

CRM User Forum

June 24, 2020

Cornelia Ellis – Don Day – Rich White



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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



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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



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



Add a Batch

Add a batch [X]

Batch template: LC Cash/Check Payment Donation [v] Field options

Batch number: <Next available batch number> ☐ Override

Description:

Owner: Cornelia Ellis BSA-BSA [v]

☒ Enable auto-save

Projected #:

Projected amount:

[?] Help [Save] [Cancel]



Revenue Batch Templates

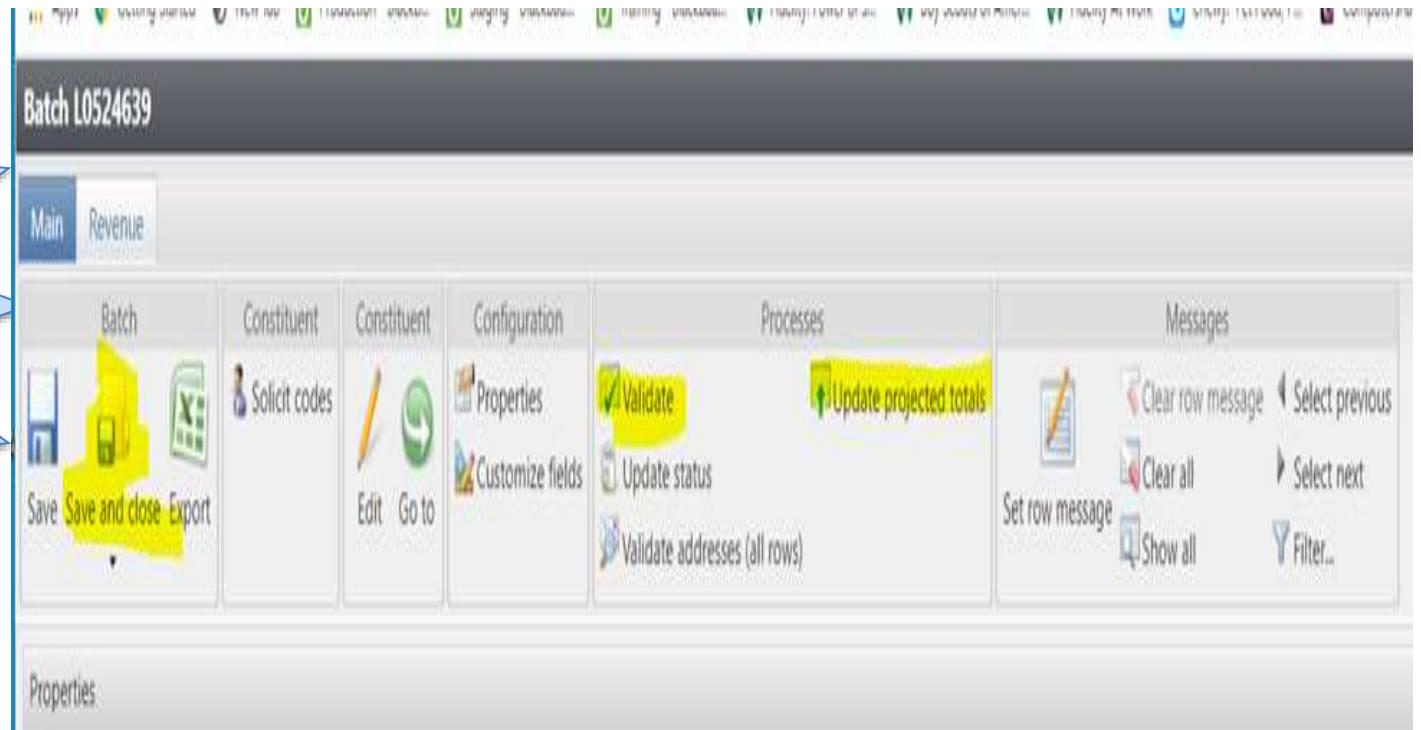
- LC Cash/Check Payment Donation
- LC Credit Card Payment Donation
- LC Gift-in-kind & Service Contribution
- LC Pledge Commitment
- LC Pledge Commitment with Credit Card
- LC Pledge Payment Cash/Check
- LC Pledge Payment Credit Card
- LC Recurring Gift Commitment (monthly or other schedule)
- LC Stock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



Update projected totals


Validate

Save and Close









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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

- 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

The screenshot displays the Blackbaud CRM P web application interface. At the top, the header includes the Blackbaud CRM P logo, a search bar with the placeholder text "Name or lookup ID", and a "Welcome, Don Day BSA-BSA" message. Below the header is a navigation bar with tabs for Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, Volunteers, Foundations, and Fundraising. The main content area is titled "Analysis" and is divided into several sections:



- More tasks:** A list of tasks including 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, and ScoutNET Merged Inactive Constituent.
- Dashboards:** A list of dashboards including KPI dashboard and Web dashboard.
- Sales reports:** A list of reports including Sales by membership.
- Reports:** A list of reports including BSA Duplicate Constituent Report (highlighted), Constituent reports, Appeal reports, Revenue reports, Membership reports, Prospect management reports, Event reports, Fundraising reports, Volunteer reports, Marketing reports, and Treasury reports.
- Selections:** A list of selections including Import selections and View selections.
- Advocacy reports:** A list of reports including Advocacy action item detail.
- Information library:** A list of information library items including Information library, Ad-hoc query search, Smart query search, Smart query browse, and Ad-hoc Query Upload Tool.
- Reporting services:** A list of reporting services including Report explorer and 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%

1 of 9

Find | Next

View re

BSA Duplicate Constituent Report

Council 303

George

317 Cypress Creek Rd, 39047

Person

Male

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	

Adrienne

638 Warren Harding Dr, 39213

Person

Female

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,

601 Beasley Rd, 39206

Organization

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



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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



REMINDERS



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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 choose from for billing
- Use the ones that fit your reminder cycle
- Click edit to open the business process

 L104 Pledge Payment Overdue	Last month or older pledge reminders
<div> Start process</div> <div> Set format options</div> <div> Edit</div> <div> Delete</div> <div> Assign permissions</div>	
 L104 Pledge Payment Reminder Current Month	Current Month Pledge Reminder
 L104 Pledge Payments Due Next Month	Next Month Pledge Reminders
 L104 Pledge Payments New This Month	Used to bill new pledges put in this mont...



Reminder Selections

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

Edit reminder process

Name: L104 Pledge Payment Overdue
Description: Last month or older pledge reminders
Site: Aloha Council
Output grouping: Commitment
Letter template: L104 Reminders_ScoutNET_Like_Pledge_Overdue.docx
Label template: <File not specified>
Output type: Export definition
Export definition: Custom Pledge Reminder Fields

Criteria

Generate reminders for:
☐ All pledges
☐ All recurring gifts
☒ Custom selection
Selection: L104 Pledge Payments Due Last

Results

These options may be modified at run time.
Calculate amounts as of: <Specific date> 3/31/2019
☐ Mark reminders sent when process completes
Sent date: Today
☐ Create selection from results
Selection type:
Selection name:
☐ Overwrite existing selection

Help Save Cancel



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

The screenshot shows a query builder interface with the following sections:

- Find field:** A search bar with a red 'X' icon and a magnifying glass icon.
- Browse for fields in:** A tree view showing the hierarchy of fields. The 'Revenue' folder is expanded, showing sub-folders like Adjustment, Appeal, Application Details, Appraisals, Attachments, Attributes, Auction Item Donation, BSAFR, BSAFR Snapshot, Constituent, Credit Card Refund, Credit Card Updates, Direct Debit Account, Donor Challenge Matched Revenue, Donor Challenge Payments, Gift Fee Adjustments, Gift Status, Gift-in-Kind Sale, and GL Distribution.
- Select Revenue fields:** A list of fields available for selection, including Account system, Amount, Batch description, Batch number, Benefits waived, Date, Designation list, Do not acknowledge, Do not receipt, Given anonymously, GL post date, GL post process, GL post status, Inbound channel, Installment frequency, Installments end date, and Installments start date.
- Include records where:** A list of criteria for filtering records. The first three criteria are highlighted with a red box: 'Appeal\Site\Site ID is equal to 104', 'and Appeal\Report code is equal to 2019', and 'and Transaction type is one of Pledge'. Other criteria include 'and Pledge/Grant award balance is greater than 0', 'and Pledge/Grant award next installment date is on or before last month and is not blank', and 'and BSA Structure Attribute\Value is not equal to Maui or is blank'.
- Results fields to display:** A list of fields to be displayed in the results, including Amount (Pledge Amount), Date (Pledge Date), Pledge/Grant award next installment date (Next Installment Due), Constituent\Name (Constituent), Constituent\Lookup ID (Lookup ID), Latest installment payment date (Last Payment Date), Latest installment payment amount (Last Payment Amount), and Pledge/Grant award balance (Balance).



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.

Include records where:

- Appeal\Site\Site ID is equal to 104
- and Appeal\Report code is equal to 2019**
- and Transaction type is one of Pledge

Apply Criteria

Appeal\Report code criteria

One of

☒ Value ☐ Output field

2024		2019
2023		2018
2022		
2021		
2020		
2017		
Multi-year		
2016		
2015		

☐ Only return records that match all selected values

OK Cancel



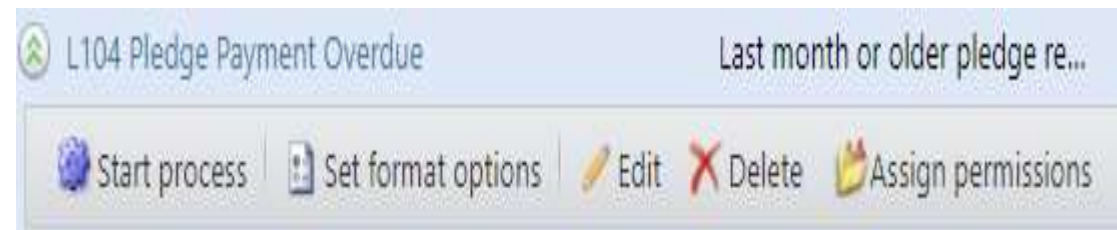
Reminder Selections

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

The 'Edit reminder process' dialog box contains the following fields and options:

- Name: L104 Pledge Payment Overdue
- Description: Last month or older pledge reminders
- Site: Aloha Council
- Output grouping: Commitment
- Letter template: L104 Reminders_ScoutNET_Like_Pledge_Overdue.docx (with 'Choose file' and 'Clear file' links)
- Label template: <File not specified> (with 'Choose file' and 'Clear file' links)
- Output type: Export definition
- Export definition: Custom Pledge Reminder Fields
- Criteria**
 - Generate reminders for:
 - ☐ All pledges
 - ☐ All recurring gifts
 - ☒ Custom selection
 - Selection: L104 Pledge Payments Due Last
- Exclusions**
- Results**
 - These options may be modified at run time.
 - Calculate amounts as of: <Specific date> (3/31/2019)
 - ☐ Mark reminders sent when process completes
 - Sent date: Today
 - ☐ Create selection from results
 - Selection type: (dropdown)
 - Selection name: (text field)
 - ☐ Overwrite existing selection

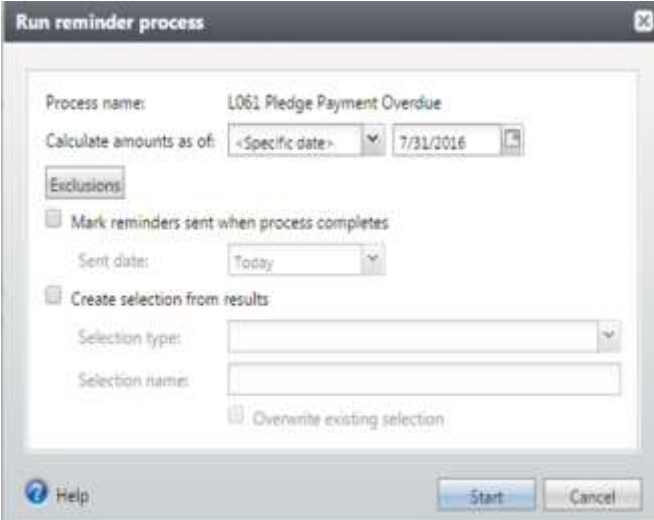
Buttons at the bottom: Help, Save, Cancel.



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.



The screenshot shows a Windows-style dialog box titled "Run reminder process". It contains the following fields and options:


- Process name:** L061 Pledge Payment Overdue
- Calculate amounts as of:** A dropdown menu showing "<Specific date>" and a date field showing "7/31/2016".
- Exclusions:** A button.
- ☐ **Mark reminders sent when process completes**
- Sent date:** A dropdown menu showing "Today".
- ☐ **Create selection from results**
- Selection type:** A dropdown menu.
- Selection name:** A text input field.
- ☐ **Overwrite existing selection**

At the bottom, there is a "Help" button with a question mark icon, and "Start" and "Cancel" buttons.



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

 [Reminder process list](#)








L104 Pledge Payment Overdue


Description:	Last month or older pledge reminders	Export definition:	Custom Pledge Reminder Fields
Include selection:	L104 Pledge Payments Due Last Month Or Older (Ad-hoc Query)	Create output selection:	No
Output selection type:		Overwrite existing selection:	No
Calculate amounts as of:	4/30/2020	Output selection name:	
Mark reminders sent:	No	Output grouping:	Commitment
Letter template:	L104 Reminders_ScoutNET_Like_Pledge_Overdue (+flipcause).docx		
Label template:			

Recent status

History

Job schedules

Recent status  Merge letter |  Merge label |  Delete |  Mark sent |  Clear results |  Download output ▾ | 

Status:  **Completed**

Status message: Completed

Started by: netbsa\alepete

Started: 6/1/2020 5:48:48 PM

Ended: 6/1/2020 5:49:16 PM

Duration: 28 seconds

Server name: D2PBBISEC10AV

Total records processed: 14

Number of exceptions: 0

Records successfully processed: 14



CRM User “Tools” in MyBSA

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





Home Page

Home

Membership

Program

Funding

ScoutNET

Knowledge Base

Home

BSA News

Resources

My Information ?

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Support ?

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[National Council Telephone Directory](#)
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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

- ▶ 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 Merchant Services Checklist](#)

[Designation Request sheet](#)

[Event Revenue Setup Request](#)



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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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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, DBO 2020, and Course Director Conferences. Information about rescheduling and rescheduling of courses will be released as soon as possible. Virtual instructor-led trainings including DCA 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 Base

Use Google Chrome browser for PC or Safari for MAC.



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SCOUTING U 2020 COURSE LISTING

ALL EMPLOYEES



POSITION SPECIFIC



ENTERPRISE SOFTWARE



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SCOUTING U
Learn. Challenge. Lead.™

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MY LEARNING

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power your passion

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 (#)

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

August 19, 2020

10:00 am & 2:00 pm CST



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