

CRM User Forum

May 20, 2020

Cornelia Ellis – Don Day



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Objectives

- Review batch templates
- Review giving categories and update
- Review BSA Structure and update
- Cleaning up duplicate constituents – Person Merge
 - New Report – BSA Duplicate Constituent Report
- CRM User “Tools” available on MyBSA
- Questions Answered?



Batches



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**Date Range:
Blank
Sites: All sites**

The screenshot shows the 'Batch Entry' interface. At the top, there are tabs for 'Uncommitted Batches' and 'Committed Batches'. Below the tabs, the text 'Uncommitted batches (0)' is followed by 'Add', 'Batch search', and 'More' buttons. A yellow highlight is placed over the 'Date range' and 'Sites' dropdown menus. The 'Date range' dropdown is currently blank, and the 'Sites' dropdown is set to 'All sites'. To the right of these dropdowns is a checkbox labeled 'Show only batches with exceptions' and 'Apply' and 'Reset' buttons. Below the filters is a 'Search' input field, 'Columns' and 'Clear all filters' buttons. At the bottom, a table header is visible with columns: 'Batch numb...', 'Batch template', 'Description', 'Owner', 'Status', 'Date ad...', 'Category', and 'Site'.

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...	Category	Site
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Batch Template – LC Cash/Check Payment Donation

(0) + Add Batch search More ▾

Add a batch [X]

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 #:

Projected amount:

? Help Save Cancel



Click on the
“Constituent”
field

The screenshot shows a software window titled 'Revenue'. It features a ribbon menu with the following tabs and options:

- Batch**: Save, Save and close, Export
- Constituent**: Solicit codes
- Constituent**: Edit, Go to
- Configuration**: Properties, Customize fields
- Processes**: Validate, Update projected totals, Update status, Validate addresses (all rows), Set ro...

Below the ribbon, the 'Properties' section displays the following information:

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

A table is located at the bottom of the window:

	Barcode	Constituent	Lookup ID	Group ID	Amount	Receipt a...
1					\$0.00	\$0.00
+						



Search for Constituent

Batch Revenue Constituent Search

Last/Org/Group name: Address:


First name: City:


Lookup ID: State:

Sites: ZIP/Postal code:




Email address:

☐ Match all criteria exactly

 Show advanced search options

Results  Add

Lookup ID	Name	Address	City	State	ZIP/Postal code
-----------	------	---------	------	-------	-----------------

 Help  



Batch Revenue Constituent Search

Last/Org/Group name: **warters** Address: Search
First name: City: Clear
Lookup ID: State:
Sites: All sites ZIP/Postal code:
Email address:
☐ Match all criteria exactly
☒ Show advanced search options

Results (36 records found) + Add

Lookup ID	Name	Address	City	State	ZIP/Postal code
8-33125225	Warters, James T.	2000 Wendover ...	Pittsburgh	Pennsylvania	15217-1940
8-41547794	Warters, John	23 Spottswood Ln	Newport News	Virginia	23606-2834
8-36499158	Warters, John/Barb	712 S East St	Homer	Illinois	61849-1502
8-49435660	Warters, Kelly	17531 SW 68th Ct	Southwest Ranc...	Florida	33331-1923
8-40319498	Warters, Mark C.	225 W Jackson St	Palmyra	New York	14522-1225
8-16207902	Warters, Marr A.	3902 Spring Gar...	Philadelphia	Pennsylvania	19104-4655
8-50276438	Warters, Matthew J.	3913 W 184th Pl	Torrance	California	90504-4851
8-27721273	Warters, Nate M.	15989 Roosevelt ...	Kendall	New York	14476-9733
8-49369831	Warters, Paul L.	976 SE 9th Ave	Pompano Beach	Florida	33060-9508

Help Select Cancel

Enter
Constituent's
information then
Select the
constituent below



Fill in the fields

Batch L0524639

MainRevenue

Batch


Constituent


Constituent


Configuration


Processes


Messages


 Save


 Save and close


 Export


 Solicit codes


 Edit


 Go to


 Properties


 Customize fields


 Validate


 Update status


 Validate addresses (all rows)


 Update projected totals


 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: 100.0000

	Barcode	Constituent	Lookup ID	Group ID	Amount	Receipt a...	Date	GL post date	Deposit Reference	Revenue t...
1		Mark C. Warters	8-40319498		\$100.00	\$100.00	5/1/2020	5/1/2020	05/1/20 Dep	Payment
*										



Fill in the fields

Batch L0524639

Main Revenue

Batch: Save Save and close Export

Constituent: Solicit codes

Constituent: Edit Go to

Configuration: Properties Customize fields

Processes: Validate Update projected totals Update status Validate addresses (all rows)

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: 100.0000

Application	Payment method	Other method	Check number	Appeal	Designation
Donation	Check		6598	(397) 20F - 2020 Friends of Scouting	39700901 SKILLS FOR LIFE - Operati...



