

# CRM User Forum

December 16, 2020

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# Objectives

- Closing the Year 2020
  - Using proper “inbound channel”
  - Clearing out old batches
  - Write offs and receivables
  - Year-end checklist
- Matching Gifts & how to process in CRM



# PREPARING FOR YEAR-END CLOSE



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# CRM – Year-End Close

- Run the Pledges Aging Receivable report
  - Ask management to review

Global Pledge Write-off should be done at the beginning of next year.

Write off the Pledges from previous years.



# Reports To Run

- Pull year end reports the morning after entry for end of year.
  - Pledge Receivable Aging Report
  - Appeal Progress by Category
  - Appeal Progress by Solicitor
  - BSA Summary of Appeals



# CRM – Year-End Close

- Getting ready for New Year in CRM
  - Appeals for 2021 set up for receiving funds Use FY inbound channels to ensure funds are going to Future Year

**Details** 

|   |  |
|---|--|
| Original amount: \$2,000.00               | Effort:                                |
| Finder number:                            | Appeal: (999) 2021 Friends of Scouting |
| Source code:                              |  |
| Inbound channel: FY - Friends of Scouting |  |
| Revenue reference:                        |  |

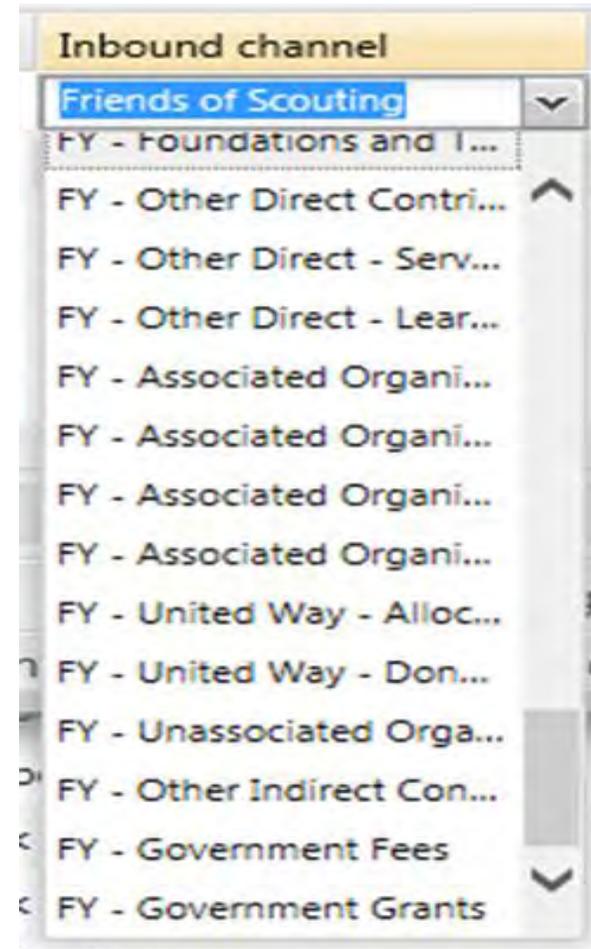
**Application details** 

**Donation - \$2,000.00**  Go to revenue  Edit

|                      |                                       |
|----------------------|---------------------------------------|
| Designation:         | 52700001 Ebensburg Office - Operating |
| Campaign:            |                                       |
| Revenue category:    | Temporarily restricted by donor       |
| Solicitors:          |                                       |
| Recognition credits: | Terry Wartens (\$2,000.00)            |

