CRM User Forum

February 19, 2020
Cornelia Ellis – John Kuehn – Don Day
Objectives

• Finishing up Year 2019
  – Pledge write-off process – timing and how-to
  – Reports for the council’s 990 & fiscal audit

• Batch
  – Using Group ID to credit units in FOS appeal
  – A Place to Give batch – making sure default values are changed

• Event appeal setup

• Using Appeal Progress feature for quick updates
Finishing Up 2019
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 to 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 shows 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.

<table>
<thead>
<tr>
<th>Appeal Name</th>
<th>Pledge/Grant award balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$250.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$600.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$500.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$40.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$30.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$20.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$1,200.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$95.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$30.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$60.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$100.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$720.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$45.45</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$75.00</td>
</tr>
<tr>
<td>(382) F-18 - 2018 Friends of Scout...</td>
<td>$30.00</td>
</tr>
</tbody>
</table>
IRS 990 Schedule B

- Creation process like creation of contribution statements
- Download and review data via export
- Merge Excel data to Word template provided
- User guide is under Administration with the CRM User Guides on MyBSA or in CRM in Marketing Communication under Letters and Documents.
Location of CRM Tools
Batches
Using Group ID in batch

• Improves solicitor reporting
Revenue Batch

- When entering a Unit to a Revenue batch select the Constituent then in the Group ID enter the information of the Unit. (Troop 0003, etc)
Search for the BSAFR Group
Populate in the BSAFR Group

• The Group ID will populate with the Unit information. This will attach to the pledge or payment and will show on the Unit and Constituent's profile.
Scouting Gives Batches

- Batches are created as donors use your Scouting Give appeals
- Batches arrive with a generic default constituent
- Default constituent is “APTG Default”
- Process is to change this default to the one indicated in batch
- If revenue is committed to this constituent, you will not be able to edit it and it will not post
- To fix this file incident with member care and include the ID# of the constituent is should be attached to.
• CRM default constituent
• Has been used by councils
• Checked periodically for mistakes
• If council has duplicated the transactions, transactions are zeroed out
• Otherwise, the transaction is edited and placed on correct constituent so it will post and can be seen
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.
Event Form

• When filling out the Event form for BCRM:
  – Go to CRM and Copy and Paste Record Names in sheet.
  – It will make the process quicker on the importing.
  – Select the right designation number associated with the Event and Appeal
  – Select the right account numbers (4201, 4202, etc) that was chosen when
    the designation was set up.

Attach the complete form to an incident and submit to Member Care.
### Event Form for CRM

<table>
<thead>
<tr>
<th>Event Form for CRM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Event Name</strong></td>
</tr>
<tr>
<td><strong>Event Date</strong></td>
</tr>
<tr>
<td><strong>Event Description</strong></td>
</tr>
<tr>
<td><strong>Appeal Name</strong></td>
</tr>
<tr>
<td><strong>Designation Name</strong></td>
</tr>
<tr>
<td><strong>Fund Type</strong></td>
</tr>
<tr>
<td><strong>4201 Sponsorship/Donation</strong></td>
</tr>
<tr>
<td><strong>4202 Participation/Ticket</strong></td>
</tr>
<tr>
<td><strong>4203 Program Item</strong></td>
</tr>
<tr>
<td><strong>4204 Event Advertising</strong></td>
</tr>
<tr>
<td><strong>4205 Event Concessions</strong></td>
</tr>
<tr>
<td><strong>4209 Auction/Fundraiser Item</strong></td>
</tr>
</tbody>
</table>

*Prepared. For Life.*
Using Appeal Progress
Multiple tabs available
## Contributions

### Appeal: (S20) S20 - 2020 Friends of Scouting

- **Description:** 2020 Friends of Scouting  
- **Start date:** 10/31/2019
- **Business unit:**  
- **End date:** 12/31/2020
- **Category:** Annual Giving (Friends of Scouting)  
- **Goal:** $0.00
- **Report code:** 2020  
- **Status:** Active
- **Site:** Council  
- **Membership:**

### Revenue Summary

- **Contributions:**
  - **Total Contributions:** $87,940.01  
  - **# of Contributions:** 277  
  - **Average Contribution:** $317.47  
  - **Recent Contribution:** 2/18/2020  
  - **Earliest Contribution:** 10/7/2019

- **Contributions: Not posted (pending)**
- **Contributions: BSA Structure - posted (6)**
- **Contributions: Giving Category - posted (3)**
- **Contributions: Both BSA Structure & Giving Category - posted (12)**

