

CRM User Forum

January 15, 2020

Cornelia Ellis – John Kuehn – Don Day



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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



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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	



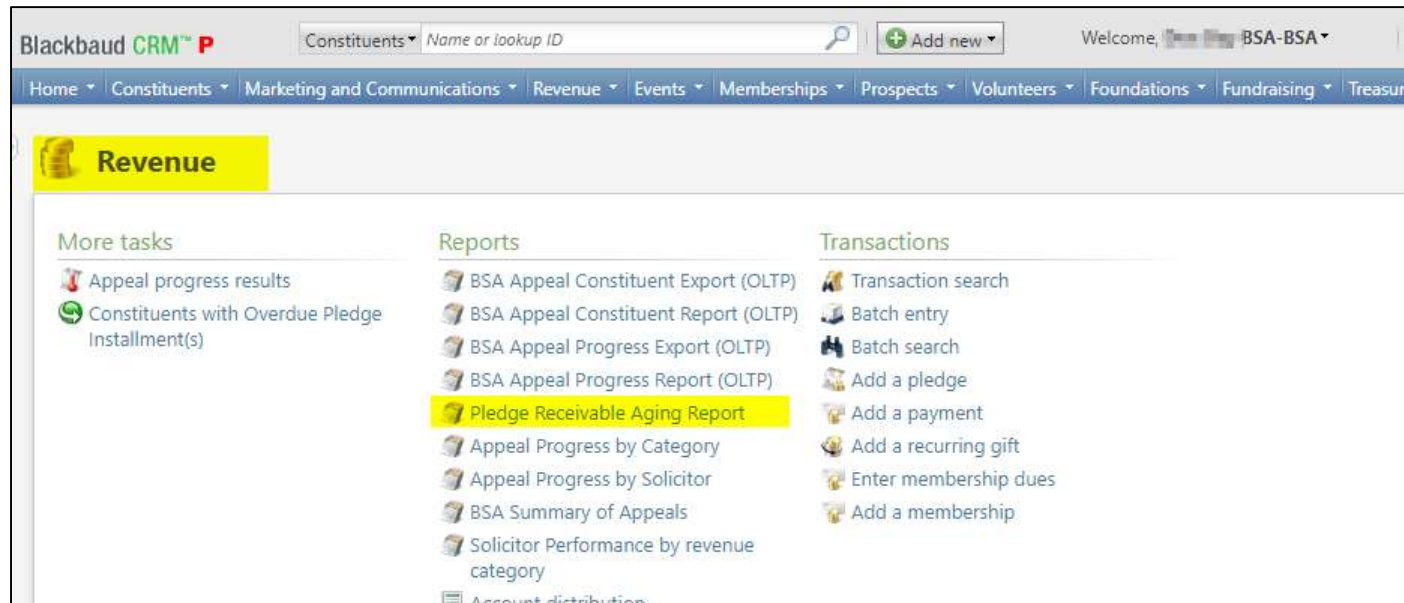
Write Offs



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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

Blackbaud CRM™ P

Constituents

Welcome,

Home • Constituents • Marketing and Communications • **Revenue** • Events • Memberships • Prospects • Volunteers • Foundations • Fundraising • Treasury

Pledge Receivable Aging Report

BSA Organization Council Report Code

Appeal



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



Global Pledge Write-off

edge write-off processes (276) + Add

Name	Description
L144	Pledge Write-Off Proc
L144 Abraham Linco...	Just change the select
L003	Pledge Write-Off Proc
L022	Pledge Write-Off Proc
L583	Pledge Write-Off Proc
L382	Pledge Write-Off Proc
Start process	
	Edit Delete As
L618	Pledge Write-Off Proc
L104	Pledge Write Off Proc
L303	Pledge Write-Off Proc
L157	Pledge Write-Off Proc
L468	Pledge Write-Off Proc
L092	Pledge Write-Off Proc
L368	Conversion Pledge W
L220	Pledge Write-Off Proc
L574	Pledge Write-Off Proc
L635	Pledge Write-Off Proc
L695	Global Write-Off
L449	Pledge Write-Off Proc
L006	Pledge Write-Off Proc

Edit pledge write-off process

General

Name: L382

Description: Pledge Write-Off Process

Selection: L382 Global Write Off Query (Ad)

