Objectives

• Review batch templates
• BSAFR Cleanup steps
  – Useful queries and tools
• Cleaning up duplicate constituents – Person Merge
• 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
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
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

### George
- **Address:** 317 Cypress Creek Rd, 39047
- **DOB:** 1992-08-16
- **Revenue #:** 0
- **CBC Exists?:** No
- **Latest Reg Date:** 3/1/2000

### Adrienne
- **Address:** 638 Warren Harding Dr, 30213
- **DOB:** 1984-09-05
- **Revenue #:** 0
- **CBC Exists?:** No
- **Latest Reg Date:** 10/1/1999

### Callaway High School
- **Address:** 601 Beasley Rd, 32206
- **DOB:** 1992-08-31
- **Revenue #:** 0
- **CBC Exists?:** No
- **Latest Reg Date:** 10/1/2000

**Council 303**
## BSA Duplicate Constituent Report

<table>
<thead>
<tr>
<th>Name</th>
<th>Lookup ID</th>
<th>Alternate ID</th>
<th>DOB</th>
<th>Revenue #</th>
<th>CBCExists?</th>
<th>Latest Reg Date</th>
<th>Latest BSAFR Date</th>
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<tr>
<td>Michael</td>
<td>8-40243967</td>
<td>12024204</td>
<td>1970-11-04</td>
<td>0</td>
<td>Yes</td>
<td>1/1/2020</td>
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<table>
<thead>
<tr>
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<th>Appeal</th>
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<td>rev-43417811</td>
<td>7/31/2019</td>
<td>$0.00</td>
<td>(303) 19FOS - 2019 Friends of Scouting</td>
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<tr>
<td>rev-42339229</td>
<td>5/31/2018</td>
<td>$0.00</td>
<td>(303) 18FS - 2018 Friends of Scouting</td>
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<tr>
<td>rev-41660296</td>
<td>12/5/2017</td>
<td>$0.00</td>
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<td>124369441</td>
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<td>(303) 16FS - 2016 Friends of Scouting</td>
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<td>2/24/2015</td>
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<td>(303) 15FS - 2015 Friends of Scouting</td>
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<td>122087834</td>
<td>3/4/2014</td>
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<td>3/4/2014</td>
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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 choose 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.

[Diagram showing a query with fields such as 'Appeal/Site ID', 'Appeal/Report code', 'Transaction type', 'Grant award balance', and 'Grant award next installment date'.]
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)
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

**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 setup
- 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
Welcome to the BSA Employee LearnCenter, Don!


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 18. This includes Project Management (Kansas City), Advanced District Administration 2002, Commissioning 2004, Managing Performance 2002, D02 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.
Select link below for Blackbaud Learning Plans and VILT Enrollment:

BLACKBAUD LEARNING PLANS and VILT ENROLLMENT

RESOURCES

How to Check Your Blackbaud Training Status
<table>
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# Blackbaud Learning Plans

**BB CRM - Accounting**

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Next Forum

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