

CRM User Forum

April 15, 2020

Cornelia Ellis – Don Day



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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



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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





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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


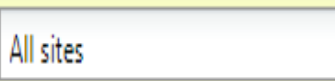






Batch Entry








 **Batch Entry** 

Uncommitted Batches **Committed Batches**

Uncommitted batches (0)  **Add**  **Batch search**  **More**

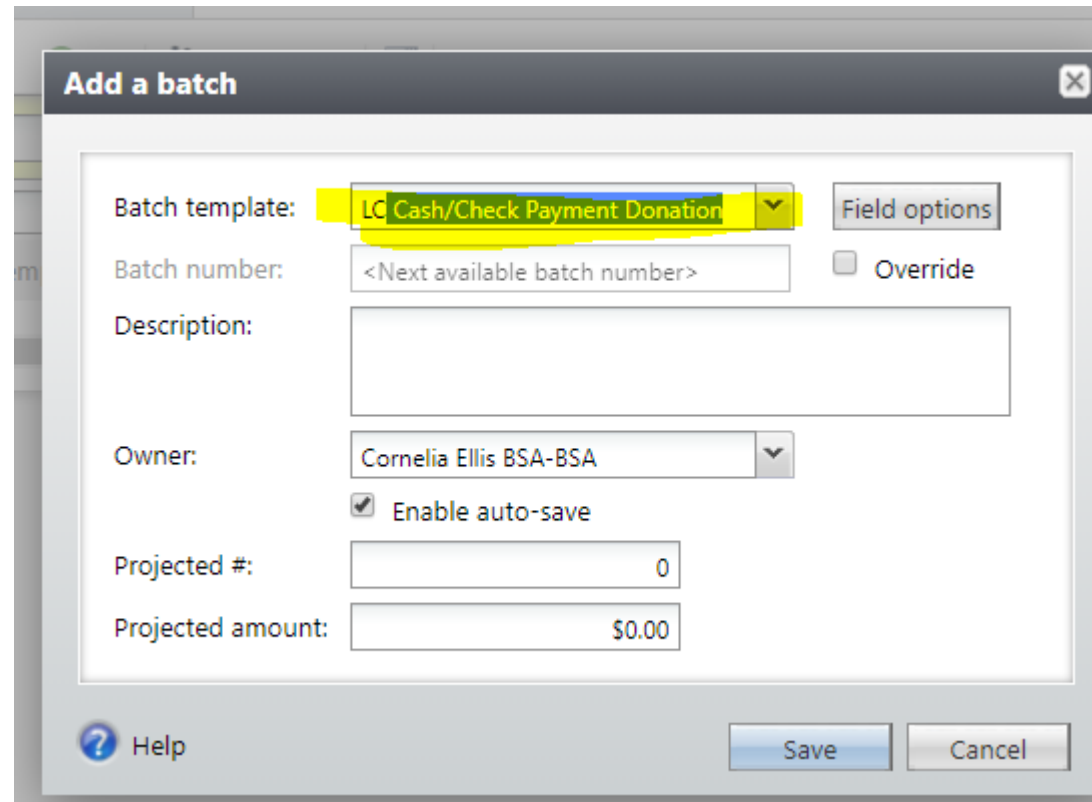
Date range:  **Sites:**  ☐ **Show only batches with exceptions**  **Apply**  **Reset**

 **Columns**  **Clear all filters**

 Batch numb...	 Batch template	 Description	 Owner	 Status	 Date ad...	 Category
--	---	--	--	---	---	---



Add a Batch



The screenshot shows a dialog box titled "Add a batch" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Batch template:** A dropdown menu with "LC Cash/Check Payment Donation" selected and highlighted in yellow.
- Field options:** A button located to the right of the Batch template dropdown.
- Batch number:** A text field containing "<Next available batch number>".
- Override:** An unchecked checkbox labeled "Override".
- Description:** A large, empty text area.
- Owner:** A dropdown menu with "Cornelia Ellis BSA-BSA" selected.
- Enable auto-save:** A checked checkbox.
- Projected #:** A text field containing "0".
- Projected amount:** A text field containing "\$0.00".

