

CRM User Forum

September 16, 2020

Cornelia Ellis – John Kuehn – Don Day



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Objectives

- Creating appeals
- Using Special Event fundraising module – important steps to follow
- Acknowledgements & Reminders
- Scouting Gives/WePay review
- CRM User “Tools” available on MyBSA
- Questions Answered?



Creating Appeals



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Add an Appeal

Add an appeal [X]

Name: (###) Nation's Best Council **1**

Description: What is the reason you are asking for funding? **2**

Split evenly Split fully

Category: Annual Giving (Friends of Scouting) **3**

Report code: 2021 **4**

Site: Boy Scouts of America **5**

Start date: 1/1/2021 **6**

End date: 12/31/2021

Goal: \$100,000.00 **7**

Help Save Cancel



Setting up the Event

Field	Value																
Name:	Use consistent naming across your Council's Events. The name should appear as: Format: [Council #] [Event Name] [4-digit Year] Example: L441 Tecumseh Dinner 2016																
Description:	A brief description of the event																
Category:	<table border="1"> <thead> <tr> <th>For Current Year events</th> <th>For Future Year events</th> </tr> </thead> <tbody> <tr> <td>Auction (sub-event)</td> <td>FY – Auction (sub-event)</td> </tr> <tr> <td>Cultivation/Recognition (no revenue)</td> <td></td> </tr> <tr> <td>Distinguished Citizens Dinner</td> <td>FY – Distinguished Citizens Dinner</td> </tr> <tr> <td>Friends of Scouting (no registration revenue)</td> <td></td> </tr> <tr> <td>Golf</td> <td>FY – Golf</td> </tr> <tr> <td>Special Fundraising Event</td> <td>FY – Special Fundraising Event</td> </tr> <tr> <td>Sporting Clays</td> <td>FY – Sporting Clays</td> </tr> </tbody> </table> <p>NOTE: If you set up an event to the next business year, in January, you must change the category of all events to the Current Year</p>	For Current Year events	For Future Year events	Auction (sub-event)	FY – Auction (sub-event)	Cultivation/Recognition (no revenue)		Distinguished Citizens Dinner	FY – Distinguished Citizens Dinner	Friends of Scouting (no registration revenue)		Golf	FY – Golf	Special Fundraising Event	FY – Special Fundraising Event	Sporting Clays	FY – Sporting Clays
For Current Year events	For Future Year events																
Auction (sub-event)	FY – Auction (sub-event)																
Cultivation/Recognition (no revenue)																	
Distinguished Citizens Dinner	FY – Distinguished Citizens Dinner																
Friends of Scouting (no registration revenue)																	
Golf	FY – Golf																
Special Fundraising Event	FY – Special Fundraising Event																
Sporting Clays	FY – Sporting Clays																
Site:	Select your Council																
Checkbox:	<i>Event is an auction</i> – Recommend to check this box for every event (See also: Special Event Auction Setup Job Aid for more information)																
Checkbox:	<i>Do not show on event calendar</i> ; check this box when the event will not need to appear on the calendar for other users to see																
Checkbox:	<i>Event allows designations on fees</i> ; check this box when you need to collect fees for the event. See also: Event Revenue Setup Job Aid for more information																
Start date:	Date the event begins for multi-day events, or the date of the event for single-day events																
Start time:	Enter the time of day the event begins																
End date:	Enter the date the event ends, if different than the <i>Start date</i>																
End time:	Enter the time of day the event ends																
Location:	Search for the location of the event (hotel, office, home, resort, etc.); if the location does not exist, click +Add in the search screen to add a new location																



