

CRM User Forum

November 18, 2020

Cornelia Ellis – John Kuehn – Don Day



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Objectives

- Closing the Year 2020
 - Using proper “inbound channel”
 - Clearing out old batches
 - Write offs and receivables
 - Year end checklist
- Next Year
 - Creating next year appeals
 - Creating designation requests – why and or when
 - Contribution statements and when to run



Use of FY and PY inbound channels

- Use Correct Inbound Channels
 - Accountant / Controller and office procedure helps determine transition during first week of Jan of what is current, future or prior year.



Pledge

Fill in your batch row. I am entering a new pledge of \$100 with 4 installments starting on 11/19/2020. I attach it to a 2021 appeal and pick the FY-Friends of Scouting, Inbound Channel. The revenue category can be changed to Temp Restricted. The inbound channel chosen will default the GL string to it if you don't pick it. For this demo I will not change it to Temp Restricted

Batch L0524283

Main Revenue

Batch: Save Save and close Export

Constituent: Solicit codes

Constituent: Edit Go to

Configuration: Properties Customize fields

Validate Update status Validate

Properties

	Constituent	Lookup ID	Group ID	Amount	Date	GL post date	Revenue type	Installment frequency	No. installme...
1	John D. Kuehn	8-11774808	Troop 1910 BT Keller - 6...	\$100.00	11/19/2019	11/19/2019	Pledge	Monthly	4
*									

Constituent: Edit Go to

Configuration: Properties Customize fields

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

Messages: Set row message Clear row message Clear all Show all Select previous Select next Filter...

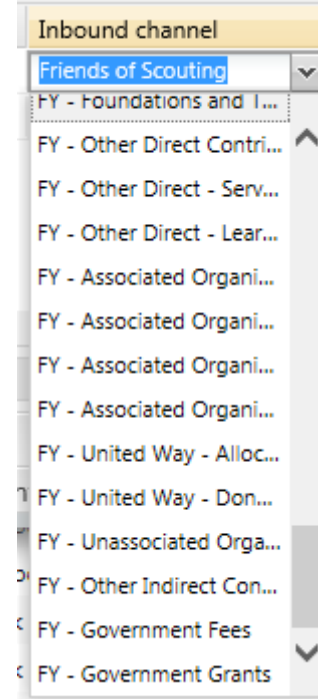
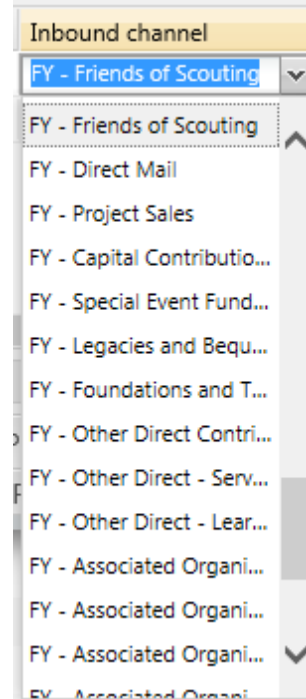
Application	Appeal	Designation	Inbound channel	Revenue category	Giving Category	BSA Structure
	(662) S20 - 2020 Friends...	66200511 FRIENDS OF S...	FY - Friends of Scouting	Unrestricted by donor	Family Division	Mustang



Prepare

Inbound Channels

These are your Future Year Inbound Channels. They mirror the same inbound channels you use most of the year. Pick accordingly to the type of revenue you are putting into the system.





John D. Kuehn

11/19/2019 Pledge: \$100.00

Transaction summary

Pledge amount: \$100.00

Date: 11/19/2019

Batch number: L0524283

Revenue ID: rev-43526954

Summary

Balance: \$100.00

Total paid: \$0.00

Past due: \$0.00

Status

Acknowledgements: Not acknowledged

Post status: Not posted

Post date: 11/19/2019

Post process ID:

The pledge has the Inbound Channel of FY – Friends of Scouting and the correct appeal on the record.

