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

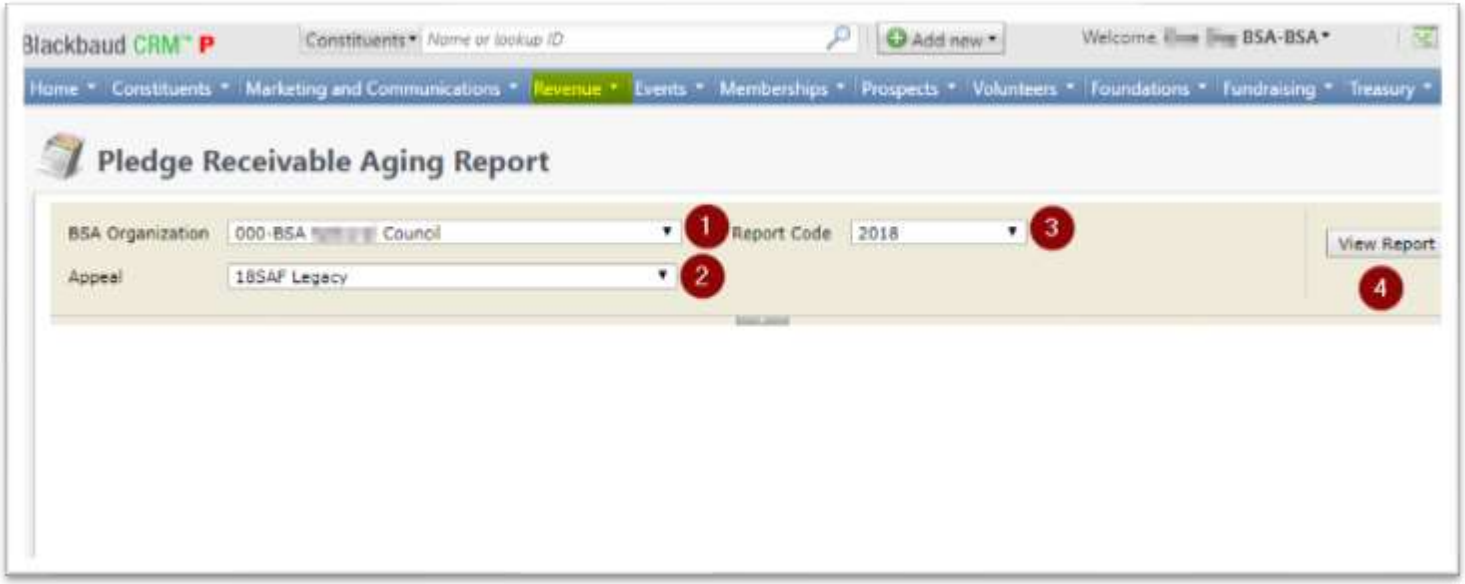
- Create the Pledges Receivable Aging Report
- Blackbaud CRM ~ Revenue ~

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



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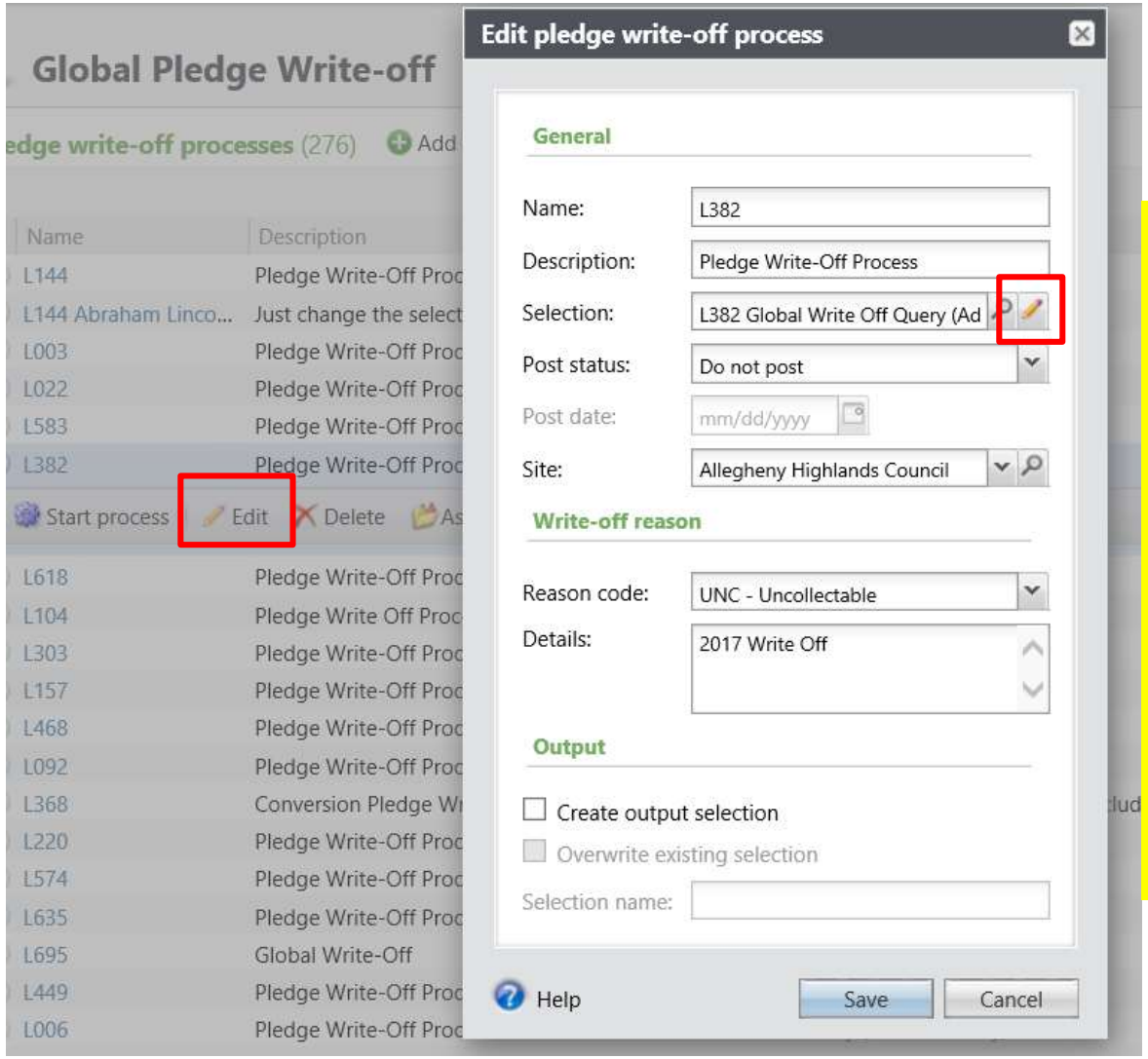
Pledge Aging Receivable Report