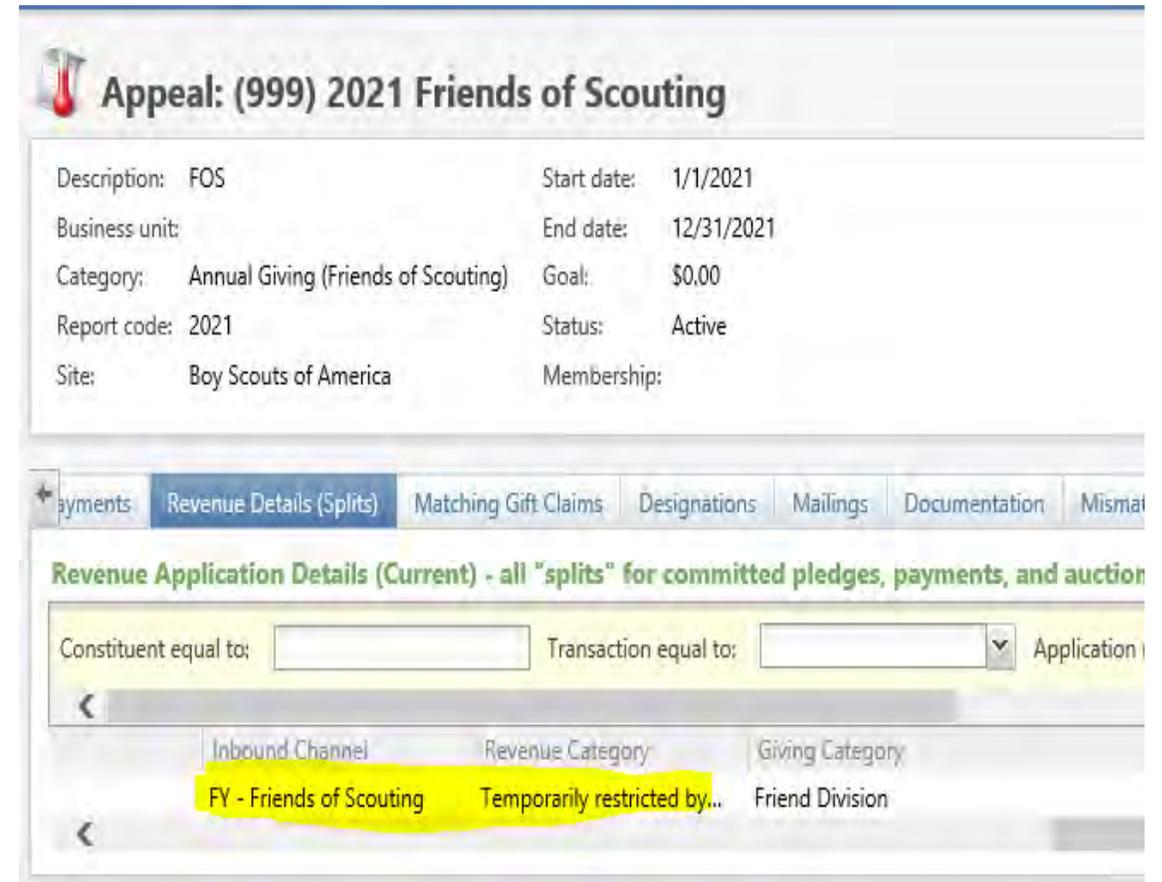


# FY – Inbound Channels



# Appeal Progress Results

- Before closing December - Under “Appeal Progress Results” check transaction on future year appeals to verify FY inbound channels have been used



# MATCHING GIFTS PROCESS



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# Matching Gifts Set Up

- Update the organization record
- Identify the employees
- Update the employee / employer relationship on the individual
- Demonstrate contribution process



Home | **Constituents** | Marketing and Communications | Revenue | Events | Memberships | Prospects | Volunteers | Foundations | Sponsorship

**Shortcuts**

- Add this page to shortcuts
- Manage my shortcuts
- Query
- John D. Kuehn
- Application Users
- GL account system import - Import
- Giving Category Table Entries
- BSA Structure Table Entries
- Business Processes
- Data Tune-Up
- Planned Gift Detail
- GL Accounts on revenue (counts) - Export
- netbsa\mocotten - Application User
- PCI Contribution Imports - Import
- L635 One Caused ERB - Import

**Recent searches**

- Designation search
- Appeal progress results

**Home** Customize

**Constituents**

- Constituent search**
- Organization search

**Revenue**

- Batch entry

**Events**

- Add an auction item

**Prospects**

- Manage research lists
- Add a giving prospect
- My fundraiser page
- Fundraisers and steps
- Prospects
- Prospect analysis

**Fundraising**

- Add purpose and designation
- Designation search

**Administration**

- General ledger setup
- Application users
- Global changes

We will start with a constituent search to find a company that needs to be updated for matching its employees' contributions.



# Constituent Search by Name or Lookup ID

Name/Lookup ID:

Last/Org/Group name:

First name:

Middle name:

Suffix:

Lookup ID:

Sites:

Email address:

Match all criteria exactly

Show advanced search options

Address:

City:

State:

ZIP:

Phone number:

After clicking the search for constituent link, I conducted a search for Sprint in Overland Park, KS. I chose the one in red to demonstrate with.

