CRM User Forum

June 24, 2020

Cornelia Ellis – Don Day – Rich White

Objectives

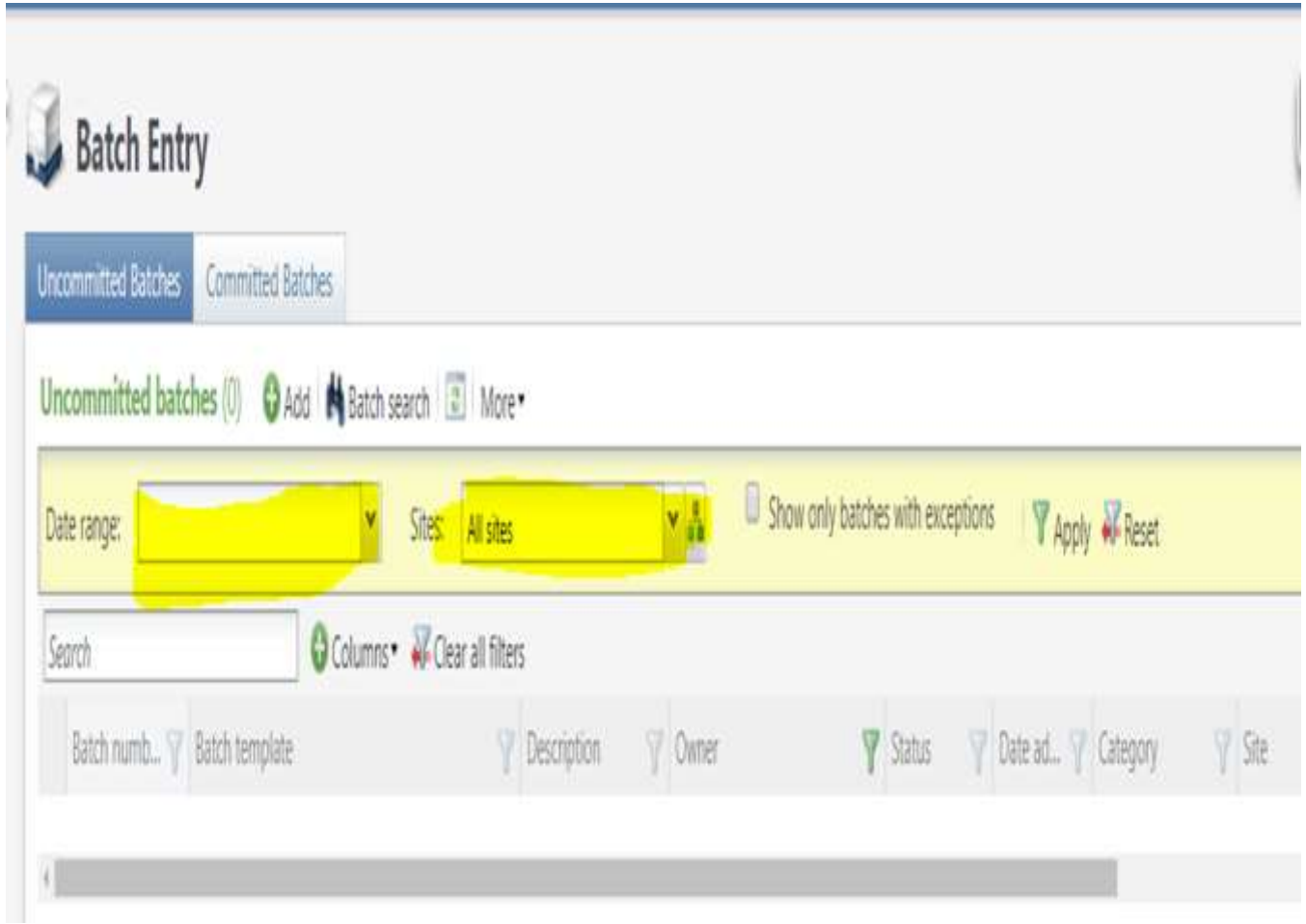
- Review batch templates
- BSAFR Cleanup steps
  - Useful queries and tools
- Cleaning up duplicate constituents – Person Merge
  - New Report – BSA Duplicate Constituent Report
- CRM User “Tools” available on MyBSA
- Questions Answered?