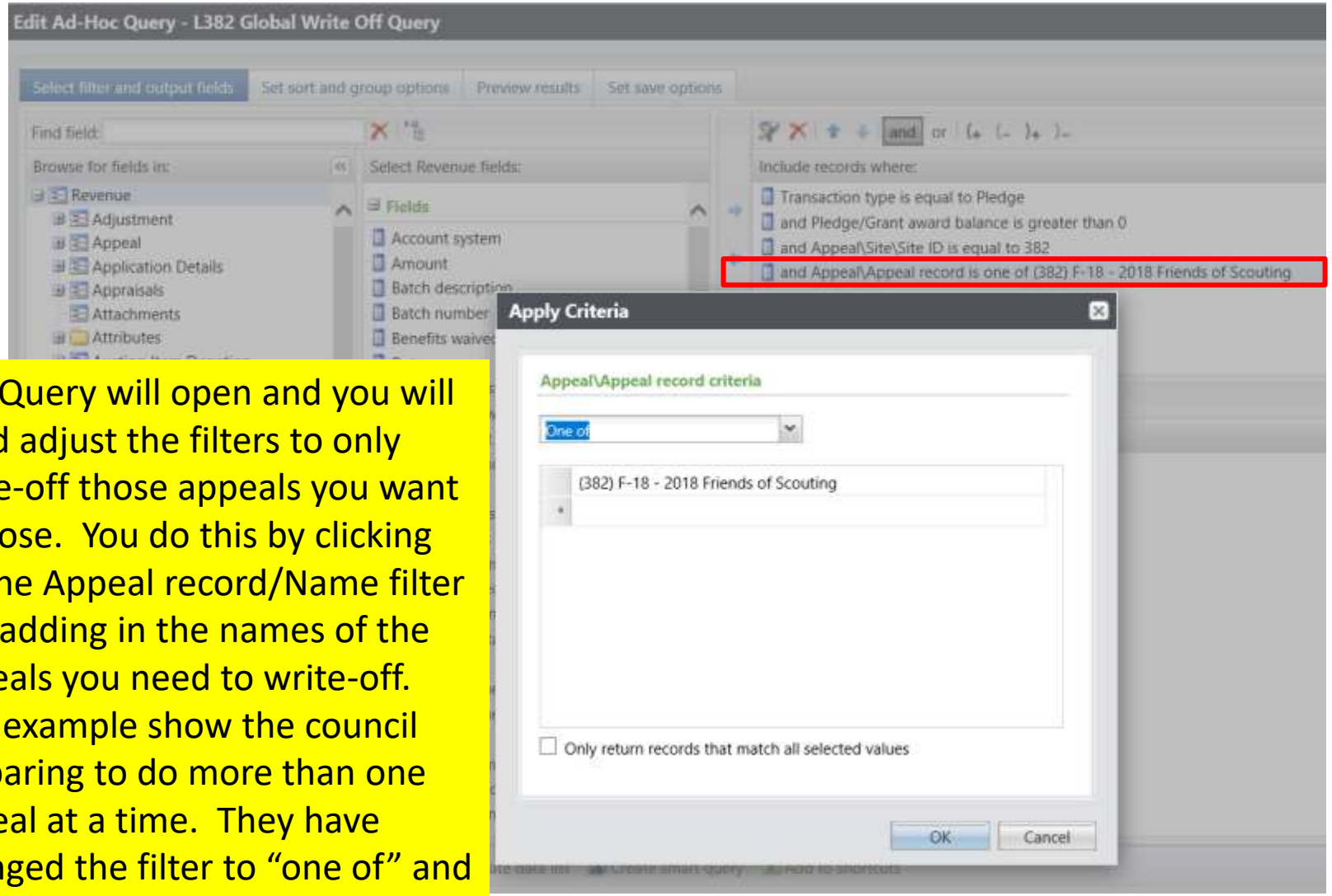
- Print report and give to management to review:
  - All open pledges
  - Determine who will still pay
  - Sign and date
- After management review, proceed to Pledge Write-Off process

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.

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.

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 depencency 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.

John Kuehn BSA-BSA	L117 Tributes	Configuration	6/27/2017	
John Kuehn BSA-BSA	L117 Pledge Payments Due Next Month Conf	Configuration	6/27/2017	
John Kuehn BSA-BSA	L117 Pledge Payments Due This Month Config	Configuration	6/27/2017	
John Kuehn BSA-BSA	L117 Credit Card Declined	Configuration	6/27/2017	10/23/2018
John Kuehn BSA-BSA	L117 Credit Card Approaching Expiration	Configuration	6/27/2017	4/19/2018
John Kuehn BSA-BSA	L117 Pledges Paid in Full Config	Configuration	6/27/2017	4/3/2018
John Kuehn BSA-BSA	L117 Tribute Gifts From This Week	Configuration	6/27/2017	
John Kuehn BSA-BSA	L117 Planned Gift Selection	Configuration	6/27/2017	6/11/2018
Gloria Marsh BSA-117	L117 CY Worked and Already Given Prospects for Spe...		7/26/2017	3/11/2019
Gloria Marsh BSA-117	L117 CY Worked and Already Given Prospects for Spe...		12/12/2017	6/14/2018
Gloria Marsh BSA-117	L117 FOS List of all donors in Appeal (3 Year history)		4/3/2018	2/25/2019
Gloria Marsh BSA-117	L117 Paid Donors for Specific Appeal		4/5/2018	8/20/2019
Gloria Marsh BSA-117	L117 All Donors for FOS with Solicitors(LY)		4/10/2018	3/11/2019
Gloria Marsh BSA-117	L117 LY Worked		5/1/2018	10/11/2019
Gloria Marsh BSA-117	L117 All Donors for FOS with Solicitors(CY)		6/14/2018	7/23/2019
Gloria Marsh BSA-117	L117 Unworked Prospects for Specific Appeal (LY Don...		12/7/2018	10/1/2019
Gloria Marsh BSA-117	Copy of L117 Unworked Prospects for FOS (3 Year His...		4/9/2019	

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

Dependencies

John Kuehn BSA-BSA | L117 Global Write Off Query | Configuration | 6/27/2017

ve | Edit | Copy | Merge | Mobilize | Delete | Browse | Create | View exports | Properties | Assign permissions | Dependencies

Information library

Dependencies for query: L117 Global Write Off Query

To view an up to date list of dependencies run the 'Generate dependencies list' process.