Post status: Do not post

Post date: mm/dd/yyyy

Site: Allegheny Highlands Council

Write-off reason

Reason code: UNC - Uncollectable

Details: 2017 Write Off

Output

☐ Create output selection

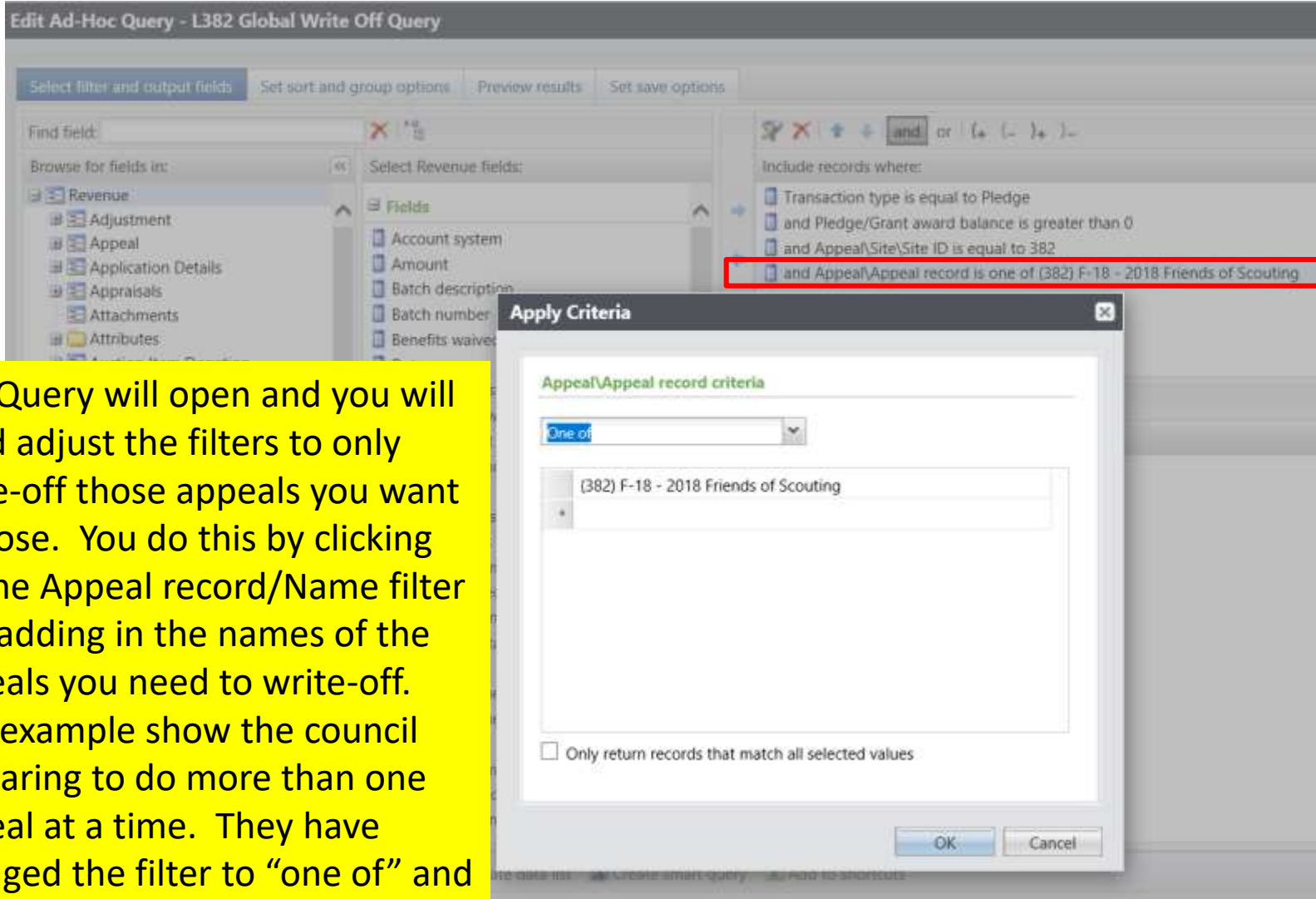
☐ Overwrite existing selection

Selection name:

Help Save Cancel

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.



Prepared.

