CRM User Forum

January 15, 2020
Cornelia Ellis – John Kuehn – Don Day
Objectives

• Finishing up Year 2019
  – Clearing out old batches
  – Write offs and receivables
  – Contribution statements

• This Year 2020
  – Creating new appeals
  – Creating designation requests – why and or when
  – Special event setup

• Data Lists
  – What are they
  – How to find them
Finishing Up 2019
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

Sample with no filter engaged
Write Offs
Determine collectible value

• Create the Pledges Receivable Aging Report
• Blackbaud CRM ~ Revenue ~
Determine collectible value

Create the Report

1. BSA Organization – your council
2. Report Code – year
3. Appeal – must be run for each open appeal with outstanding donor pledge values
4. Click “View Report”
5. Wait...
Pledge Receivable Aging Report
Pledge Aging Receivable Report

• Print report and give to management to review:
  – All open pledges
  – Determine who will still pay
  – Sign and date

• After management review, proceed to Pledge Write-Off process
Pledge Write-off Procedure

- Determine when your council needs to write-off pledges.
- Pledges written off by appeal
- You will use your current Global Pledge Write-off business process
- You will edit the selection in your current business process
Go to the Global Pledge Write-off processes and edit your routine. No need to create a new routine. When the edit window opens, click the pencil to edit the query attached as the selection.
The Query will open and you will need adjust the filters to only write-off those appeals you want to close. You do this by clicking on the Appeal record/Name filter and adding in the names of the appeals you need to write-off. This example show the council preparing to do more than one appeal at a time. They have changed the filter to “one of” and then can now list multiple appeals.
Always preview your query before saving it and running your routine to make sure only your appeals are showing and that only the appeals you want to write-off are listed.
Contribution Statements
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
IRS Publication 1771, Charitable Contributions—Substantiation and Disclosure Requirements

• A donor must have a bank record or written communication from a charity for any monetary contribution before the donor can claim a charitable contribution on his/her federal income tax return
• A donor is responsible for obtaining a written acknowledgment from a charity for any single contribution of $250 or more
• A charitable organization is required to provide a written disclosure to a donor who receives goods or services in exchange for a single payment in excess of $75
• Recipient organizations typically send written acknowledgments to donors no later than January 31 of the year following the donation.
Process Overview

1. Run export to get data set
2. Review data set and update as needed
3. Run mail merge to generate statements
4. Review and mail statements
Process Overview

- Marketing and Communications>Packages>Letters and documents>View letters and documents>Documents tab
- Job aids have detailed, step-by-step instructions
To Download Document

• Click the Chevron
• Either click “View document” or click the document hyperlink to download.
• Do not edit and change the site for LC Global to your council.
Run Export

• 3 Choices
  – Cumulative contributions > $0
    • All donors get statements
  – Cumulative contributions >= $250 or Benefited
    • Donors that give $250 or more, cumulatively, and any donors that received benefits get statements
  – Single contribution >= $250 or Benefited
    • Donors that give a single gift of $250 or more and any donors that received benefits get statements
Run Export

- Administration>Tools>Export
Run Export

• Because you are site secured only your records will be returned when you run this.
Review and Update

• Review your data and make updates as needed
• Add a dummy record at end of the file
Review and Update

• Review Columns V and W
  – Possible benefit issue
  – Possible receipt amount issue
  – These errors depend on how you have been using the system
  – Giving category column is on the sheet to help with benefits in column S
Review and Update

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| 89 | 1 | $500.00 | $500.00 | rev-34061 | 45170 | FALSE | FALSE | Community - DCA |
| 89 | 1 | $1300.00 | $800.00 | $320.00 | 34061 | 43158 | FALSE | FALSE | Table Sponsor |
| 89 | 1 | $500.00 | $500.00 | rev-41640 | 53320 | FALSE | FALSE | Family |
| 89 | 1 | $500.00 | $500.00 | rev-34061 | 59990 | FALSE | FALSE | Board Division |
| 89 | 1 | $250.00 | $250.00 | PA-13985 | 60480 | FALSE | FALSE | Community - DCA |

Prepared. For Life.
Run Mail Merge

• Download mail merge template
• Edit merge field values for your council
• Start a Directory mail merge
• Select the contribution statement data file
• Finish the merge
Run Mail Merge
Run Mail Merge
Run Mail Merge

- Navigate to your downloaded data file and select it
Run Mail Merge
Run Mail Merge
Review and Mail

- Print, fold, stuff and mail per your council’s usual procedure
- Discard the first and last pages from the merge file
Next Year
Add an Appeal
Assign Designation & Prior Appeal (if one)
Designations

- Only request new designations for new
- The appeal may change but the designation stays the same
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.
Adding Special Events
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.
Data Lists
Data Lists

• Specific use queries
• Run easily
• Only for 10,000 or less records
• Several created for council use:
  – Decease Finder Constituent List
  – Eagle Scout Lists
  – ScoutNET Merged Inactive Constituent
Navigation for Data Lists

- Analysis tab
New Data List

- ScoutNET Merged Inactive Constituent
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

February 19, 2020
10:00 am & 2:00 pm CST
Questions & Answers