Fill in the fields

Batch L0524639

Main Revenue

Batch	Constituent	Constituent	Configuration	Processes	Messages
Save Save and close Export	Solicit codes	Edit Go to	Properties Customize fields	Validate Update projected totals Update status Validate addresses (all rows)	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: 100.0000

Application	Payment method	Other method	Check number	Appeal	Designation
Donation	Check		6598	(397) 20F - 2020 Friends of Scouting	39700901 SKILLS FOR LIVI - Operati...



Fill in the fields to “Reference”

Batch L0524639

Main Revenue

Batch	Constituent	Constituent	Configuration	Processes	Messages
Save Save and close Export	Solicit codes	Edit Go to	Properties Customize fields	Validate Update status Validate addresses (all rows) Update projected totals	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: 100.0000

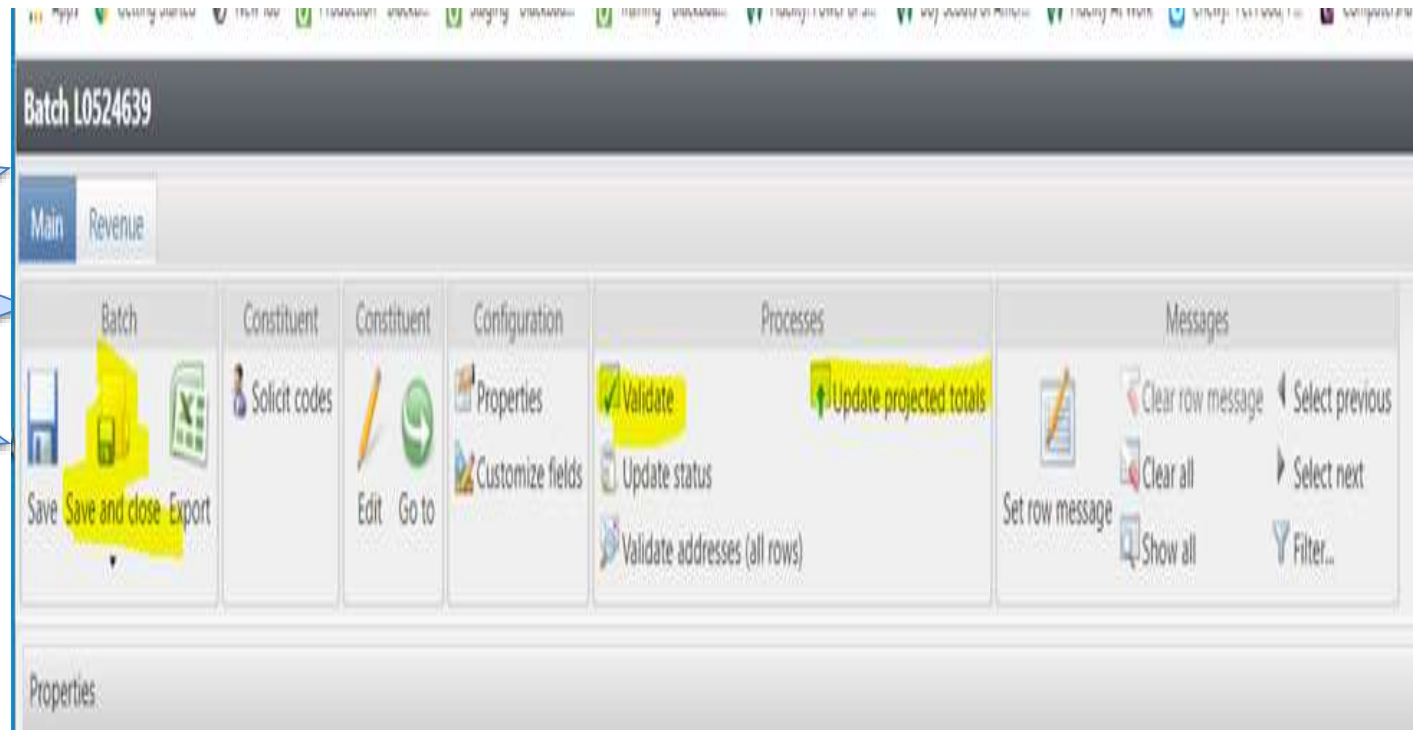
Inbound channel	Revenue category	Giving Category	BSA Structure	Given anonymously	Reference	Do not acknowledge
ati... Friends of Scouting	Unrestricted by donor	Family	Seneca Waterways	<input type="checkbox"/>		<input type="checkbox"/>
				<input type="checkbox"/>		<input type="checkbox"/>