Status | Generate dependencies list

Status: Completed

Status message: Completed

Started by: netbsa\jkuehn | Duration: 5 seconds

Started: 3/25/2020 7:39:10 AM | Ended: 3/25/2020 7:39:15 AM

Common dependencies (0) | More

Dependency name	Dependency type	Prevents delete	Additional dependency info

Other dependencies (2) | More

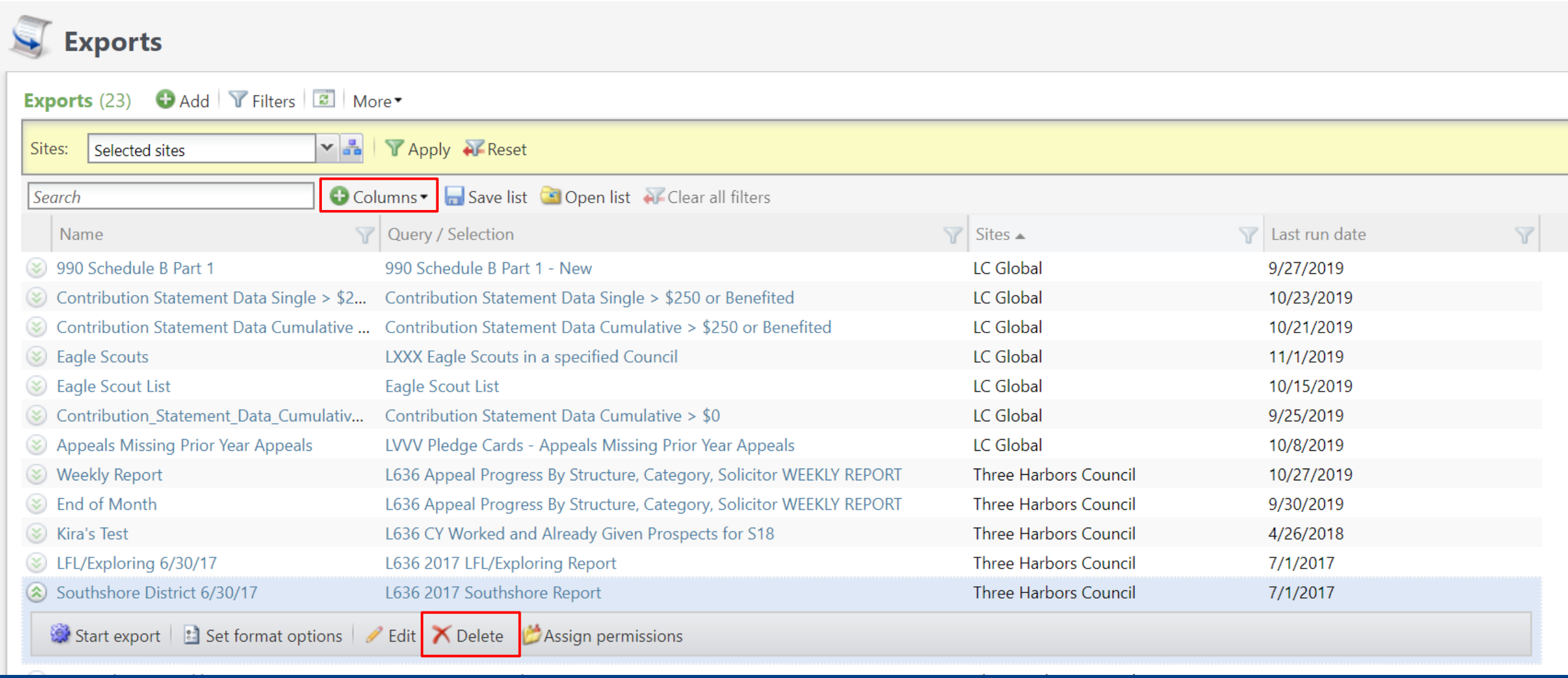
Dependency name	Dependency type	Prevents delete	Additional dependency info
Global Pledge Write-off Process	Global Pledge Write-off Process	✓	This table contains information pertaining to the pledge write-off business process.
CMS Query Publishing	CMS Query Publishing		Indicates if a given query has been published in the CMS.

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.