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## By Giving Category or by Structure

### Contributions: Summary - posted 2/18/2020

<table>
<thead>
<tr>
<th>Total Contributions</th>
<th># of Contributions</th>
<th>Average Contribution</th>
<th>Recent Contribution</th>
<th>Earliest Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>$87,940.01</td>
<td>277</td>
<td>$317.47</td>
<td>2/18/2020</td>
<td>10/7/2019</td>
</tr>
</tbody>
</table>

Expand all  Collapse all

- Contributions: Not posted (pending)
- Contributions: BSA Structure - posted (6)
- Contributions: Giving Category - posted (3)
- Contributions: Both BSA Structure & Giving Category - posted (12)
# Solicitor Credits

<table>
<thead>
<tr>
<th>BSA Structure</th>
<th>Giving Category</th>
<th>Inactive?</th>
<th>Group Name</th>
<th>Group Public Name</th>
<th>Solicitor Credit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hoover</td>
<td>Family</td>
<td>No</td>
<td>Pack 3151 BP Wilton - 133 (163962)</td>
<td>Pack 3151</td>
<td>$25.00</td>
</tr>
<tr>
<td>Hoover</td>
<td>Family</td>
<td>No</td>
<td>Pack 3153 FP Durant - 133 (163963)</td>
<td>Pack 3153</td>
<td>$195.00</td>
</tr>
<tr>
<td>Hoover</td>
<td>Family</td>
<td>No</td>
<td>Troop 0127 BT Muscatine - 133 (164...</td>
<td>Troop 0127</td>
<td>$780.00</td>
</tr>
<tr>
<td>Hoover</td>
<td>Family</td>
<td>No</td>
<td>Troop 0151 BT Wilton - 133 (164235)</td>
<td>Troop 0151</td>
<td>$25.00</td>
</tr>
<tr>
<td>Hoover</td>
<td>Family</td>
<td>No</td>
<td>Troop 0426 BT Muscatine - 133 (100...</td>
<td>Troop 0426</td>
<td>$650.00</td>
</tr>
</tbody>
</table>

**Council**

- **Indi**
- **Kittan**
- **Mesquakie**
- **Saukenuk**
### Revenue Details (Splits)

**Revenue Application Details (Current)** - all "splits" for committed pledges, payments, and auction donations

<table>
<thead>
<tr>
<th>Verified</th>
<th>Constituent</th>
<th>Date</th>
<th>Transaction</th>
<th>Application</th>
<th>Split Amount</th>
<th>Total Amount</th>
<th>Pay Method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2/6/2020</td>
<td>Pledge</td>
<td>Donation</td>
<td>$195.00</td>
<td>$195.00</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1/28/2020</td>
<td>Payment</td>
<td>Donation</td>
<td>$10.00</td>
<td>$10.00</td>
<td>Cash</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2/6/2020</td>
<td>Pledge</td>
<td>Donation</td>
<td>$195.00</td>
<td>$195.00</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2/6/2020</td>
<td>Pledge</td>
<td>Donation</td>
<td>$75.00</td>
<td>$75.00</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2/6/2020</td>
<td>Pledge</td>
<td>Donation</td>
<td>$500.00</td>
<td>$500.00</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2/10/2020</td>
<td>Payment</td>
<td>Donation</td>
<td>$300.00</td>
<td>$300.00</td>
<td>Check</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1/28/2020</td>
<td>Payment</td>
<td>Donation</td>
<td>$50.00</td>
<td>$50.00</td>
<td>Check</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1/8/2020</td>
<td>Pledge</td>
<td>Donation</td>
<td>$400.00</td>
<td>$400.00</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2/14/2020</td>
<td>Pledge</td>
<td>Donation</td>
<td>$500.00</td>
<td>$500.00</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1/27/2020</td>
<td>Payment</td>
<td>Donation</td>
<td>$100.00</td>
<td>$100.00</td>
<td>Check</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1/29/2020</td>
<td>Payment</td>
<td>Pledge</td>
<td>$10.00</td>
<td>$10.00</td>
<td>Other</td>
</tr>
</tbody>
</table>
Add to Shortcuts
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

March 18, 2020
10:00 am & 2:00 pm CST
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
Best Practices
Document Library
Donor Research
FOS Planning Kit
Sample Grant Proposals

www.scouting.org/financeimpact
Questions & Answers