Batch

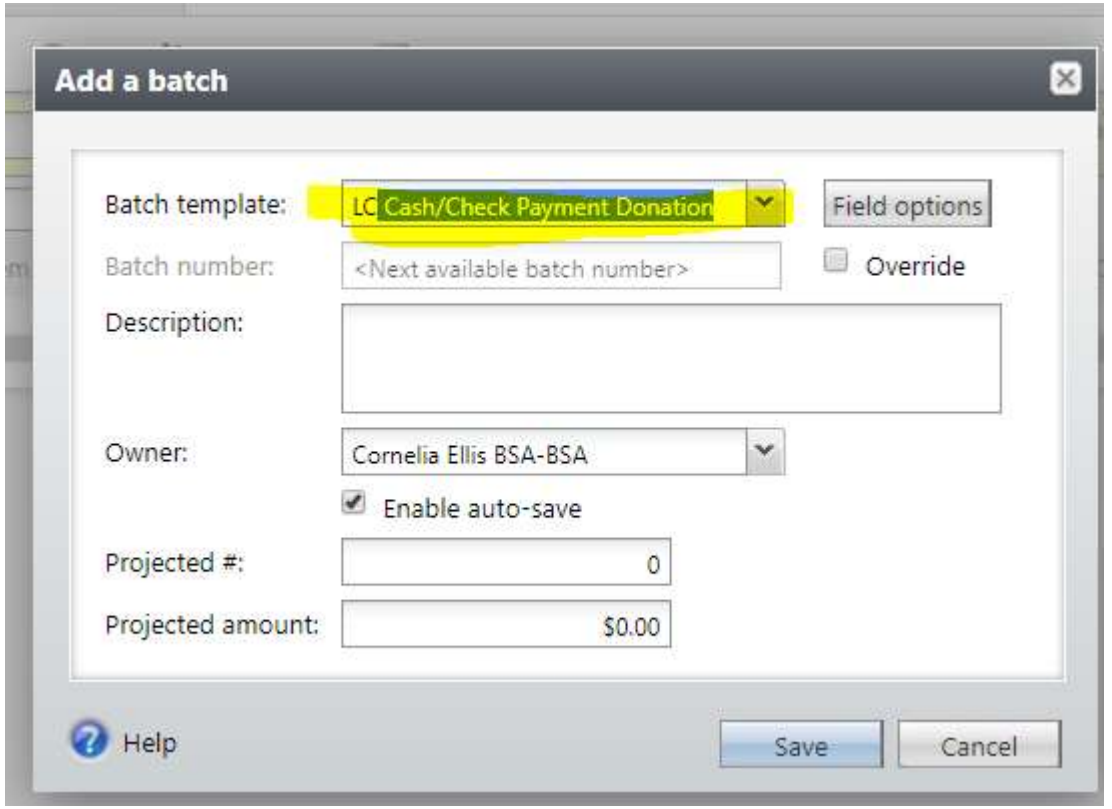
Committed Vs. Uncommitted Batches

- 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

Date Range:
Blank
Sites: All sites



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

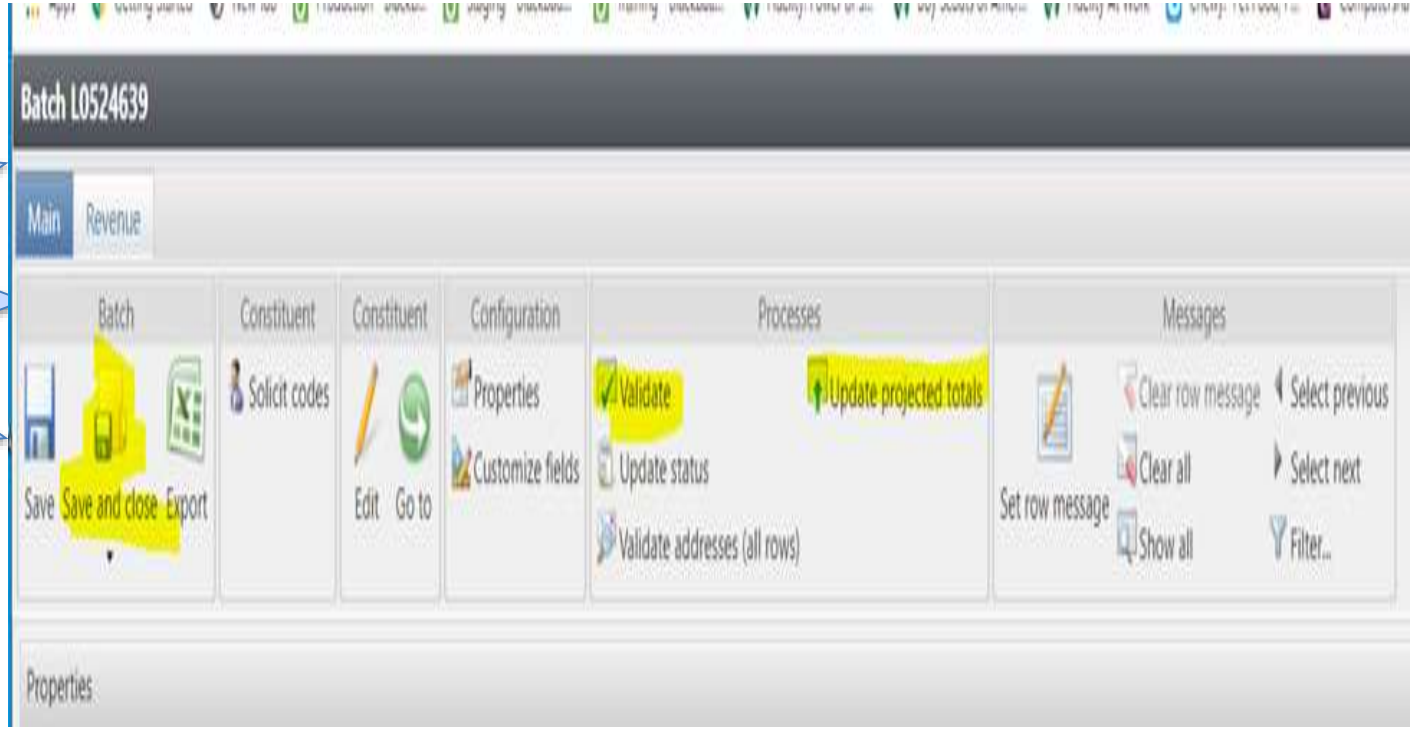
Revenue Batch Templates

- 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

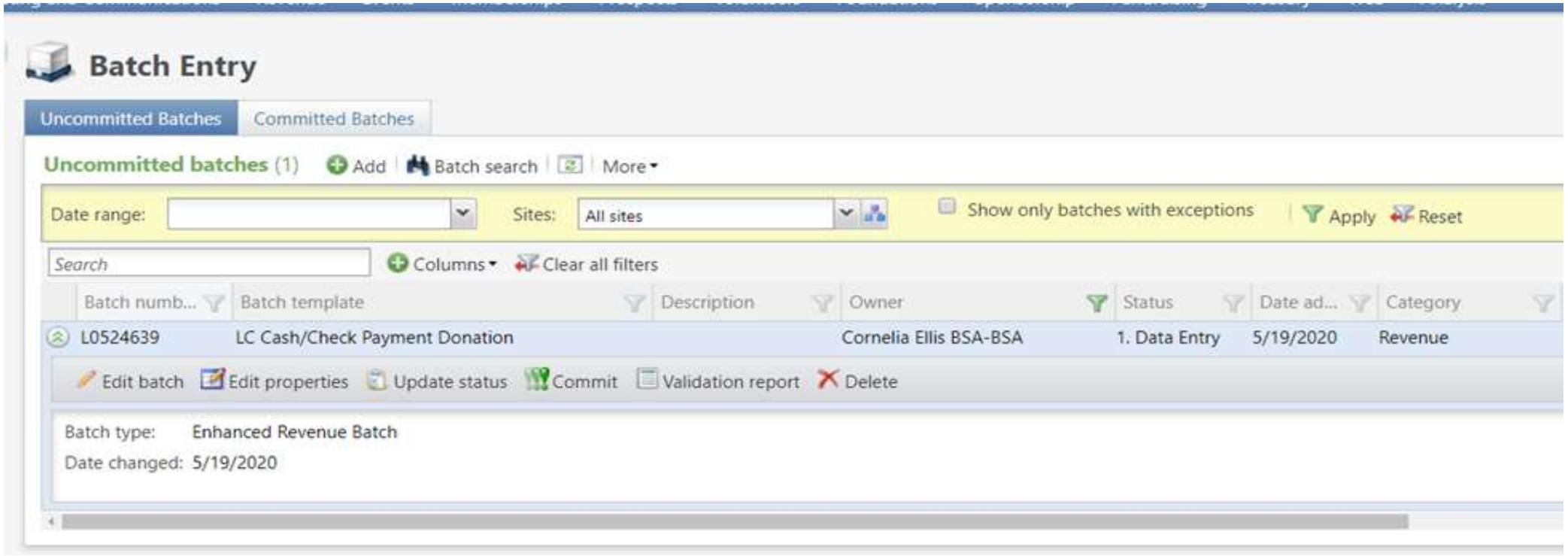
Update projected totals

Validate

Save and Close



Click on chevron then Commit



CRM Data Hygiene

- Modifying BSAFR
- Constituents
  - New Report in CRM – Analysis – BSA Duplicate Constituent Report

Modifying BSAFR

- Change BSAFR groups
  - Query – LXXX BSAFR Groups
- Change BSAFR Revenue for 3 prior years – so reports work
  - Query – L### Revenue Details for BSAFR
- Change BSAFR Snapshots
  - Query – L### BSAFR Groups and Snapshots

