CRM User Forum

November 20, 2019

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

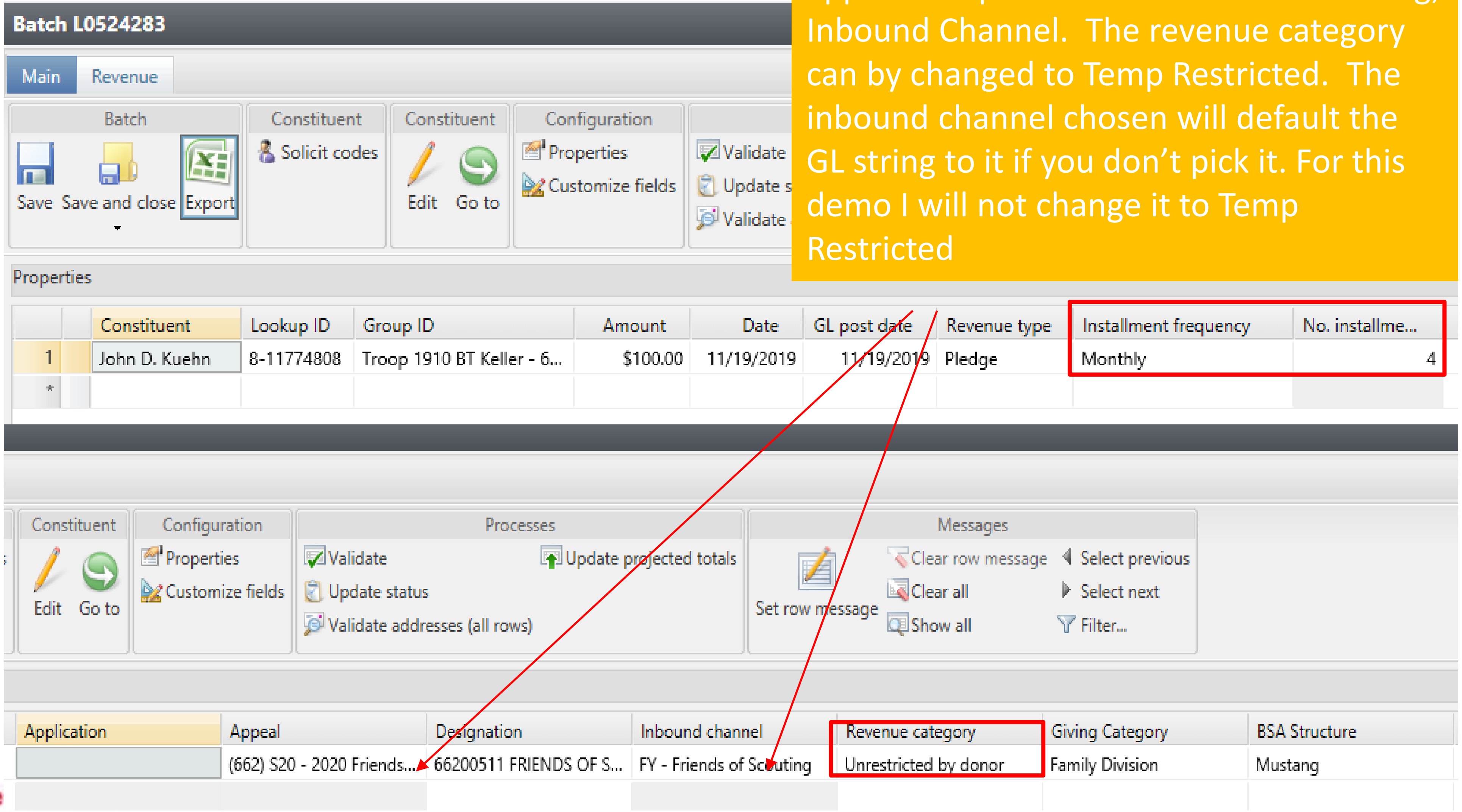
Year-End Batch transaction

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.

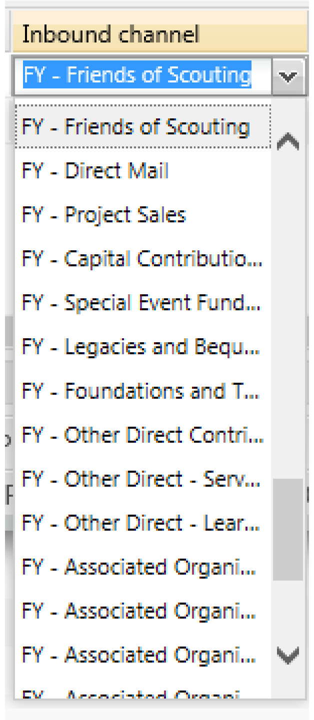
Pledge

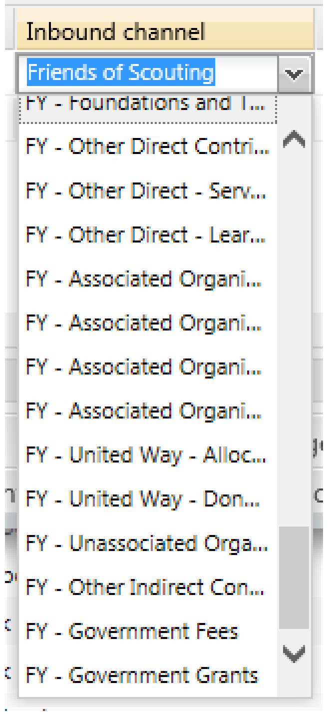
Fill in your batch row. I am entering a new pledge of $100 with 4 installments starting on 11/19/2019. I attach it to a 2020 appeal and pick the FY-Friends of Scouting, Inbound Channel. The revenue category can by changed to Temp Restricted. The inbound channel chosen will default the GL string to it 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.

