# 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

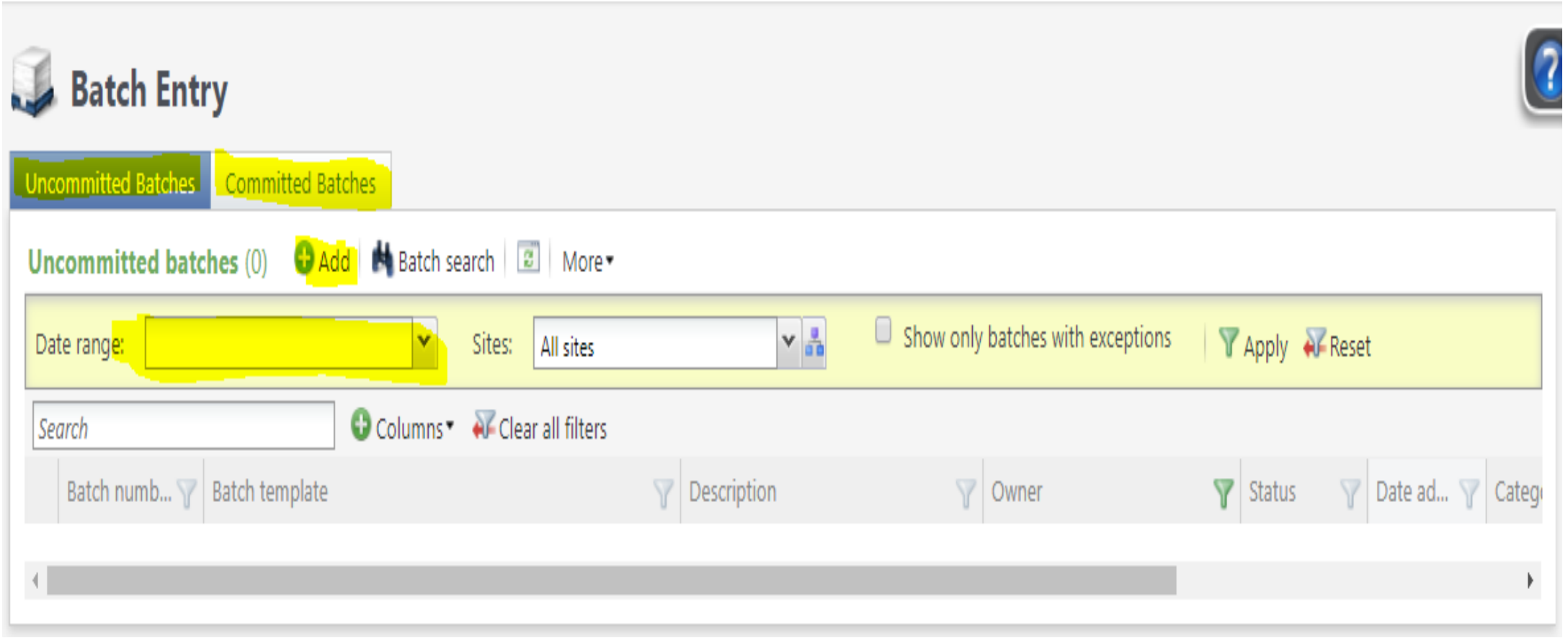
- Place these in a separate multi-year appeal.
- Once recurrence is created, redact the donors credit card info from your paper files.  You should not store a donors credit card for future use.  This is not PCI compliant.
- Ensure that your recurring generate payment routine has been updated and placed 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

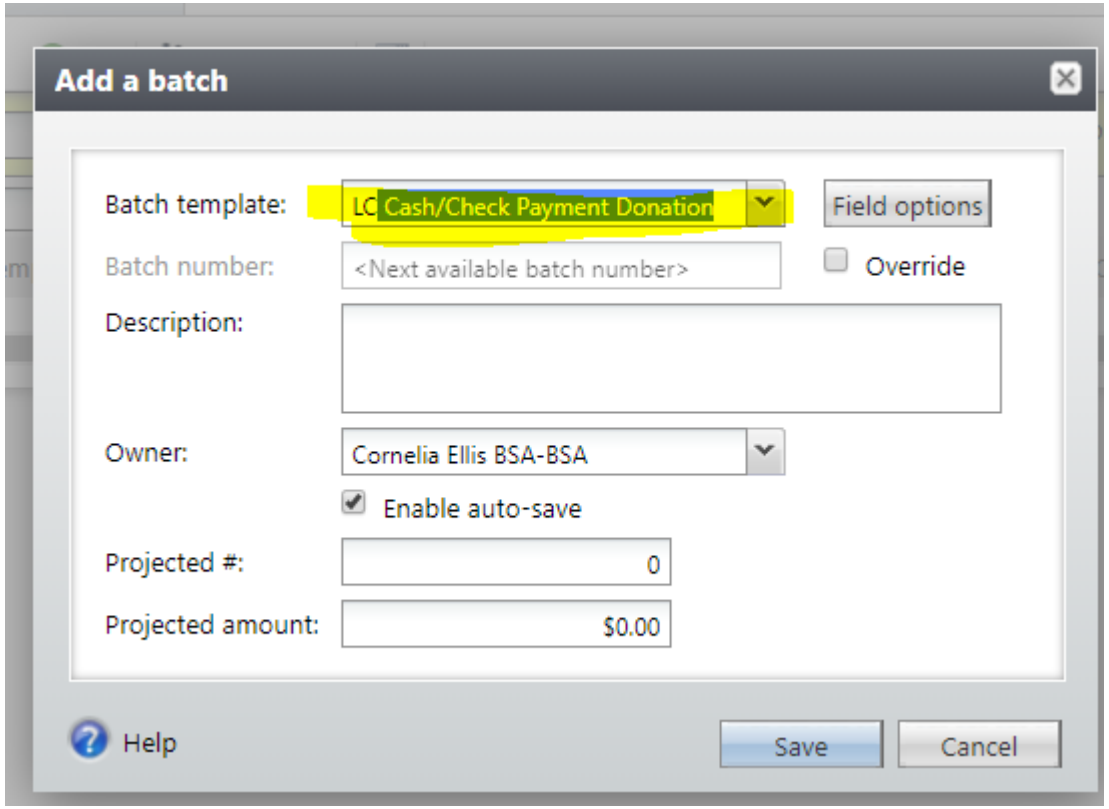
# Committed Vs. Uncommitted Batches

- 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


Batch Entry
Uncommitted Batches
Committed Batches
Uncommitted batches (0)
Add
Batch search
More
Date range:
Sites:
All sites
Show only batches with exceptions
Apply
Reset
Search
Columns
Clear all filters
Batch numb...
Batch template
Description
Owner
Status
Date ad...