Details Installment/Write-off Activity Benefits Recognition Solicitors Letters Attributes Documentation GL Distributions Tributes Campa

Details

Original amount: \$100.00

Subtype: Pledge Receivable

Source code:

Inbound channel: FY - Friends of Scouting

Send reminders: Yes

Revenue reference:

Effort:

Appeal: (662) S20 - 2020 Friends of Scouting

Revenue category: Unrestricted by donor

Designations (1)

Designation	Amount	Balance	Category
66200511 FRIENDS OF SCOUTIN -...	\$100.00	\$100.00	Unrestricted by donor

Payment information

Automatic payment: Not set up for automatic payment



Prepared. F



John D. Kuehn

11/19/2019 Pledge: \$100.00

Transaction summary

Pledge amount: \$100.00

Date: 11/19/2019

Batch number: L0524283

Revenue ID: rev-43526954

Summary

Balance: \$100.00

Total paid: \$0.00

Past due: \$0.00

Status

Acknowledgements: Not acknowledged

Post status: Not posted

Post date: 11/19/2019

Post process ID:

When we look at the GL distribution the pledge went to account 1331 (FY – receivable). Account 4001 which is the contribution account was also touched but this has a 91 on it. By selecting FY Friends of Scouting it change the 90 to a 91 making the gift Temp Restricted (Default). This process builds your reclass for next year's contributions. The system did create 2 entry's for my \$100 Gift. \$50 is due in 2019 and \$50 is due in 2020.

Details Installment/Write-off Activity Benefits Recognition Solicitors Letters Attr

Transaction history by post date

All dates

11/19/2019
Pledge

GL distributions (5)

Filters



More

View:

All



Apply



Reset

Account

Description

Debit amount

Credit amount

Reference

Pledge

Edit

→ L662-1-4001-051-91

L662-1-FOSF-FRCY-L6620...

\$50.00 Kuehn-Pledge

→ L662-1-4001-051-91

L662-1-FOSF-FRCY-L6620...

\$50.00 Kuehn-Pledge

→ L662-1-1331-051-00

L662-1-FOSF-PLRC-L6620...

\$50.00

Kuehn-Pledge

→ L662-1-1331-051-00

L662-1-FOSF-PLRC-L6620...

\$50.00

Kuehn-Pledge



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John D. Kuehn

11/19/2019 Pledge: \$100.00

Transaction summary

Pledge amount: \$100.00

Date: 11/19/2019

Batch number: L0524283

Revenue ID: rev-43526954

Summary

Balance: \$100.00

Total paid: \$0.00

Past due: \$0.00

Status

Acknowledgements: Not acknowledged

Post status: Not posted

Post date: 11/19/2019

Post process ID:

When we look at the installments there are 4. 2 in 2019 and 2 in 2020. This is why the GL created two \$50 entries.

Details

Installment/Write-off Activity

Benefits

Recognition

Solicitors

Letters

Attributes

Documentation

GL Distributions

Tributes

Campaigns

Busi

Installment activity (4)



Reschedule installments



Filters



More

Activity	Date	Amount	Receipt amount	Paid by	Pay method
Installment 1	11/19/2019	\$25.00	\$25.00		
Installment 2	12/19/2019	\$25.00	\$25.00		
Installment 3	1/19/2020	\$25.00	\$25.00		
Installment 4	2/19/2020	\$25.00	\$25.00		

Write-offs (0)



Add



More

Date	Amount	Post status	Post date	Reason details
------	--------	-------------	-----------	----------------



Prepar

Future Year Payment

Selected a pledge payment batch. Set the Inbound Channel to future year. Check pledge dates when Applying payments. The Appeal field is also now unhidden for your viewing

Batch L0524284

Main Revenue

Batch: Save Save and close Export

Constituent: Solicit codes

Constituent: Edit Go to

Configuration: Properties Customize fields

Process: Validate Update status Validate addresses (all rows) Update

Properties

	Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Deposit Reference
1	John D. Kuehn	8-11774808	\$25.00	\$25.00	11/29/2019	11/29/2019	WF123
*							

Messages: Set row message Clear row message Clear all Show all Select previous Select next Filter...

Application	Payment method	Other method	Check number	Appeal	Inbound channel
Pledge for John D. Kuehn 11/19/2019...	Check		555	(662) S20 - 2020 Friends...	FY - Friends of Scouting



Prepared.



John D. Kuehn

11/29/2019 Payment: \$25.00

Transaction summary



Payment amount: \$25.00

Date: 11/29/2019

Receipt amount: \$25.00

Batch number: L0524284

Revenue ID: rev-43526955

Status

Acknowledgements: Not acknowledged

Receipt preference: Per payment

Receipt status: Not receipted

Receipt date:

Receipt number:

Post status: Not posted

Post date: 11/29/2019

Post process ID:

Payment method

Payment method: Check

Check number: 555

Check date:

I validated and committed the batch. Next, I will proceed to the revenue record. I see FY – Friends of Scouting on the record.