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
Subtype: Pledge Receivable
Source code:
Inbound channel: FY - Friends of Scouting

Send reminders: Yes
Revenue reference:
Effort:
Appeal: (662) S20 - 2020 Friends of Scouting
Revenue category: Unrestricted by donor

Designations (1)

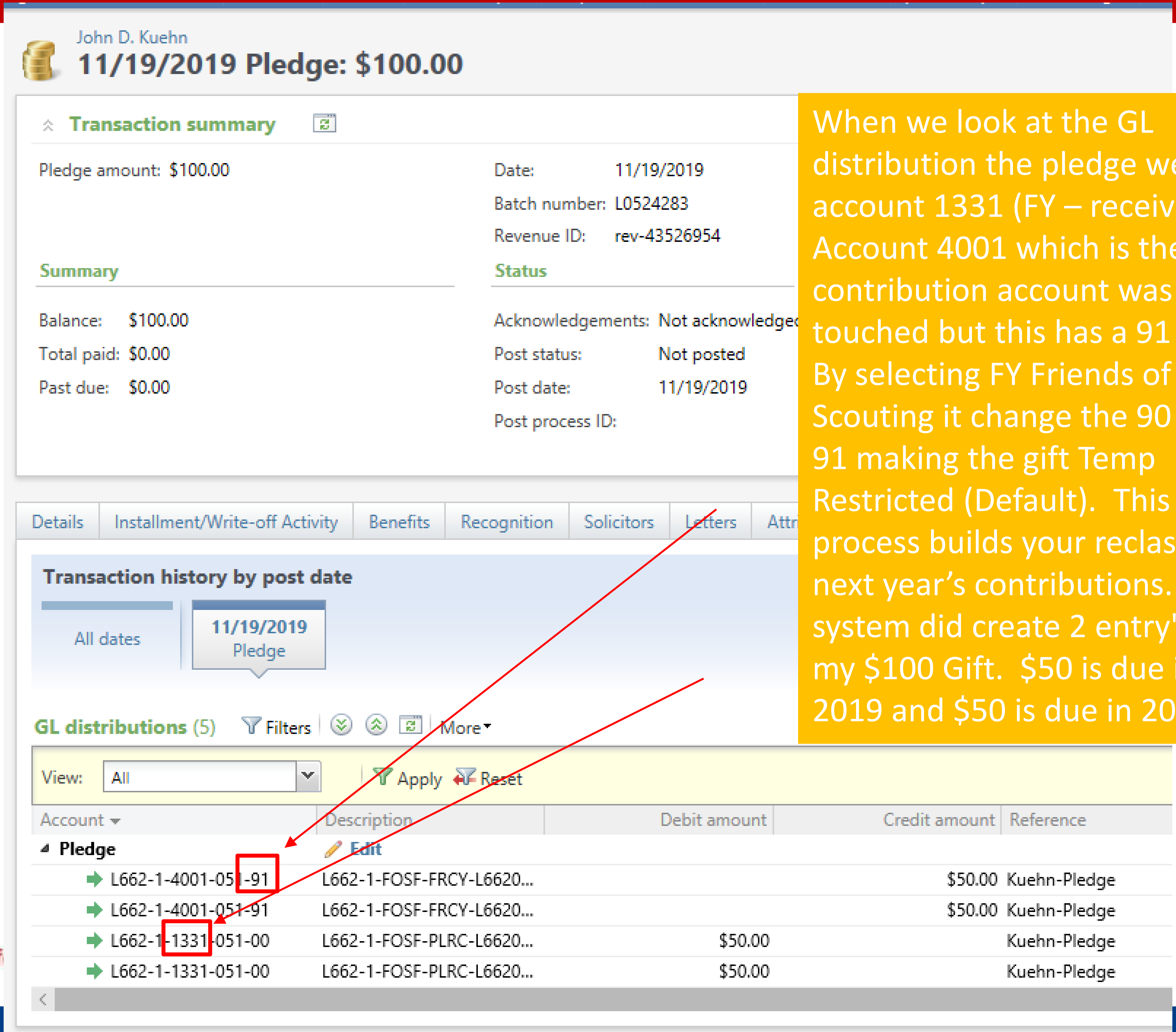
More

Designation	Amount	Balance	Category
66200511 FRIENDS OF SCOUTIN -...	$100.00	$100.00	Unrestricted by donor

Payment information

Edit

Automatic payment: Not set up for automatic payment



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.

John D. Kuehn

11/19/2019 Pledge: $100.00

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.

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:

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		

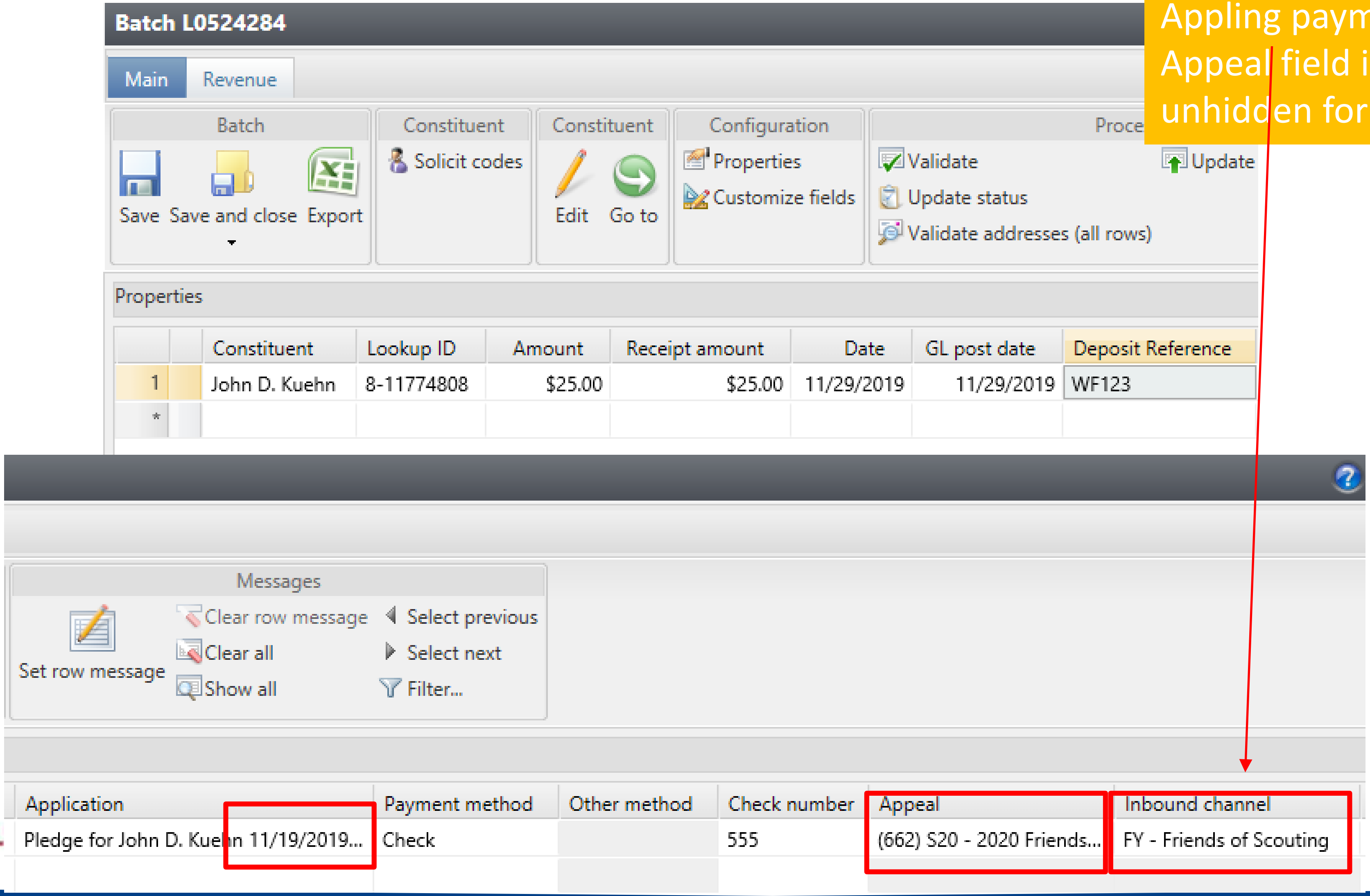
Write-offs (0)

Add | More

Date	Amount	Post status	Post date	Reason details

Future Year Payment

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



Prepared.