# Add a Batch


Add a batch
Batch template:
LC Cash/Check Payment Donation
Field options
Batch number:
<Next available batch number>
Override
Description:
Owner:
Cornelia Ellis BSA-BSA
Enable auto-save
Projected #:
0
Projected amount:
$0.00
Help
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

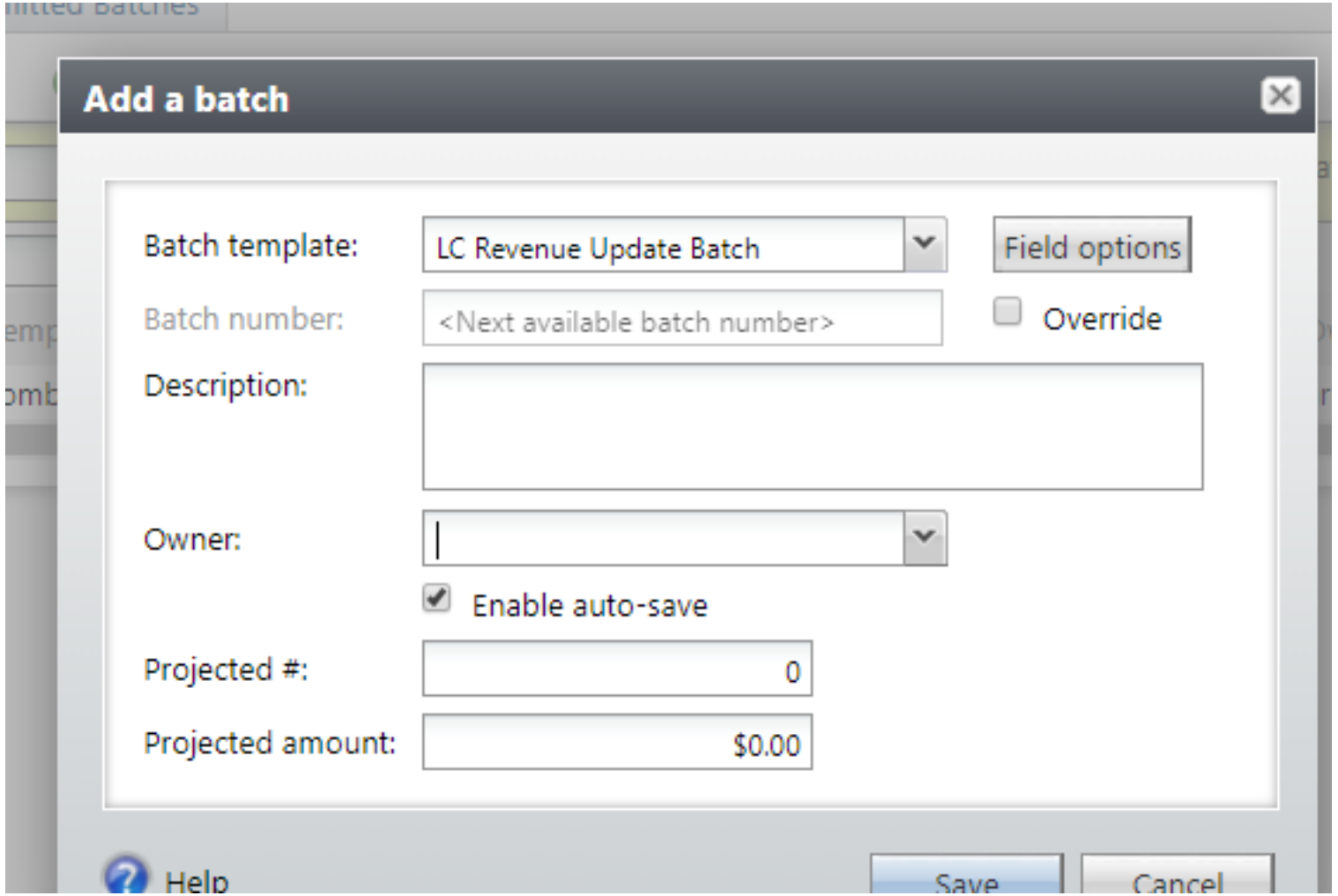
# LC Revenue Update Batch

When making changes to the following transaction types:

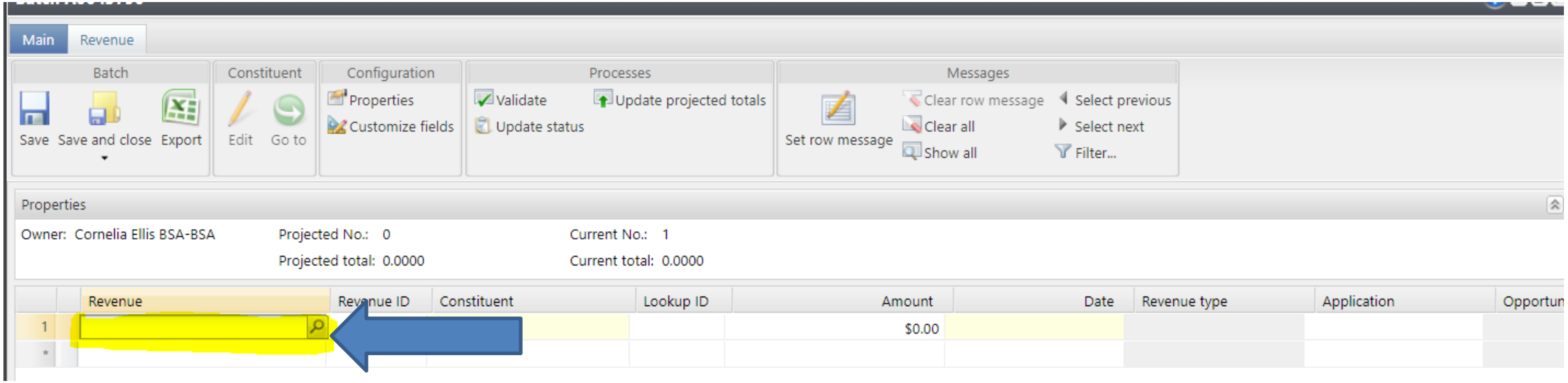
- Pledge

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

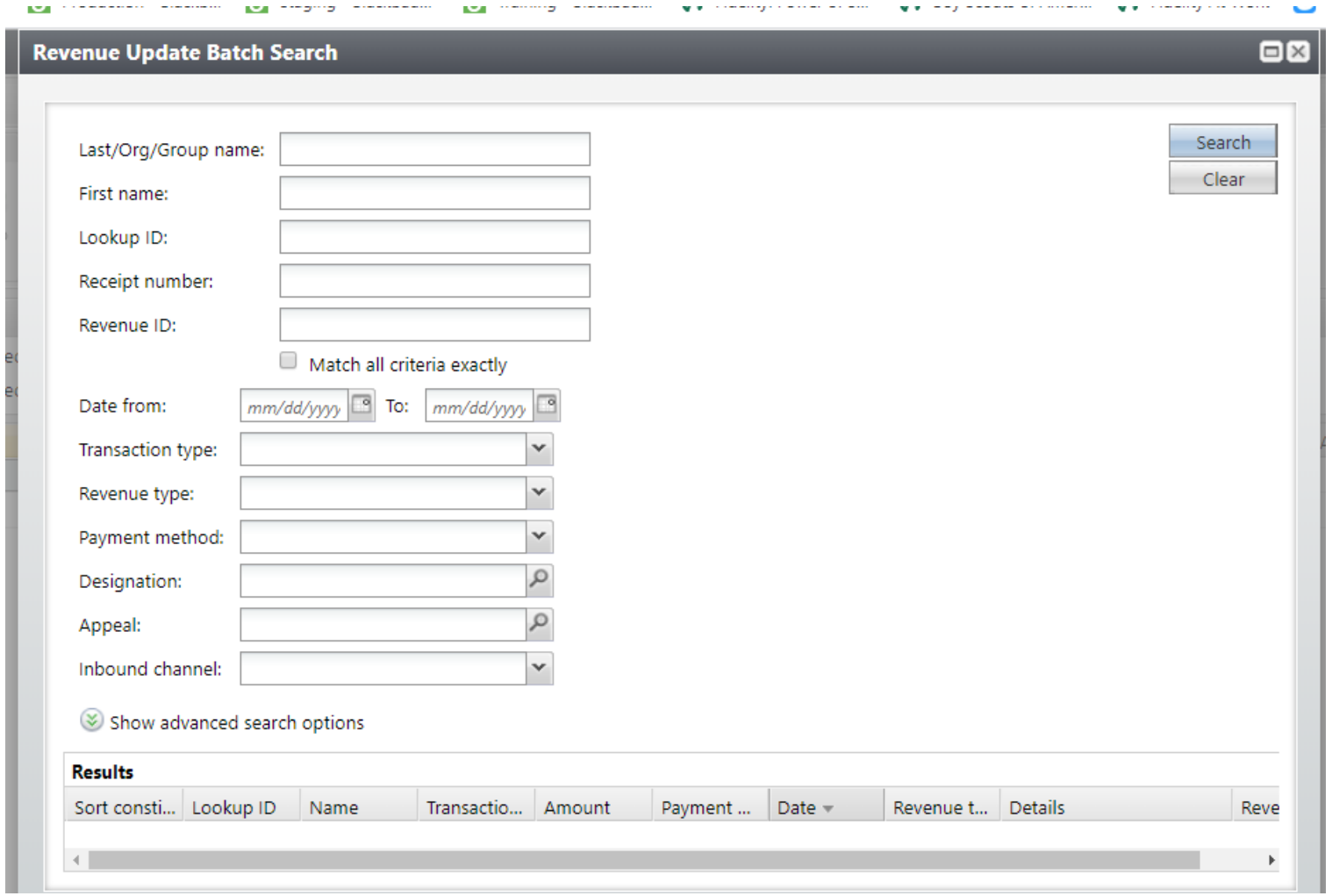
# LC Revenue Update Batch



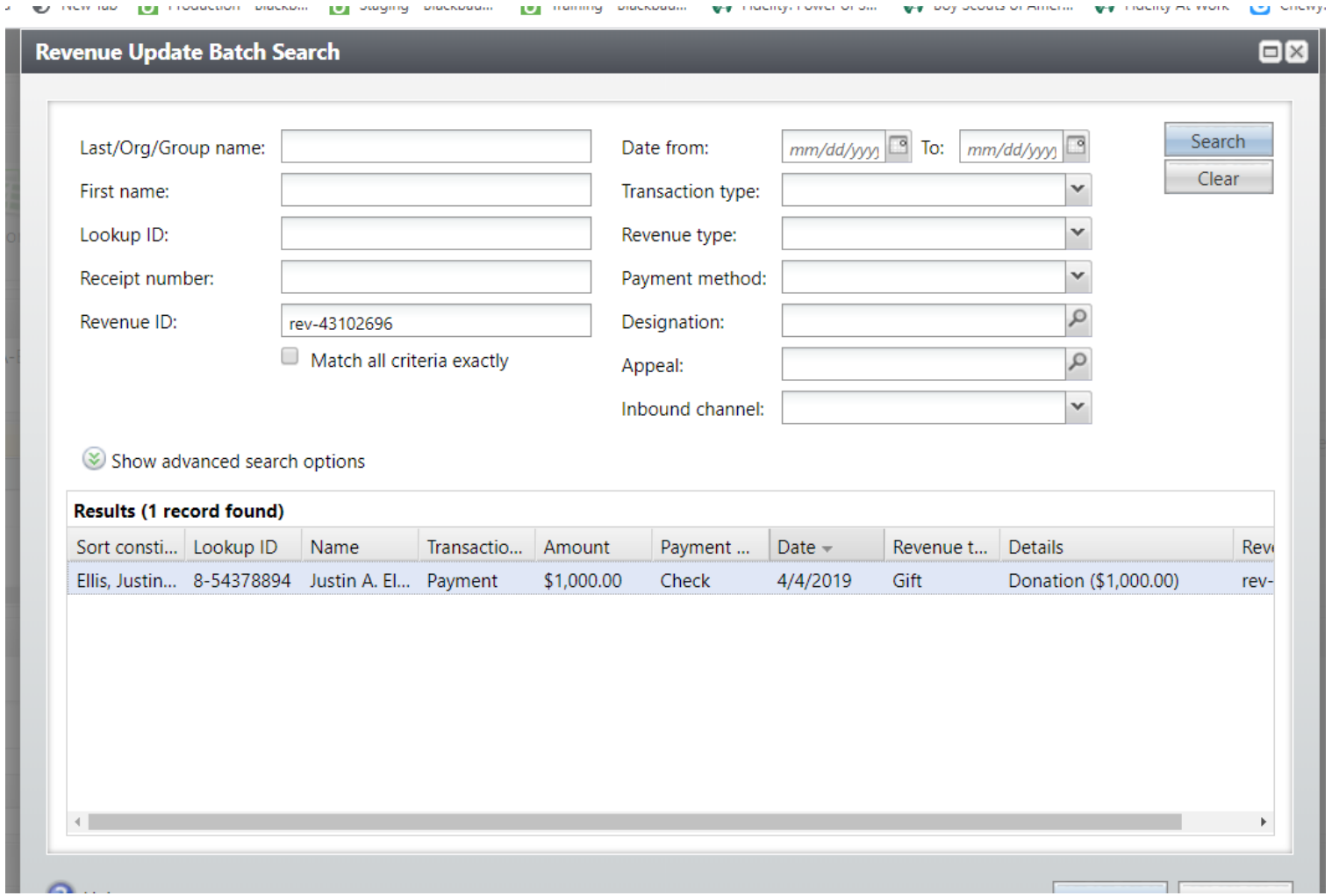
# Main Tab of Revenue Batch



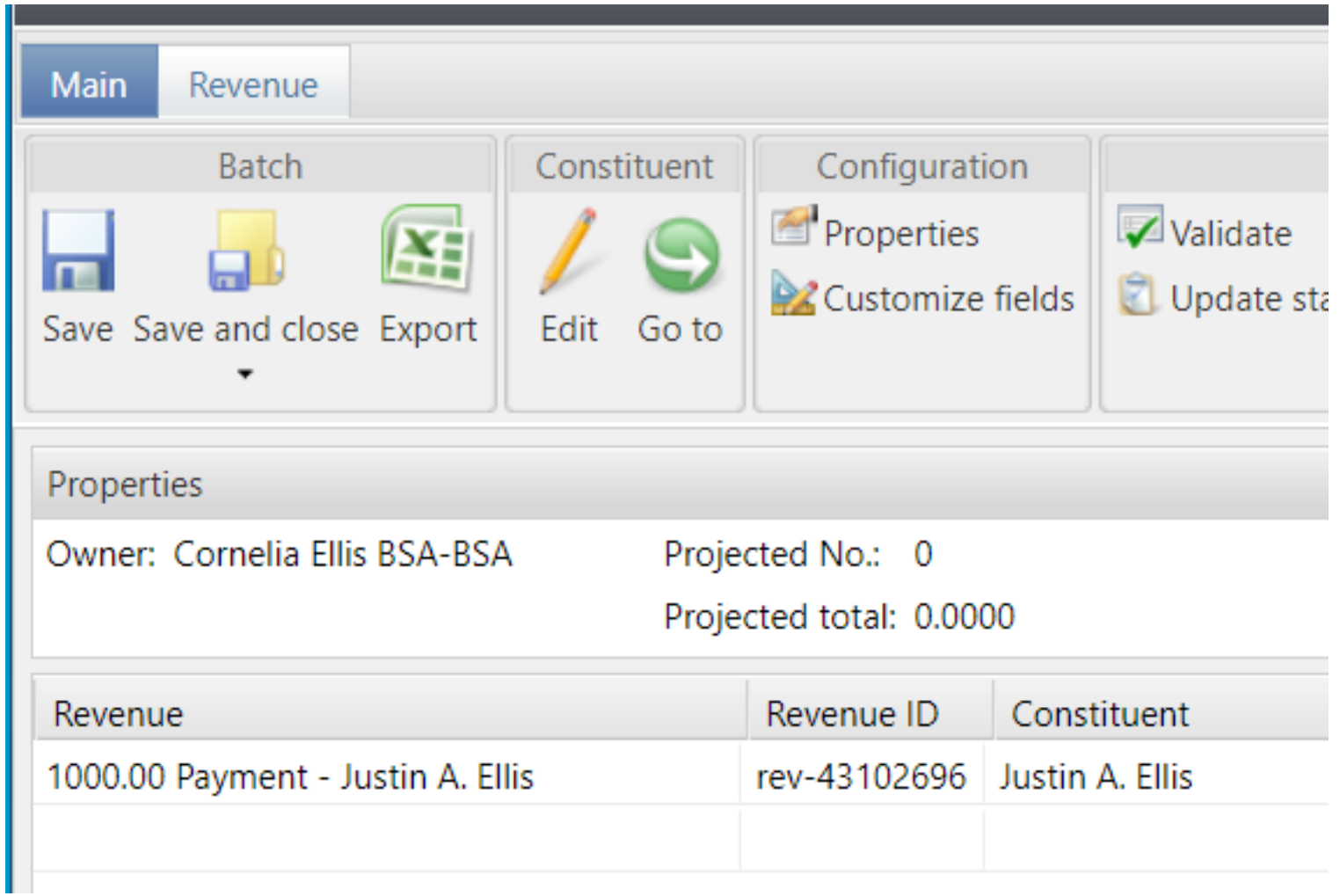