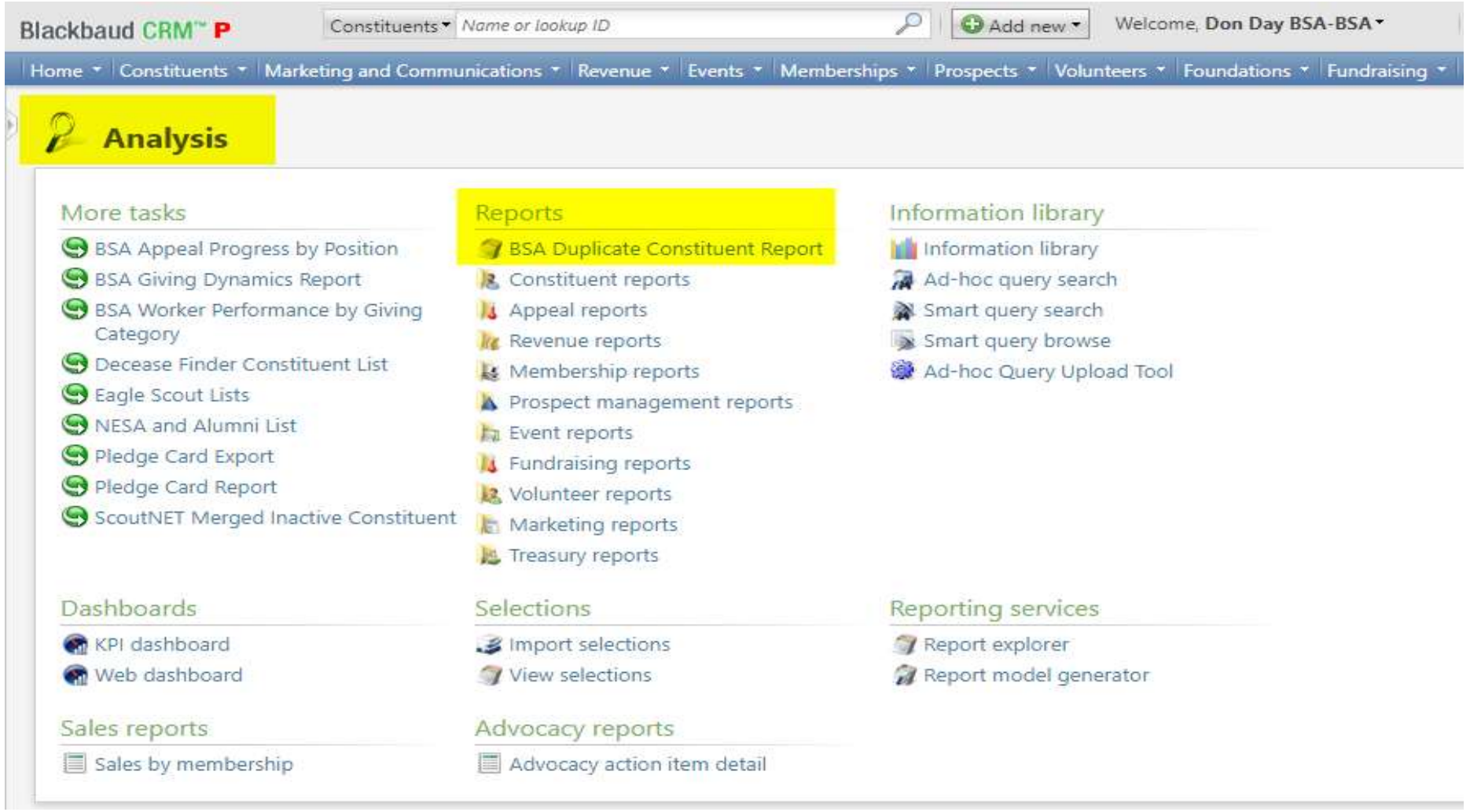
Modifying BSAFR

- Run the queries
  - Determine changes to Giving Categories, Structures, Reporting Parent, etc
  - Submit BSAFR change templates to Member Care for updates
  - Test reports and data

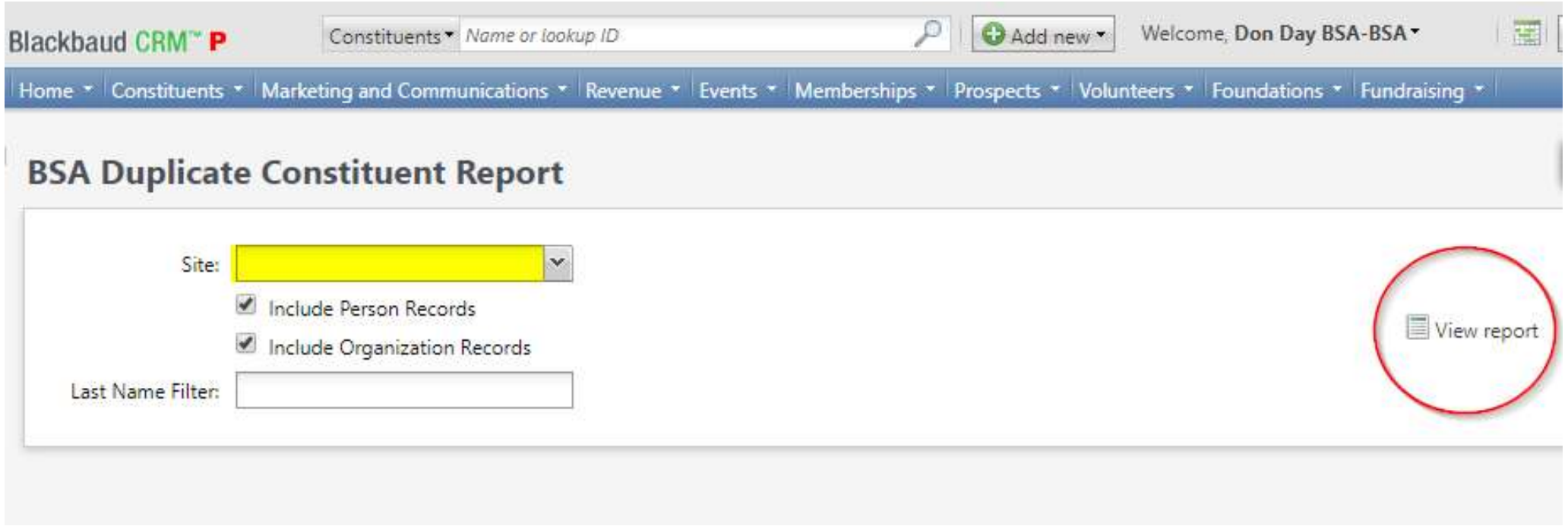
BSA Duplicate Constituent Report

- 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.

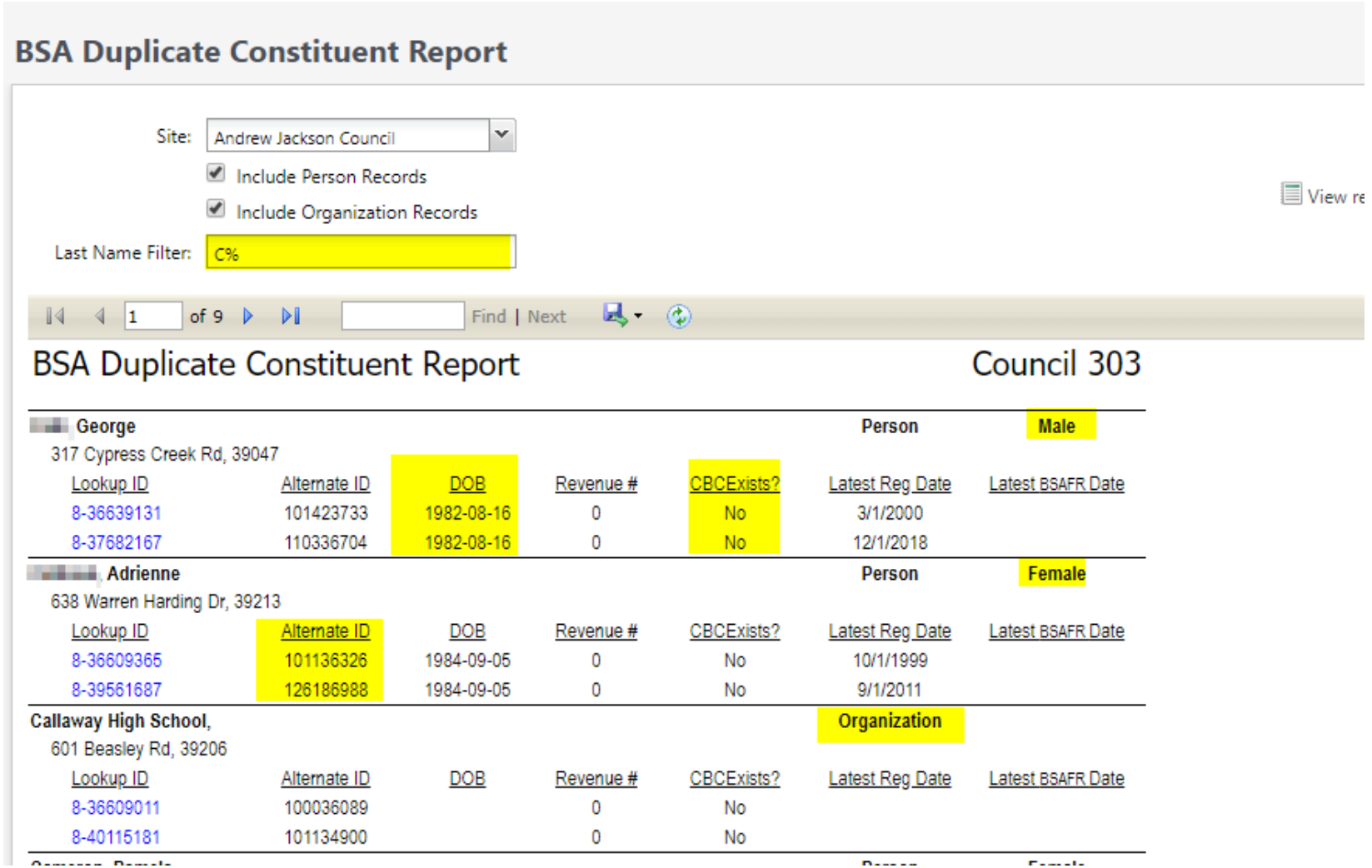
BSA Duplicate Constituent Report



BSA Duplicate Constituent Report



BSA Duplicate Constituent Report



BSA Duplicate Constituent Report

Site: Andrew Jackson Council

Include Person Records

Include Organization Records

Last Name Filter: C%

1 of 9 Find | Next

BSA Duplicate Constituent Report — Council 303

[redacted] George — Person — Male

317 Cypress Creek Rd, 39047

Lookup ID	Alternate ID	DOB	Revenue #	CBCExists?	Latest Reg Date	Latest BSAFR Date
8-36639131	101423733	1982-08-16	0	No	3/1/2000	
8-37682167	110336704	1982-08-16	0	No	12/1/2018	