**Results (70 records found)**

| Lookup ID  | Name   | Constitu... | Address     | City        | State  | ZIP        | Email ad... | Middle n... | Suffix | Phone |
|------------|--------|-------------|-------------|-------------|--------|------------|-------------|-------------|--------|-------|
| 8-12256... | Sprint | Organiza... | PO Box 7... | Overland... | Kansas | 66207-0... |             |             |        |       |
| 8-12256... | Sprint | Organiza... | 6160 Spr... | Overland... | Kansas | 66211      |             |             |        |       |
| 8-12257... | Sprint | Organiza... | 6550 Spr... | Overland... | Kansas | 66251-6... |             |             |        |       |
| 8-12835... | Sprint | Organiza... | 5454 W ...  | Overland... | Kansas | 66211-1... |             |             |        |       |
| 8-12869... | Sprint | Organiza... | 6391 Spr... | Overland... | Kansas | 66251-6... |             |             |        |       |
| 8-13274... | Sprint | Organiza... | 6050 Spr... | Overland... | Kansas | 66209      |             |             |        |       |

## Sprint

Organization      **Lookup ID: 8-13274150**

**Constituencies:** Relation Only

↓ Show more

Contact   **Organization Info**   Relationships   Security   Revenue   History   Attributes   Documentation and Interactions   Memberships   Comm

Expand all   Collapse all

✖ **Addresses** (1)   + Add   Filters   More ▾

| Contact information                      | Type               | Primary | Do not |
|--|--------------------|---------|--------|
| 6050 Sprint Pkwy Overland Park, KS 66209 | Location (Current) | Yes     |        |

✖ **Phone numbers** (0)   + Add

✖ **Email addresses** (0)   + Add

✖ **Social media accounts** (0)   + Add   More ▾

| Contact information | Service |
|---------------------|---------|
|---------------------|---------|

By clicking the link in the search window, it opened the home page for the organization. We are going to take a quick look at those individuals related and the Organization info.

 **Sprint**

**Organization**      **Lookup ID: 8-13274150**

**Constituencies:** Relation Only

↓ Show more

The Relationship tab show me who is currently working for this company. This info imported over from ScoutNET. You can add new employs here or from the individual constituent record.

Relationships | Relationship Tree

**Relationships (7)**    + Add individual    + Add organization    + Add group/household    | Filters | More ▾

Relationship type:      Only display current relationships     Only display contacts

Show relationships with:  Individuals     Organizations     Groups     Households    | Apply    Reset

| Name ▲  | Constituent type | Type | Relationship | Start date | End date |
|---|------------------|------|--------------|------------|----------|
|  Dondi W. Reed         | Individual       |      | Employee     | 6/1/2007   |          |
|  George A. Selleck     | Individual       |      | Employee     | 4/23/2004  |          |
|  Guy E. Jacobs         | Individual       |      | Employee     | 5/1/2007   |          |
|  James A. Clark        | Individual       |      | Employee     | 7/31/2002  |          |
|  Jimmy W. Nowell       | Individual       |      | Employee     | 6/3/2003   |          |
|  Kenneth J. Fisher     | Individual       |      | Employee     | 7/3/2003   |          |
|  Zachery J. Gillihan | Individual       |      | Employee     | 11/22/2005 |          |

**Employment history (5)**    + Add    | Filters | More ▾

Include inactive    | Apply    Reset

| Name ▲  | Job title | Job category     | Career level | Schedule | Department | Division |
|---|-----------|------------------|--------------|----------|------------|----------|
|  George A. Selleck |           | Managers and ... |              |          |            |          |



# Sprint

Organization Lookup ID: 8-13274150

Constituencies: Relation Only

Show more



Expand all Collapse all

Organization details Edit Mark inactive

Name: Sprint  
Industry: Business  
Website:  
Number of employees: 0  
Number of subsidiaries: 0



Aliases (0) Add

Demographics Edit

Matching gift conditions Add

Alternate lookup IDs (1) Add More

| Type          | Lookup ID |
|---------------|-----------|
| Legacy Org Id | 100314203 |

The Organization info page is where we begin our record update. We need to add a Matching Gift Condition to the record. I scroll to the lower section of the page and click the add button.