Enter the Revenue ID information. The revenue ID looks like this with rev-xxxxxxx.



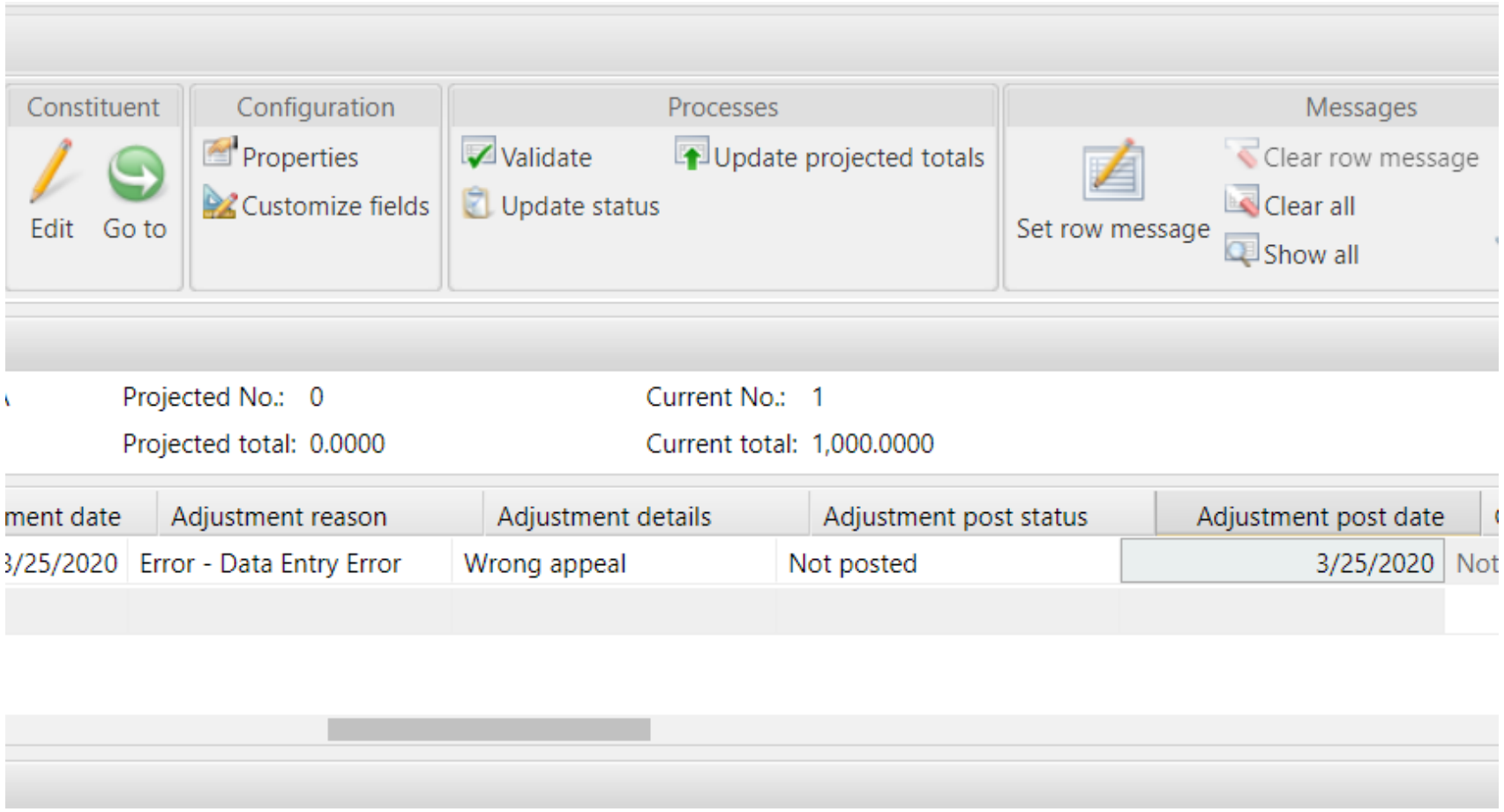
The information populate when you enter the Revenue ID and click Search.  Click Select.