Edit Ad-Hoc Query - L382 Global Write Off Query

[Select filter and output fields](#)[Set sort and group options](#)[Preview results](#)[Set save options](#)

Results (78 records found)

Appeal\Name	Pledge/Grant award balance
(382) F-18 - 2018 Friends of Scout...	\$250.00
(382) F-18 - 2018 Friends of Scout...	\$600.00
(382) F-18 - 2018 Friends of Scout...	\$500.00
(382) F-18 - 2018 Friends of Scout...	\$40.00
(382) F-18 - 2018 Friends of Scout...	\$30.00
(382) F-18 - 2018 Friends of Scout...	\$20.00
(382) F-18 - 2018 Friends of Scout...	\$1,200.00
(382) F-18 - 2018 Friends of Scout...	\$1,000.00
(382) F-18 - 2018 Friends of Scout...	\$95.00
(382) F-18 - 2018 Friends of Scout...	\$30.00
(382) F-18 - 2018 Friends of Scout...	\$60.00
(382) F-18 - 2018 Friends of Scout...	\$100.00
(382) F-18 - 2018 Friends of Scout...	\$720.00
(382) F-18 - 2018 Friends of Scout...	\$45.45
(382) F-18 - 2018 Friends of Scout...	\$75.00
(382) F-18 - 2018 Friends of Scout...	\$20.00

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.



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Contribution Statements



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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

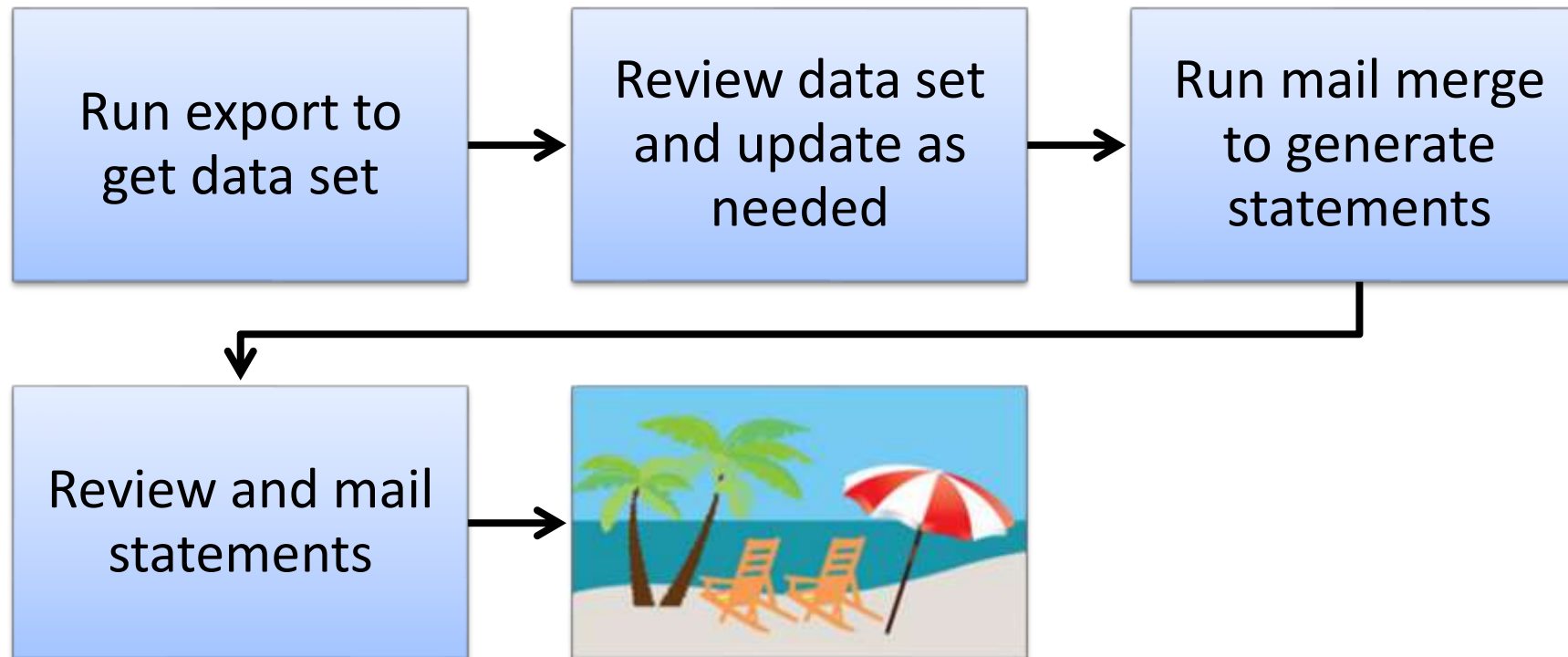


IRS Publication 1771, Charitable Contributions—Substantiation and Disclosure Requirements

- 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.