CRM Add an Event Form

Add an event

General

Name: 2019 Scouting Gives Event

Description: Scouting Gives Event Setup Demo

Category: Special Fundraising Event

Sites: Site, Bay-Lakes Council

Event is an auction

Do not show event on calendar

Event allows designations on fees

Copy options

Details

Start date: 9/18/2019 Start time: hh:mm AM

End date: 9/18/2019 End time: hh:mm AM

Location information

Location: Marriott Center City

Room/Unit: Capacity: 0

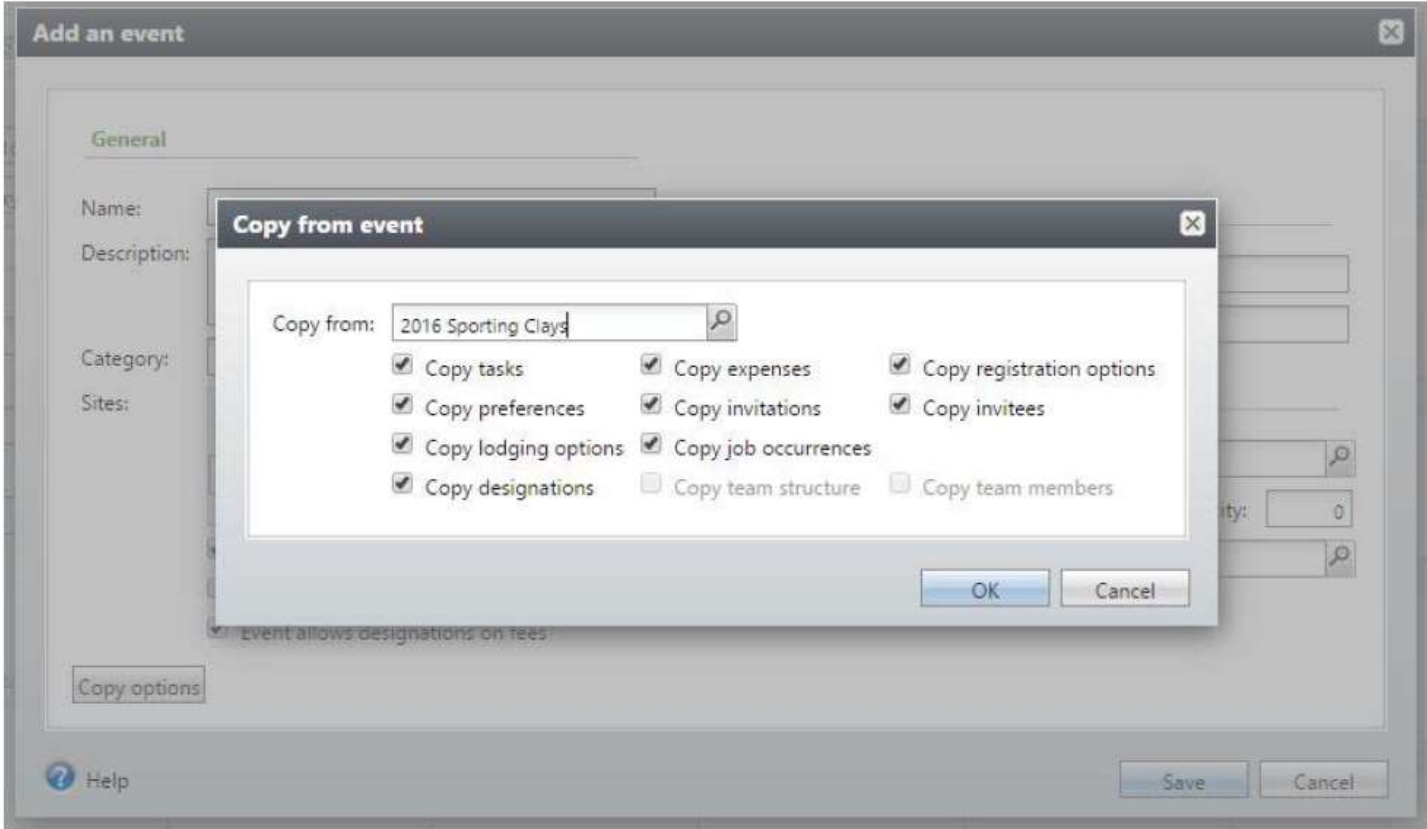
Contact: John C. Kuehn

Help Save Cancel

Fill in the information on the event form. Ensure that you select “Event allows designation on fees” and “Event is an auction”. You do not need to use the auction side of the event. However, if you fail to select either option, neither option can be added after you click save.