At the bottom of the dialog, there is a "Help" button (represented by a question mark icon) on the left, and "Save" and "Cancel" buttons on the right.



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

mitted batches

Add a batch ✕

Batch template:

LC Revenue Update Batch ▼

Field options

Batch number:

<Next available batch number>

☐ Override

Description:

Owner:

| ▼

☒ Enable auto-save

Projected #:

0

Projected amount:

\$0.00

? Help

Save

Cancel



Main Tab of Revenue Batch

Main Revenue

Batch: Save Save and close Export

Constituent: Edit Go to

Configuration: Properties Customize fields

Processes: Validate Update projected totals Update status

Messages: Set row message Clear row message Clear all Show all Select previous Select next Filter...

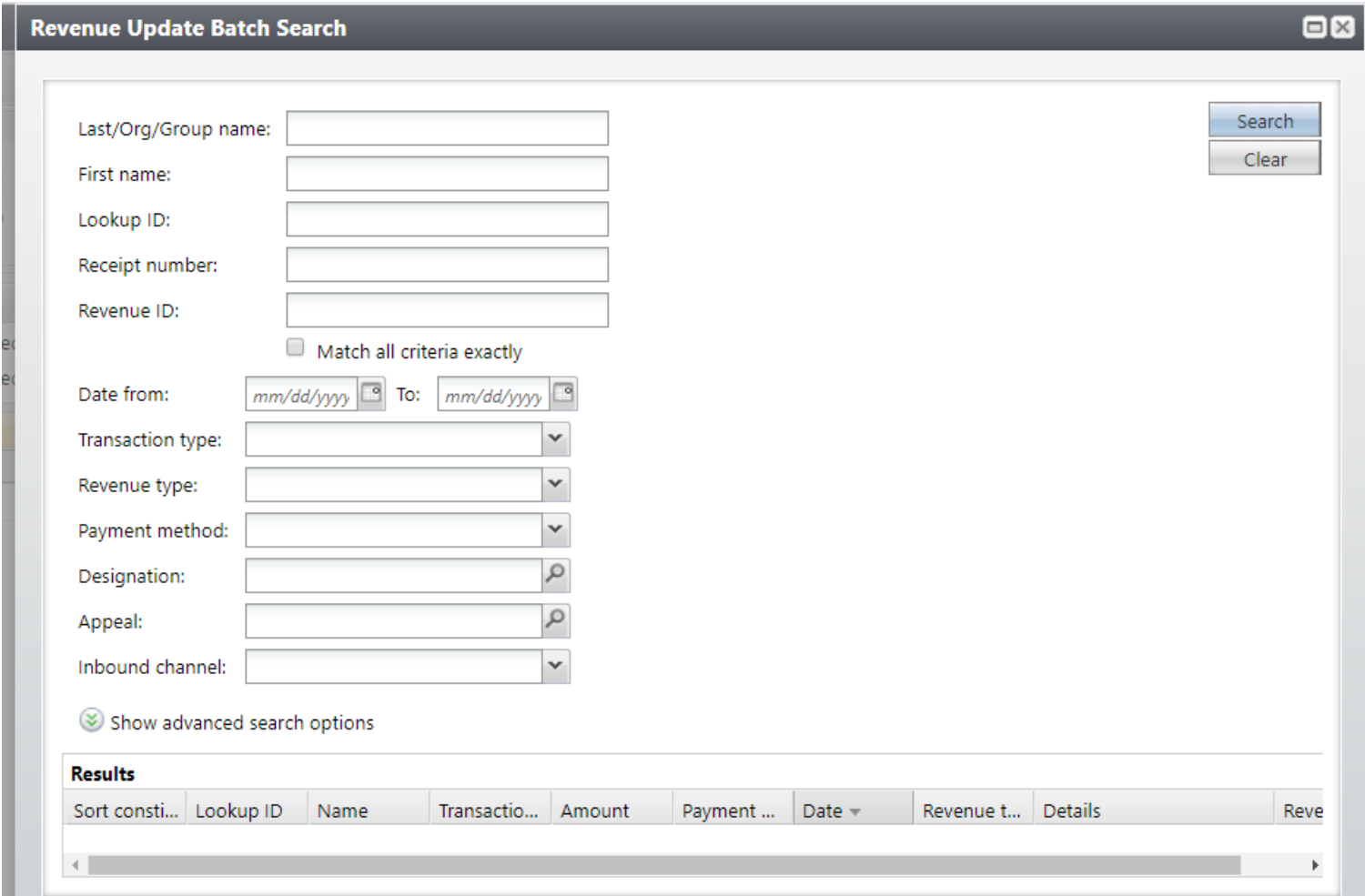
Properties

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

	Revenue	Revenue ID	Constituent	Lookup ID	Amount	Date	Revenue type	Application	Opportun
1					\$0.00				
*									