John D. Kuehn

11/29/2019 Payment: $25.00

Transaction summary

Payment amount: $25.00
Receipt amount: $25.00

Date: 11/29/2019
Batch number: L0524284
Revenue ID: rev-43526955

Status

Acknowledgements: Not acknowledged
Receipt preference: Per payment
Receipt status: Not receipted
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:

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
Finder number:
Source code:
Inbound channel: FY - Friends of Scouting
Revenue reference:

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

Application details

Pledge - $25.00 Go to revenue Edit

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

Prepared. F

John D. Kuehn

11/29/2019 Payment: $25.00

Transaction summary

Payment amount: $25.00
Receipt amount: $25.00

Date: 11/29/2019
Batch number: L0524284
Revenue ID: rev-43526955

Status

Acknowledgements: Not acknowledged
Receipt preference: Per payment
Receipt status: Not receipted
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)

Filters | More

View: All | Apply | Reset

Account	Description	Debit amount	Credit amount	Reference	Post date
Pledge	Edit				
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

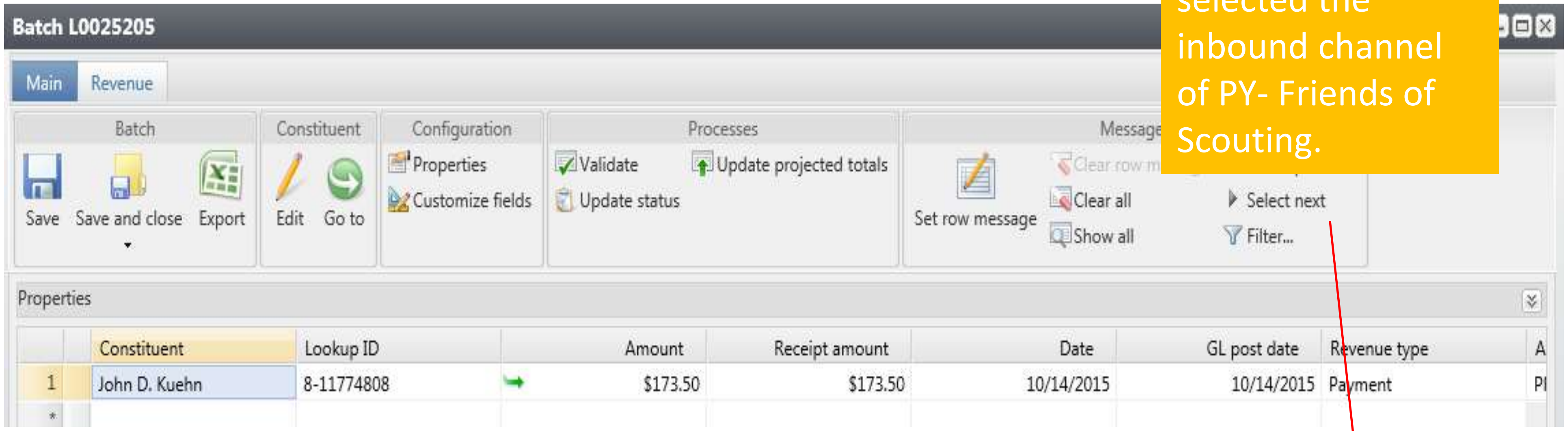
Prepared

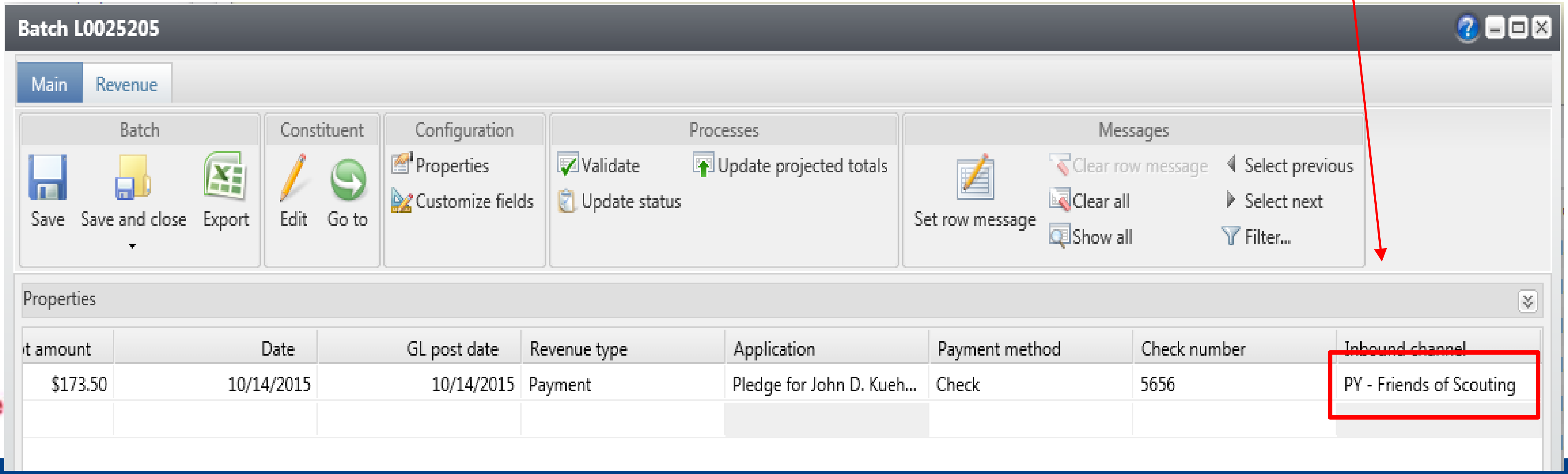
Prior Year Payments

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

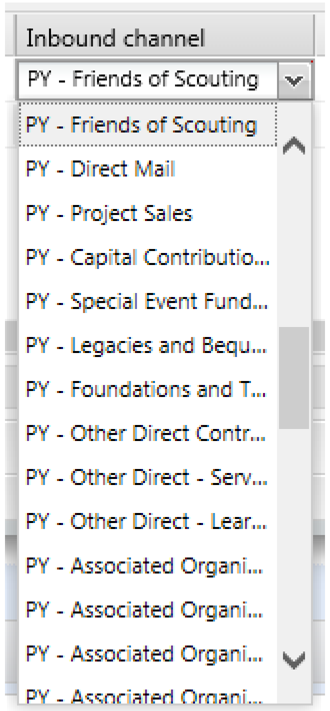
Prior Year Payment

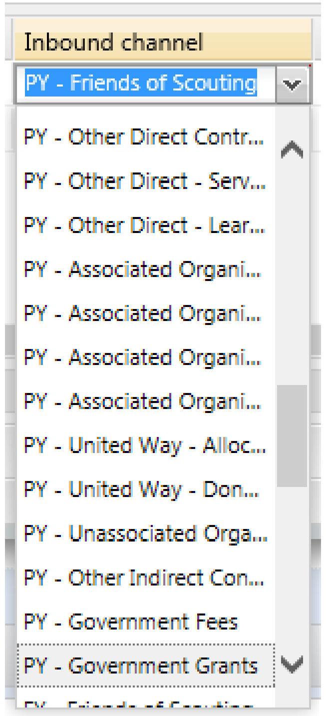
Here is a sample payment paying off a pledge in 2019. I selected the inbound channel of PY- Friends of Scouting.



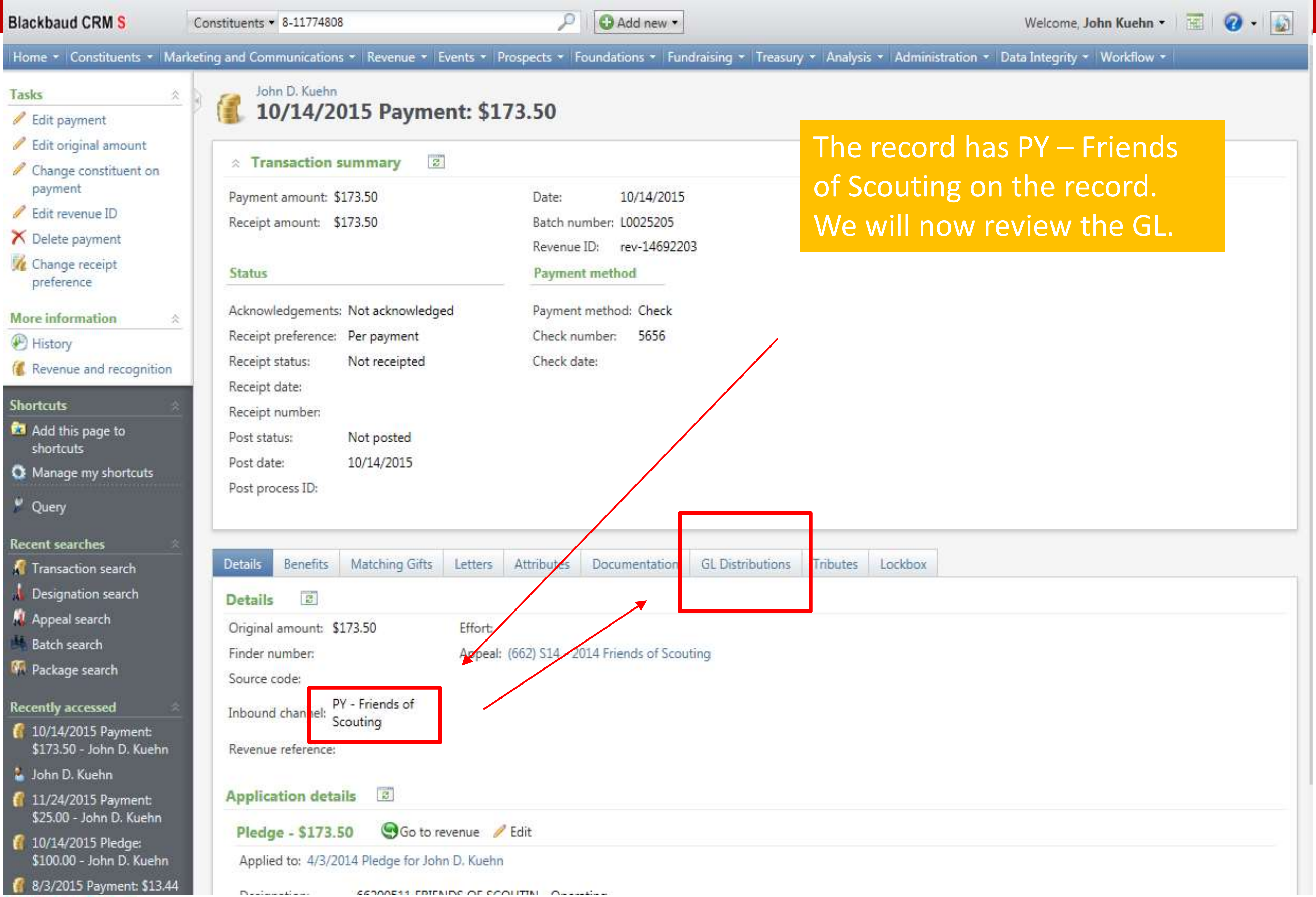


Prior Year Inbound Channels





These are your inbound channel choices for prior year payments.