Details

Benefits

Matching Gifts

Letters

Attributes

Documentation

GL Distributions

Tributes

Lockbox

BSAFR

Details



Original amount: \$25.00

Effort:

Finder number:

Appeal: (662) S20 - 2020 Friends of Scouting

Source code:

Inbound channel: FY - Friends of Scouting

Revenue reference:

Application details



Pledge - \$25.00



Go to revenue



Edit

Applied to: 11/19/2019 Pledge for John D. Kuehn



Prepared. F



John D. Kuehn

11/29/2019 Payment: \$25.00

Transaction summary

Payment amount: \$25.00

Receipt amount: \$25.00

Date: 11/29/2019

Batch number: L0524284

Revenue ID: rev-43526955

Status

Acknowledgements: Not acknowledged

Receipt preference: Per payment

Receipt status: Not received

Receipt date:

Receipt number:

Post status: Not posted

Post date: 11/29/2019

Post process ID:

Payment method

Payment method: Check

Check number: 555

Check date:

The cash account has been debited and the future year receivables have been relieved.

Details Benefits Matching Gifts Letters Attributes Documentation **GL Distributions** Tributes Lockbox BSAFR

Transaction history by post date

All dates

11/29/2019
Payment

GL distributions (3) More

View: All Apply Reset

Account	Description	Debit amount	Credit amount	Reference	Post date
Pledge					
→ L662-1-1331-051-00	L662-1-FOSF-PAPL-L6620...		\$25.00	Kuehn-Pledge Payment fo...	11/29/2019
→ L662-1-1001-015-00	L662-1-FOSF-CASH-L6620...	\$25.00		Kuehn-Pledge Payment fo...	11/29/2019

<



Prepared

Prior Year Payments

- Payment made next year on this year's pledges.
- Occurs on payments that are postmark after January 1.



Prior Year Payment

Here is a sample payment paying off a pledge in 2020. I selected the inbound channel of PY- Friends of Scouting.

Batch L0025205

Main Revenue

Batch: Save, Save and close, Export

Constituent: Edit, Go to

Configuration: Properties, Customize fields

Processes: Validate, Update projected totals, Update status

Messages: Set row message, Clear row message, Clear all, Show all, Select next, Filter...

Properties

	Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type	
1	John D. Kuehn	8-11774808	\$173.50	\$173.50	10/14/2015	10/14/2015	Payment	PI

Batch L0025205

Main Revenue

Batch: Save, Save and close, Export

Constituent: Edit, Go to

Configuration: Properties, Customize fields

Processes: Validate, Update projected totals, Update status

Messages: Set row message, Clear row message, Clear all, Show all, Select previous, Select next, Filter...

Properties

Amount	Date	GL post date	Revenue type	Application	Payment method	Check number	Inbound channel
\$173.50	10/14/2015	10/14/2015	Payment	Pledge for John D. Kueh...	Check	5656	PY - Friends of Scouting



Prepare

Prior Year Inbound Channels

These are your inbound channel choices for prior year payments.

Inbound channel

PY - Friends of Scouting

PY - Friends of Scouting

PY - Direct Mail

PY - Project Sales

PY - Capital Contributio...

PY - Special Event Fund...

PY - Legacies and Bequ...

PY - Foundations and T...

PY - Other Direct Contr...

PY - Other Direct - Serv...

PY - Other Direct - Lear...

PY - Associated Organi...

PY - Associated Organi...

PY - Associated Organi...

PY - Associated Organi...

PY - Associated Organi...

Inbound channel

PY - Friends of Scouting

PY - Other Direct Contr...

PY - Other Direct - Serv...

PY - Other Direct - Lear...

PY - Associated Organi...

PY - Associated Organi...

PY - Associated Organi...

PY - Associated Organi...

PY - United Way - Alloc...

PY - United Way - Don...

PY - Unassociated Orga...

PY - Other Indirect Con...

