

CRM User Forum

November 20, 2019



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WELCOME

- Cornelia Ellis
- John Kuehn
- Don Day



Objectives

- Closing the Year 2019
 - Using proper “inbound channel”
 - Clearing out old batches
 - Write offs and receivables
 - How to bake a turkey so it comes out moist and juicy
 - Cranberry Sauce – Yes or No?
 - Year end checklist
- Next Year
 - Creating next year appeals
 - Creating designation requests – why and or when
 - Contribution statements and when to run



Year-End Batch transaction



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Use of FY an PY inbound channels

- Use Correct Inbound Channels
 - Accountant / Controller and office procedure helps determine transition during first week of Jan of what is current, future or prior year.



Pledge

Fill in your batch row. I am entering a new pledge of \$100 with 4 installments starting on 11/19/2019. I attach it to a 2020 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 L0524283

Main Revenue

Batch: Save, Save and close, Export

Constituent: Solicit codes

Constituent: Edit, Go to

Configuration: Properties, Customize fields

Validate, Update status, Validate

Properties

	Constituent	Lookup ID	Group ID	Amount	Date	GL post date	Revenue type	Installment frequency	No. installme...
1	John D. Kuehn	8-11774808	Troop 1910 BT Keller - 6...	\$100.00	11/19/2019	11/19/2019	Pledge	Monthly	4
*									

Constituent: Edit, Go to

Configuration: Properties, Customize fields

Processes: Validate, Update status, Validate addresses (all rows), Update projected totals

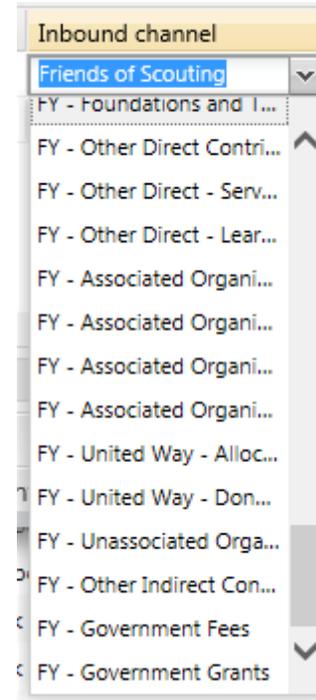
Messages: Set row message, Clear row message, Clear all, Show all, Select previous, Select next, Filter...

Application	Appeal	Designation	Inbound channel	Revenue category	Giving Category	BSA Structure
	(662) S20 - 2020 Friends...	66200511 FRIENDS OF S...	FY - Friends of Scouting	Unrestricted by donor	Family Division	Mustang



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.





John D. Kuehn

11/19/2019 Pledge: \$100.00

Transaction summary

Pledge amount: \$100.00

Date: 11/19/2019

Batch number: L0524283

Revenue ID: rev-43526954

Summary

Balance: \$100.00

Total paid: \$0.00

Past due: \$0.00

Status

Acknowledgements: Not acknowledged

Post status: Not posted

Post date: 11/19/2019

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
- Campa

Details

Original amount: \$100.00

Send reminders: Yes

Subtype: Pledge Receivable

Revenue reference:

Source code:

Effort:

Inbound channel: **FY - Friends of Scouting**

Appeal: **(662) S20 - 2020 Friends of Scouting**

Revenue category: Unrestricted by donor

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



Prepared. F

John D. Kuehn
11/19/2019 Pledge: \$100.00

Transaction summary

Pledge amount: \$100.00

Date: 11/19/2019

Batch number: L0524283

Revenue ID: rev-43526954

Summary

Balance: \$100.00

Total paid: \$0.00

Past due: \$0.00

Status

Acknowledgements: Not acknowledged

Post status: Not posted

Post date: 11/19/2019

Post process ID:

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 2019 and \$50 is due in 2020.

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

Transaction history by post date

All dates

11/19/2019
Pledge

GL distributions (5)

Filters

View: All Apply Reset

Account	Description	Debit amount	Credit amount	Reference
Pledge				
L662-1-4001-051-91	L662-1-FOSF-FRCY-L6620...		\$50.00	Kuehn-Pledge
L662-1-4001-051-91	L662-1-FOSF-FRCY-L6620...		\$50.00	Kuehn-Pledge
L662-1-1331-051-00	L662-1-FOSF-PLRC-L6620...	\$50.00		Kuehn-Pledge
L662-1-1331-051-00	L662-1-FOSF-PLRC-L6620...	\$50.00		Kuehn-Pledge





John D. Kuehn

11/19/2019 Pledge: \$100.00

Transaction summary

Pledge amount: \$100.00

Date: 11/19/2019

Batch number: L0524283

Revenue ID: rev-43526954

Summary

Balance: \$100.00

Total paid: \$0.00

Past due: \$0.00

Status

Acknowledgements: Not acknowledged

Post status: Not posted

Post date: 11/19/2019

Post process ID:

When we look at the installments there are 4. 2 in 2019 and 2 in 2020. This is why the GL created two \$50 entries.