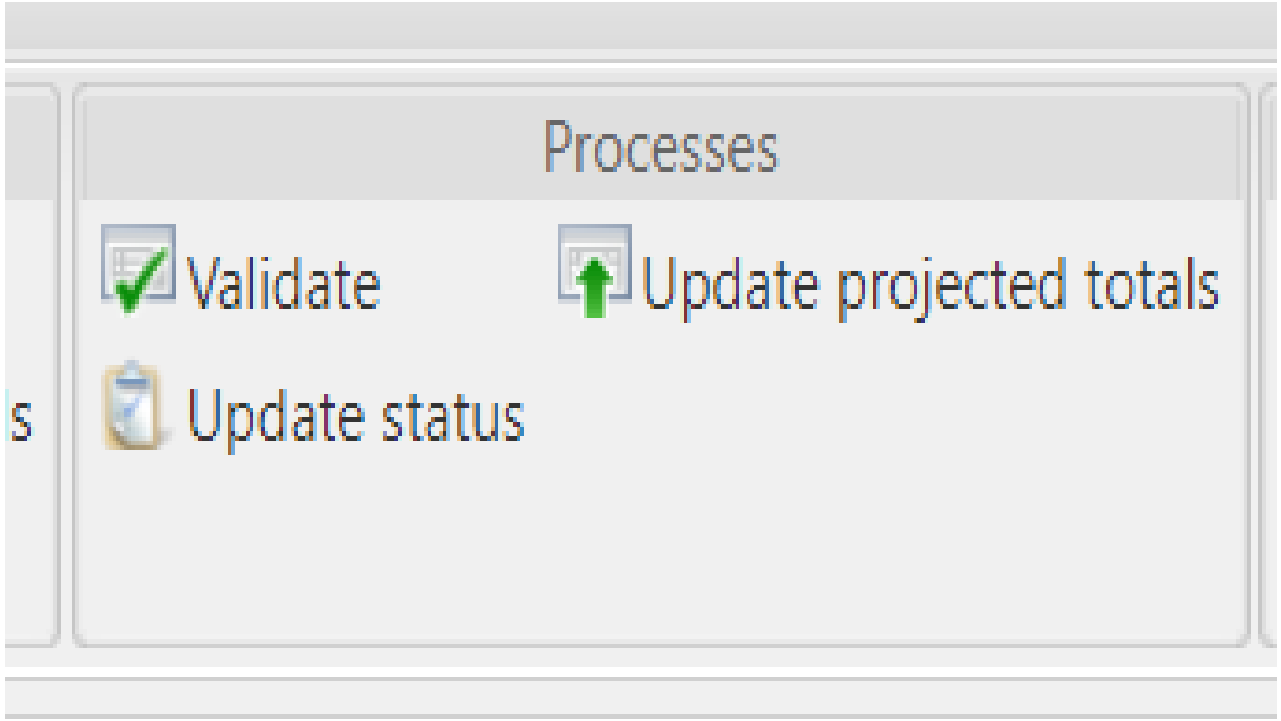
The fields are populated with the information.

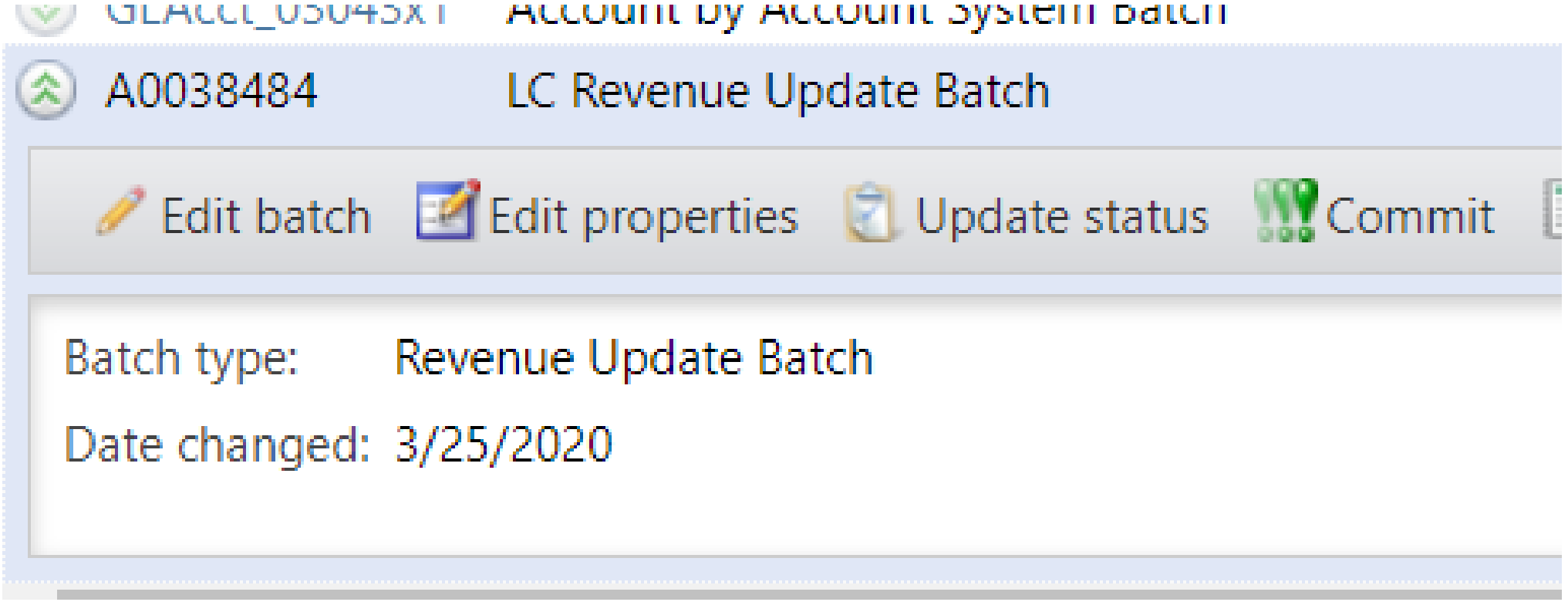


Make sure that Adjustment reason, Adjustment details and Adjustment post date is filled out.