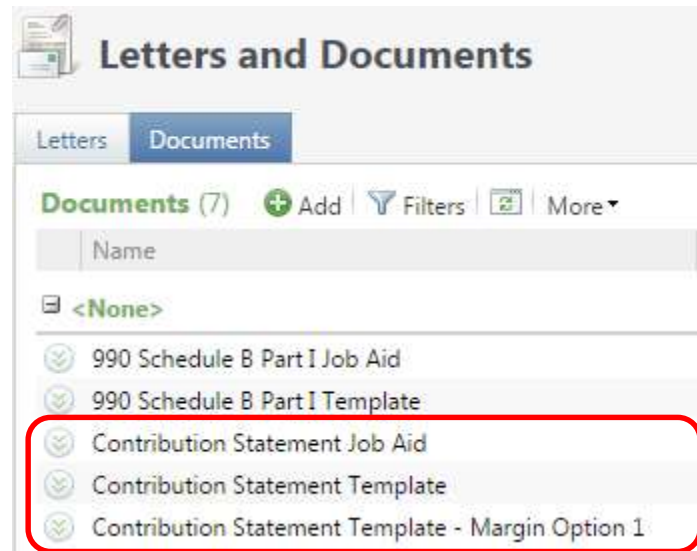


Process Overview



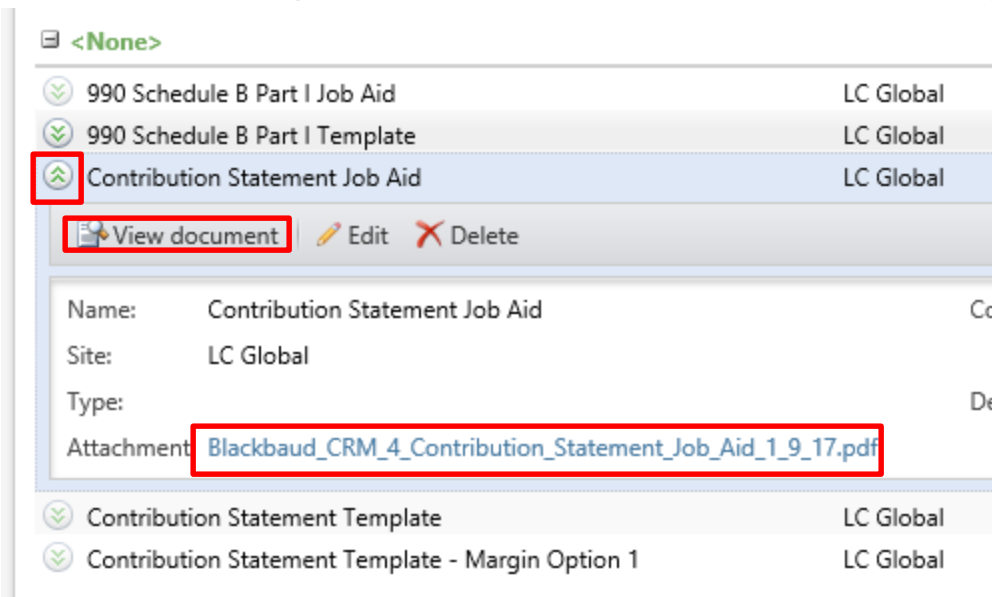
Process Overview

- 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.

The screenshot displays the 'Export list' interface. On the left, a sidebar contains 'Tasks' and 'Shortcuts'. The 'Tasks' section has a red box around the 'Start process' button, labeled with a red '1'. The 'Shortcuts' section lists various actions like 'Add this page to shortcuts', 'Manage my shortcuts', 'Post Revenue to GL', 'netbsa\lhendric - Application User', and 'Query'. The main area shows the details for an export job titled 'Contribution_Statement_Data_Cumulative_Donations>\$0 - Export'. Below this, there are tabs for 'Recent Status', 'History', and 'Job Schedules'. The 'Recent Status' tab is active, showing a 'Recent status' section with a red box around the 'Download output' button, labeled with a red '3'. Below this, the status is 'Completed', indicated by a green checkmark and a red box labeled with a red '2'. The status message is 'Completed'. Below the status, there is a table of details:

Started by:	netbsa\rwhite	Server name:	D2PBBISEC10BV
Started:	1/8/2016 1:05:09 PM	Total records processed:	92438
Ended:	1/8/2016 1:20:32 PM	Number of exceptions:	0
Duration:	15 minutes 23 seconds	Records successfully processed:	92438



