CRM User Forum

March 25, 2020
Cornelia Ellis – John Kuehn – Don Day
Objectives

• Pledge write-off process – why and how
• Query cleanup – deleting unused queries
• Review giving categories and update
• Review BSA Structure and update
• Using revenue update batches
Why “write-off” pledges

- Properly update constituent record
- Does not impact ability to collect the pledge
How to write-off pledges
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.

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

- Proceed to information library
- Arrange your folder by date
- Add the last run date column
- Decide what query is no longer needed and delete.
- Oldest queries are your configuration queries. (Don’t Delete)
- If they don’t delete the system will tell you what dependency they have. Delete the dependency and the query will delete.
The query folder below is organized by date created. You can add and subtract columns by clicking the columns button. I added the column of last time ran to see when the query was last used. You configuration queries are the ones with the oldest created on date. Try to avoid deleting these. The ones created by Gloria below should be reviewed. She may not need these since the Appeal and Constituent OTLP reports can on-line and can be used to generate prospect / donor list.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Type</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Kuehn BSA-BSA</td>
<td>L117 Tributes</td>
<td>Configuration</td>
<td>6/27/2017</td>
</tr>
<tr>
<td>John Kuehn BSA-BSA</td>
<td>L117 Pledge Payments Due Next Month Conf</td>
<td>Configuration</td>
<td>6/27/2017</td>
</tr>
<tr>
<td>John Kuehn BSA-BSA</td>
<td>L117 Pledge Payments Due This Month Config</td>
<td>Configuration</td>
<td>6/27/2017</td>
</tr>
<tr>
<td>John Kuehn BSA-BSA</td>
<td>L117 Credit Card Declined</td>
<td>Configuration</td>
<td>6/27/2017</td>
</tr>
<tr>
<td>John Kuehn BSA-BSA</td>
<td>L117 Credit Card Approaching Expiration</td>
<td>Configuration</td>
<td>6/27/2017</td>
</tr>
<tr>
<td>John Kuehn BSA-BSA</td>
<td>L117 Tribute Gifts From This Week</td>
<td>Configuration</td>
<td>6/27/2017</td>
</tr>
<tr>
<td>Gloria Marsh BSA-117</td>
<td>L117 CY Worked and Already Given Prospects for Spec...</td>
<td>7/26/2017</td>
<td>3/11/2019</td>
</tr>
<tr>
<td>Gloria Marsh BSA-117</td>
<td>L117 CY Worked and Already Given Prospects for Spec...</td>
<td>12/12/2017</td>
<td>6/14/2018</td>
</tr>
<tr>
<td>Gloria Marsh BSA-117</td>
<td>L117 FOS List of all donors in Appeal (3 Year history)</td>
<td>4/3/2018</td>
<td>2/25/2019</td>
</tr>
<tr>
<td>Gloria Marsh BSA-117</td>
<td>L117 All Donors for FOS with Solicitors(LY)</td>
<td>4/10/2018</td>
<td>3/11/2019</td>
</tr>
<tr>
<td>Gloria Marsh BSA-117</td>
<td>L117 LY Worked</td>
<td>5/1/2018</td>
<td>10/11/2019</td>
</tr>
<tr>
<td>Gloria Marsh BSA-117</td>
<td>L117 All Donors for FOS with Solicitors(CY)</td>
<td>6/14/2018</td>
<td>7/23/2019</td>
</tr>
<tr>
<td>Gloria Marsh BSA-117</td>
<td>L117 Unworked Prospects for Specific Appeal (LY Don...</td>
<td>12/7/2018</td>
<td>10/1/2019</td>
</tr>
<tr>
<td>Gloria Marsh BSA-117</td>
<td>Copy of L117 Unworked Prospects for FOS (3 Year His...</td>
<td>4/9/2019</td>
<td></td>
</tr>
</tbody>
</table>
My Query will not delete

- Tied to an export
- Tied to a business process
- Used as a selection in another query

One can learn what this dependency is by checking for it by clicking the dependency button and running the process to check. This provides a list of dependencies and will tell you if it will stop the query from being able to be deleted. Address the issue and you can delete the query
To run dependencies, drop the chevron next the query and click the “Dependencies” button. Then click “Generate dependencies list”. The process will run and provide a list for you to review. The example here shows that this query is used with the Global Write-Off process. You would not want to delete it.
Deleting Exports

• Proceed to Administration/Exports
• Exports that will show have your site or LC Global
• Do not Delete LC Global Exports.
• Change the columns to include last run on
• Decide if you still use your exports
• Drop Chevron and delete export if not needed
- Review Exports by last run date. You can add the column by clicking the “Columns” button.
- Exports have query / selections attached. To delete a query the export must be deleted first.
- To delete an export drop the chevron and click delete.