Copy Options



Appeal in CRM



Appeal: 2019 SG19 Special Event Appeal

Description: Appeal for Scouting Give Set Up Demo Start date: 1/1/2019
Business unit: End date: 12/31/2019
Category: Special Events Goal: \$100,000.00
Report code: 2019 Status: Active
Site: Bay-Lakes Council Membership:

- Revenue Summary
- Contributions
- Payments
- Balances
- Revenue Details (Splits)
- Revenue Details (Write-offs)

Designations (3) Edit list of appeal designations More ▾

Designation ▲	Default designation
63508521 SG Event	
63508521 SG Event \ 63508521-4202 SG Event - Operating (Ticket)	
63508521 SG Event \ 63508521-4250 SG Event - Operating (Fees)	

Benefits (0) View benefits catalog Add More ▾

Level	From	To	Benefits
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Follow directions in the CRM user guide to create an event appeal. All monies in CRM must be connected to an appeal. The designation tab must be completed with at least the main designation. Sub-designation are not available until you have your designation event mapping completed.



Assign Designation & Prior Appeal (if one)

Blackbaud CRM™ T Application features Wel

Home | Constituents | Marketing and Communications | Revenue | Events | Prospects | Foundations | Fundraising | Analysis | Administration

Appeal: Nation's Best Fundraising Appeal

Description: We raise more \$\$ than anyone else Start date: 1/1/2020
 Business unit: End date: 12/31/2020
 Category: Other Support Goal: \$100,000.00
 Report code: 2020 Status: Active
 Site: Black Warrior Council Membership:

1 2

Revenue Summary | Contributions | Payments | Balances | Revenue Details (Splits) | Matching Gift Claims | Designations | Mailings | Documentation | Mismatch: Appeals? | Solicitor Credits by Group | Prior Appeal

Contributions - posted 8/21/2019 More ▾

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
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Payments Received - posted 8/21/2019 More ▾

Payments Received	# of Payments	Average Payment	Most Recent Payment	Mismatch: Appeal?	Mismatch: Inbound Channel?
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Write-offs - will not post (manual PeopleSoft journal entry required) More ▾

Loading...

Outstanding Balances - through 8/21/2019 More ▾

Total Balances	# Pledges with Balance	Average Balance	Final Installment Due	Mismatch: Appeal?
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Designations

- Use the LXXX New Designation Form (New Designation)
- Use the LXXX BCRM Event Revenue Form (Special Event)
- Only request new designations for new
- The appeal may change but the designation stays the same



Acknowledgements & Reminders



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Acknowledgements and Reminders

- Why do my Donor relation processes stop working?
 - There may be a bad selection attached that needs to be updated
 - The Job Schedule may conflict with another therefore it does not complete
 - The selection on the letter, the assign letter process and the acknowledgment process is not the same.
- The person who created the business process is no longer employed
 - The business process needs assigned roles to let it run
 - A terminated creator has been stripped of permission in CRM
 - Business processes can be assigned to a service account



Acknowledgements and Reminders

- The “Add” button has been removed from:
 - Reminders
 - Assign Letter Process
 - Acknowledgement Process
- If you would like to add a new process, please create a ticket with Member Care.
- You can still edit your processes to bring in the correct revenue to remind and acknowledge.
- You can still add new letter for acknowledgement that then can be added to existing assign letter processes and acknowledgement processes.



Scouting Gives - WePay



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We Pay

- Third party payment processor for:
 - Scouting Gives,
 - STEM,
 - Online Registration
- When one signs into WePay, the email address of “CouncilXXX.PaymentPlatform@scouting.org”, where XXX is your council number, must ALWAYS be used while in WePay. WePay will not recognize your council with any other email address.
- WePay is not the same thing as BSA Payment Platform.
- BSA Payment Platform is a BSA developed middle-ware between BSA online transactions and WePay. It was set up as part of the safeguard to not store any credit card information in any of the products using WePay.
- BSA Payment Platform can be used to issue refunds, stop recurring payments, pull reporting information from, etc.



← → ↻ go.wepay.com

wepay
a CHASE company


PRODUCT ▾ COMPANY ▾ DEVELOPERS ▾ CONTACT SALES SUPPORT SIGN IN

COVID-19 Resources from JPMorgan Chase

Payments you can bank on

Powerful APIs built for platforms,
powered by Chase

GET STARTED



INTEGRATED
PAYMENTS FOR

SMB SaaS, POS
platforms and

\$1.4T in annual payments ⓘ



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WePay Login



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Log In

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CRM Scouting Gives Roles

- APTGBasicAdmin – Council Administer should be assigned to this role. Role allows for financial reports from Scout Gives and the ability to create appeals on Scouting Gives. Can be assigned to more than one person.
- APTGBatchAssignee – the council data entry clerk who will receive and commit Scouting Give batches in CRM should have this role. Assigned to only one person.
- APTGReadOnly – allows a person access to Scouting Gives to view appeals and data only. Can be assigned to more than one