Update projected totals


Validate

Save and Close









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Click on chevron then Commit








 **Batch Entry**

Uncommitted Batches | Committed Batches

Uncommitted batches (1)  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
 L0524639	LC Cash/Check Payment Donation		Cornelia Ellis BSA-BSA	1. Data Entry	5/19/2020	Revenue
 Edit batch  Edit properties  Update status  Commit  Validation report  Delete						

Batch type: Enhanced Revenue Batch
Date changed: 5/19/2020



CRM Data Hygiene

- Structure
- Giving categories
- Constituents
 - New Report in CRM – Analysis – [BSA Duplicate Constituent Report](#)



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



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 Duplicate Constituent Report

- Customized tool that looks at the following:
 - identifies constituent records that have:
 - the same name and address AND
 - a ‘matching’ date of birth (a missing/blank DOB is considered a match).
 - the report displays key information for each constituent record that is helpful in determining which record to keep and which record(s) to merge/inactivate.



BSA Duplicate Constituent Report

Blackbaud CRM™ P

Constituents Add new Welcome, Don Day BSA-BSA

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Memberships ▾ Prospects ▾ Volunteers ▾ Foundations ▾ Fundraising ▾

Analysis

More tasks

- BSA Appeal Progress by Position
- BSA Giving Dynamics Report
- BSA Worker Performance by Giving Category
- Decease Finder Constituent List
- Eagle Scout Lists
- NESAs and Alumni List
- Pledge Card Export
- Pledge Card Report
- ScoutNET Merged Inactive Constituent

Dashboards

- KPI dashboard
- Web dashboard

Sales reports

- Sales by membership

Reports

- BSA Duplicate Constituent Report**
- Constituent reports
- Appeal reports
- Revenue reports
- Membership reports
- Prospect management reports
- Event reports
- Fundraising reports
- Volunteer reports
- Marketing reports
- Treasury reports

Selections

- Import selections
- View selections

Advocacy reports

- Advocacy action item detail

Information library

- Information library
- Ad-hoc query search
- Smart query search
- Smart query browse
- Ad-hoc Query Upload Tool

Reporting services



- Report explorer
- Report model generator



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BSA Duplicate Constituent Report

Blackbaud CRM™ P

Constituents  [+ Add new](#) Welcome, Don Day BSA-BSA 

[Home](#) [Constituents](#) [Marketing and Communications](#) [Revenue](#) [Events](#) [Memberships](#) [Prospects](#) [Volunteers](#) [Foundations](#) [Fundraising](#)


BSA Duplicate Constituent Report

Site:

☒ Include Person Records

☒ Include Organization Records

Last Name Filter:

 View report



BSA Duplicate Constituent Report

BSA Duplicate Constituent Report

Site: Andrew Jackson Council

☒ Include Person Records

☒ Include Organization Records

Last Name Filter: C%

[View re](#)