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

Prepared. For Life.™

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

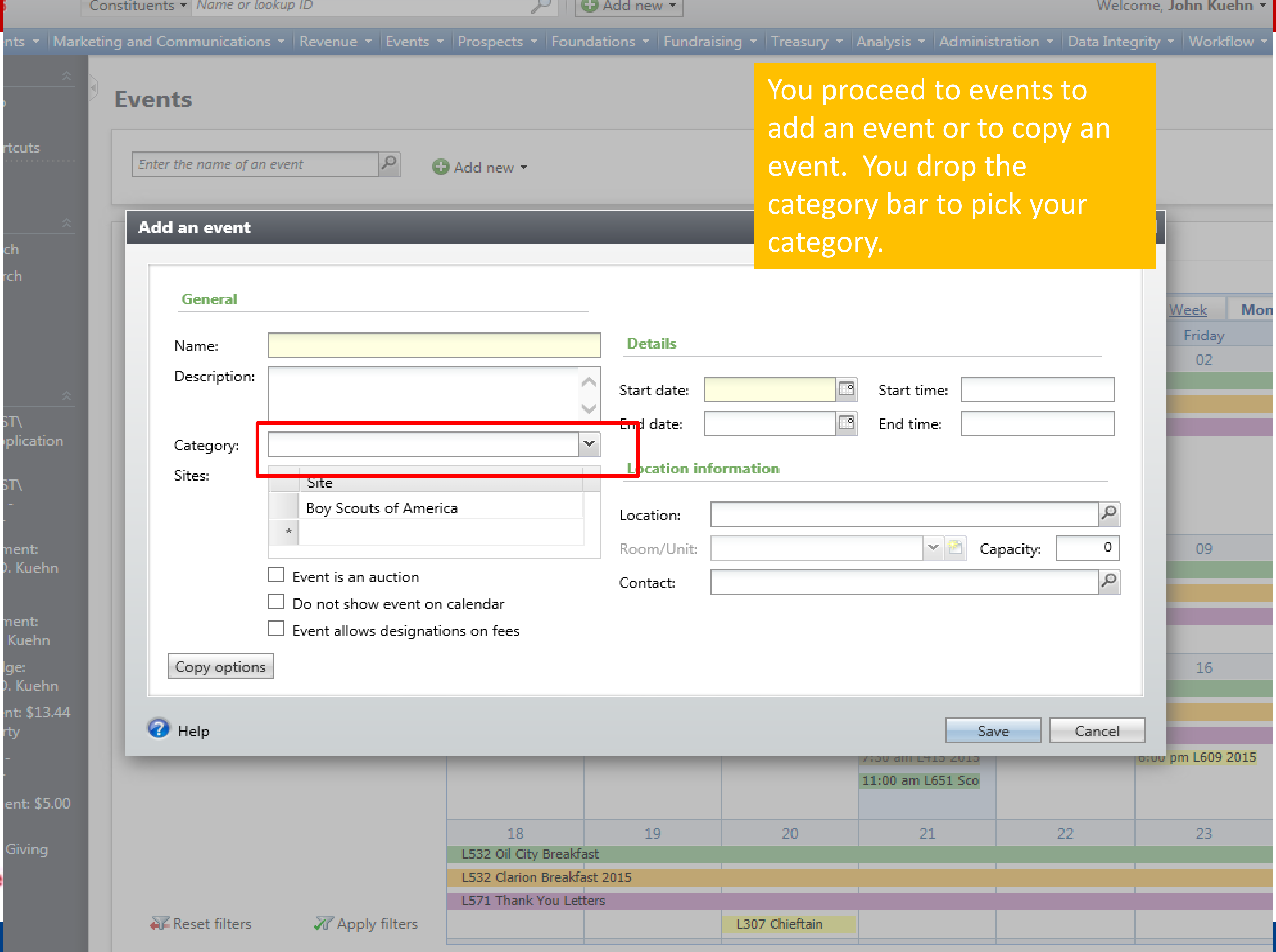
View: All | Apply | Reset

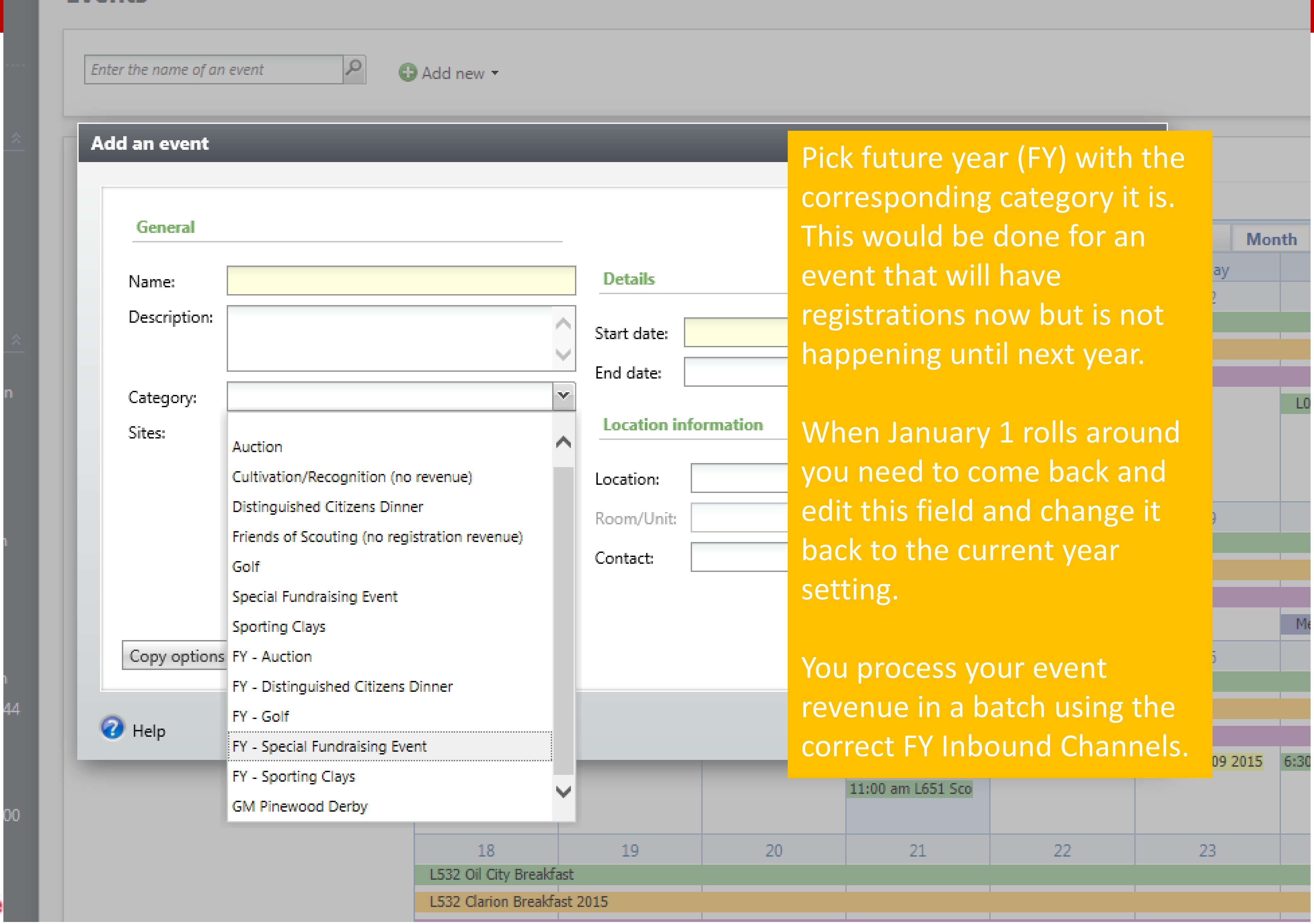
Account	Description	Debit amount	Credit amount	Reference
Pledge	Edit			
L662-1-1321-051-00	L662-1-FOSP-PAPL-L66200511-UNR. PAYMENT-...		$173.50	Kuehn-Pledge Payment for I
L662-1-1001-015-00	L662-1-FOSP-CASH-L66200511-UNR. PAYMENT...	$173.50		Kuehn-Pledge Payment for I