Review and Update

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

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	BUSINESS	Site ID	ID	Last	First	Address	City	State	ZIP	Date	Transactio	Appeal	Amount	Receipt A	Benefit V	Benefit D	Revenue I
2	1	42	8-1009096	Genentech		1 Dna Way	South San	CA	94080-491	#####	Payment	(042) S15	\$900.00	\$900.00			rev-14573
3	2	42	8-1215544	Domingue	Francisco	3985 Lyma	Oakland	CA	94602-185	#####	Payment	(042) S16	\$300.00	\$300.00			rev-14697
4	3	42	8-1215650	Peterson	Andrew	103 Monti	Piedmont	CA	94611-392	#####	Payment	(042) S16	\$250.00	\$250.00			rev-14689
5	4	42	8-1217480	Kuesel	Christoph	3829 Rand	Oakland	CA	94602-120	#####	Payment	(042) S16	\$500.00	\$500.00			rev-14709
6	5	42	8-1217491	Kim	Kenneth	240 Estate	Piedmont	CA	94611-331	#####	Payment	(042) S16	\$100.00	\$100.00			rev-14688
7	6	42	8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	#####	Payment	(042) 150	\$260.00	\$260.00			rev-14692
8	7	42	8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	#####	Payment	(042) 150	\$400.00	\$0.00			rev-14700
9	8	42	8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	#####	Payment	(042) 150	#####	#####			rev-14700
10	9	42	8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	#####	Payment	(042) S16	#####	#####			rev-14701
11	10	42	8-1228420	Pierce	Christoph	4085 Whit	Oakland	CA	94602-243	4/6/2015	Payment	(042) S15	\$100.00	\$100.00			rev-14601
591	590	42	8-1571911	Cheung	Daniel	125 Ronac	Piedmont	CA	94611	#####	Payment	(042) S16	\$100.00	\$100.00			rev-14711
592			Dummy	Dummy	Discard												



Review and Update

- Review Columns V and W
 - Possible benefit issue
 - Possible receipt amount issue
 - These error 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

(089) S17	\$250.00	\$250.00			rev-37512	440403	FALSE	FALSE	Sebring	
(089) S17	\$250.00	\$250.00			PAS-13985	61788	FALSE	FALSE	Sebring	
(089) S17	\$250.00	\$250.00			PAS-13975	60848	FALSE	FALSE	Family	
(089) S17	\$250.00	\$250.00			PAS-13965	60470	FALSE	FALSE	Community - DCA	
(089) A17	#####	\$0.00			rev-41589	491027	TRUE	TRUE	Mexico Trip	
(089) A17	\$120.00	\$0.00			rev-41598	497003	TRUE	TRUE	Kendra Scott Necklace a	
(089) A17	\$500.00	\$0.00			rev-41598	497682	TRUE	TRUE	Golf Clubs and Bag	
(089) A17	\$100.00	\$100.00			rev-41598	498645	FALSE	FALSE	Sponsor	
(089) A17	\$40.00	\$0.00			rev-41599	499007	TRUE	TRUE	Play and Music Lesson	
(089) S17	\$250.00	\$250.00			PAS-13985	61326	FALSE	FALSE	Community - DCA	
(089) S17	#####	#####			PAS-13985	61364	FALSE	FALSE	Citrus County	

(089) S1	\$50.00	\$50.00			rev-41706	585076	FALSE	FALSE	Community - DCA	
(89) X1	\$500.00	\$500.00			rev-34061	431701	FALSE	FALSE	1/2 PAGE AD	
(89) X1	\$1,300.00	\$980.00	\$320.00	Table Sponsor	rev-34061	431585	FALSE	FALSE	Table Sponsors	
(89) S1	\$500.00	\$500.00			rev-41640	533302	FALSE	FALSE	Family	
(89) S1	\$500.00	\$500.00			PAS-13955	59990	FALSE	FALSE	Board Division	
(089) S1	\$250.00	\$250.00			PAS-13965	60470	FALSE	FALSE	Community - DCA	



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

Contribution_Statement_Template v1.8 2015.docx - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT Rich White

Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Preview Results Find Recipient Check for Errors Finish Merge Merge to Adobe PDF