[redacted] Adrienne — Person — Female

638 Warren Harding Dr, 39213

Lookup ID	Alternate ID	DOB	Revenue #	CBCExists?	Latest Reg Date	Latest BSAFR Date
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

Lookup ID	Alternate ID	DOB	Revenue #	CBCExists?	Latest Reg Date	Latest BSAFR Date
8-36609011	100036089		0	No		
8-40115181	101134900		0	No		

BSA Duplicate Constituent Report

[redacted], Michael — Person — Male

261 Willow Ln, [redacted]

Lookup ID	Alternate ID	DOB	Revenue #	CBCExists?	Latest Reg Date	Latest BSAFR Date
8-40243967	12024204	1970-11-04	0	Yes	1/1/2020	
8-40052987	130318920	1970-11-04	8	No		3/4/2014

Revenue ID	Date	Amount	Appeal
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

REMINDERS

Reminder Processes

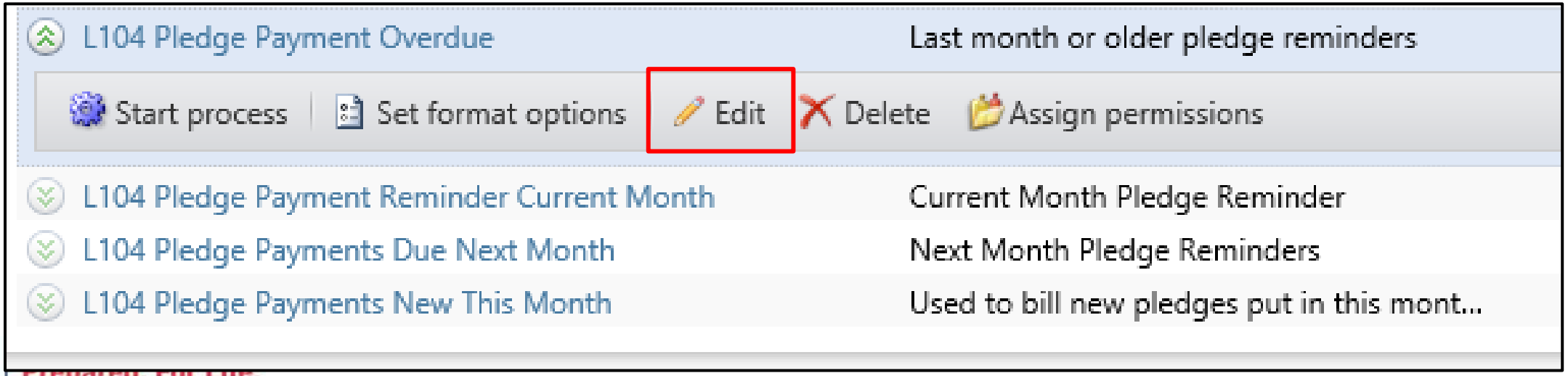
- Determine your business cycle for running reminders
- If running reminders during the last week of the month, use the “Next Month Reminders” with the last day of the next month as the run date.
- If running reminders during the first week of the month, use the “Current month Reminders” using the last day of the month as the run date.
- If running “Overdue Reminders,” always use the last day of the last month for the run date.

Reminder Selections

- Reminders will not run without a selection
- Selections determine which pledges should be brought in for billing
- A bad selection can hold the que for others, while yours processes
- Occasionally selections need updating
  - Adding in new appeals that needs billed
  - Changing appeal report codes at year end to include next year
  - Making your reminders appeal specific.

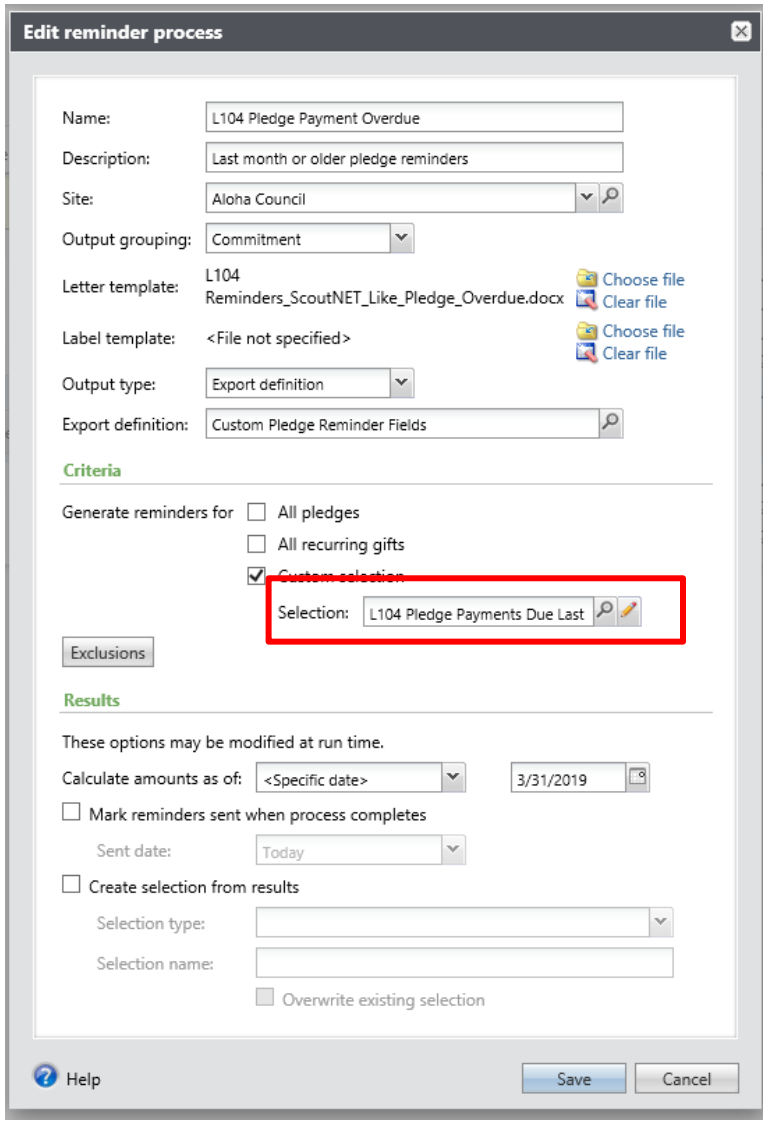
Reminder Selections

- Go to Reminders
- Most council have 4 options to choice from for billing
- Use the ones that fit your reminder cycle
- Click edit to open the business process