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

Summary

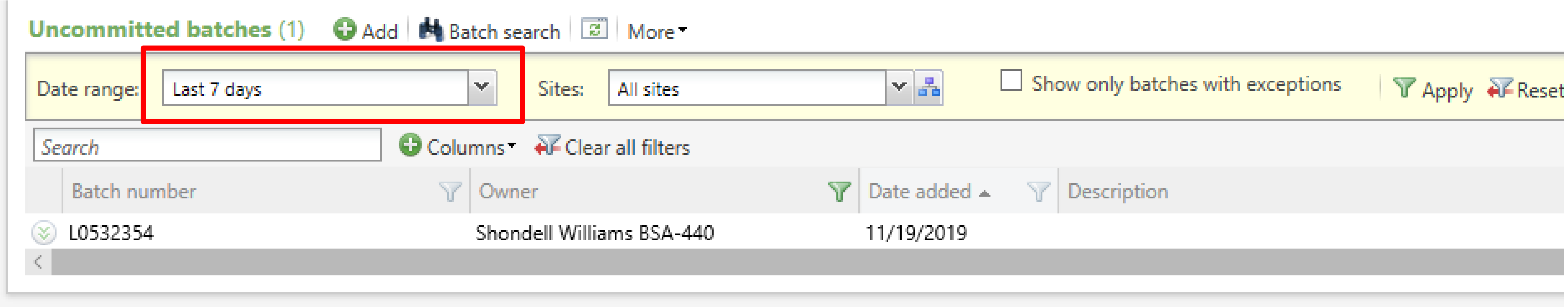
- Gifts for next year need to be placed into the system using FY inbound channels
- Events need to be tweaked for FY and current year at Jan 2 before additional registrations are added.
- Payment for Prior Year pledges should use PY inbound channels.

Cleaning up Batches

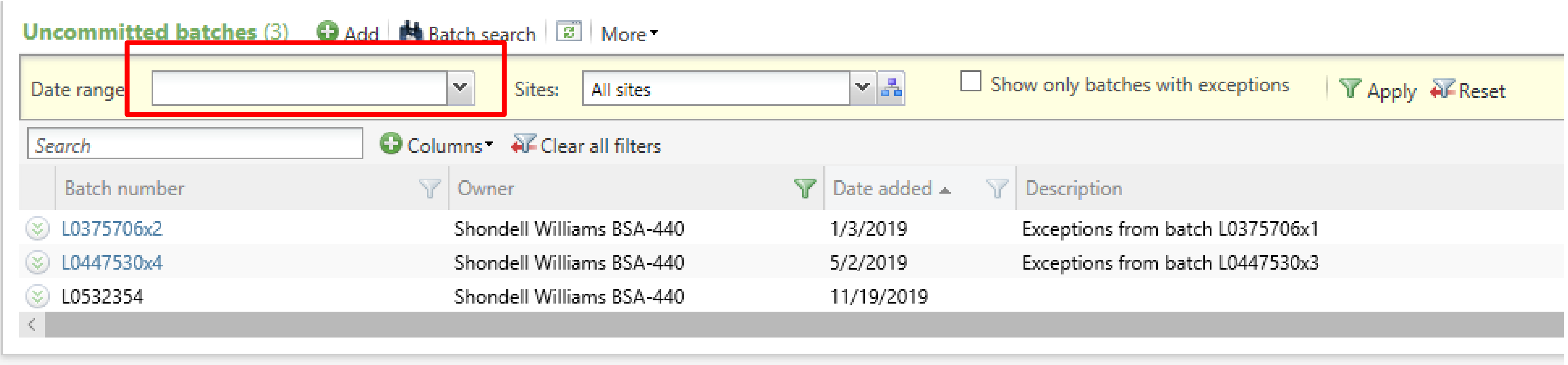
- This will be done in the Uncommitted Batch Tab.
- Uncommitted batches accumulate if you have your filters active
- Need to clear your date filters to see if you have hidden batches
- Leave site filter to all sites
- If you find uncommited batches, edit the batch
  - If batch contains information, confirm 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