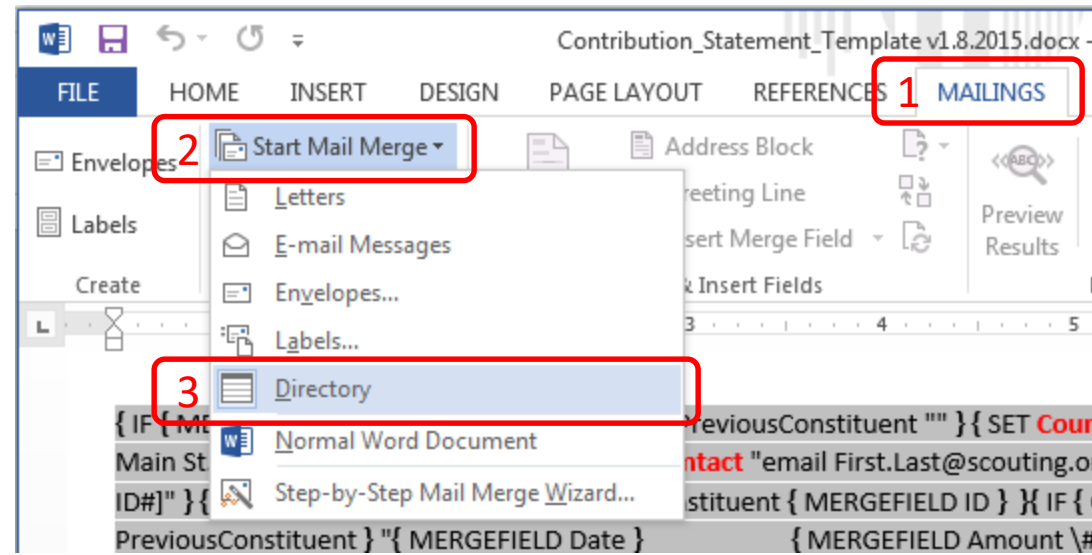
Create Start Mail Merge Write & Insert Fields Preview Results Finish Acrobat

1 2 3 4 5 6 7

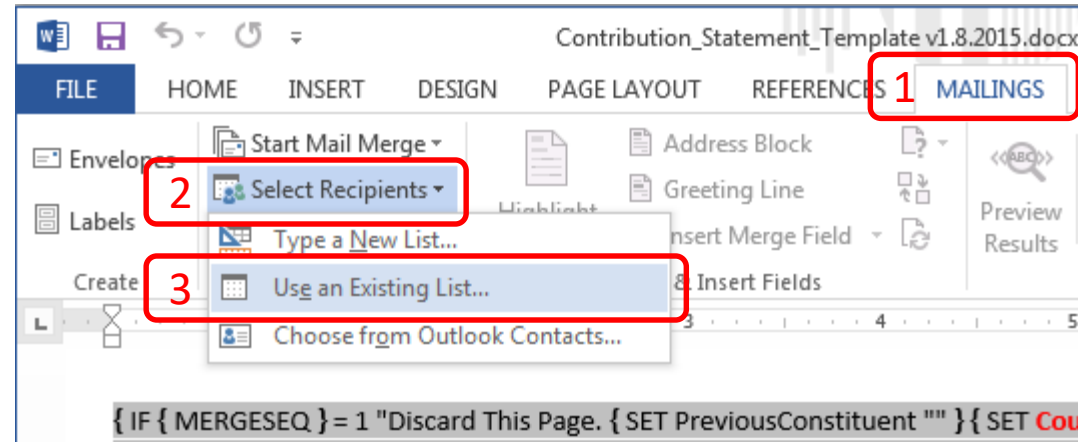
```
{ IF { MERGESEQ } = 1 "Discard This Page. { SET PreviousConstituent "" } { SET CouncilAddress "Example Council, 123
Main St., Anytown, TX 12345" } { SET CouncilContact "email First.Last@scouting.org" } { SET CouncilTaxID "[Federal Tax
ID#]" } { SET Year "2015" } "" } { SET CurrentConstituent { MERGEFIELD ID } } { IF { CurrentConstituent } = {
PreviousConstituent } "{ MERGEFIELD Date } { MERGEFIELD Amount \# "$#,###,###0.00 } { MERGEFIELD
Appeal } { IF { MERGEFIELD Benefit_Value } <> "" "{ SET BenefitValue { MERGEFIELD Benefit_Value \# "$#,###,###0.00 }
}" "{ SET BenefitValue 0 }" } { BenefitValue \# "$#,###,###0.00 } { SET NetContribution { = { MERGEFIELD Amount } - {
BenefitValue } } { NetContribution \# "$#,###,###0.00 } { SET TotalPaid { = TotalPaid + { MERGEFIELD Amount } } { SET
TotalContribution { = TotalContribution + { NetContribution } } { SET TotalBenefitValue { = TotalBenefitValue + {
BenefitValue } } }" "
Total:{ TotalPaid \# "$#,###,###0.00 } { TotalBenefitValue
\# "$#,###,###0.00 } { TotalContribution \# "$#,###,###0.00 } { SET TotalPaid 0 } { SET TotalContribution 0 } { SET
TotalBenefitValue 0 }
```



