CRM User Forum

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:

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

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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*

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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.
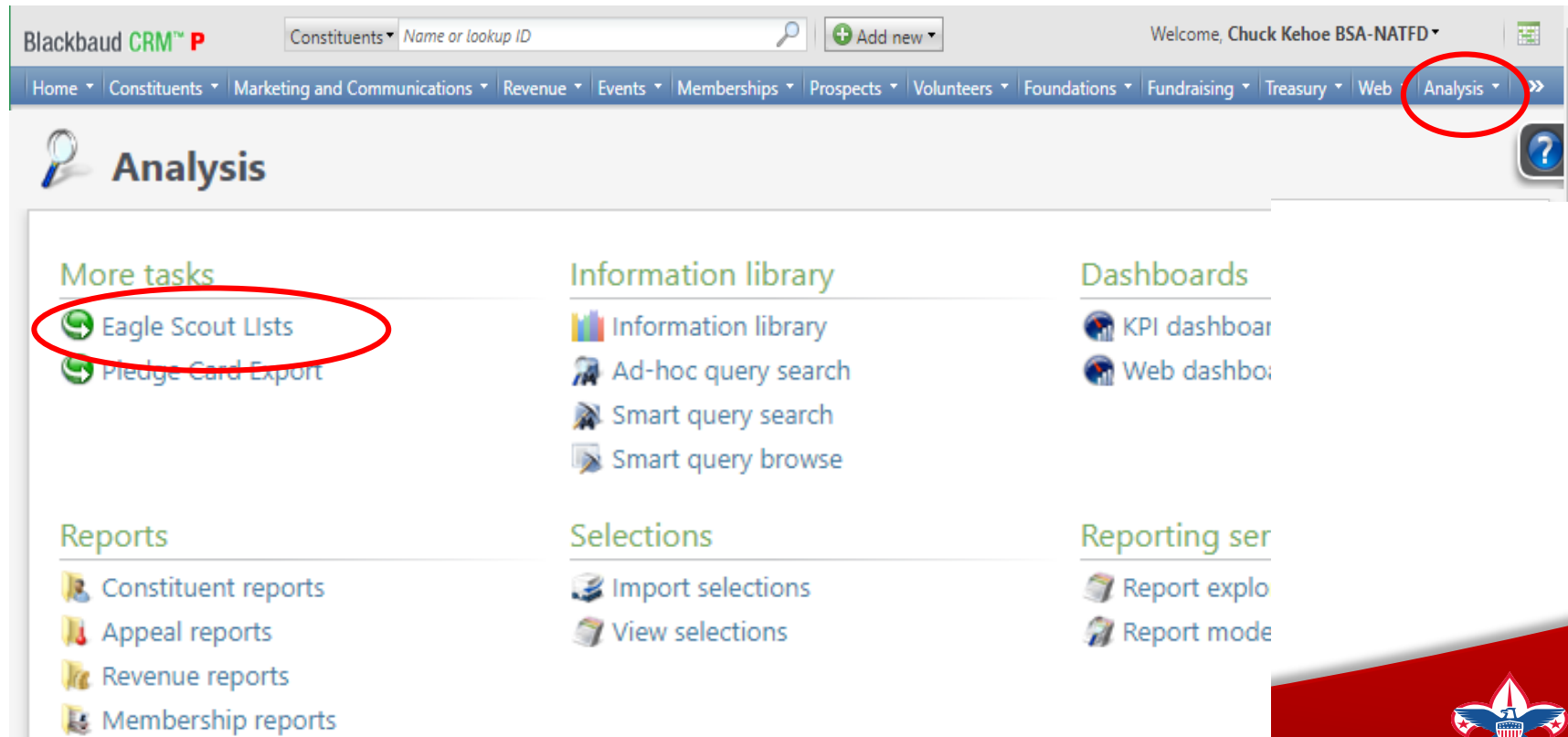

Constituent Security should be set to *'Records with no security group assigned'*.

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Navigating to the Eagle Scout List

- Navigate to the *Analysis* tab in CRM

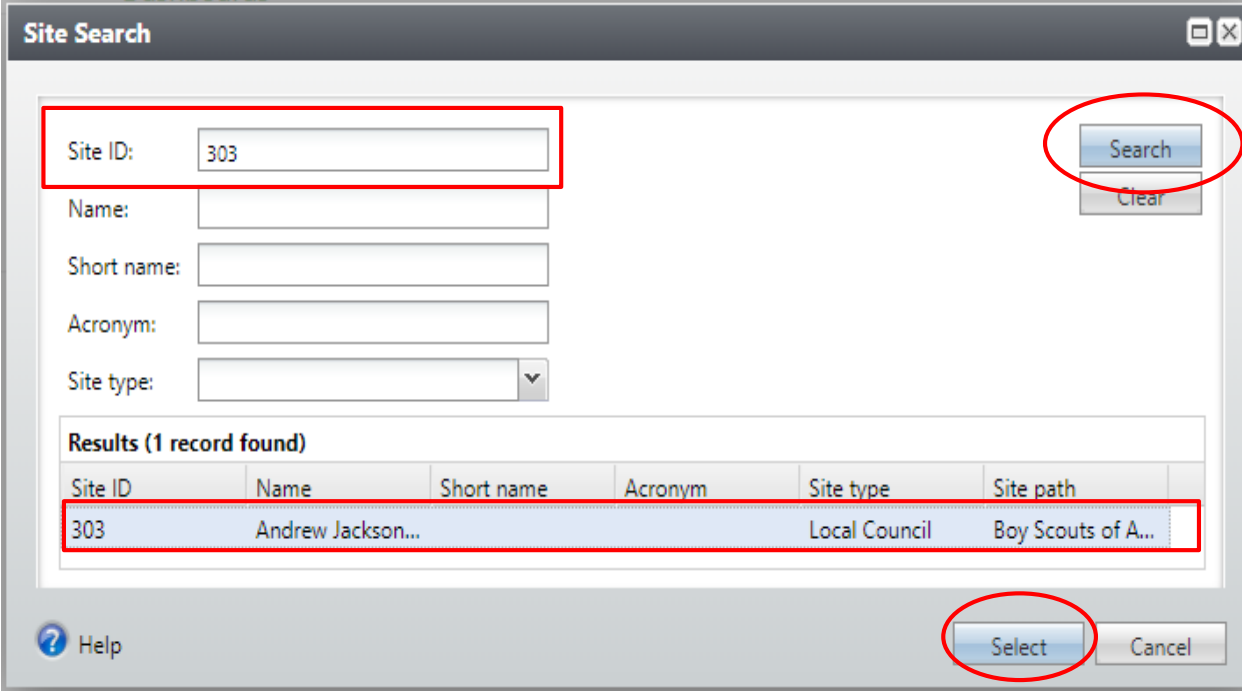- Click on the *Eagle Scout Lists* under the More Tasks section

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

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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

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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

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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.

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: | Jackson | State equal to: | | Zip equal to: | | Eagle Unit equa |

< 1 2 3 4

	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		

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Exporting Your Eagle Scout List

- You can export your Eagle Scout list
  - Click on the "More" drop drown
  - 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 browsers back button.

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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.

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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

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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.

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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.

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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

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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.

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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

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Webinar Slide Deck & Recording

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

Questions & Answers

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