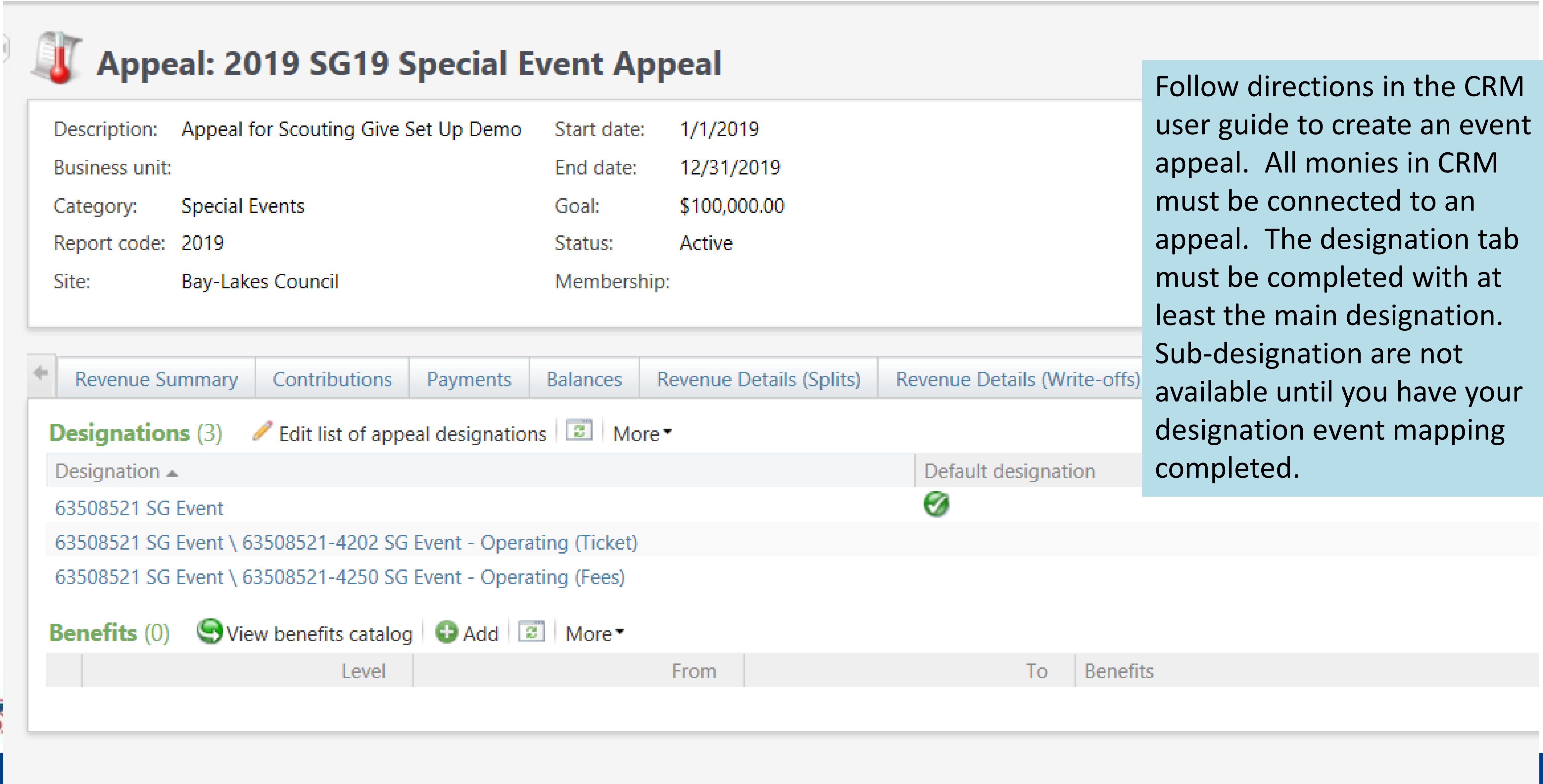


Sample with no filter engaged



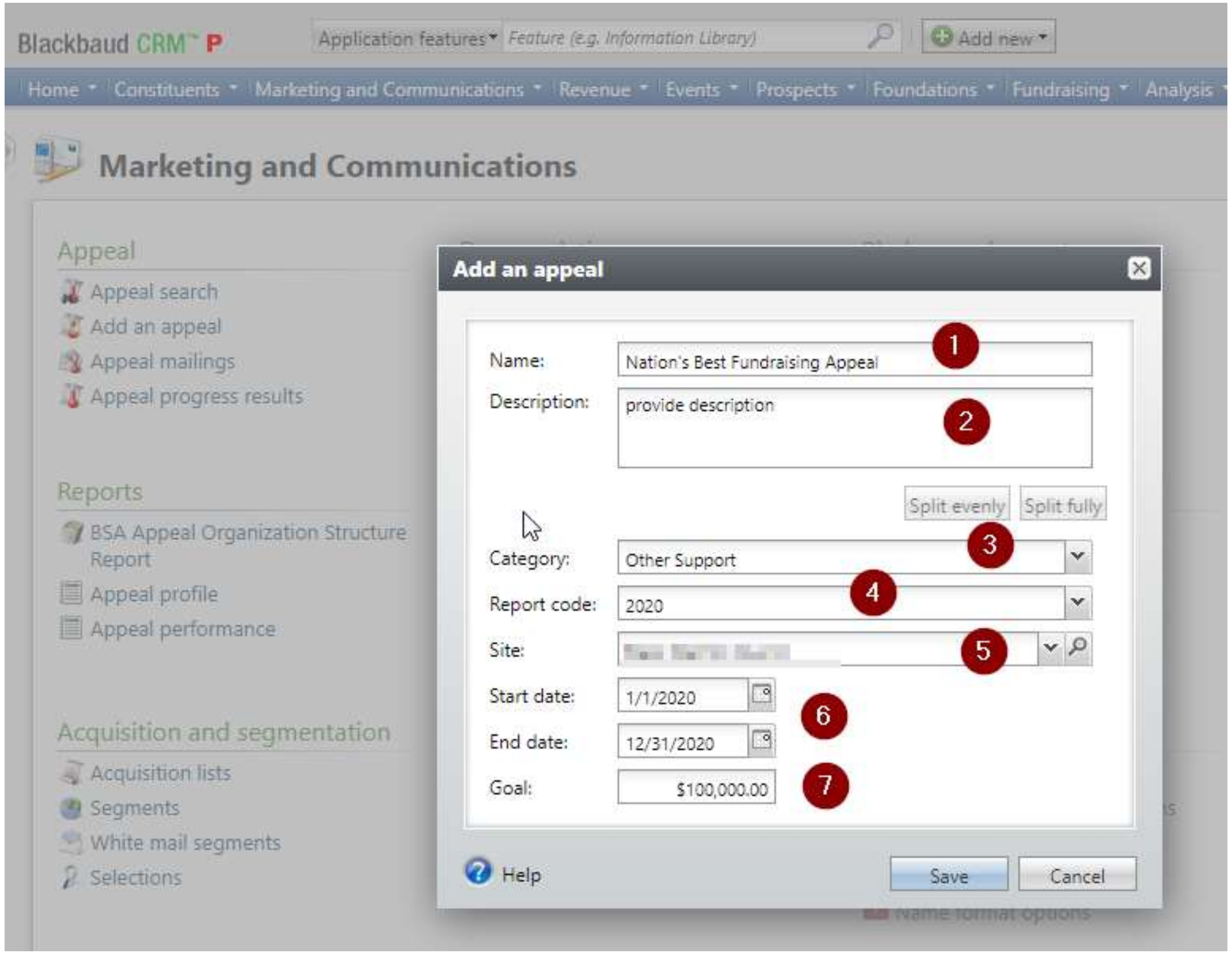
Next Year

Create Appeal in CRM

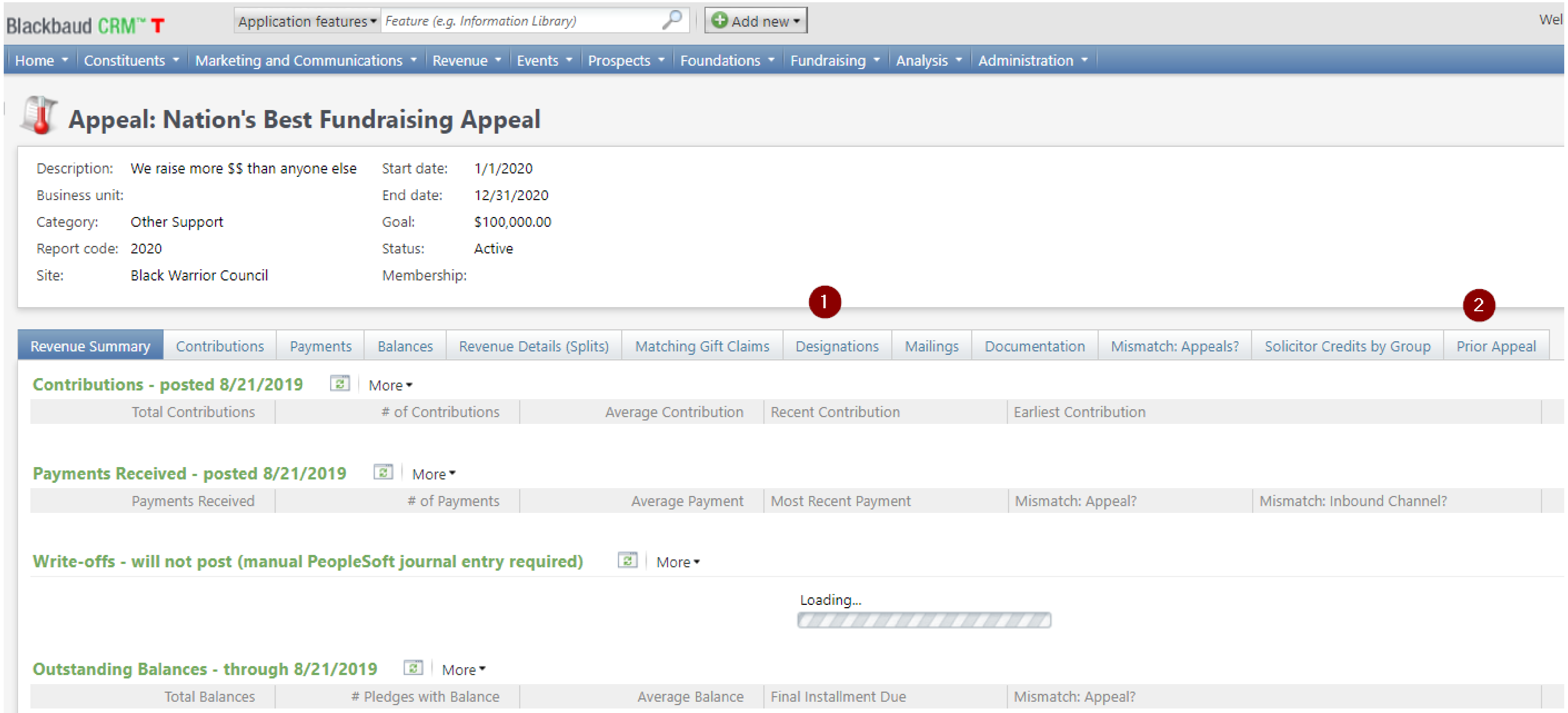


Follow directions in the CRM user guide to create an event appeal. All monies in CRM must be connected to an appeal. The designation tab must be completed with at least the main designation. Sub-designation