**Add matching gift condition** [X]

|                  |                             |                     |        |
|------------------|-----------------------------|---------------------|--------|
| Type:            | [ ]                         | Min match per gift: | \$0.00 |
| Revenue type:    | Gifts                       | Max match per gift: | \$0.00 |
| Matching factor: | 0.00                        | Max match per year: | \$0.00 |
| Matching amount: | Tax deductible portion only | Max match total:    | \$0.00 |

Apply to:

| Relationship type | Job schedule | Career level |
|-------------------|--------------|--------------|
| [ ]               |              |              |

Notes:

[ ]

Help [ Save ] [ Cancel ]

This opens the “Add matching gift condition” form. The form request information that we may not have. You can head to link on the next page.



# Matching Gift Criteria

- [https://www.matchinggifts.com/bbscouting\\_iframe](https://www.matchinggifts.com/bbscouting_iframe)
- Type in the name of company you are looking for.

---



# Example output

## Matching Gift Details for Sprint Nextel Corp (as of 4/7/2010)

**Min. Gift:** 25.00  
**Max. per Gift:** 5,000.00  
**Max. per Employee:** 5,000.00  
**Website:** [Go To...](#)

**Match Ratio:** 1:1  
**Deadline:**  
**Guidelines:**

**Notes:** Through direct grants and a robust matching gifts program for employees and retirees, the Foundation creatively and thoughtfully delivers Sprint's commitment to championing our communities. No Athletics

### For more information, please contact:

**Name:** Mrs. Janet Verstraete  
**Position:** Grants Administrator  
**Phone Number:** (913) 794-4402  
**Fax:** 913-624-3396  
**E-mail:** [janet.verstraete@sprint.com](mailto:janet.verstraete@sprint.com)

They system will bring up those companies that meet your search. You click the hyperlink and the company info for matching will populate.



### Add matching gift condition

Type: Matching Gift Condition      Min match per gift: \$25.00

Revenue type: Gifts      Max match per gift: \$5,000.00

Matching factor: 1.00      Max match per year: \$5,000.00

Matching amount: Full gift amount      Max match total: \$0.00

Apply to:

| Relationship type | Job schedule | Career level |
|-------------------|--------------|--------------|
| Employee          |              |              |

Notes:

Help      Save      Cancel

Take the info found and plug it into the criteria. The relationship type will be Employee. I left the "Job schedule" and "Career level" default to blank. Some companies match full time and part time differently. Then click Save.



# Sprint

**Organization**      **Lookup ID: 8-13274150**

**Constituencies:** Relation Only

Show more

Expand all   Collapse all

Organization details   Edit   Mark inactive

Aliases (0)   Add

Demographics   Edit

**Matching gift conditions**   Add

**Matching Gift Condition**   Edit   Delete

|                     |            |                     |                  |
|---------------------|------------|---------------------|------------------|
| Matching factor:    | 1.00       | Max match per year: | \$5,000.00       |
| Min match per gift: | \$25.00    | Max match total:    | No maximum       |
| Max match per gift: | \$5,000.00 | Matching amount:    | Full gift amount |
| Revenue type:       | Gift       |                     |                  |
| Applies to:         | Employee   |                     |                  |
| Notes:              |            |                     |                  |

On the right you can see the inserted condition. You can have more than one condition. Some companies will match their company officers' gifts with a different ratio than what they do for regular employees. We will now head back to the Relationships tab.



 **Sprint**

**Organization**      **Lookup ID: 8-13274150**

**Constituencies:** Relation Only

 Show more

On this tab, we are going to make a quick edit of our employees to activate the matching condition we just applied to the record. This change can be made here or on the individual constituent record. All employees are here so I will just go down the list. I will click the Chevron next to their names.

Contact   Organization Info   **Relationships**   Security   Revenue   History

Relationships   Relationship Tree

**Relationships (7)**    Add individual    Add organization    Add group/household    Filters    More

Relationship type:     Only display current relationships    Only display contacts    Apply    Reset

Show relationships with:  Individuals    Organizations    Groups    Households

| Name  | Constituent type | Type | Relationship | Start date | End date |
|---|------------------|------|--------------|------------|----------|
|  Dondi W. Reed         | Individual       |      | Employee     | 6/1/2007   |          |
|  George A. Selleck     | Individual       |      | Employee     | 4/23/2004  |          |
|  Guy E. Jacobs       | Individual       |      | Employee     | 5/1/2007   |          |
|  James A. Clark      | Individual       |      | Employee     | 7/31/2002  |          |
|  Jimmy W. Nowell     | Individual       |      | Employee     | 6/3/2003   |          |
|  Kenneth J. Fisher   | Individual       |      | Employee     | 7/3/2003   |          |
|  Zachery J. Gillihan | Individual       |      | Employee     | 11/22/2005 |          |

**Employment history (5)**    Add    Filters    More

Include inactive    Apply    Reset



**Prepare**

 **Sprint**

**Organization**      **Lookup ID: 8-13274150**

**Constituencies:** Relation Only

↓ Show more

I will use the edit button on each record to open it up to make my edit.