How to Add Roles

- Only the person with the BSA Local Admin Role can add these roles to another person
- When you add these roles make sure you add your site to the role
- Also make sure the rolled is not aligned with a security group



Steps to add Role

- Search for Selected Application user
- Click the Add Role Button
- Search for the appropriate role
- Select the role
- On the Site Security Tab select records with one of these sites assigned and find your council
- On the Constituent security tab select records with no security group assigned



Example of Assigning Roles

Add system role

System role: APTGBatchAssignee

Security

Site Security | Constituent Security

Record access: Records with one of these sites assigned

Hierarchy:

- Boy Scouts of America
 - Global
 - Inactive
 - Suspended
 - BSA Local Councils
 - LC Global
 - Central Region
 - Central Area 1
 - Northern Star Council
 - Twin Valley Council
 - Voyageurs Area Council
 - Central Minnesota Council

Help Save Cancel

Add system role

System role: APTGBatchAssignee

Security

Site Security | **Constituent Security**

Record access: Records with no security group assigned

Security group

Help Save Cancel



CRM User “Tools” in MyBSA

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





- 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

- [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](#)

[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 Dissolving 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](#)





FEATURED COURSE

2020 Course Listing

Revised 2020 Course Listing as of August 14, 2020

Explore

The banner features a background image of a computer monitor displaying the Scouting U logo and the text 'CUSTOM CONTENT'. Navigation arrows are visible on the left and right sides of the banner.



You have 1 past due compliance assignment. [Go to compliance now.](#)



My Assignments

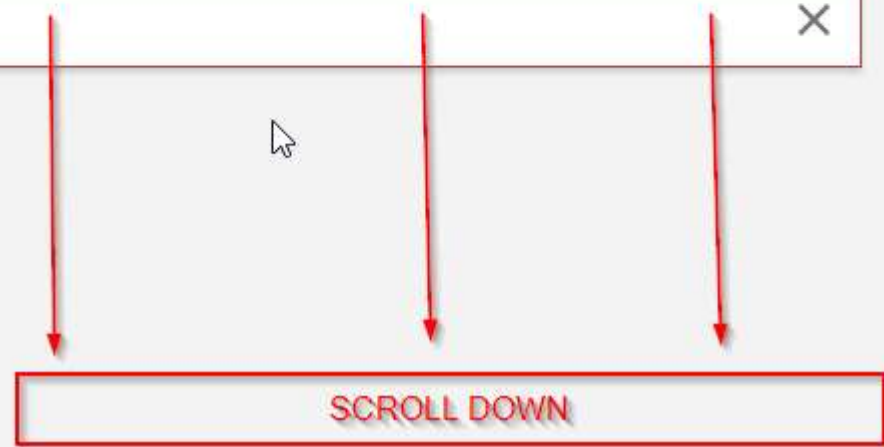
[View Compliance](#)



COMPLIANCE ASSIGNMENTS PAST DUE

Launch Compliance Training

Your required training will be in your learning plan





Blackbaud Training [Edit Skills >](#)




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VIDEO

VILT Marketing and Communication
Scouting U

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VILT Recorded Session

VIDEO

VILT CRM Information Library (Includes Export,
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VILT Recorded Session

VIDEO

VILT Credit Card Process Credit Card
Scouting U

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BSA Diversity and Inclusion [Edit Skills >](#)





Council Support

Council Management Support

Contact Council Management Support

Council Assessments

Council Board Resources

Council Business Practices

Council Fiscal Management and Training

Journey to Excellence

Council Funding and Finance

[Home](#) > [Council Support](#) > Council Funding and Finance

Council Funding and Finance

Funding a Council and assuring proper financial management are among the primary responsibilities of the Council Board. The material presented in this Section provides tools for performing these critical functions. This is designed to be used by both Volunteers and Council staff.

[Financial Planning](#)

[Funding the Council](#)

Council Administration

[Local Council Financial Audits](#)

[Back Office Business Solutions](#)

[BSA-COVID-19 Financial Resources](#)

www.scouting.org/financeimpact



Next Forum

October 21, 2020
10:00 am & 2:00 pm CT

