CRM User Forum

April 15, 2020
Cornelia Ellis – Don Day
Objectives

- Using recurring gifts
- Review batch templates
- Review giving categories and update
- Review BSA Structure and update
- Cleaning up duplicate constituents – Person Merge
- Using revenue update batches
- CRM User “Tools” available on MyBSA
RECURRING GIFTS IN CRM
Recurring Gifts in CRM

• Recurring gifts establish a process for the donor to make a repeat gift at regular intervals without an end date.
• Payment method is set up with a credit card
• System looks for recurring gifts with activity schedule due and created a new donation batch for processing at the correct time based on the recurring gift schedule
• When the batch is processed, they come into CRM as new contributions and cash.
Recurring Gifts in CRM

• New gift opportunity for donors
  – No total amount known
  – No end date for giving
  – Donor could stop gift at any time

• These are pledges
  – Pledges require total gift amount, indicated by donor
  – Defined payment schedule
  – End date
Recurring Gifts in CRM

- Place these in a separate multi-year appeal.
- Once recurrence is created, redact the donors credit card info from your paper files. You should not store a donors credit card for future use. This is not PCI compliant.
- Ensure that your recurring generate payment routine has been updated and placed on a job schedule to run daily after business hours
- Check the Generate Payment Routine to make sure it ran overnight
- The routine will create a batch for you to process when a recurrence has schedule activity on it.
Batch
Committed Vs. Uncommitted Batches

• Uncommitted
  – Filled out but not recorded
  – All batches start as uncommitted

• Committed
  – After steps are completed, commit a batch
  – The batch has been entered and recorded
Batch Entry
Add a Batch

Batch template: Style Cash/Check Payment Donation
Batch number: <Next available batch number>
Description:
Owner: Comelio Ellis BSA-BSA
Enable auto-save
Projected #: 0
Projected amount: $0.00

Save Cancel
Revenue Batch Templates

• LC Cash/Check Payment Donation
• LC Credit Card Payment Donation
• LC Gift-in-kind & Service Contribution
• LC Pledge Commitment
• LC Pledge Commitment with Credit Card
• LC Pledge Payment Cash/Check
• LC Pledge Payment Credit Card
• LC Recurring Gift Commitment (monthly or other schedule)
• LC Stock & Securities Received
Maintaining CRM data

• Giving categories
• Structure
• Duplicates
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
Duplicate constituents

• Duplicates are common in any database
  – Multiple people adding records
  – People using nicknames on materials
  – Data being fed from other systems

• How do we minimize this
  – Review constituent records
  – Review “ScoutNET Merged Inactive Constituent” data list
  – Find in daily constituent searches
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

![Main Tab of Revenue Batch Image]

- **Owner:** Cornelia Ellis BSA-BSA
- **Projected No.:** 0
- **Projected total:** 0.0000
- **Current No.:** 1
- **Current total:** 0.0000

<table>
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<th>Revenue</th>
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<th>Constituent</th>
<th>Lookup ID</th>
<th>Amount</th>
<th>Date</th>
<th>Revenue type</th>
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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.
CRM User “Tools” in MyBSA

- CRM Resources
- CRM User Guide
- Learn Blackbaud CRM (self-study)
Click the links below to learn more about fundraising.

**Home**
- 4.6 Glossary of Terms

**Constituents**
- Add an Individual
- Add an Interaction
- Add a Constituency to a Constituent
- Add a Group-Household Relationship
- Add a Member
- Add a Note/Attachment/Media
- Add BSAFR Group
- Add an Individual Relationship
- Add an Organization’s Contact
- Add/Remove a Spouse Relationship
- Changing a Constituent Site Security
- Constituent Reports
- Constituent Search
- Updating Wealthpoint
- Planned Gift
- Recognition Credits Report
- Volunteer Set up
- Matching Gifts
- Wealth and Ratings Wealthpoint

**Revenue**
- Add a Cash or Check payment or donation
- Add a Credit Card Payment or Donation
- Add a donor challenge
- Add a Pledge
- Add a Pledge with Credit Card
- Adding a recurring gift batch
- Adjusted Revenue
- Batch Workflow
- Credit Card Best Practices
- Credit Card Processing
- Future year and prior year
- Gift in Kind Batch
- GL Revenue
- Hierarchy and Designations
- Pledge installment schedule change
- Recognition Credit
- Stock Revenue Batch
- Summary of Appeal Report
- Transaction Search
- Tributes

**Events**
- Add an Event
- Auction Setup
- Event Revenue set up
- Event Revenue Setup Request
- Event Invitation and Registration

**Reports**
- Appeal Organization Structure Report
- Appeal Progress by Category Report
- Appeal Progress by Solicitor Report
- Appeal Revenue Data List
- Constituent Reports
- Entering a Goal to a Group
- IRS 990 Schedule B
- Pledge Receivable Aging Report
- Appeal Profile
- Account Distribution
- Reconcile PeopleSoft to Blackbaud
- Solicitor Performance Report

**Analysis**
- Additional Pledge Cards
- Appeal mailing
- Copy/Edit an existing query
- Folder Management
- O-Data Lists
- Query Aid
- Query Tips and Tricks
- Smart Query
- Three year history query
- LXXX Appeal All Const 3 Year Hist
- Unpaid Donor Query
- Unworked Constituents List
- Working with LXXX Queries
WELCOME
to the BSA Employee LearnCenter, Don!

Your safety is the Boy Scouts of America’s top priority. Scouting U is cancelling all in-person courses and conferences scheduled to commence between now and May 19. This includes Project Management (Kansas City), Advanced District Administration 2003, Commissioning 2004, Managing Performance 2002, DO2 2002, and Course Director Conferences. Information about rescheduling and rebooking of courses will be released as soon as possible. Virtual instructor led trainings, including DO2 VILTs and BSA Competencies VILTs, will continue as scheduled. Registration is still open for these courses. Please monitor this website, the Scouting U Workplace for updates as the situation evolves. Thank you for your patience and understanding - for further questions please contact the specific course leadership listed on the Scouting U website.
Select link below for Blackbaud Learning Plans and VILT Enrollment:
BLACKBAUD LEARNING PLANS and VILT ENROLLMENT

RESOURCES
How to Check Your Blackbaud Training Status
## Blackbaud Learning Plans

### BB CRM - Accounting

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Next Forum

May 20, 2020
10:00 am & 2:00 pm CST