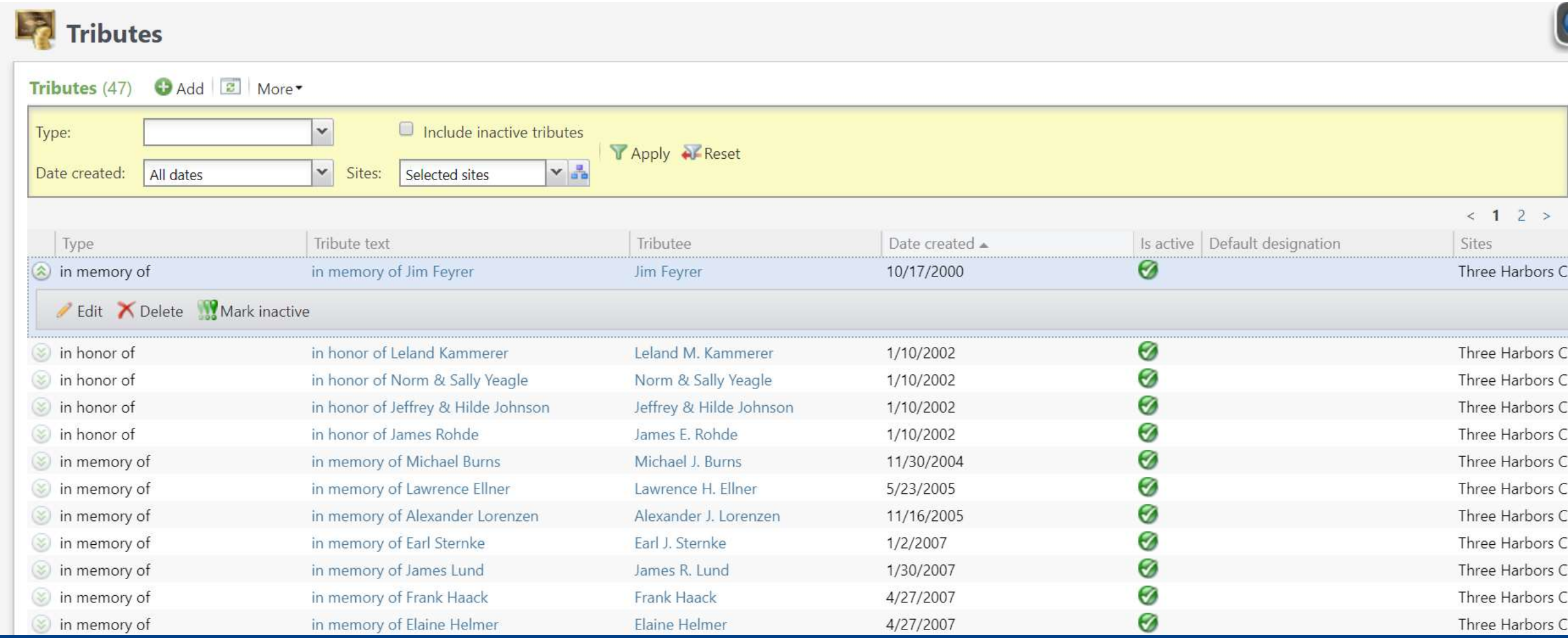
Deleting Exports

- 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



- 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 fine old revenue

Contribution Summary | Payment Summary | Write-off & Balance Summary | Contributions by Segment | Payments by Segment | Appeal Data Integrity

Appeal Data Integrity ... STEPS: (1) Filter/Sort/Group to find Appeals missing data (2) Click chevron to edit Appeal record (71)

Active equal to: | Appeal equal to: | Report Code equal to: | Category equ

Missing A Field?	Active?	Appeal	Goal	Prior Appeal	Missing Report Code?	Report Co...	Miss...	Start Date	End Date	Missi...
<None>										
Yes	Yes	(194) C01 - Capital Land Acquisition	$200,000.00		Yes		No	1/1/2002	12/15/2011	Yes
Yes	Yes	(194) C02 - Capital Campaign (Land)	$200,000.00	(194) C97 - Capital Campaign	Yes		No	1/25/2...	12/14/2012	Yes
Yes	Yes	(194) C97 - Capital Campaign	$600,000.00		Yes		No	1/1/1997	12/15/2010	Yes
Yes	No	(194) D13 - Direct Mail 2013	$0.00		Yes		No	8/1/2013	12/31/2013	Yes
Yes	No	(194) D14 - Direct Mail 2014	$0.00	(194) D13 - Direct Mail 2013	Yes		No	8/1/2014	12/31/2014	Yes
Yes	Yes	(194) D15 - Direct Mail 2015	$0.00	(194) D14 - Direct Mail 2014	Yes		No	8/1/2015	12/31/2015	Yes
Yes	No	(194) E01 - Endowment James E West	$0.00		Yes		No	12/1/2...	12/31/2001	Yes
Yes	No	(194) E02 - Endowment James E West	$0.00	(194) E01 - Endowment James E...	Yes		No	12/1/2...	12/31/2002	Yes
Yes	No	(194) E03 - Endowment James E West	$0.00	(194) E02 - Endowment James E	Yes		No	12/1/2	12/31/2003	Yes

Go to appeal | Edit appeal | Edit prior appeal | Mark active

Edit an appeal

Name: (194) E02 - Endowment James E West

Description: Endowment James E West

Split evenly | Split fully

Category:

Report code:

Site: Santa Fe Trail Council

Start date: 12/1/2002

End date: 12/31/2002

Goal: $0.00

Help | Save | Cancel

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

LC Revenue Update Batch

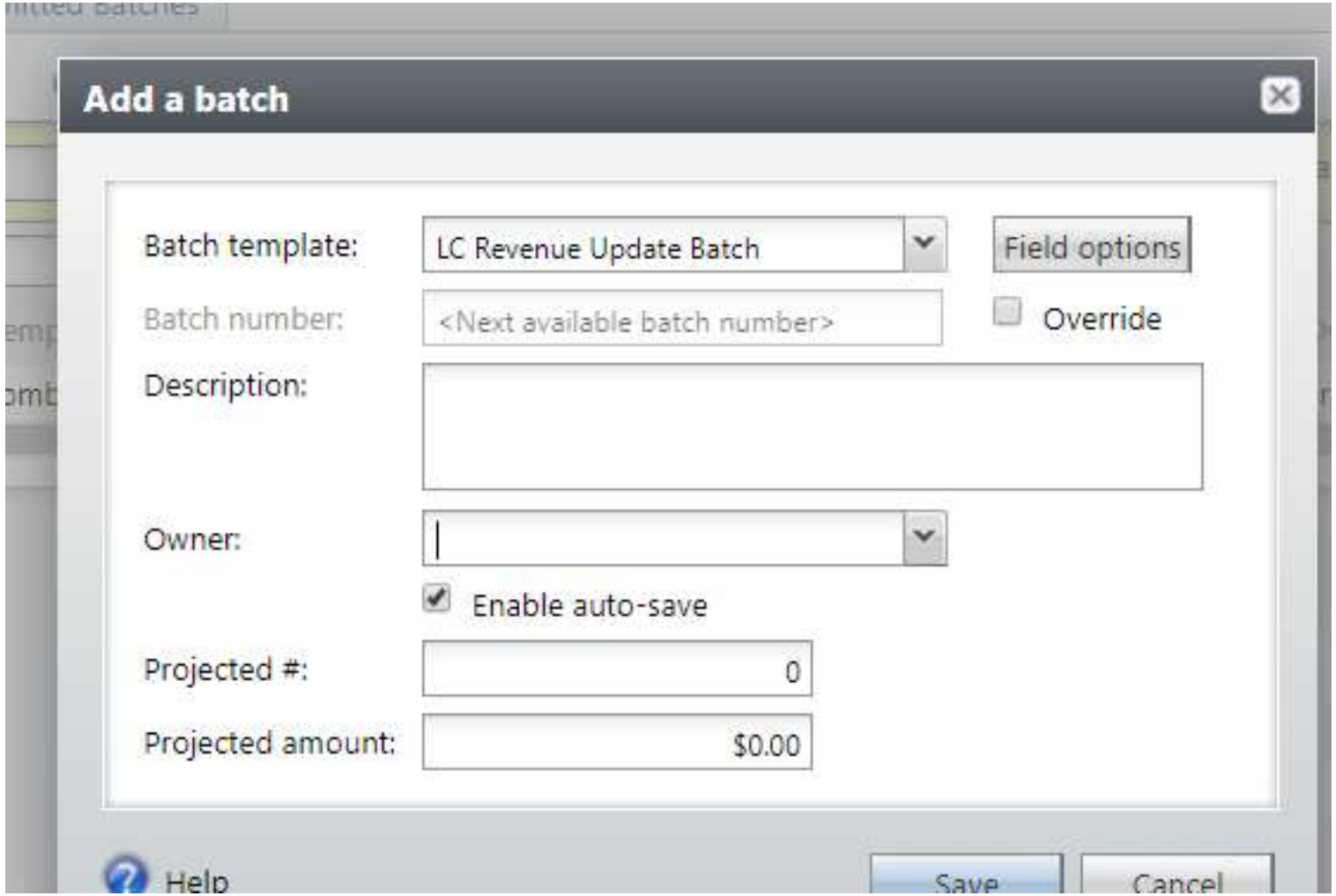
When making changes to the following transaction types:

- Pledge

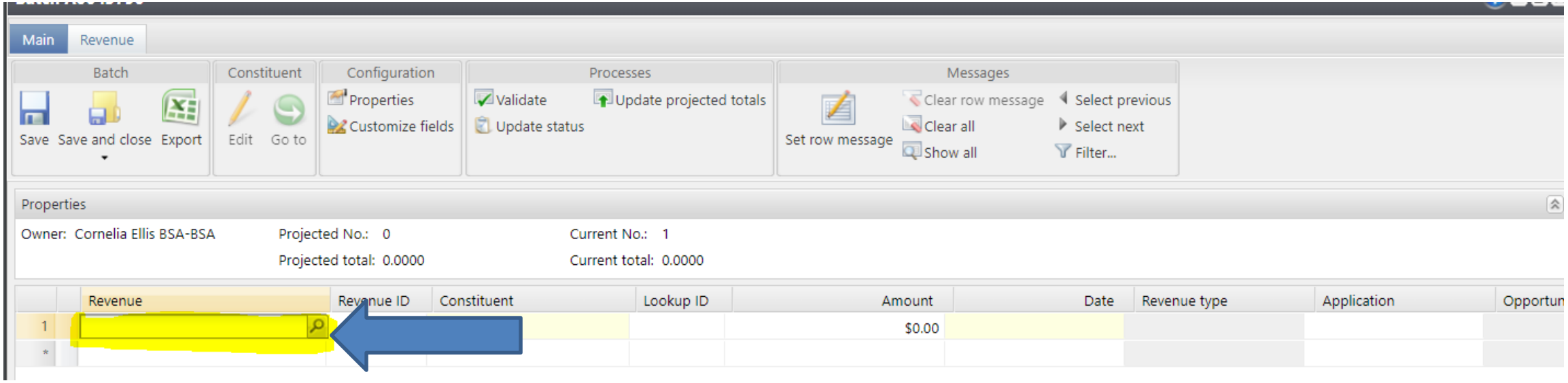
1. When you adjust the designations on a pledge, you are prompted to adjust the previously-posted payments as well; this will trigger a reversal and redistribution in the GL

- Pledge Payment
- Recurring Gift
- Recurring Gift Payment
- Matching Gift Payment
- Event Registration Payment
- Auction Purchase Payment
- Any other Payment