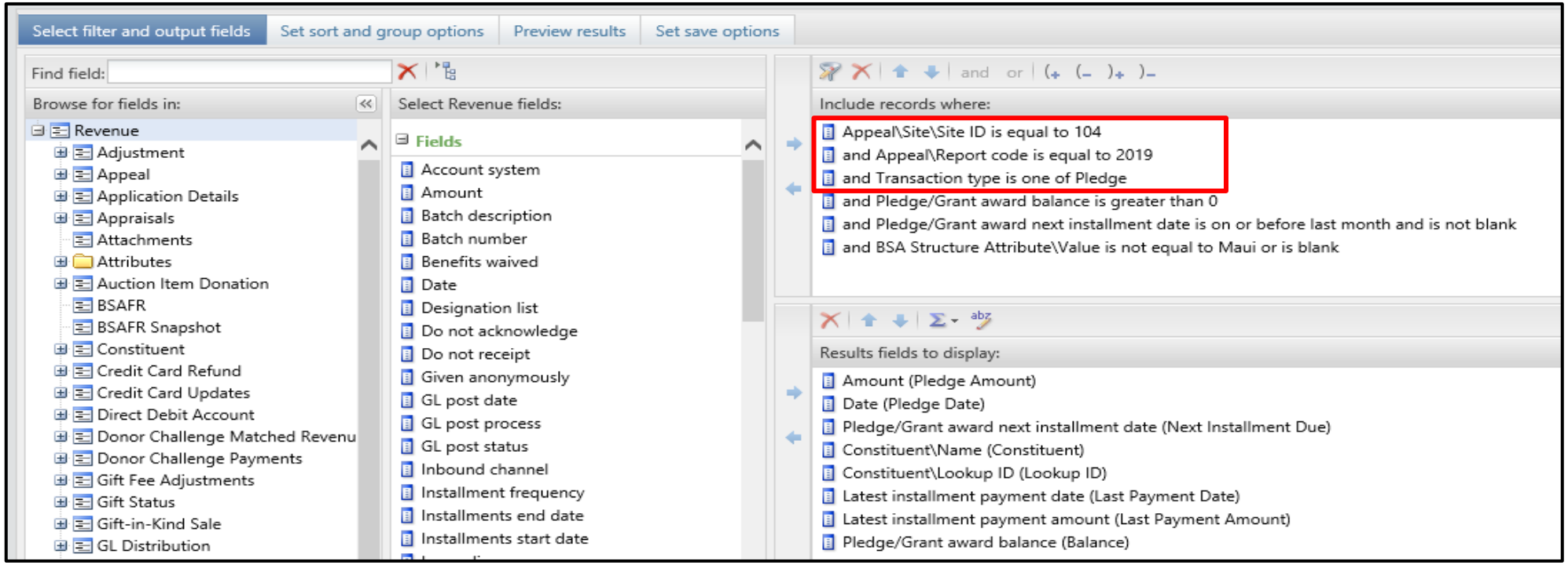
Reminder Selections

- The Business Process opens
- The selection is in the middle and can be edited by clicking the pencil.



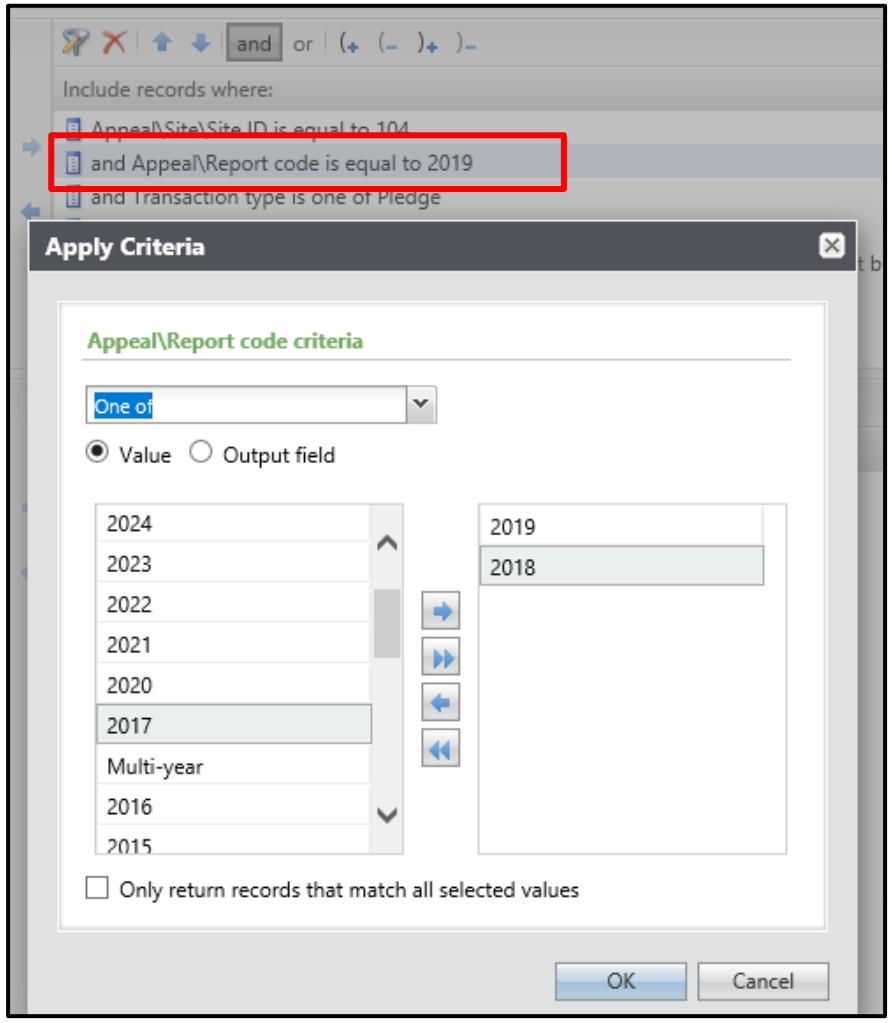
Reminder Selections

- A selection is just a query that needs to be updated.
- The one shown is secured to site 104 and is looking for pledges in 2019 appeals



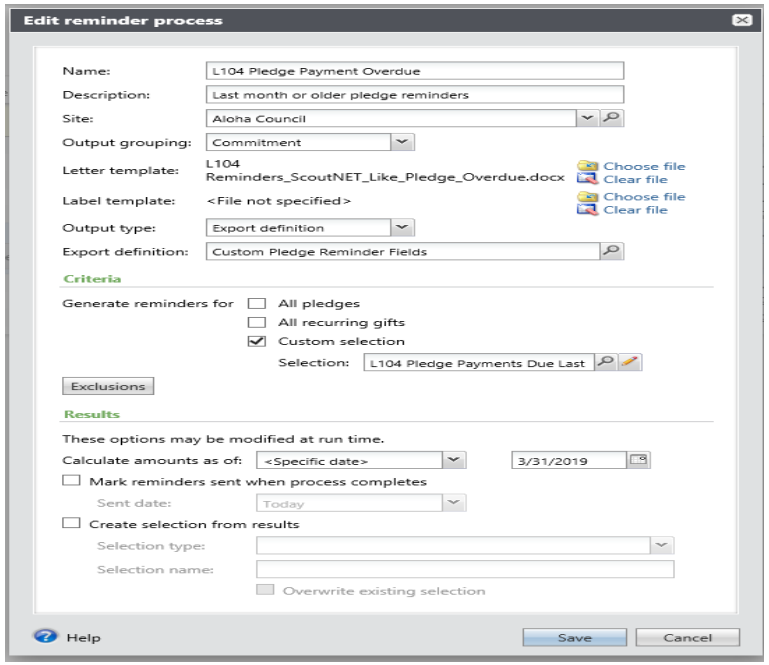
Reminder Selections

- Add next year appeals by adding in the 2020 appeal report code
- Double click the report code line in the filter.
- Change it to **one of**
- Add the additional appeal years into the filter.
- Each council's selections may look different.
- Click on OK.



Reminder Selections

- Click on Save
- Click on the chevron next to the name of process
- Click on Start Process



Reminders – Running the Process

A. Click on the chevron next to the process
   - Click on Start Process

Or

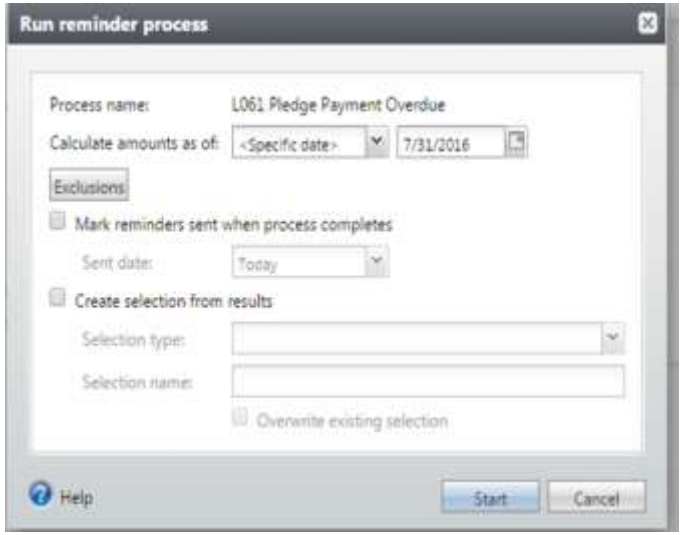
B. Click on the Reminder
   - Under Tasks on the explorer bar
   - Click Start process

- In the Run Reminder Process pop-up window
  - Select <Specific Date> from the drop down “Calculate amount as of”
  - Select the date you need to based on the reminder