Update projected totals, Validate and Save and Close.

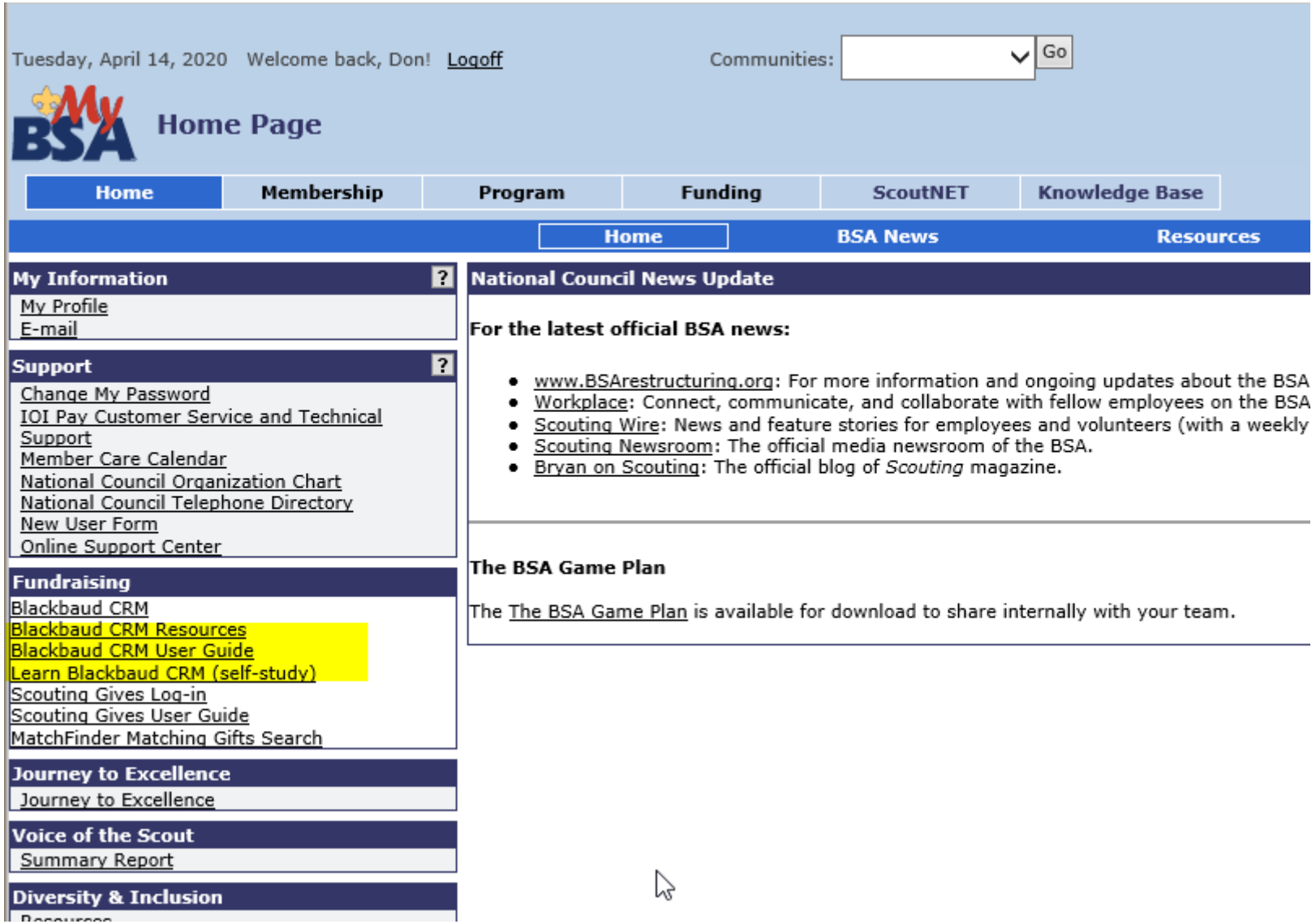





The Batch is ready to commit.

# CRM User “Tools” in MyBSA

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


Tuesday, April 14, 2020 Welcome back, Don! Logoff
Communities:
Go
My BSA
Home Page
Home
Membership
Program
Funding
ScoutNET
Knowledge Base
Home
BSA News
Resources
My Information
My Profile
E-mail
Support
Change My Password
IOI Pay Customer Service and Technical Support
Member Care Calendar
National Council Organization Chart
National Council Telephone Directory
New User Form
Online Support Center
Fundraising
Blackbaud CRM
Blackbaud CRM Resources
Blackbaud CRM User Guide
Learn Blackbaud CRM (self-study)
Scouting Gives Log-in
Scouting Gives User Guide
MatchFinder Matching Gifts Search
Journey to Excellence
Journey to Excellence
Voice of the Scout
Summary Report
Diversity & Inclusion
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.

# 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
- Benefits in CRM
- Blackbaud Terminology
- BSAFR Pledge Card Brief
- Checking your Blackbaud Training Status
- Constituent Reports
- Constituent Site Security & Searches Presentation
- Contribution Statements and 990 Schedule B
- Creating and Disolving Households
- Credit Card Best Practices Presentation
- Credit Cards Processing
- Foundation Functional Area
- Future and Prior year Inbound Channels
- Gift In Kind Batch Presentation
- Global Write-Off Presentation
- Marking Individuals Deceased
- Matching Gifts II Presentation
- Matching Gifts Presentation
- Matching Gifts II Presentation
- Matching Gifts Presentation
- Misc Batch Types Presentation
- Planned Gifts Presentation
- Pledge Card Presentation
- Pledge Installment Schedule Changes Presentation
- Pledge Installment Schedule Changes Updated
- Pledges with Credit Cards Presentation
- Preparing to Print Pledge Cards
- Queries and Folders Presentation
- Recognition Programs Presentation
- Reconcile PeopleSoft to Blackbaud
- Recognition Credits
- Reconciliation
- Reminders Process Presentation
- Special Event Data Entry
- Special Event Set Up
- Special Event Registration and Revenue Presentation
- Special Event Setup Presentation
- Stock Revenue Batch Presentation
- Tributes
- Wealth and Ratings

**Blackbaud Setup Documents**

- Barcode Scanner Specifications
- Blackbaud Merchant Services Checklist
- Designation Request sheet
- Event Revenue Setup Request