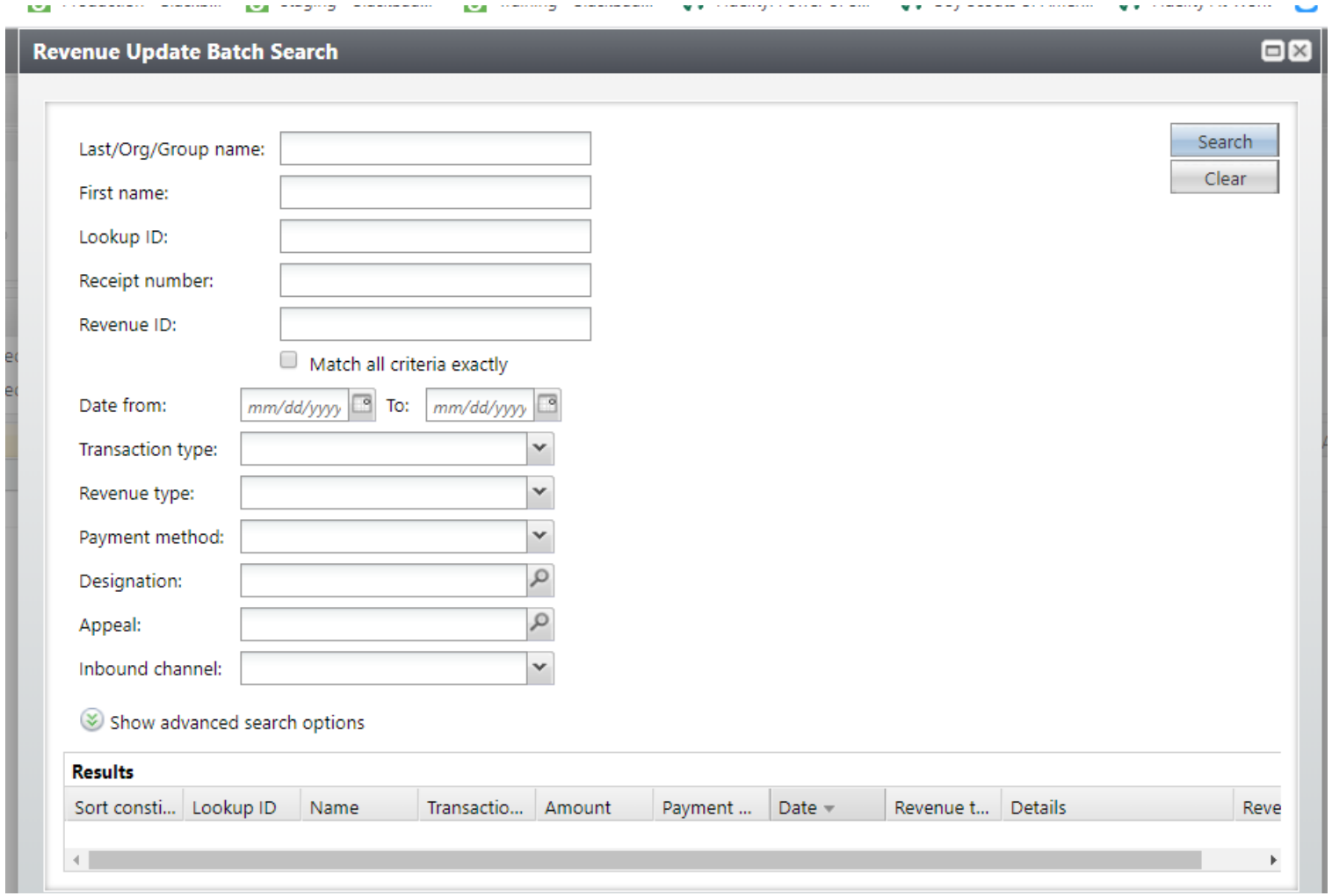
LC Revenue Update Batch



Main Tab of Revenue Batch



Enter the Revenue ID information. The revenue ID looks like this with rev-xxxxxxx.