1 of 9 Find Next

BSA Duplicate Constituent Report **Council 303**

George		Person		Male		
317 Cypress Creek Rd, 39047						
<u>Lookup ID</u>	<u>Alternate ID</u>	<u>DOB</u>	<u>Revenue #</u>	<u>CBCExists?</u>	<u>Latest Reg Date</u>	<u>Latest BSAFR Date</u>
8-36639131	101423733	1982-08-16	0	No	3/1/2000	
8-37682167	110336704	1982-08-16	0	No	12/1/2018	
Adrienne		Person		Female		
638 Warren Harding Dr, 39213						
<u>Lookup ID</u>	<u>Alternate ID</u>	<u>DOB</u>	<u>Revenue #</u>	<u>CBCExists?</u>	<u>Latest Reg Date</u>	<u>Latest BSAFR Date</u>
8-36609365	101136326	1984-09-05	0	No	10/1/1999	
8-39561687	126186988	1984-09-05	0	No	9/1/2011	
Callaway High School,		Organization				
601 Beasley Rd, 39206						
<u>Lookup ID</u>	<u>Alternate ID</u>	<u>DOB</u>	<u>Revenue #</u>	<u>CBCExists?</u>	<u>Latest Reg Date</u>	<u>Latest BSAFR Date</u>
8-36609011	100036089		0	No		
8-40115181	101134900		0	No		



BSA Duplicate Constituent Report

[REDACTED], Michael					Person	Male
261 Willow Ln, [REDACTED]						
<u>Lookup ID</u>	<u>Alternate ID</u>	<u>DOB</u>	<u>Revenue #</u>	<u>CBCExists?</u>	<u>Latest Reg Date</u>	<u>Latest BSAFR Date</u>
8-40243967	12024204	1970-11-04	0	Yes	1/1/2020	
8-40052987	130318920	1970-11-04	8	No		3/4/2014
<u>Revenue ID</u>	<u>Date</u>	<u>Amount</u>	<u>Appeal</u>			
rev-43417811	7/31/2019	\$0.00	(303) 19FOS - 2019 Friends of Scouting			
rev-42339229	5/31/2018	\$0.00	(303) 18FS - 2018 Friends of Scouting			
rev-41660296	12/5/2017	\$0.00	(303) 17FS - 2017 Friends of Scouting			
124369441	5/12/2016	\$150.00	(303) 16FS - 2016 Friends of Scouting			
123118139	2/24/2015	\$300.00	(303) 15FS - 2015 Friends of Scouting			
PAS-136353411	2/24/2015	\$300.00	(303) 15FS - 2015 Friends of Scouting			
122087834	3/4/2014	\$150.00	(303) 14FS - 2014 FOS			
PAS-134471398	3/4/2014	\$150.00	(303) 14FS - 2014 FOS			



BSA Duplicate Constituent Report

- Similar to Duplicate Persons Report in ScoutNET
 - ScoutNET report ignores gender differences
 - CRM Report ignores suffix differences
 - CRM Report ignores middle name differences
- Each report is useful but can provide differing results



CRM User “Tools” in MyBSA

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





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Funding

ScoutNET

Knowledge Base

Home

BSA News

Resources

My Information ?

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[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](#)
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Fundraising

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[Scouting Gives User Guide](#)
[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.





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

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- ▶ Add an Appeal
- ▶ Appeal Setup
- ▶ Billing Statements

Revenue

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- ▶ Add a Credit Card Payment or Donation
- ▶ Add a donor challenge
- ▶ Add a Pledge
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- ▶ Event Invitation and Registration

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- ▶ IRS 990 Schedule B
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Analysis

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- ▶ Appeal mailing
- ▶ Copy/Edit an existing query
- ▶ Folder Management
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- ▶ Query Tips and Tricks
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- ▶ 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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SCOUTING U
Learn. Challenge. Lead.™

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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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WELCOME

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Learn. Challenge. Lead.

Your safety is the Boy Scouts of America's top priority. Scouting U is canceling all in-person courses and conferences scheduled to commence between now and May 15. This includes District Management (Kansas City), advanced District Administration sems, Councilwide Learning, Managing Performance, Don's 2020, and Course Director Conferences. Information about rescheduling and rescheduling of courses will be released as soon as possible. Virtual instructor-led trainings including DCM VII T4 and BSA Conferences VII T4 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.



Council

Local Council Employees



National

National Service Center



Supply

National Distribution Center and Scout Shops



Outdoor

Outdoor Programs and High Adventure Ba

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ALL EMPLOYEES



POSITION SPECIFIC



ENTERPRISE SOFTWARE



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RESOURCES

How to Check Your Blackbaud Training Status



PDF





Blackbaud Learning Plans



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

June 17, 2020

10:00 am & 2:00 pm CST



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