**Relationships (7)**   [+ Add individual](#)   [+ Add organization](#)   [+ Add group/household](#)   [Filters](#)   [More ▾](#)

Relationship type:  ▾    Only display current relationships    Only display contacts

Show relationships with:  Individuals    Organizations    Groups    Households   [Apply](#)   [Reset](#)

| Name ▲ | Constituent type | Type | Relationship | Start date | End date |
|--------|------------------|------|--------------|------------|----------|
|--------|------------------|------|--------------|------------|----------|

**Individual**

|  |            |                 |          |           |  |
|--|------------|-----------------|----------|-----------|--|
|  Dondi W. Reed  | Individual | Employee        |          | 6/1/2007  |  |
|   Edit |            |                 |          |           |  |
| <b>Relationship</b>  |            | <b>Comments</b> |          |           |  |
| Sprint is the:   | Employer   | Start date:     | 6/1/2007 |           |  |
| Dondi W. Reed is the:  | Employee   | End date:       |          |           |  |
|  George A. Selleck  | Individual | Employee        |          | 4/23/2004 |  |
|  Guy E. Jacobs  | Individual | Employee        |          | 5/1/2007  |  |
|  James A. Clark   | Individual | Employee        |          | 7/31/2002 |  |



Home - Constituents - Marketing and Communications - Revenue - Events - Memberships - Prospects - Volunteers - Foundations - Sponsorship - Fundraising - Treasury

### Sprint

Organization

Constituencies: Relation

Show more

Contact Organization

Relationships

Relationships (7)

Relationship type: Em

Show relationships with:

Name

Individual

Dondi W. Reed

Edit

Relationship

Sprint is the:

Dondi W. Reed is the: Employee End date:

|                   |            |          |           |
|-------------------|------------|----------|-----------|
| George A. Selleck | Individual | Employee | 4/23/2004 |
| Guy E. Jacobs     | Individual | Employee | 5/1/2007  |
| James A. Clark    | Individual | Employee | 7/31/2002 |

#### Edit relationship

Relationship information | Contact information

Related constituent: Dondi W. Reed

**Relationship**

Sprint is the: Employer

Dondi W. Reed is the: Employee

Start date: 6/1/2007

End date: mm/dd/yyyy

**General**

This is the primary business for Dondi W. Reed

The organization will match contributions for this relationship

Help

**Recognition credits**

Apply to Sprint for revenue from Dondi W. Reed

Recognition credit type: [dropdown]

Recognition credit match percent: 100.00

Apply to Dondi W. Reed for revenue from Sprint

Recognition [dropdown]

Recognition [dropdown]

**Comments**

[text area]

The feature I am turning on is the check box in front of the phrase "The organization will match contributions for this relationship". When I set up the condition, I selected the employee relationship or confirm it.



Show more

Contact Organization Info Relationships Security Revenue History Attributes Doc

Relationships Relationship Tree

Relationships (7) + Add individual + Add organization + Add group/household Filters

Relationship type: Employee Only display current relationships Only display

Show relationships with:  Individuals  Organizations  Groups  Households

Apply Reset

| Name | Constituent type | Type | Relationship | Start date | End date |
|------|------------------|------|--------------|------------|----------|
|------|------------------|------|--------------|------------|----------|

Individual

|                       |            |  |          |            |  |
|-----------------------|------------|--|----------|------------|--|
| ⊖ Dondi W. Reed       | Individual |  | Employee | 6/1/2007   |  |
| ⊖ George A. Selleck   | Individual |  | Employee | 4/23/2004  |  |
| ⊖ Guy E. Jacobs       | Individual |  | Employee | 5/1/2007   |  |
| ⊖ James A. Clark      | Individual |  | Employee | 7/31/2002  |  |
| ⊖ Jimmy W. Nowell     | Individual |  | Employee | 6/3/2003   |  |
| ⊖ Kenneth J. Fisher   | Individual |  | Employee | 7/3/2003   |  |
| ⊕ Zachery J. Gillihan | Individual |  | Employee | 11/22/2005 |  |

 Edit

Relationship

Sprint is the: Employer Start date: 11/22/2005  
Zachery J. Gillihan is the: Employee End date:

Employment information

Job title: Industry: Business  
Category: Managers and Administrators, All Other Start date: 11/22/2005  
Career level: End date:

Comments

I repeated that process for all employees on the organization. I then proceeded to create a revenue batch under the Revenue functional area to demonstrate how the system works.