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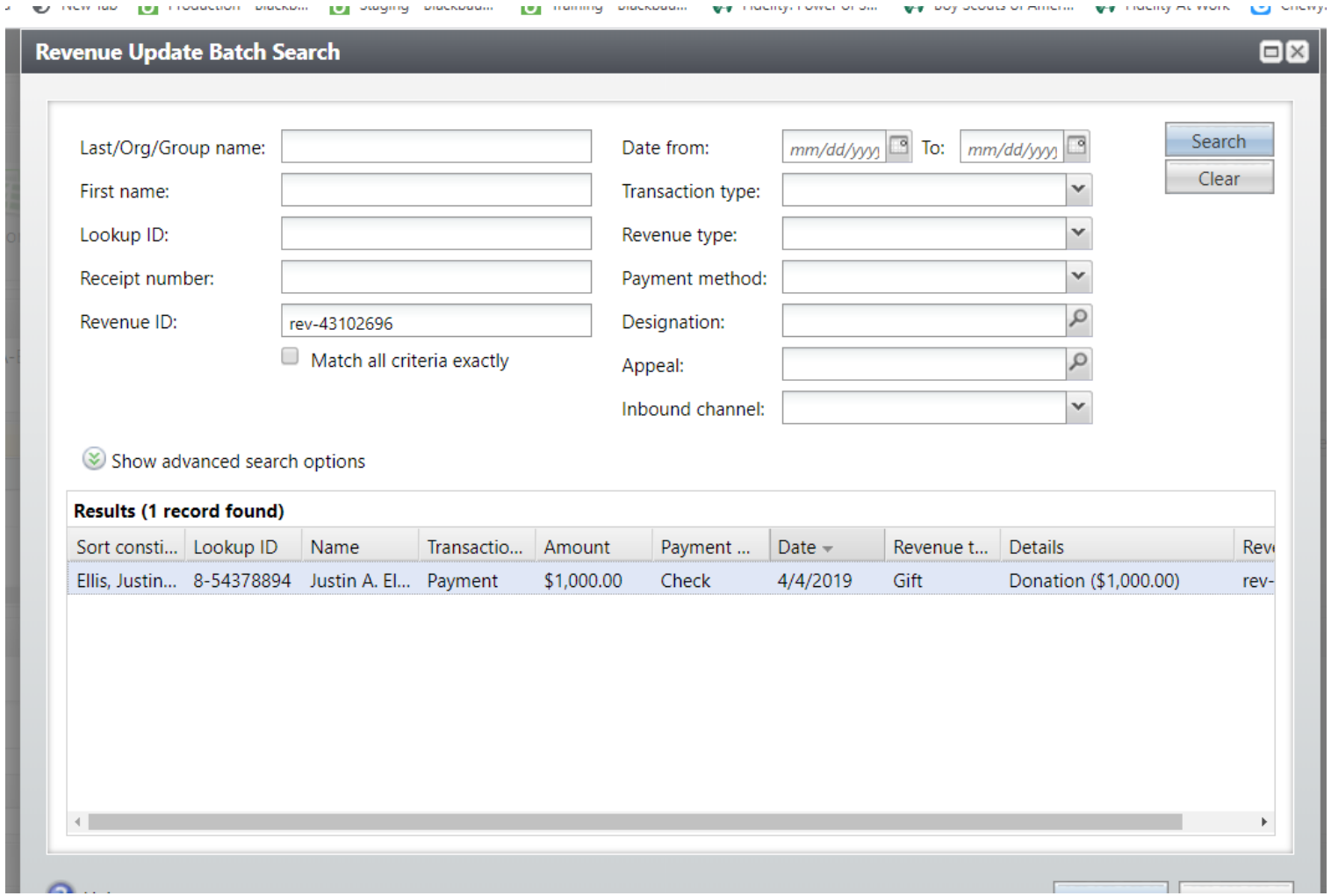
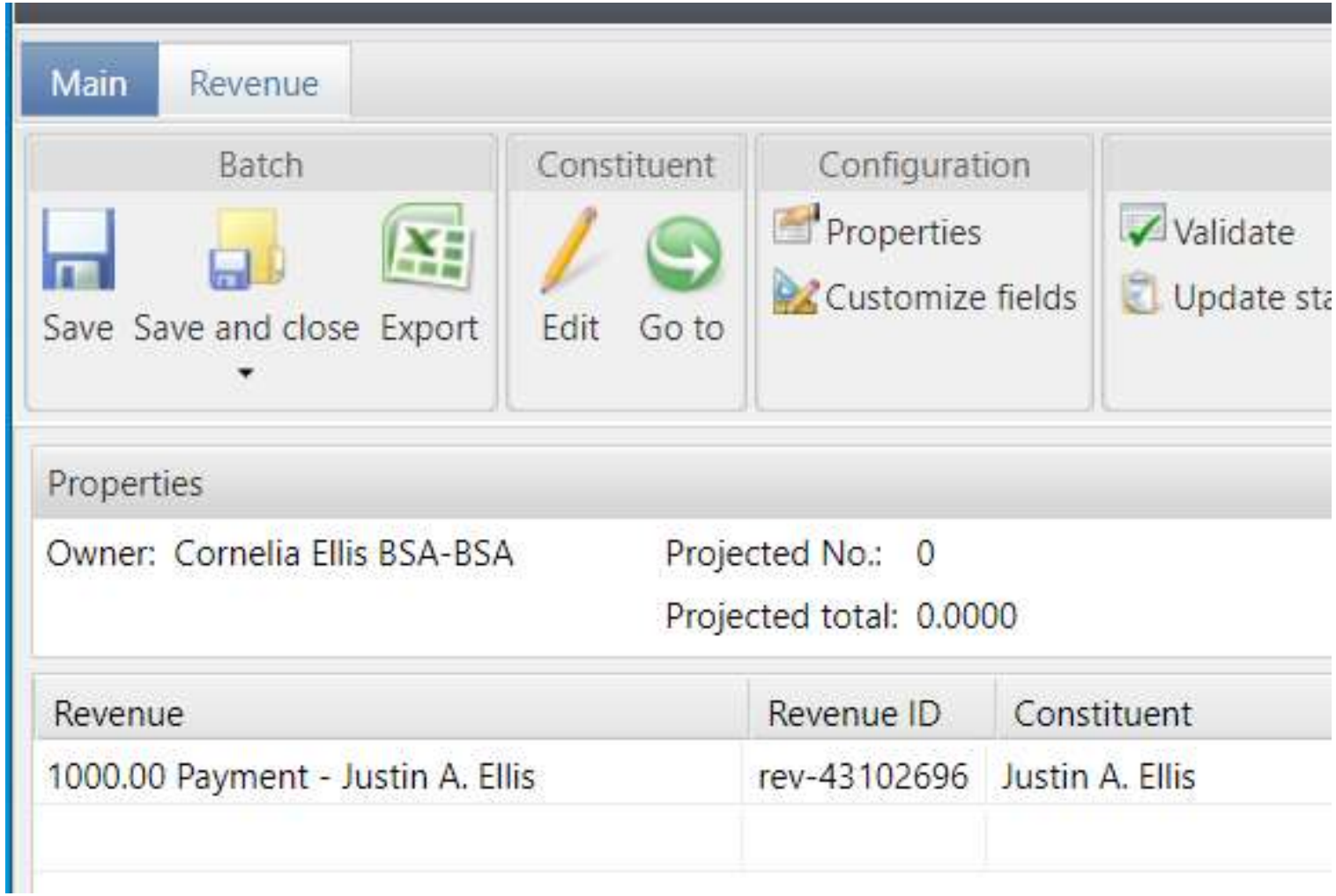
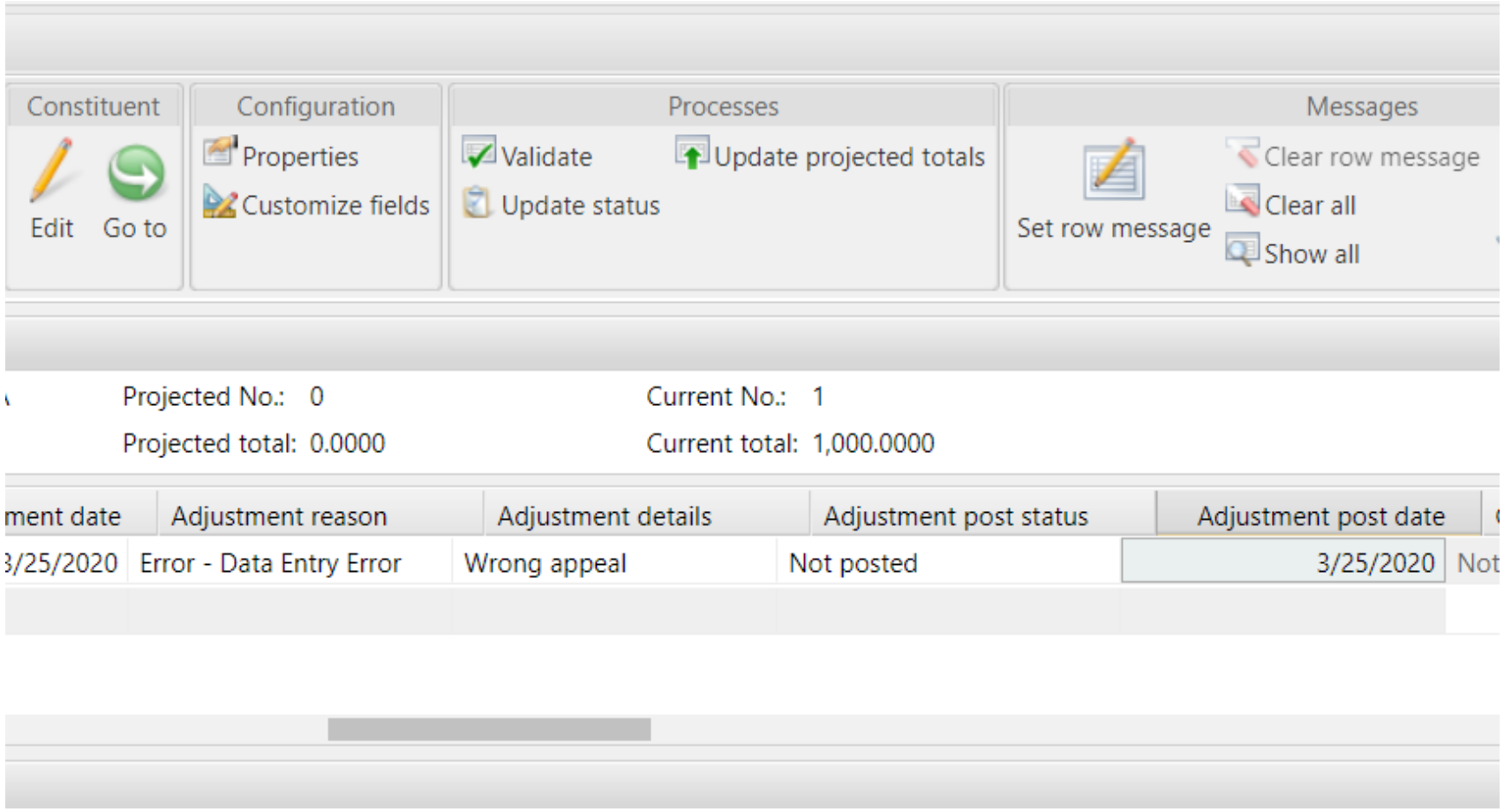
The information populate when you enter the Revenue ID and click Search. Click Select.