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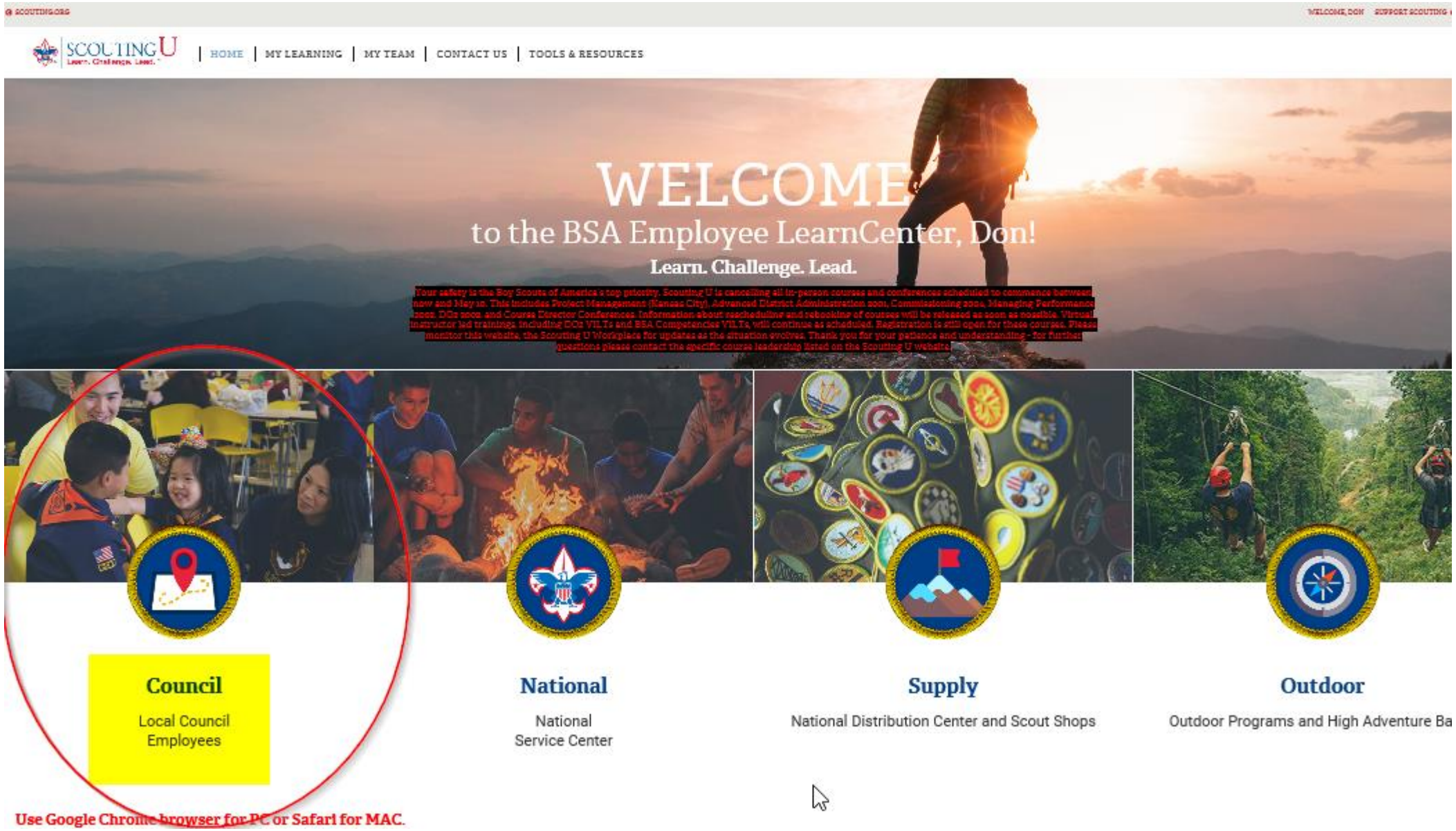
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to the BSA Employee LearnCenter, Don!
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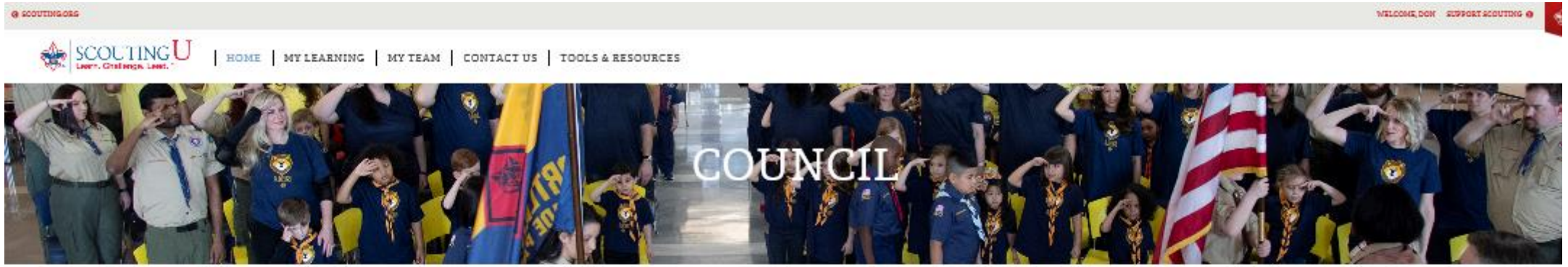
Council
Local Council Employees
National
National Service Center
Supply
National Distribution Center and Scout Shops
Outdoor
Outdoor Programs and High Adventure Ba
Use Google Chrome browser for PC or Safari for MAC.




