The screenshot displays the Blackbaud CRM interface. At the top, the user profile for 'netbsa\jbledsoe - Application User' is shown, with a red box highlighting the user name. Below this, the 'System Roles' tab is active, showing a list of roles. A red circle highlights the 'Add' button. An 'Add system role' dialog box is open, showing 'BSA Query Add/Edit' selected in the 'System role' field. The 'Site Security' tab is selected, and the 'Constituent Security' dropdown is set to 'Records with one of these sites assigned'. A tree view of sites is shown, with 'Heart of America Council' selected and highlighted by a red box. A red arrow points from this box to a yellow callout box on the right.

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

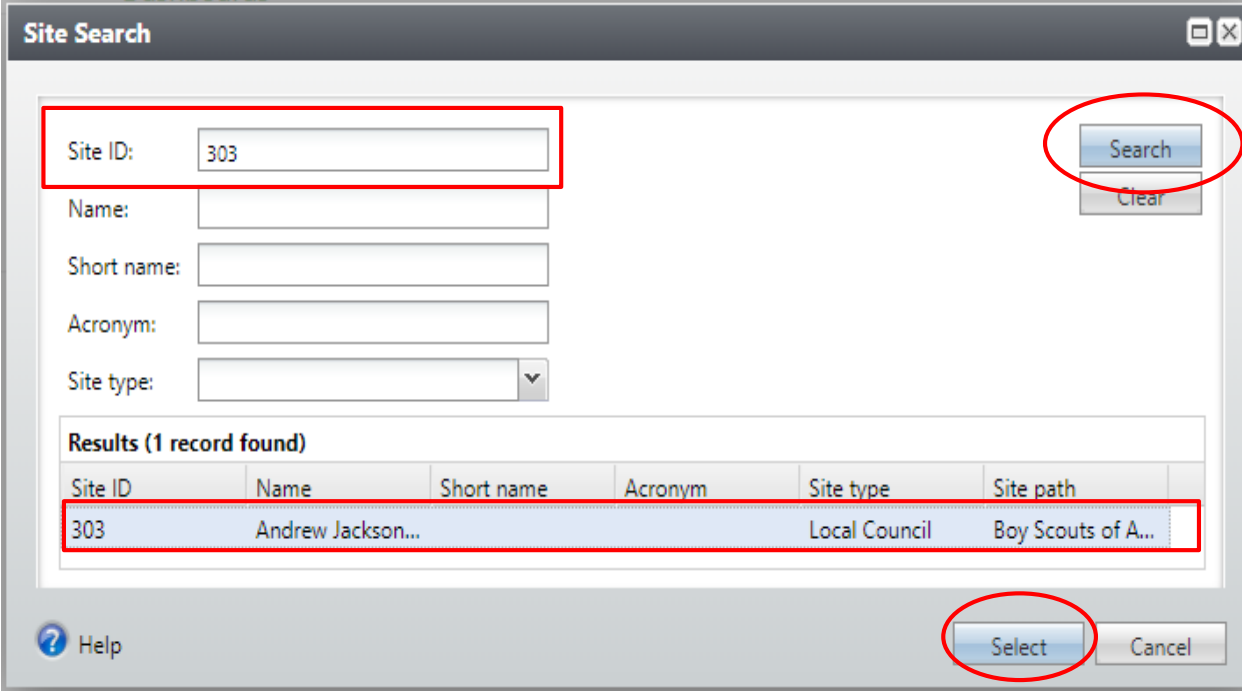


The screenshot displays the Blackbaud CRM P interface. At the top, there is a search bar for 'Constituents' with a search icon and an 'Add new' button. The user is logged in as 'Welcome, Chuck Kehoe BSA-NATFD'. The navigation menu includes: Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, Volunteers, Foundations, Fundraising, Treasury, Web, and Analysis (highlighted with a red circle). Below the navigation menu, the 'Analysis' section is active, showing a magnifying glass icon and the word 'Analysis'. Under the 'More tasks' section, 'Eagle Scout Lists' is highlighted with a red circle, along with 'Pledge Card Export'. Other sections include 'Information library' (Information library, Ad-hoc query search, Smart query search, Smart query browse), 'Dashboards' (KPI dashboard, Web dashbo), 'Reports' (Constituent reports, Appeal reports, Revenue reports, Membership reports), 'Selections' (Import selections, View selections), and 'Reporting ser' (Report explo, Report mode).



# 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



The screenshot shows a 'Site Search' dialog box with the following fields and buttons:

- Site ID: 303 (highlighted with a red box)
- Name: (empty)
- Short name: (empty)
- Acronym: (empty)
- Site type: (dropdown menu)
- Search button (circled in red)
- Clear button

Results (1 record found):

Site ID	Name	Short name	Acronym	Site type	Site path
303	Andrew Jackson...			Local Council	Boy Scouts of A...