PY - Government Fees

PY - Government Grants

PY - Friends of Scouting



Tasks

- Edit payment
- Edit original amount
- Change constituent on payment
- Edit revenue ID
- Delete payment
- Change receipt preference

More information

- History
- Revenue and recognition

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query

Recent searches

- Transaction search
- Designation search
- Appeal search
- Batch search
- Package search

Recently accessed

- 10/14/2015 Payment: \$173.50 - John D. Kuehn
- John D. Kuehn
- 11/24/2015 Payment: \$25.00 - John D. Kuehn
- 10/14/2015 Pledge: \$100.00 - John D. Kuehn
- 8/3/2015 Payment: \$13.44



John D. Kuehn

10/14/2015 Payment: \$173.50

Transaction summary

Payment amount: \$173.50 Date: 10/14/2015
Receipt amount: \$173.50 Batch number: L0025205
Revenue ID: rev-14692203

Status

Acknowledgements: Not acknowledged

Receipt preference: Per payment

Receipt status: Not receipted

Receipt date:

Receipt number:

Post status: Not posted

Post date: 10/14/2015

Post process ID:

Payment method

Payment method: Check

Check number: 5656

Check date:

The record has PY – Friends of Scouting on the record.
We will now review the GL.

Details | Benefits | Matching Gifts | Letters | Attributes | Documentation | GL Distributions | Tributes | Lockbox

Details

Original amount: \$173.50 Effort:
Finder number: Appeal: (662) S14 - 2014 Friends of Scouting
Source code:
Inbound channel: PY - Friends of Scouting
Revenue reference:

Application details

Pledge - \$173.50 Go to revenue Edit

Applied to: 4/3/2014 Pledge for John D. Kuehn

Designation: 6620511 FRIENDS OF SCOUTING - Contribution



Tasks

- Edit payment
- Edit original amount
- Change constituent on payment
- Edit revenue ID
- Delete payment
- Change receipt preference

More information

- History
- Revenue and recognition

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query

Recent searches

- Transaction search
- Designation search
- Appeal search
- Batch search
- Package search

Recently accessed

- 10/14/2015 Payment: \$173.50 - John D. Kuehn
- John D. Kuehn
- 11/24/2015 Payment: \$25.00 - John D. Kuehn
- 10/14/2015 Pledge: \$100.00 - John D. Kuehn
- 8/3/2015 Payment: \$13.44 - Give With Liberty
- netbsa\mrussell -



John D. Kuehn

10/14/2015 Payment: \$173.50

Transaction summary

Payment amount: \$173.50	Date: 10/14/2015
Receipt amount: \$173.50	Batch number: L0025205
	Revenue ID: rev-14692203
Status	Payment method
Acknowledgements: Not acknowledged	Payment method: Check
Receipt preference: Per payment	Check number: 5656
Receipt status: Not received	Check date:
Receipt date:	
Receipt number:	
Post status: Not posted	
Post date: 10/14/2015	
Post process ID:	

Our cash account was debited with the payment and our prior year receivable account 1321 was credited for the amount to relieve.

Details | Benefits | Matching Gifts | Letters | Attributes | Documentation | GL Distributions | Tributes | Lockbox

Transaction history by post date

Account system: Local Council

All dates

10/14/2015
Payment

GL distributions (3)



More

View: All



Apply



Reset

Account	Description	Debit amount	Credit amount	Reference
Pledge				
L662-1-1321-051-00	L662-1-FOSP-PAPL-L66200511-UNR. PAYMENT...		\$173.50	Kuehn-Pledge Payment for t
L662-1-1001-015-00	L662-1-FOSP-CASH-L66200511-UNR. PAYMENT...	\$173.50		Kuehn-Pledge Payment for t



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Special Event – Future Year

- When setting up an event you will put money in this year for next year the event category needs to be FY – “Choice”
- When January 1 rolls around you need to edit your event and change this to just “Choice”



Events

Enter the name of an event

+ Add new ▾

Add an event

General

Name:

Description:

Category:

Sites:

Site

Boy Scouts of America

- ☐ Event is an auction
- ☐ Do not show event on calendar
- ☐ Event allows designations on fees

Copy options

Details

Start date:

Start time:

End date:

End time:

Location information

Location:

Room/Unit:

Capacity:

0

Contact:

? Help

Save

Cancel

You proceed to events to add an event or to copy an event. You drop the category bar to pick your category.