- Do Not check the “Mark reminders sent when process completes”

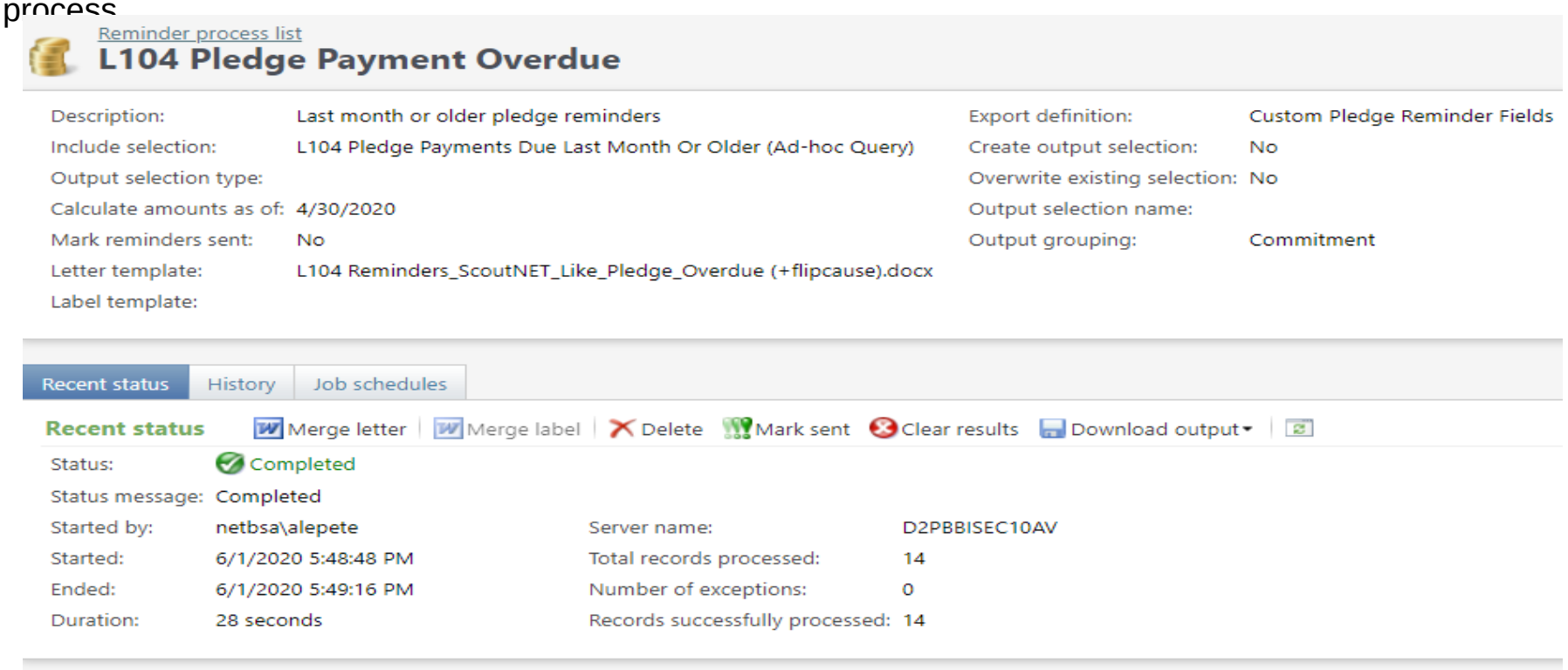
- Click Start

Remember – You will mark reminders as sent after you review the reminders, not before.



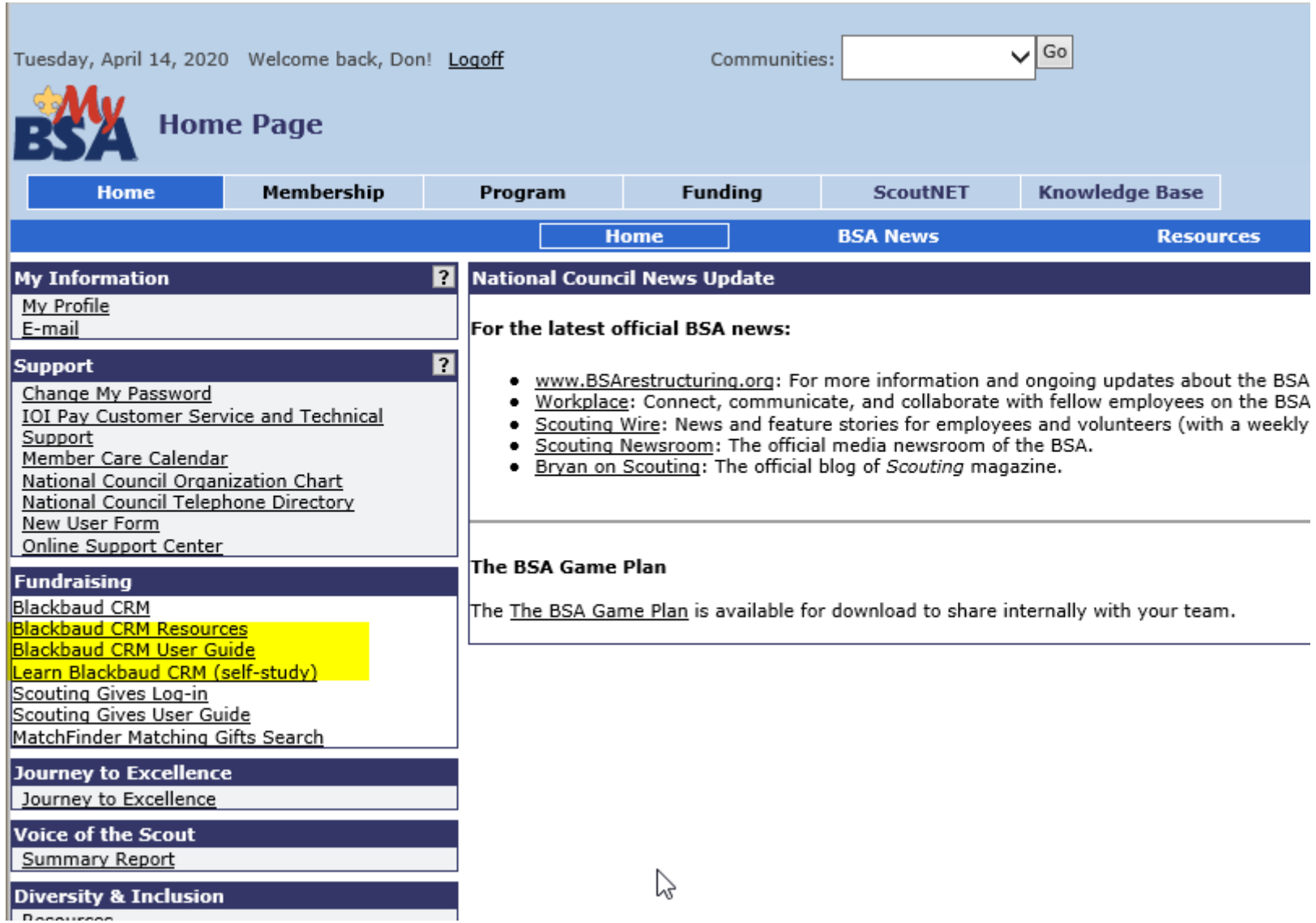
Reminders – Review Reminders

- After the process has run, review the Reminder
- Click on Merge Letter
- Review the letters –
  - If all is correct, Mark the reminders as sent
  - If there are errors that need to be fixed, download the output file to use as reference
    - Clear the results
    - Fix the errors in the constituents' record
    - Rerun the process