<table>
<thead>
<tr>
<th>Name</th>
<th>Query / Selection</th>
<th>Sites</th>
<th>Last run date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contribution Statement Data Single &gt; $250 or Benefited</td>
<td>Contribution Statement Data Single &gt; $250 or Benefited</td>
<td>LC Global</td>
<td>10/23/2019</td>
</tr>
<tr>
<td>Contribution Statement Data Cumulative &gt; $250 or Benefited</td>
<td>Contribution Statement Data Cumulative &gt; $250 or Benefited</td>
<td>LC Global</td>
<td>10/21/2019</td>
</tr>
<tr>
<td>Eagle Scouts</td>
<td>LXXX Eagle Scouts in a specified Council</td>
<td>LC Global</td>
<td>11/1/2019</td>
</tr>
<tr>
<td>Eagle Scout List</td>
<td>Eagle Scout List</td>
<td>LC Global</td>
<td>10/15/2019</td>
</tr>
<tr>
<td>Contribution Statement Data Cumulative &gt; $0</td>
<td>Contribution Statement Data Cumulative &gt; $0</td>
<td>LC Global</td>
<td>9/25/2019</td>
</tr>
<tr>
<td>Appeals Missing Prior Year Appeals</td>
<td>LVVV Pledge Cards - Appeals Missing Prior Year Appeals</td>
<td>LC Global</td>
<td>10/8/2019</td>
</tr>
<tr>
<td>End of Month</td>
<td>L636 Appeal Progress By Structure, Category, Solicitor WEEKLY REPORT</td>
<td>Three Harbors Council</td>
<td>9/30/2019</td>
</tr>
<tr>
<td>Kira's Test</td>
<td>L636 CY Worked and Already Given Prospects for S18</td>
<td>Three Harbors Council</td>
<td>4/26/2018</td>
</tr>
<tr>
<td>Southshore District 6/30/17</td>
<td>L636 2017 Southshore Report</td>
<td>Three Harbors Council</td>
<td>7/1/2017</td>
</tr>
</tbody>
</table>
• Tributes can be found under Constituents / Tributes
• Set your filters as you see below. Sites should read My Site.
• Filter on date created – it will organize by date – oldest to newest.
• If you feel the tribute is so old, you will no longer receive money for it, make it inactive
Giving Categories

• Review list in batch or
  – Request list from Member Care
• Determine giving categories to revise or delete
• Create ticket with Member Care to have updated
BSA Structure

• Review list in batch or
  – Request list from Member Care
• Determine structure to revise or delete
• Create ticket with Member Care to have updated
Appeals
Appeal Clean-up

• Done under Appeals Progress Results
• Found under Revenue or Marketing and Communications
• Click *Appeals Progress Results* and type in council number and select your site.
• Go to the Appeal Data Integrity tab.
• Clear all filters and click apply.
• If this has been done, the list of appeals will appear in black. If you see red, work should be completed.
• BBCRM User Guide *Appeal Revenue Data List* provides directions.
• Example below shows the appeals in red - so they need to be updated
• The report code in missing and the appeal category is missing
• Drop the chevron on the information line and click “Edit appeal”
• Fill in the missing information and click save
• Do this for all lines in red
• This allows for better query usage to find old revenue
Batches
Adjusting Revenue
GL-Triggering Adjustments

- Amount
- Application
- Benefits
- Revenue Constituent (Not Recognition credit constituent)
- Designation - generates a reversal and updated GL distribution
- Events
- Gift fees
- Inbound Channels
- Payment method
- Payment method subtypes
- Revenue category
When making changes to the following transaction types:

- Pledge
  1. When you adjust the designations on a pledge, you are prompted to adjust the previously-posted payments as well; this will trigger a reversal and redistribution in the GL
- Pledge Payment
- Recurring Gift
- Recurring Gift Payment
- Matching Gift Payment
- Event Registration Payment
- Auction Purchase Payment
- Any other Payment
LC Revenue Update Batch
Main Tab of Revenue Batch
Enter the Revenue ID information. The revenue ID looks like this with `rev-xxxxxxx`. 
The information populate when you enter the Revenue ID and click Search. Click Select.
The fields are populated with the information.
Make sure that Adjustment reason, Adjustment details and Adjustment post date is filled out.
Update projected totals, Validate and Save and Close.
The Batch is ready to commit.
Next Forum

April 15, 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.

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- Major Gifts & Endowment
- CRM Resources
- Best Practices
- Document Library
- Donor Research
- FOS Planning Kit
- Sample Grant Proposals

www.scouting.org/financeimpact
Questions & Answers