Prepare

Reset filters

Apply filters

			7:30 am L415 2015		6:00 pm L609 2015
			11:00 am L651 Sco		
18	19	20	21	22	23
L532 Oil City Breakfast					
L532 Clarion Breakfast 2015					
L571 Thank You Letters					
		L307 Chieftain			

Enter the name of an event



+ Add new

Add an event

General

Name:

Description:

Category:

Sites:

Auction

Cultivation/Recognition (no revenue)

Distinguished Citizens Dinner

Friends of Scouting (no registration revenue)

Golf

Special Fundraising Event

Sporting Clays

Copy options

FY - Auction

FY - Distinguished Citizens Dinner

FY - Golf

FY - Special Fundraising Event

FY - Sporting Clays

GM Pinewood Derby



Help

Details

Start date:

End date:

Location information

Location:

Room/Unit:

Contact:

Pick future year (FY) with the corresponding category it is. This would be done for an event that will have registrations now but is not happening until next year.

When January 1 rolls around you need to come back and edit this field and change it back to the current year setting.

You process your event revenue in a batch using the correct FY Inbound Channels.



Prepare

The Inbound Channel type (CY/FY/PY) used for new revenue in BCRM should always align with what your Controller considers CY/FY/PY in PeopleSoft.

At the beginning of January, continue using the same BCRM Inbound CY/FY/PY you used in December ... as long as your Controller still considers the recently completed year to be “Current” in PeopleSoft. This is very important to keep CY/FY/PY balances aligned between BCRM and PeopleSoft.

For example, on 1/1/2021, when your Controller still considers “2020” to be “Current”, use:

- PY = 2019 and earlier appeal years pledge payment
- CY = 2020 appeal year
- FY = 2021 appeal year

A few days later, when your Controller “closes” the 2020 fiscal year in PeopleSoft, she also manually transfers all year-end CY receivables to PY (and all year-end FY receivables to CY). When these receivable balances are moved in PeopleSoft, at that point in BCRM you begin using updated Inbound types for new revenue to post to GL.

For example, if your Controller “closes” the 2020 fiscal year in PeopleSoft on 1/8/2021, and now considers 2021 to be the “Current” year, then you start using Inbound types:

- PY = 2020, 2019 and earlier appeal years pledge payments
- CY = 2021 appeal year
- FY = 2022 appeal year



Summary

- Gifts for next year need to be placed into the system using FY inbound channels
- Events need to be tweaked for FY and current year at Jan 2 before additional registrations are added.
- Payment for Prior Year pledges should use PY inbound channels.



Appeal: (307) A21 - 2021 Annual Giving Campaign

Description: 2021 Annual Giving Campaign Start date: 1/1/2021
Business unit: End date: 12/31/2021
Category: Annual Giving (Friends of Scouting) Goal: \$0.00
Report code: 2021 Status: Active
Site: Heart of America Council Membership:

Review all 2021
appeals to ensure all
transactions have a
FY inbound channel
before you close
2020 books.

Revenue Summary Contributions Payments Balances **Revenue Details (Splits)** Revenue Details (Write-offs) Matching Gift Claims Designations Mailings Documentation Mismatch: Appeals? Solicit

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (7) More ▾

Constituent equal to: Transaction equal to: ▾ Application not equal to: ▾ GL Post Status equal to: ▾ GL Post D

T...	Pay M...	GL Post Status	GL Post Date ▲	D...	Balance	Designation	Inbound Channel	Revenue Categ...	Giving Category	BSA Structure
...	Check	Posted	9/14/2020	9...	\$0.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Leadership Event	Council Scoute...
...	Check	Posted	10/27/2020	9...	\$0.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Community	North Star
...	Check	Posted	10/30/2020	9...	\$0.00	30709101 Camp Staff Scholarship - Operating	FY - Project Sales	Temporarily res...	Fdn - Camp St...	Council Scoute...
...	None	Posted	11/10/2020		\$540.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Community	Lone Bear
...	None	Posted	11/10/2020		\$540.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Community	Lone Bear
...	None	Posted	11/10/2020		\$180.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Community	Lone Bear
...	None	Posted	11/10/2020		\$100.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Leadership Event	Lone Bear



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Donor Communications

- Reminders – Add 2021 appeals to selections so you bill new pledges
- Acknowledgements – Add 2021 appeals to selections so you thank new pledges and payments.



Cleaning up Batches

- This will be done in the Uncommitted Batch Tab.
- Uncommitted batches accumulate if you have your filters active
- Need to clear your date filters to see if you have hidden batches
- Leave site filter to all sites
- If you find uncommitted batches, edit the batch
 - If batch contains information, confirm if it has or has not been committed in another batch
 - If batch not needed, delete the batch
 - If batch is empty, use or delete the batch.
- Your goal should be to not have open batches.