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

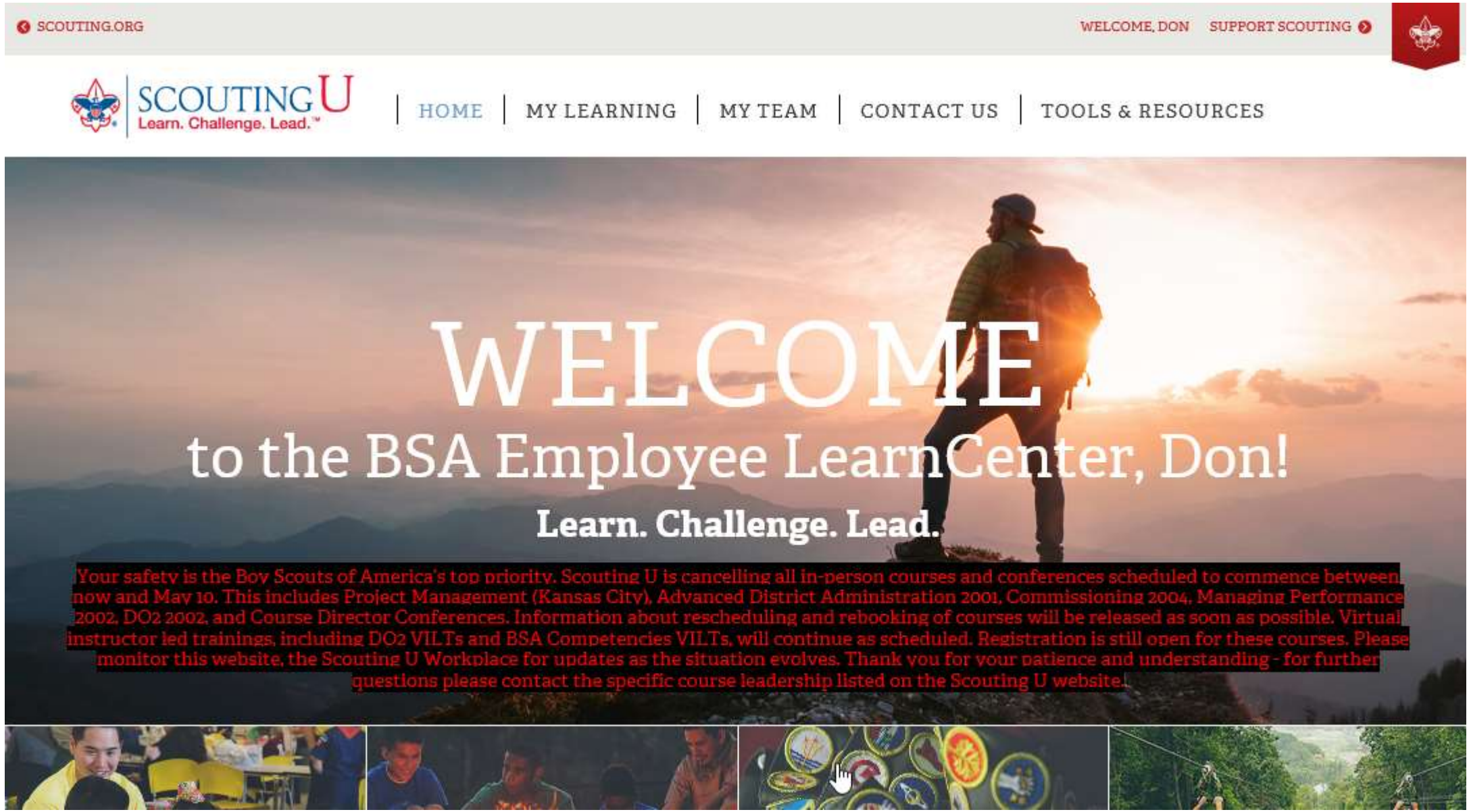
- Blackbaud CRM 4.0 Documentation
- CRM 4.0 Data Sheet

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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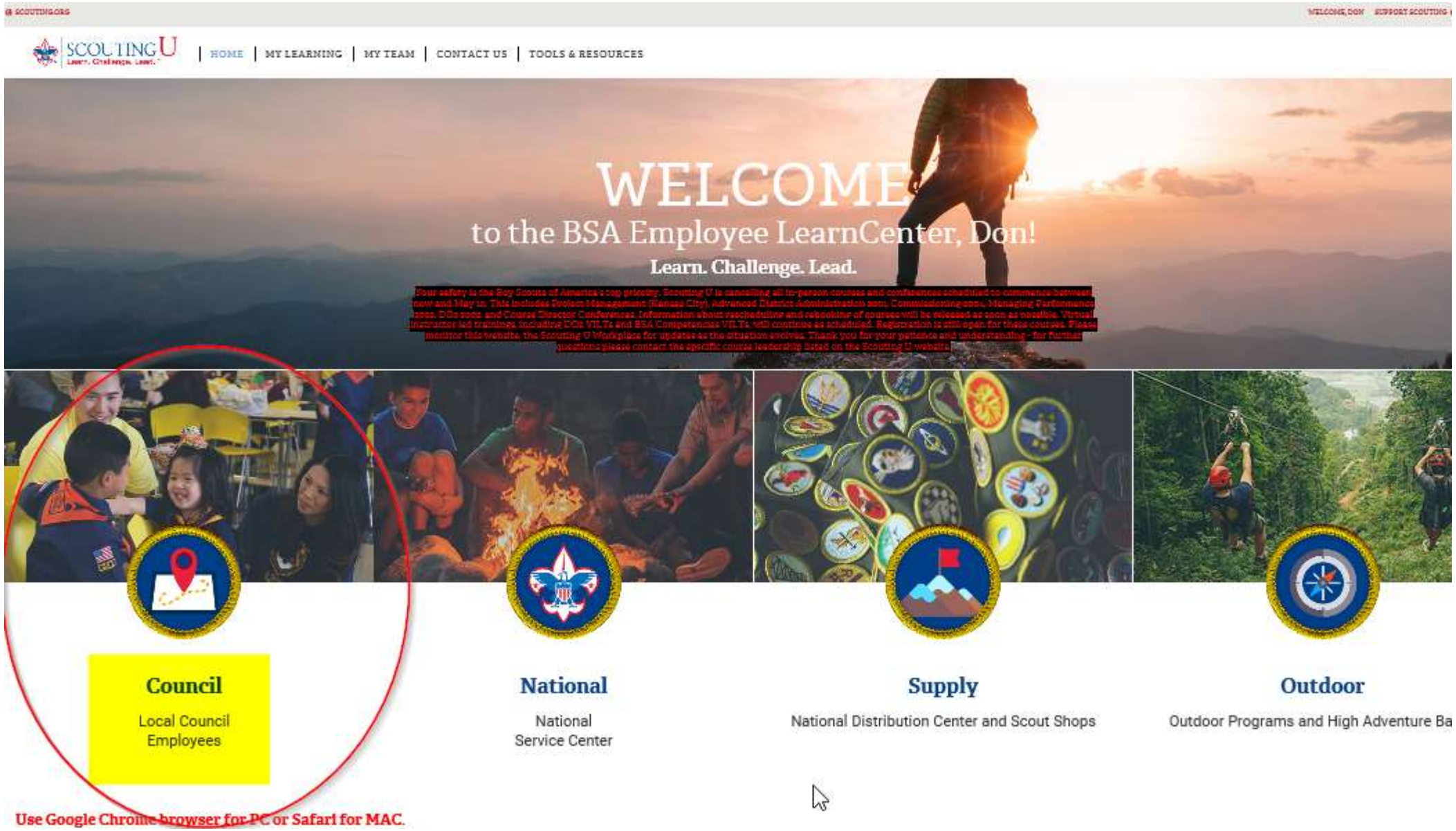
Your safety is the Boy Scouts of America's top priority. Scouting U is cancelling all in-person courses and conferences scheduled to commence between now and May 10. This includes Project Management (Kansas City), Advanced District Administration 2001, Commissioning 2004, Managing Performance 2002, DO2 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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National Service Center
Supply
National Distribution Center and Scout Shops
Outdoor
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Use Google Chrome browser for PC or Safari for MAC.