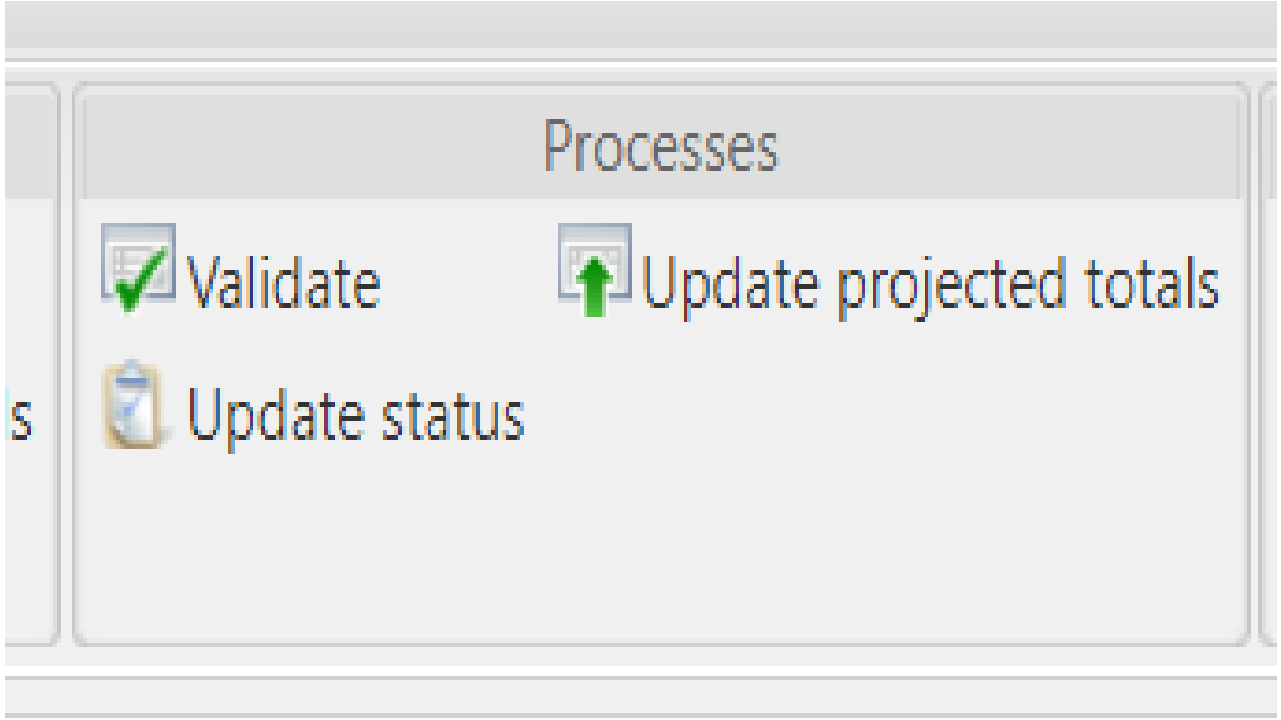
The fields are populated with the information.

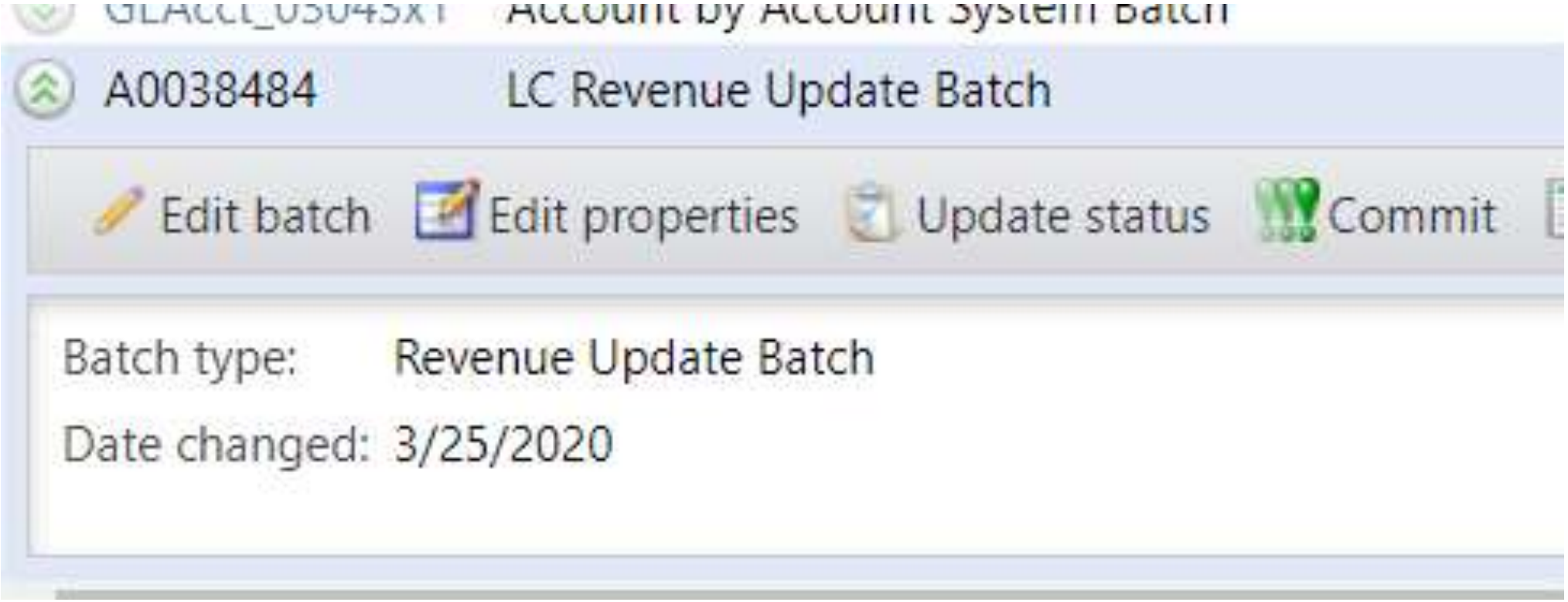


Make sure that Adjustment reason, Adjustment details and Adjustment post date is filled out.



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

BOY SCOUTS OF AMERICA

Join Give Shop My.Scouting Login Search

- Council Support
  - Strategic Performance Office
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    - 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.

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- Capital
- Major Gifts & Endowment
- CRM Resources (2)
- Best Practices
- Document Library
- Donor Research
- FOS Planning Kit
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www.scouting.org/financeimpact

Questions & Answers