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

Installment activity (4) Reschedule installments | Filters | More ▾

Activity	Date	Amount	Receipt amount	Paid by	Pay method
Installment 1	11/19/2019	\$25.00	\$25.00		
Installment 2	12/19/2019	\$25.00	\$25.00		
Installment 3	1/19/2020	\$25.00	\$25.00		
Installment 4	2/19/2020	\$25.00	\$25.00		

Write-offs (0) Add More ▾

Date	Amount	Post status	Post date	Reason details
------	--------	-------------	-----------	----------------



Prepar

Future Year Payment

Selected a pledge payment batch. Set the Inbound Channel to future year. Check pledge dates when Applying payments. The Appeal field is also now unhidden for your viewing

Batch L0524284

Main Revenue

Batch: Save, Save and close, Export

Constituent: Solicit codes

Constituent: Edit, Go to

Configuration: Properties, Customize fields

Process: Validate, Update status, Validate addresses (all rows), Update

Properties

	Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Deposit Reference
1	John D. Kuehn	8-11774808	\$25.00	\$25.00	11/29/2019	11/29/2019	WF123
*							

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

Application	Payment method	Other method	Check number	Appeal	Inbound channel
Pledge for John D. Kuehn 11/19/2019...	Check		555	(662) S20 - 2020 Friends...	FY - Friends of Scouting





John D. Kuehn

11/29/2019 Payment: \$25.00

Transaction summary

Payment amount: \$25.00

Date: 11/29/2019

Receipt amount: \$25.00

Batch number: L0524284

Revenue ID: rev-43526955

Status

Payment method

Acknowledgements: Not acknowledged

Payment method: Check

Receipt preference: Per payment

Check number: 555

Receipt status: Not received

Check date:

Receipt date:

Receipt number:

Post status: Not posted

Post date: 11/29/2019

Post process ID:

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
- BSAFR

Details

Original amount: \$25.00

Effort:

Finder number:

Appeal: (662) S20 - 2020 Friends of Scouting

Source code:

Inbound channel: **FY - Friends of Scouting**

Revenue reference:

Application details

Pledge - \$25.00 Go to revenue Edit

Applied to: 11/19/2019 Pledge for John D. Kuehn



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John D. Kuehn

11/29/2019 Payment: \$25.00

Transaction summary

Payment amount: \$25.00

Date: 11/29/2019

Receipt amount: \$25.00

Batch number: L0524284

Revenue ID: rev-43526955

Status

Acknowledgements: Not acknowledged

Receipt preference: Per payment

Receipt status: Not received

Receipt date:

Receipt number:

Post status: Not posted

Post date: 11/29/2019

Post process ID:

Payment method

Payment method: Check

Check number: 555

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
- BSAFR

Transaction history by post date

All dates

11/29/2019
Payment

GL distributions (3) More

View: All

Account	Description	Debit amount	Credit amount	Reference	Post date
4 Pledge 					
→ L662-1-1331-051-00	L662-1-FOSF-PAPL-L6620...		\$25.00	Kuehn-Pledge Payment fo...	11/29/2019
→ L662-1-1001-015-00	L662-1-FOSF-CASH-L6620...	\$25.00		Kuehn-Pledge Payment fo...	11/29/2019



Prepared

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

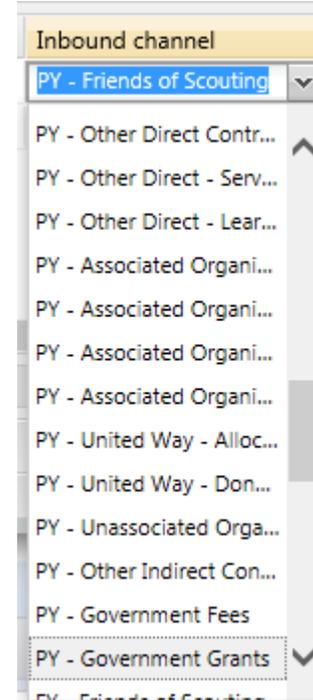
Batch: Save, Save and close, Export
Constituent: Edit, Go to
Configuration: Properties, Customize fields
Processes: Validate, Update projected totals, Update status
Messages: Set row message, Clear row message, Clear all, Show all, Select previous, Select next, Filter...