are not available until you have your designation event mapping completed.

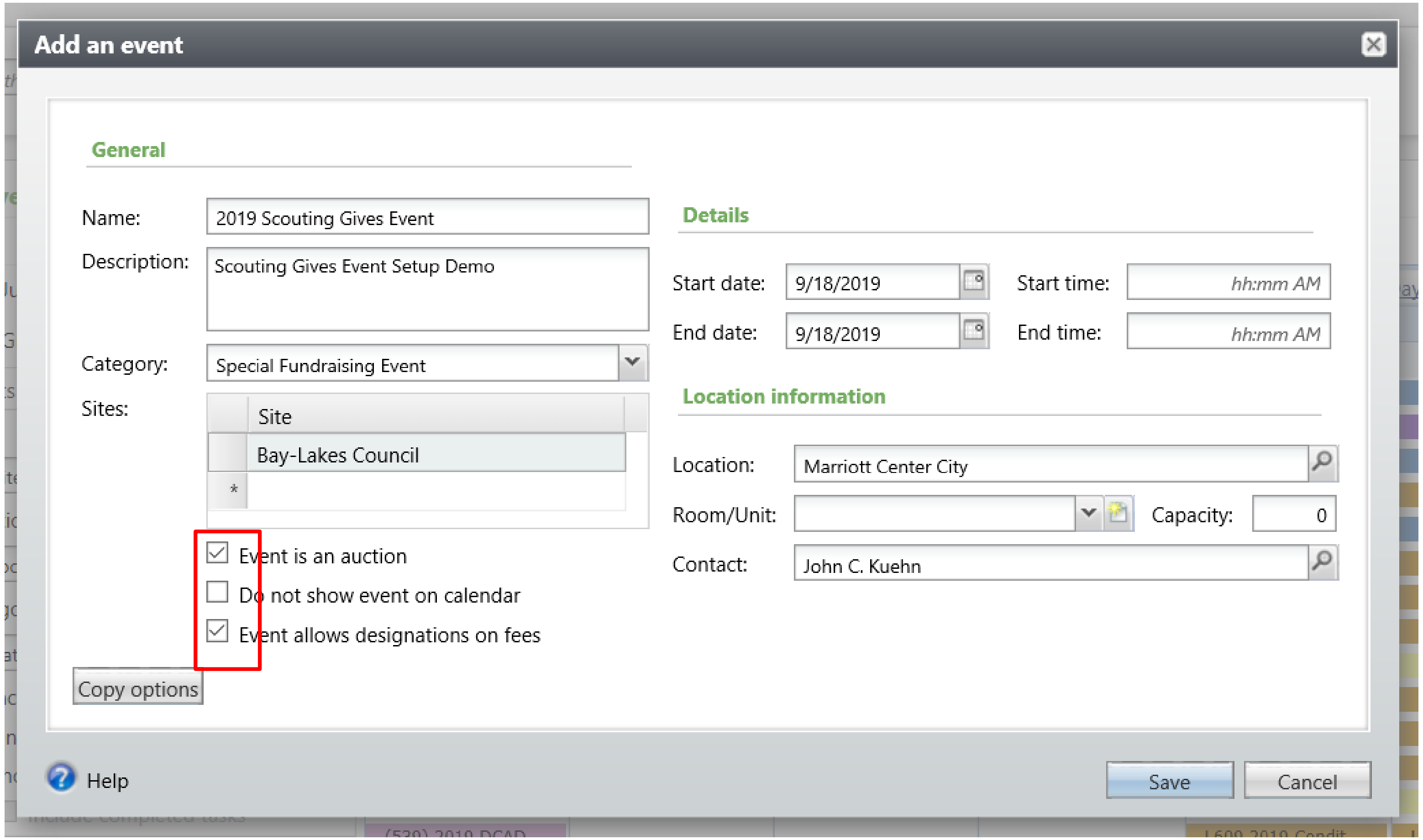
Add an Appeal



Assign Designation & Prior Appeal (if one)



CRM Add an Event Form



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

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

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

Questions & Answers