Run Mail Merge



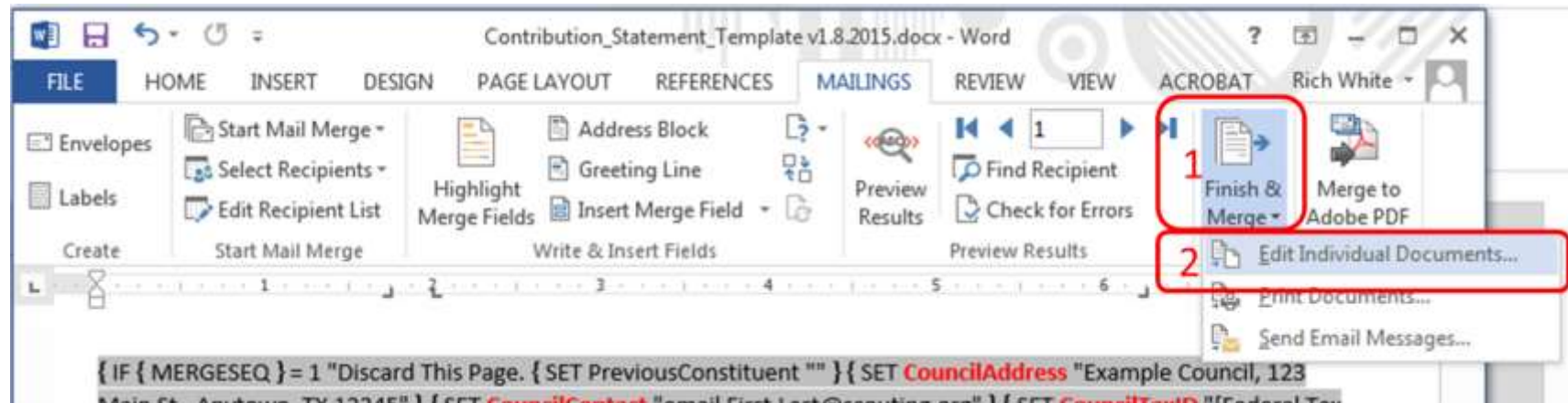
Run Mail Merge



- Navigate to your downloaded data file and select it



Run Mail Merge



Run Mail Merge

Directory6 - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT Rich White

Calibri (Body) 11 A A Aa B I U abc x x' sty - AaBbCcDc AaBbCcDc AaBbCcDc Normal No Spac... Heading 1 Editing

Clipboard Font Paragraph Styles

Clifford Wang
603 Blair Ave
Piedmont, CA 94611-3405

Dear Clifford Wang,

The following is a list of paid contributions for the calendar year 2015 recorded by Example Council, 123 Main St., Anytown, TX 12345 (Federal Tax ID [Federal Tax ID#]). Thank you for your generous support of Scouting! If you have any questions or concerns, please email First.Last@scouting.org.

Date	Amount Paid	Appeal Name	Benefit Value	Net Contribution
10/14/2015	150.00	{042} S16 - 2016 Friends of Scouting <i>Benefit: Something cool!</i>	100.00	50.00
12/21/2015	150.00	{042} S16 - 2016 Friends of Scouting	0.00	<u>150.00</u>
12/22/2015	150.00	{042} S16 - 2016 Friends of Scouting	0.00	150.00
12/23/2015	150.00	{042} S16 - 2016 Friends of Scouting <i>Benefit: Something awesome!</i>	100.00	50.00
12/24/2015	150.00	{042} S16 - 2016 Friends of Scouting	0.00	150.00
12/25/2015	150.00	{042} S16 - 2016 Friends of Scouting	0.00	150.00
12/26/2015	150.00	{042} S16 - 2016 Friends of Scouting	0.00	150.00
12/27/2015	150.00	{042} S16 - 2016 Friends of Scouting	0.00	150.00
12/28/2015	150.00	{042} S16 - 2016 Friends of Scouting <i>Benefit:</i>	100.00	50.00
Total:	\$ 1,350.00		\$ 300.00	\$ 1,050.00



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



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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



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



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Designations

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



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:	

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.

← 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 Add More ▾

	Level	From	To	Benefits
--	-------	------	----	----------



Adding Special Events



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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.