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



Prior Year Inbound Channels



These are your inbound channel choices for prior year payments.



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

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 received
 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



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 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)

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



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 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

Details

Start date: Start time:

End date: End time:

Location information

Location:

Room/Unit: Capacity:

Contact:

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



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:

Copy options



Help

- 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

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

18 L532 Oil City Breakfast

19 L532 Clarion Breakfast 2015

20 11:00 am L651 Sco

21

22

23

09 2015 6:30

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.



Cleaning up Batches

- This will be done in the Uncommitted Batch Tab.
- Uncommitted batches accumulate if you have your filters active
- Need to clear your date filters to see if you have hidden batches
- Leave site filter to all sites
- If you find uncommitted batches, edit the batch
 - If batch contains information, confirm if it has or has not been committed in another batch
 - If batch not needed, delete the batch
 - If batch is empty, use or delete the batch.
- Your goal should be to not have open batches.



Sample from production

Sample with filter engaged

Uncommitted batches (1) + Add Batch search More

Date range: Last 7 days Sites: All sites Show only batches with exceptions Apply Reset

+ Columns Clear all filters

Batch number	Owner	Date added	Description
L0532354	Shondell Williams BSA-440	11/19/2019	

Sample with no filter engaged

Uncommitted batches (3) + Add Batch search More

Date range: Sites: All sites Show only batches with exceptions Apply Reset

+ Columns Clear all filters

Batch number	Owner	Date added	Description
L0375706x2	Shondell Williams BSA-440	1/3/2019	Exceptions from batch L0375706x1
L0447530x4	Shondell Williams BSA-440	5/2/2019	Exceptions from batch L0447530x3
L0532354	Shondell Williams BSA-440	11/19/2019	



Next Year



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Create Appeal in CRM



Appeal: 2019 SG19 Special Event Appeal

Description: Appeal for Scouting Give Set Up Demo Start date: 1/1/2019
Business unit: End date: 12/31/2019
Category: Special Events Goal: \$100,000.00
Report code: 2019 Status: Active
Site: Bay-Lakes Council Membership:

← Revenue Summary Contributions Payments Balances Revenue Details (Splits) Revenue Details (Write-offs)

Designations (3) Edit list of appeal designations More ▾

Designation ▲ Default designation

63508521 SG Event

63508521 SG Event \ 63508521-4202 SG Event - Operating (Ticket)

63508521 SG Event \ 63508521-4250 SG Event - Operating (Fees)

Benefits (0) View benefits catalog More ▾

Level	From	To	Benefits
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Follow directions in the CRM user guide to create an event appeal. All monies in CRM must be connected to an appeal. The designation tab must be completed with at least the main designation. Sub-designation are not available until you have your designation event mapping completed.



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?
----------------	------------------------	-----------------	-----------------------	-------------------



CRM Add an Event Form

Add an event

General

Name: 2019 Scouting Gives Event

Description: Scouting Gives Event Setup Demo

Category: Special Fundraising Event

Sites: Site, Bay-Lakes Council

Event is an auction

Do not show event on calendar

Event allows designations on fees

Copy options

Details

Start date: 9/18/2019 Start time: hh:mm AM

End date: 9/18/2019 End time: hh:mm AM

Location information

Location: Marriott Center City

Room/Unit: Capacity: 0

Contact: John C. Kuehn

Help Save Cancel

Fill in the information on the event form. Ensure that you select “Event allows designation on fees” and “Event is an auction”. You do not need to use the auction side of the event. However, if you fail to select either option, neither option can be added after you click save.



Designations

- Only request new designations for new
- The appeal may change but the designation stays the same



Contribution Statements

- Due to donors by last day of January
- There is work we must do to the template after January 1
- Contribution statement template will be ready by January 15, 2020



Tweaking BSAFR



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Tweaking BSAFR

- 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



Tweaking BSAFR

- 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



Consider using conventional BSA structure

- Council
 - Executive Board chair
 - Special Gifts chair
 - Leadership chair
- District
 - Family chair
 - Community chair



Next Forum

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





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 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



Questions & Answers



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