SCOUTING U 2020 COURSE LISTING

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YOUTH PROTECTION TRAINING

COMPLIANCE TRAINING

DIVERSITY AND INCLUSION

PROGRAM SAFETY

BSA COMPETENCIES

FINANCIAL ACUMEN

POSITION SPECIFIC

REGISTRAR TRAINING

ACCOUNTING SPECIALIST TRAINING

FIRST TIME SCOUT EXECUTIVES

STAR ACHIEVEMENT

RANGER TRAINING

SE CONTINUING ED

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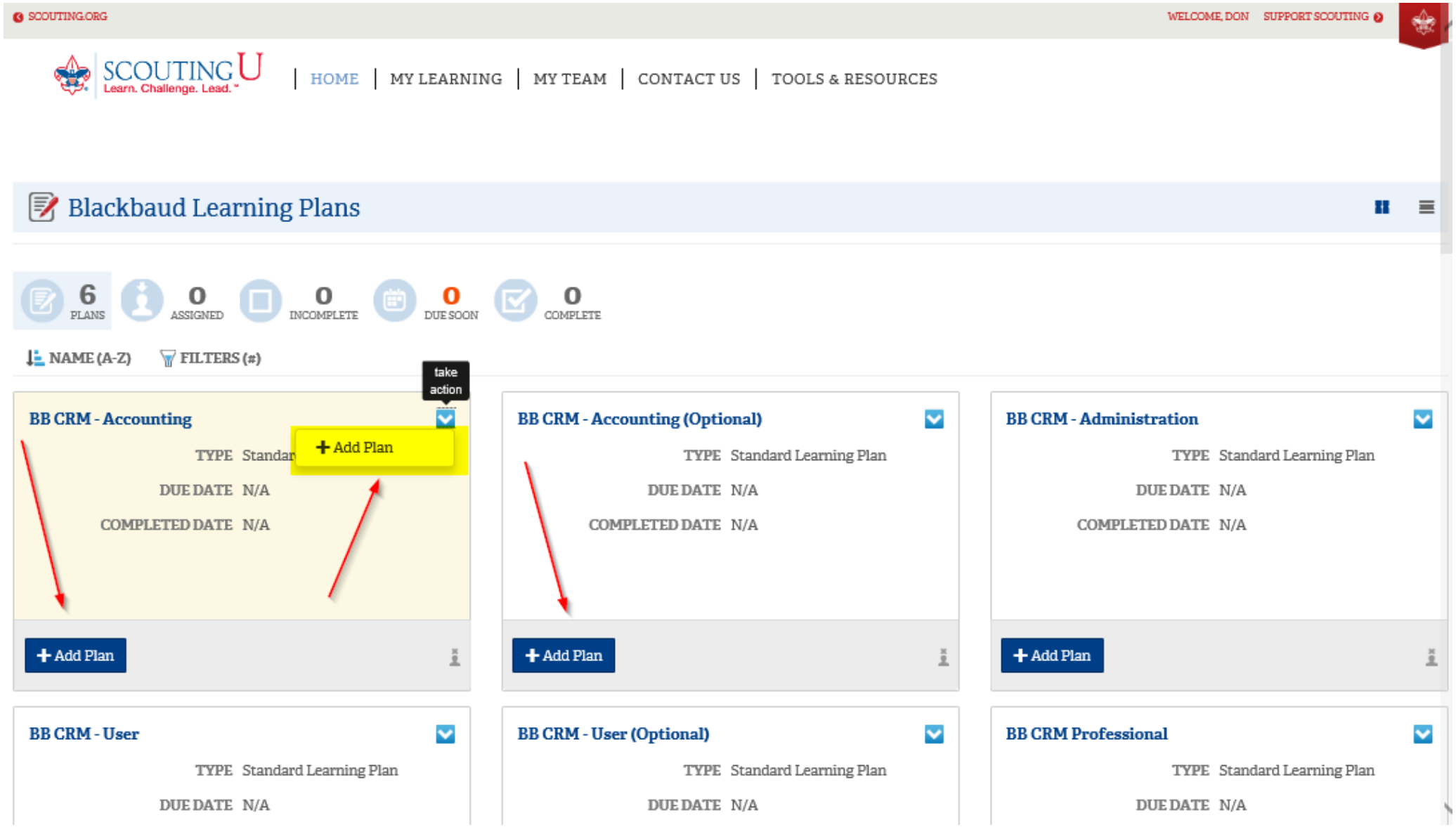
BLACKBAUD LEARNING PLANS and VILT ENROLLMENT

RESOURCES

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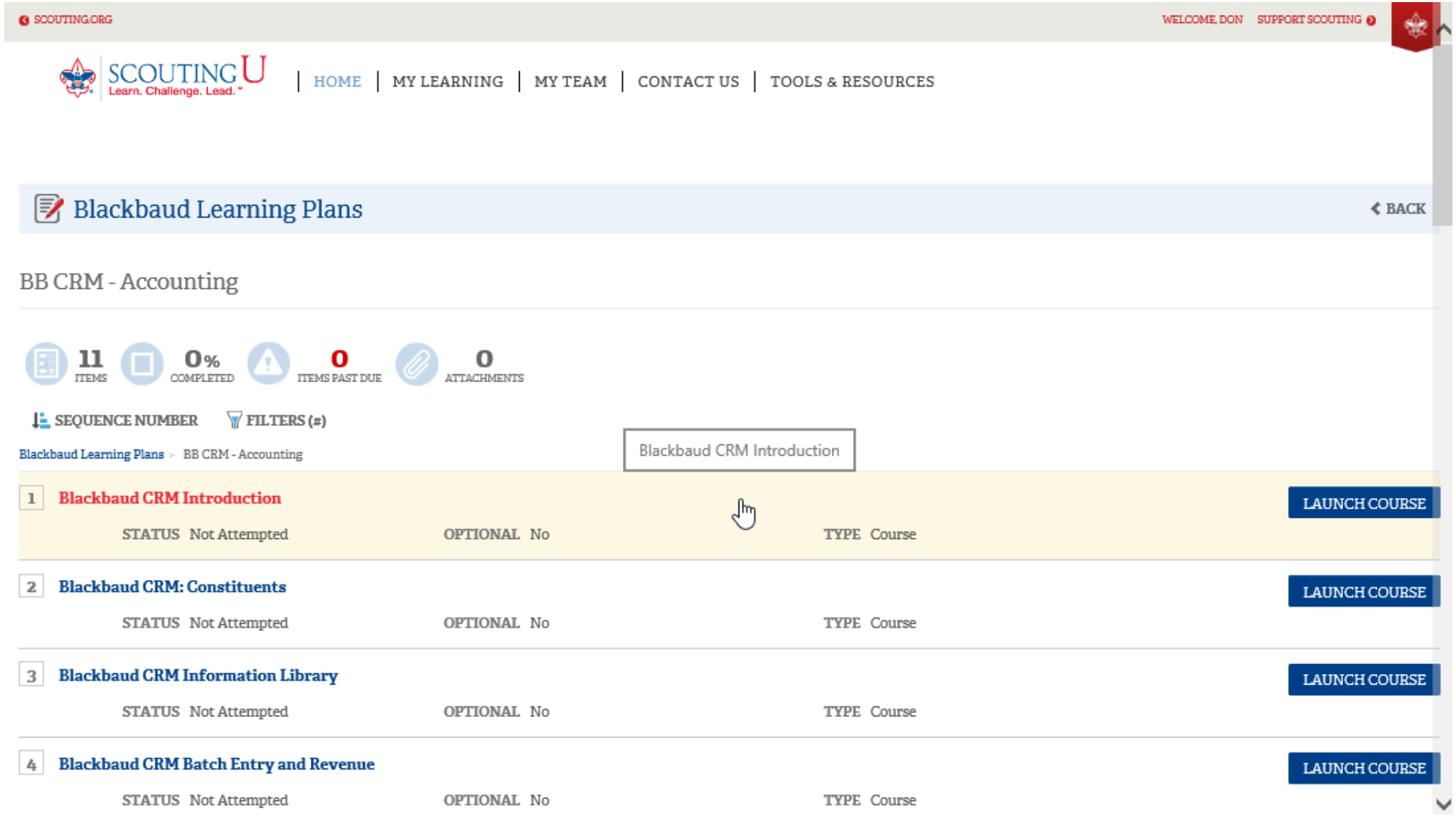
Blackbaud Learning Plans
6 PLANS
0 ASSIGNED
0 INCOMPLETE
0 DUE SOON
0 COMPLETE
NAME (A-Z)
FILTERS (#)
take action
BB CRM - Accounting
TYPE Standar
DUE DATE N/A
COMPLETED DATE N/A
+ Add Plan
BB CRM - Accounting (Optional)
TYPE Standard Learning Plan
DUE DATE N/A
COMPLETED DATE N/A
+ Add Plan
BB CRM -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

August 19, 2020
10:00 am & 2:00 pm CST