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

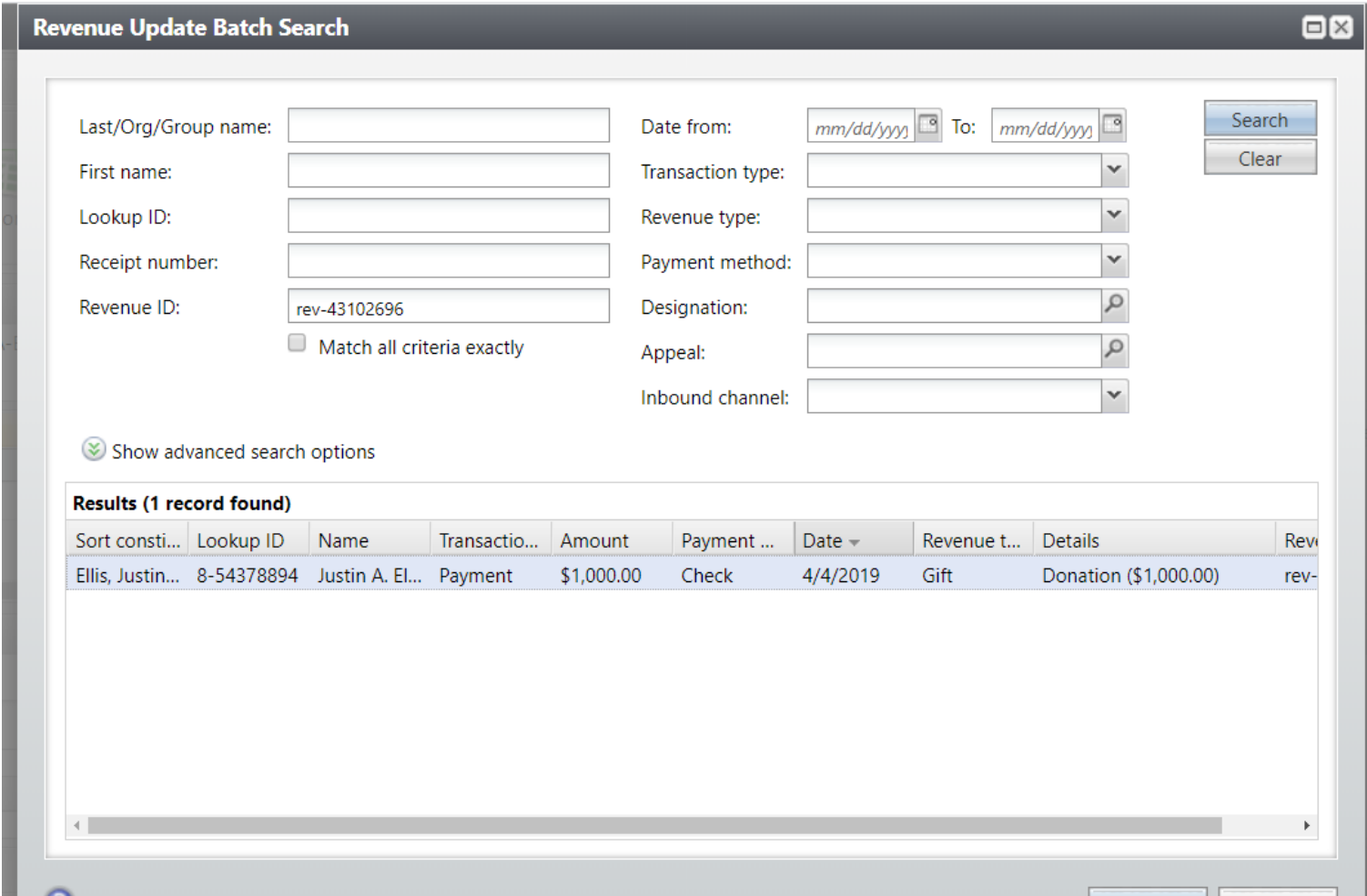


The screenshot shows a software window titled "Revenue Update Batch Search". It contains several input fields for searching: "Last/Org/Group name:", "First name:", "Lookup ID:", "Receipt number:", and "Revenue ID:". To the right of these fields are "Search" and "Clear" buttons. Below the input fields is a checkbox labeled "Match all criteria exactly". Further down are date range fields "Date from:" and "To:" with "mm/dd/yyyy" placeholders and calendar icons. Below these are dropdown menus for "Transaction type:", "Revenue type:", and "Payment method:". There are also search fields with magnifying glass icons for "Designation:" and "Appeal:". At the bottom of the search section is a link "Show advanced search options" with a green checkmark icon. Below the search section is a "Results" section with a table header. The table headers are: "Sort consti...", "Lookup ID", "Name", "Transactio...", "Amount", "Payment ...", "Date ▼", "Revenue t...", "Details", and "Reve". A horizontal scrollbar is visible below the table headers.

Sort consti...	Lookup ID	Name	Transactio...	Amount	Payment ...	Date ▼	Revenue t...	Details	Reve
----------------	-----------	------	---------------	--------	-------------	--------	--------------	---------	------



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



The screenshot shows a web application window titled "Revenue Update Batch Search". It contains a search form with the following fields:

- Last/Org/Group name:
- First name:
- Lookup ID:
- Receipt number:
- Revenue ID:
- ☐ Match all criteria exactly
- Date from: To:
- Transaction type:
- Revenue type:
- Payment method:
- Designation:
- Appeal:
- Inbound channel:

Buttons: Search, Clear

☒ Show advanced search options

Results (1 record found)


Sort consti...	Lookup ID	Name	Transactio...	Amount	Payment ...	Date	Revenue t...	Details	Rev
Ellis, Justin...	8-54378894	Justin A. El...	Payment	\$1,000.00	Check	4/4/2019	Gift	Donation (\$1,000.00)	rev-





The fields are populated with the information.

MainRevenue


Batch


 Save

 Save and close


 Export


Constituent


 Edit


 Go to

Configuration

 Properties

 Customize fields

 Validate

 Update status

Properties

Owner: Cornelia Ellis BSA-BSA












Projected No.: 0

Projected total: 0.0000

Revenue	Revenue ID	Constituent
1000.00 Payment - Justin A. Ellis	rev-43102696	Justin A. Ellis