Sample from production

Sample with filter engaged

Uncommitted batches (1) + Add 🔍 Batch search 📅 More ▾

Date range: Last 7 days ▾ Sites: All sites ▾ ☐ Show only batches with exceptions 🟢 Apply 🔄 Reset

+ Columns ▾ 🗑️ Clear all filters

Batch number	Owner	Date added ▲	Description
🟢 L0532354	Shondell Williams BSA-440	11/19/2019	

Sample with no filter engaged

Uncommitted batches (3) + Add 🔍 Batch search 📅 More ▾

Date range: ▾ Sites: All sites ▾ ☐ Show only batches with exceptions 🟢 Apply 🔄 Reset

+ Columns ▾ 🗑️ Clear all filters

Batch number	Owner	Date added ▲	Description
🟢 L0375706x2	Shondell Williams BSA-440	1/3/2019	Exceptions from batch L0375706x1
🟢 L0447530x4	Shondell Williams BSA-440	5/2/2019	Exceptions from batch L0447530x3
🟢 L0532354	Shondell Williams BSA-440	11/19/2019	



Next Year



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Create 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:	

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.

← 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
--	-------	------	----	----------



Add an Appeal

Blackbaud CRM™ P Application features ▾ Feature (e.g. Information Library) 🔍 + Add new ▾

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Prospects ▾ Foundations ▾ Fundraising ▾ Analysis ▾

Marketing and Communications

Appeal

- Appeal search
- Add an appeal
- Appeal mailings
- Appeal progress results

Reports

- BSA Appeal Organization Structure Report
- Appeal profile
- Appeal performance

Acquisition and segmentation

- Acquisition lists
- Segments
- White mail segments
- Selections

Add an appeal

Name: Nation's Best Fundraising Appeal 1

Description: provide description 2

Split evenly Split fully

Category: Other Support 3

Report code: 2020 4

Site: 5

Start date: 1/1/2020 6

End date: 12/31/2020

Goal: \$100,000.00 7

? Help Save Cancel

Name format options



Assign Designation & Prior Appeal (if one)

Blackbaud CRM™ T Application features ▾ Feature (e.g. Information Library) 🔍 + Add new ▾ 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
---------------------	--------------------	----------------------	---------------------	-----------------------

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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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.



Designations

- Only request new designations for new
- The appeal may change but the designation stays the same



Contribution Statements

- Due to donors by last day of January
- There is work we must do to the template after January 1
- Contribution statement template will be ready by January 15, 2021



Tweaking BSAFR



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Tweaking BSAFR

- This is the best time of the year to review your BSAFR setup
- Run query – LXXX BSAFR Groups
- Review Output
- Determine if group names need changes



Tweaking BSAFR

- Cleanup which can be done by Member Care
 - Switching group from one structure to another
 - Changing giving category of group
 - Change parent group
 - Change reporting level – unit, district, subdistrict, council
 - Changing revenue history



Consider using conventional BSA structure

- Council
 - Executive Board chair
 - Special Gifts chair
 - Leadership chair
- District
 - Family chair
 - Community chair



Next Forum

December 16, 2020

10:00 am or 2:00 pm CST





Resources

Council Business Practices

Council Fiscal Management and Training

Journey to Excellence

Council Funding and Finance

Financial Planning

Funding The Council

Council Administration

Local Council Financial Audits

Back Office

[Council Office Procedures](#)

[Council Stewardship Policies](#)

[FASB Accounting Changes and the BSA](#) – new for 2018

[Fiscal Management Procedures for Stewardship](#)

[Fiscal Policies And Procedures for BSA Units](#) – Revised November 2019

[Interpreting Financial Statements](#)

[Life Insurance Imputed Calculation](#)

[Local Council Accounting Manual](#)

[Local Council Financial Audit Tools](#)

[New York Conflict of Interest Policy](#)—Updated March 2014

[New York Conflict of Interest Policy](#)—March 2014

[Records Retention Policy](#)– Updated January 2019

Presentation: [Fringe Benefits: Employer-Provided Vehicles and Group-Term Life Insurance](#) –
Uploaded April 2014

[Record Camp Card Transactions—PeopleSoft](#)

[Record Product Sales](#) in General Ledger

[Time Study Forms](#)

[Blackbaud CRM User Forum](#)

[PeopleSoft Support](#)

- [Accounts Payable](#)
- [Asset Management](#)
- [Audit Adjustments](#)



Questions & Answers



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