Buttons at the bottom: Help, Select (circled in red), Cancel



# 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

Blackbaud CRM™ P

Constituents

Home | Constituents | Marketing and Communications | Revenue | Events | Memberships | Prospects | Volunteers | Foundations | Fundraising | Treasury | Web | Analysis | Administration | Data Integrity | W

### Andrew Jackson Council (303) - Eagle Scout Lists

**Eagle Scout List** | Distinguished Eagle Scout Award List | National Outstanding Eagle Scout Award List

**Eagle Scout list for your council** (8,311)

City equal to:  State equal to:  Zip equal to:  Eagle Unit equal to:

Council ID	Council Name	Lookup ID ▲	First name	Middle name	Last Name	Suffix	Address	City	State	Zip	Email Type	Em
303	Andrew Jackso...							Mandeville	LA	70448-1017	Home Email A...	davi
303	Andrew Jackso...							Birmingham	AL	35242-3903		
303	Andrew Jackso...							Jyess	MS	39641-9803	Home Email A...	jsca





# 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

**Andrew Jackson Council (303) - Eagle Scout Lists**

Eagle Scout List | Distinguished Eagle Scout Award List | National Outstanding Eagle Scout Award List

Eagle Scout list for your council. (1,342) More ▾

City equal to:  State equal to:  Zip equal to:  Eagle Unit equal to:

Council ID	Council Name	Lookup ID ▲	First name	Middle name	Last Name	Suffix	Address	City	State	Zip	Em
303	Andrew Jackso...							Jackson	MS	39211-6521	Hoi
303	Andrew Jackso...							Jackson	MS	39216-4109	Bus
303	Andrew Jackso...							Jackson	MS	39211	Hoi



# 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

## Andrew Jackson Council (303) - Eagle Scout Lists

Eagle Scout List   Distinguished Eagle Scout Award List   National Outstanding Eagle Scout Award List

Eagle Scout list for your council. (1,342) More ▾

City equal to:  State equal to:  Zip equal to:  Eagle Unit equal to:

	Council ID	Council Name	Lookup ID	First name	Middle name	Last Name ▲	Suffix	Address
▼	303	Andrew Jackso...				Abraham		
▼	303	Andrew Jackso...				Abraham		
▼	303	Andrew Jackso...				Abraham		
▼	303	Andrew Jackso...				Adams		
▼	303	Andrew Jackso...				Adams		

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



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# 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

Andrew Jackson Council (303) - Eagle Scout Lists

Eagle Scout List | Distinguished Eagle Scout Award List | National Outstanding Eagle Scout Award List

Eagle Scout list for your council. (1,342) More ▾

City equal to:  State equal to:  Zip equal to:  Eagle Unit:

Download to CSV  
Download to XLSX  
Autosize all columns  
Restore grid defaults

Council ID	Council Name	Lookup ID	First Name	Last Name	Suffix	Address
153	Jackson	153	John	Smith		1234 Main St



# 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

Andrew Jackson Council (303) - Eagle Scout Lists

Eagle Scout List | Distinguished Eagle Scout Award List | National Outstanding Eagle Scout Award List

Eagle Scout list for your council. (1,342) More ▾

City equal to:  State equal to:  Zip equal to:

	Council ID	Council Name	Lookup ID	First name	Middle name	Last Name	Suffix	Address
	303	Andrew Jackso...						163 In
	303	Andrew Jackso...						1949 E
	303	Andrew Jackso...						4651 F
	303	Andrew Jackso...						127 W

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)  Edit list of appeal designations

Designation ▲

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**  Edit 

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

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (1) More ▾

Constituent equal to:  Transaction equal to:  Application not equal to:  GL Post Status equal to:  GL

ed	Constituent	Date	T...	A...	Split Amount	T...	Pay M...	G...	GL Post Date	D...	Balance	Designation ▲	Inbound Channel	Revenue
<		9/23/2019	P...	D...	\$10,000.00	\$...	Check	P...	9/23/2019		\$0.00	32600001 Council Genera - Operating	FY - Project Sales	Unrestrict



# Webinar Slide Deck & Recording

<https://www.scouting.org/council-support/finance-impact/council-financial-management/crm-resources/>

The screenshot shows the Boy Scouts of America website. At the top, there is a navigation bar with the logo, "BOY SCOUTS OF AMERICA", and links for "Join", "Give", "Shop", and "My.Scouting Login". A search bar is also present. Below the navigation bar, a left sidebar contains a "Council Support" menu with items like "Strategic Performance Office", "Council Assessments", and "Council Fund Development" (highlighted with a red circle and the number 1). The main content area features a breadcrumb trail: "Home > Council Support > Financial Services > Council Fund Development". The main heading is "Council Fund Development". Below this, a paragraph describes the role of Council Fund Development. A list of resources follows, with "CRM Resources" highlighted in yellow and marked with a red circle and the number 2. Other resources include "Operating", "Capital", "Major Gifts & Endowment", "Best Practices", "Document Library", "Donor Research", "FOS Planning Kit", and "Sample Grant Proposals". A red-bordered box at the bottom of the main content area contains the URL "www.scouting.org/financeimpact". The footer includes social media icons for Facebook, Twitter, Instagram, Pinterest, and YouTube, along with the copyright notice "© 2019 Boy Scouts of America - All Rights Reserved".



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# Questions & Answers



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