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

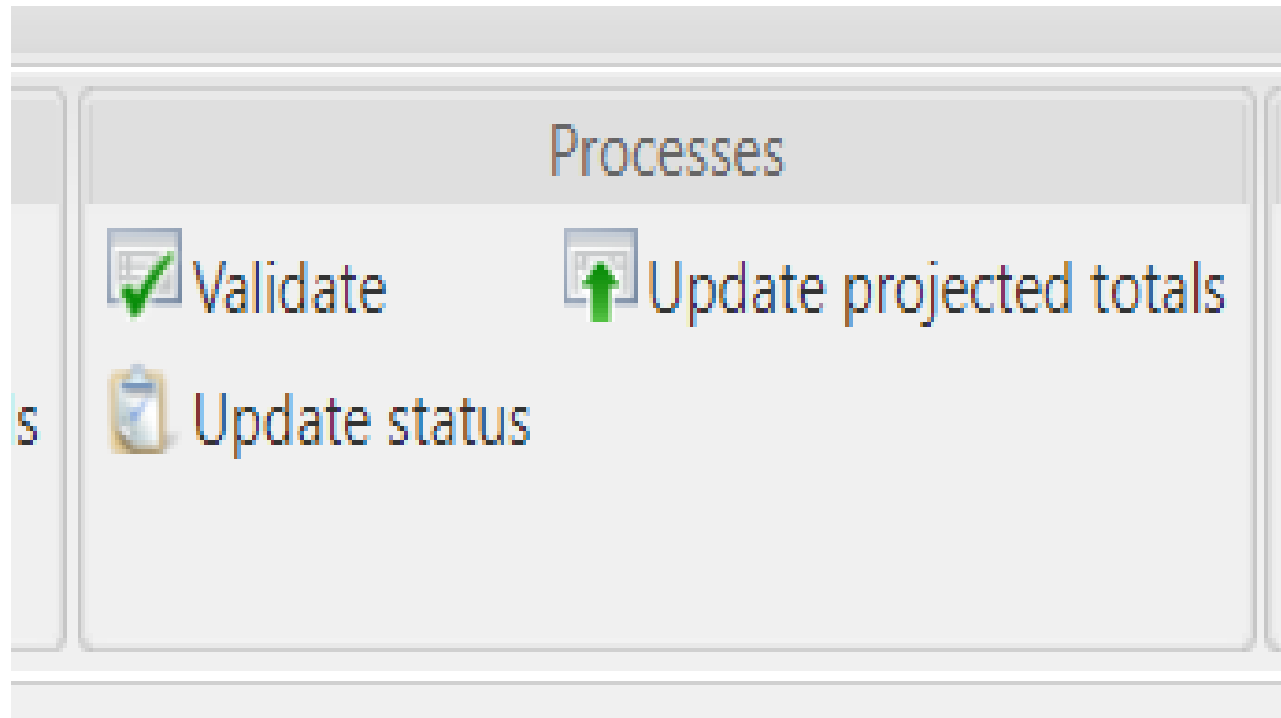
Constituent		Configuration		Processes		Messages	
		 Properties	 Customize fields	 Validate	 Update projected totals		 Clear row message
Edit	Go to			 Update status		Set row message	 Clear all
							 Show all

Projected No.: 0	Current No.: 1
Projected total: 0.0000	Current total: 1,000.0000


ment date	Adjustment reason	Adjustment details	Adjustment post status	Adjustment post date	
3/25/2020	Error - Data Entry Error	Wrong appeal	Not posted	3/25/2020	Not







Update
projected
totals,
Validate and
Save and
Close.



GLACCL_03043X1 ACCOUNT by Account System Batch

 A0038484 LC Revenue Update Batch

 Edit batch  Edit properties  Update status  Commit

Batch type: Revenue Update Batch

Date changed: 3/25/2020

The Batch is ready to commit.



CRM User “Tools” in MyBSA

- CRM Resources
- CRM User Guide
- Learn Blackbaud CRM (self-study)



Tuesday, April 14, 2020 Welcome back, Don! [Logoff](#)

Communities:



Home Page

[Home](#)[Membership](#)[Program](#)[Funding](#)[ScoutNET](#)[Knowledge Base](#)[Home](#)[BSA News](#)[Resources](#)

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[MatchFinder Matching Gifts Search](#)

Journey to Excellence

[Journey to Excellence](#)

Voice of the Scout

[Summary Report](#)

Diversity & Inclusion

[Resources](#)

National Council News Update

For the latest official BSA news:

- www.BSArestructuring.org: For more information and ongoing updates about the BSA
- [Workplace](#): Connect, communicate, and collaborate with fellow employees on the BSA
- [Scouting Wire](#): News and feature stories for employees and volunteers (with a weekly [Scouting Newsroom](#): The official media newsroom of the BSA.
- [Bryan on Scouting](#): The official blog of *Scouting* magazine.