Data Lists



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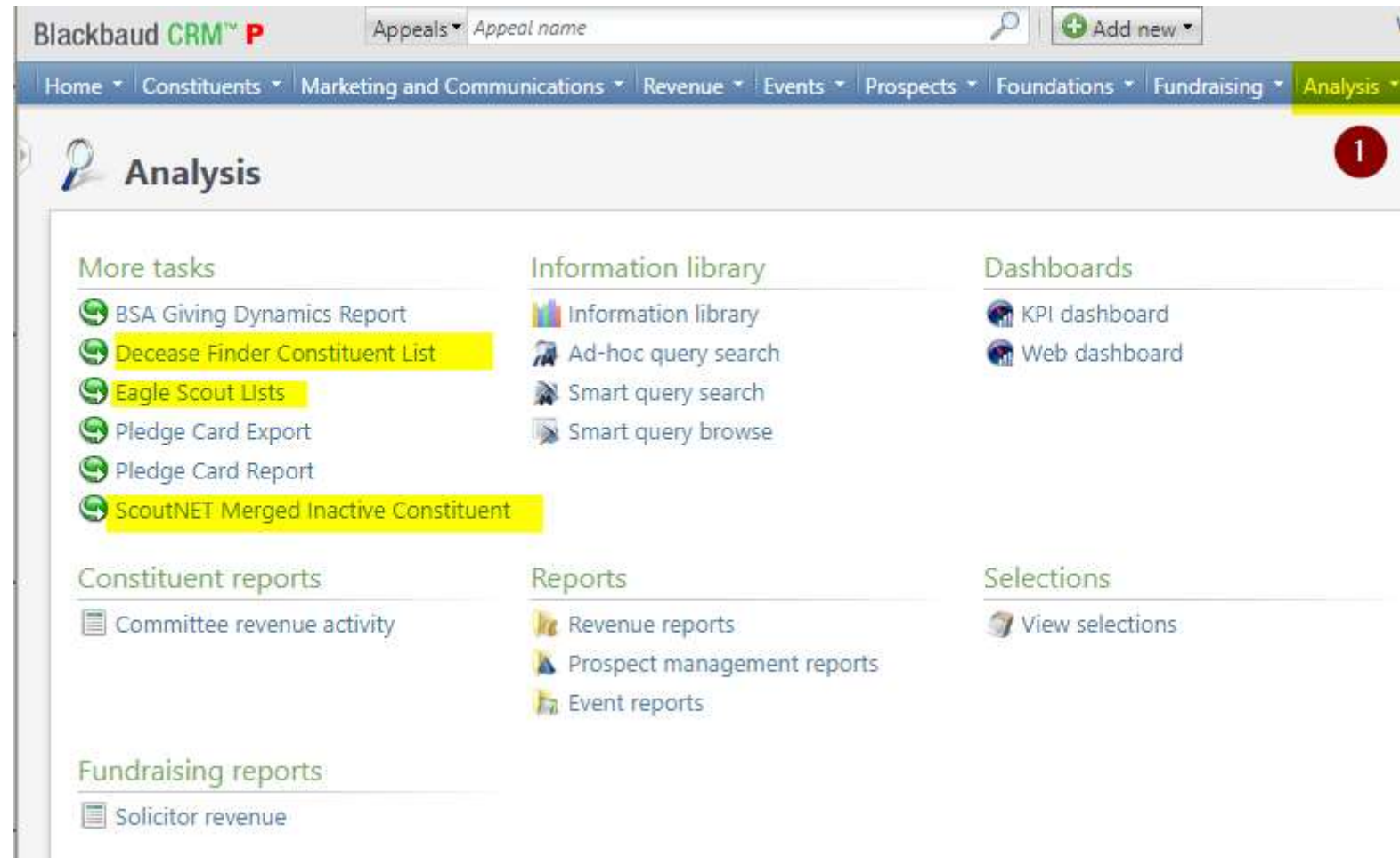
Data Lists

- 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

Council () - ScoutNET Merged Inactive Constituent

ScoutNET Merged Inactive Constituent (5) More ▾

<input type="checkbox"/>	Lookup ID	Name ▲	City	Inactive	Inactive reason	Last Gift Date	Last Gift Amo...
<input type="checkbox"/>	8-22996779	Angela R.		Yes	RFM - Marked inactive by PAS Person Merge	2/22/2019	\$10.00
Go to Constituent Mark Active							
<input type="checkbox"/>	8-22345907	Dennis		Yes	RFM - Marked inactive by PAS Person Merge	4/23/2019	\$100.00
<input type="checkbox"/>	8-25263096	Doug V.	Rathdrum	Yes	RFM - Marked inactive by PAS Person Merge	5/30/2019	\$50.00
<input type="checkbox"/>	8-22590891	Robert	Lewiston	Yes	RFM - Marked inactive by PAS Person Merge	3/15/2019	\$300.00
<input type="checkbox"/>	8-31537275	Steven	Loon Lake	Yes	RFM - Marked inactive by PAS Person Merge	3/15/2019	\$25.00



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

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



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**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](#)[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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