## SCOUTING U 2020 COURSE LISTING

### ALL EMPLOYEES

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FINANCIAL ACUMEN

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FIRST TIME SCOUT EXECUTIVES

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RANGER TRAINING

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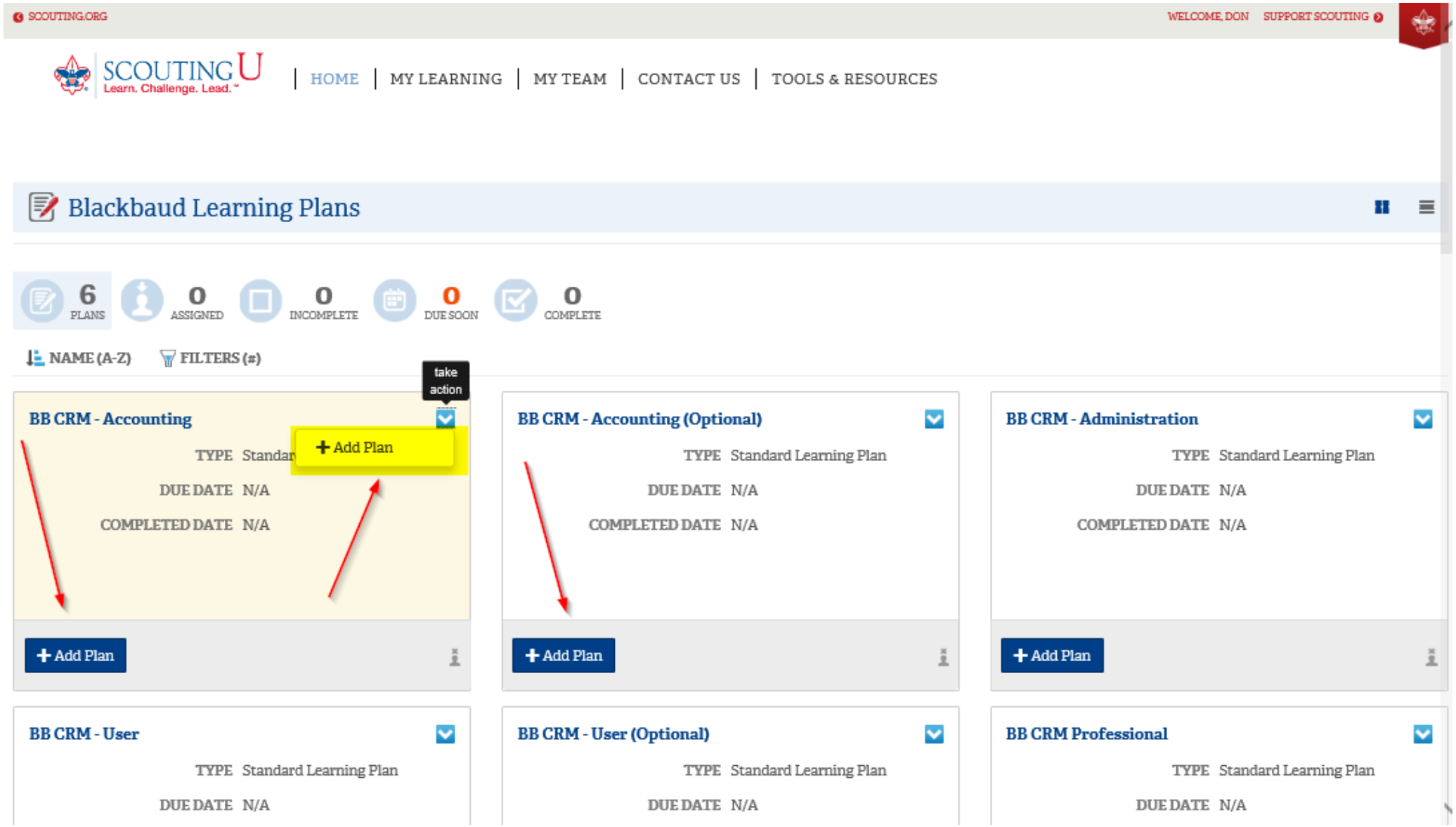
Select link below for Blackbaud Learning Plans and VILT Enrollment:

## BLACKBAUD LEARNING PLANS and VILT ENROLLMENT

## RESOURCES

How to Check Your Blackbaud Training Status PDF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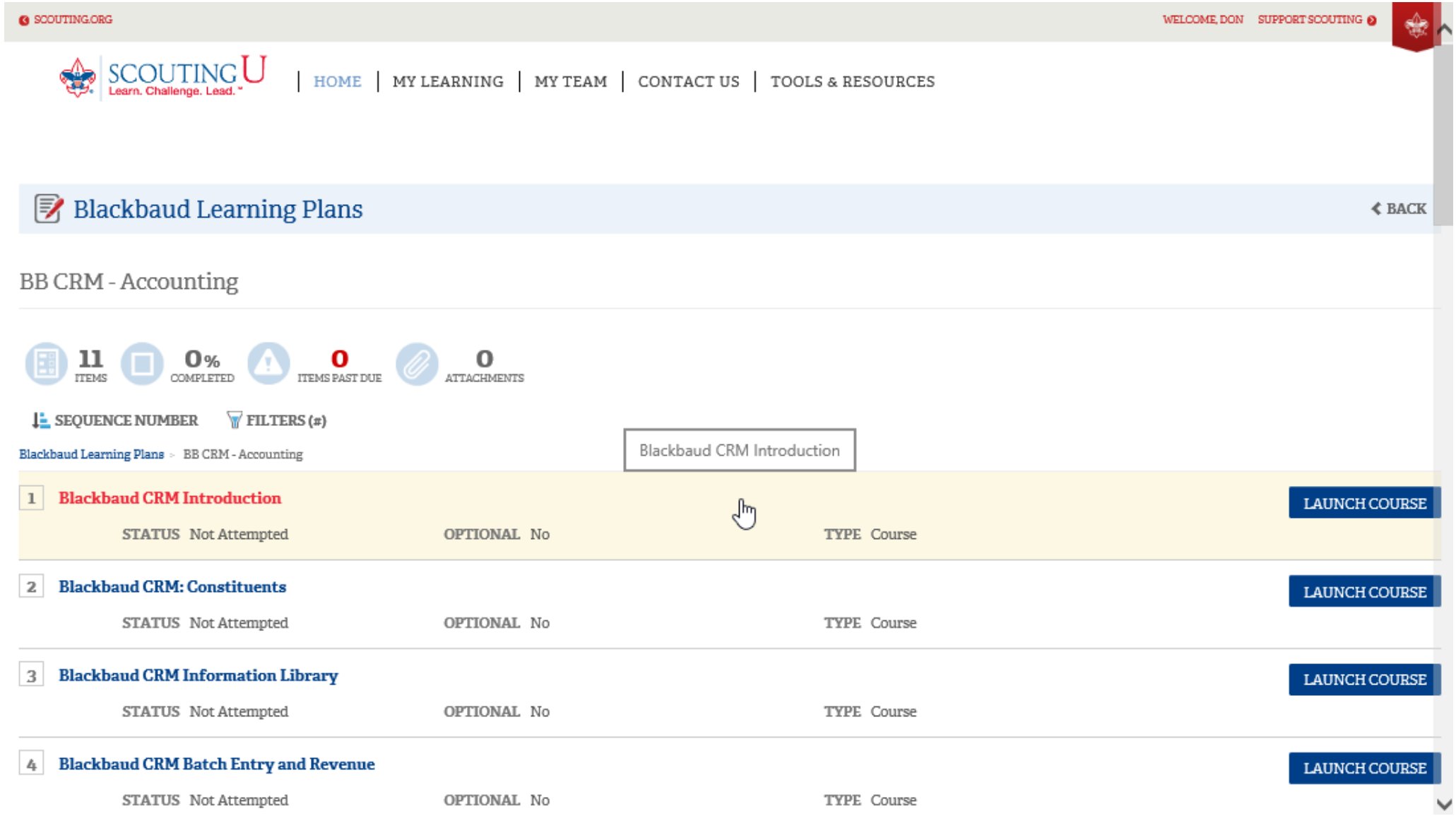
Blackbaud Learning Plans
6 PLANS
0 ASSIGNED
0 INCOMPLETE
0 DUE SOON
0 COMPLETE
NAME (A-Z)
FILTERS (#)
take action
BB CRM - Accounting
TYPE Standar
DUE DATE N/A
COMPLETED DATE N/A
+ Add Plan
BB CRM - Accounting (Optional)
TYPE Standard Learning Plan
DUE DATE N/A
COMPLETED DATE N/A
+ Add Plan
BB CRM - 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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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