The BSA Game Plan

The [The BSA Game Plan](#) is available for download to share internally with your team.



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Blackbaud CRM User Guide

Click the links below to learn more about fundraising.

Home

- ▶ 4.0 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

Marketing and Communications

- ▶ Acknowledgements & Reminders
- ▶ Add an Appeal
- ▶ Appeal Setup
- ▶ Billing Statements

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



Blackbaud Product Documentation

[Blackbaud CRM 4.0 Documentation](#)

[CRM 4.0 Data Sheet](#)

BSA Training Materials

[Acknowledgements and Reminders](#)

[Adding a Unit Committee](#)

[Appeal Setup Presentation](#)

[Auction Data Entry](#)

[Batch Entry and Deposit Reference](#)

[BBMS Presentation](#)

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[Blackbaud Terminology](#)

[BSAFR Pledge Card Brief](#)

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[Credit Cards Processing](#)

[Foundation Functional Area](#)

[Future and Prior year Inbound Channels](#)

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[Marking Individuals Deceased](#)

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[Pledge Installment Schedule Changes Updated](#)

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[Reconciliation](#)

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[Special Event Data Entry](#)

[Special Event Set Up](#)

[Special Event Registration and Revenue Presentation](#)

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[Stock Revenue Batch Presentation](#)

[Tributes](#)

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[Blackbaud Merchant Services Checklist](#)

[Designation Request sheet](#)

[Event Revenue Setup Request](#)



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WELCOME

to the BSA Employee LearnCenter, Don!

Learn. Challenge. Lead.

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 10. This includes Project Management (Kansas City), Advanced District Administration 2001, 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.



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Council

Local Council Employees



National

National Service Center



Supply

National Distribution Center and Scout Shops



Outdoor

Outdoor Programs and High Adventure Base

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6

PLANS



0

ASSIGNED



0

INCOMPLETE



0

DUE SOON



0

COMPLETE

NAME (A-Z)

FILTERS (#)

BB CRM - Accounting

TYPE Standard

+ Add Plan

DUE DATE N/A

COMPLETED DATE N/A

+ Add Plan

BB CRM - Accounting (Optional)

TYPE Standard Learning Plan

DUE DATE N/A

COMPLETED DATE N/A

+ Add Plan

BB CRM - Administration

TYPE Standard Learning Plan

DUE DATE N/A

COMPLETED DATE N/A

+ Add Plan

BB CRM - User

TYPE Standard Learning Plan

DUE DATE N/A

BB CRM - User (Optional)

TYPE Standard Learning Plan

DUE DATE N/A

BB CRM Professional

TYPE Standard Learning Plan

DUE DATE N/A





Blackbaud Learning Plans

[← BACK](#)

BB CRM - Accounting



11

ITEMS



0%

COMPLETED



0

ITEMS PAST DUE



0

ATTACHMENTS



SEQUENCE NUMBER



FILTERS (#)

[Blackbaud Learning Plans](#) > [BB CRM - Accounting](#)

Blackbaud CRM Introduction

1

Blackbaud CRM Introduction

STATUS Not Attempted

OPTIONAL No

TYPE Course

LAUNCH COURSE

2

Blackbaud CRM: Constituents

STATUS Not Attempted

OPTIONAL No

TYPE Course

LAUNCH COURSE

3

Blackbaud CRM Information Library

STATUS Not Attempted

OPTIONAL No

TYPE Course

LAUNCH COURSE

4

Blackbaud CRM Batch Entry and Revenue

STATUS Not Attempted

OPTIONAL No

TYPE Course

LAUNCH COURSE



Next Forum

May 20, 2020

10:00 am & 2:00 pm CST