## Batch L0525040

Main

Revenue

|       |                |        |               |      |             |            |                  |  |                               |                         |
|-------|----------------|--------|---------------|------|-------------|------------|------------------|--|-------------------------------|-------------------------|
| Batch |                |        | Constituent   |      | Constituent |            | Configuration    |  | Processes                     |                         |
|       |                |        |               |      |             |            |                  | <input checked="" type="checkbox"/> Validate |                               | Update projected totals |
| Save  | Save and close | Export | Solicit codes | Edit | Go to       | Properties | Customize fields | Update status                                | Validate addresses (all rows) |                         |

### Properties

|   | Constituent         | Lookup ID  | Group ID      | Amount   | Receipt... | Date      | GL post date | Revenue type | Aj  |
|---|---------------------|------------|---------------|----------|------------|-----------|--------------|--------------|-----|
| 1 | Dondi W. Reed       | 8-14779091 | Pack 3149 ... | \$100.00 | \$100.00   | 10/6/2020 | 10/6/2020    | Payment      | Dor |
| 2 | George A. Selleck   | 8-13821920 | Pack 3149 ... | \$50.00  | \$50.00    | 10/6/2020 | 10/6/2020    | Payment      | Dor |
| 3 | Guy E. Jacobs       | 8-13358428 | Pack 3149 ... | \$75.00  | \$75.00    | 10/6/2020 | 10/6/2020    | Payment      | Dor |
| 4 | James A. Clark      | 8-13274151 | Pack 3149 ... | \$200.00 | \$200.00   | 10/6/2020 | 10/6/2020    | Payment      | Dor |
| 5 | Jimmy W. Nowell     | 8-14230421 | Pack 3149 ... | \$10.00  | \$10.00    | 10/6/2020 | 10/6/2020    | Payment      | Dor |
| 6 | Kenneth J. Fisher   | 8-13219518 | Pack 3149 ... | \$25.00  | \$25.00    | 10/6/2020 | 10/6/2020    | Payment      | Dor |
| 7 | Zachery J. Gillihan | 8-14625382 | Pack 3149 ... | \$80.00  | \$80.00    | 10/6/2020 | 10/6/2020    | Payment      | Dor |
| * |                     |            |               |          |            |           |              |              |     |

Let's pretend that all these individuals are members of the same unit and gave money at the family presentation. I plug in their contributions in an LC Cash Check batch. I then updated my projected totals and validated and committed my batch. Note the amounts. They range from \$10 to \$200.



Prepare

Reports

View control report

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query
- John D. Kuehn
- Application Users
- GL account system import - Import
- Giving Category Table Entries
- BSA Structure Table Entries
- Business Processes
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- Planned Gift Detail
- GL Accounts on revenue (counts) - Export
- netbsa\mocotten - Application User
- PCI Contribution Imports - Import
- L635 One Caused ERB - Import

Recent searches



Batch entry  
**Batch L0525040**

**Batch commit process parameters**

Batch number: L0525040

Validate batch before committing: Yes

Check for duplicate constituents: Yes

Delete batch after committing: No

Create exception batch: Yes

Exception batch number: L0525040x1

Create control report: Yes

Create output selection: No

Output selection name:

Overwrite existing selection: No

Here is a quick screen shot of my batch validation. It completed and committed the seven records.

**Batch commit status**

Status: Completed

Status message: Completed

|                                |                                   |
|--------------------------------|-----------------------------------|
| Started by: netbsa\jkuehn      | Server name: D2SBBISEC10BV        |
| Started: 10/6/2020 12:54:37 PM | Total records processed: 7        |
| Ended: 10/6/2020 12:55:35 PM   | Number of exceptions: 0           |
| Duration: 58 seconds           | Records successfully processed: 7 |



## Revenue

### Transactions

-  Transaction search
-  Batch entry
-  Batch search
-  Add a pledge
-  Add a payment
-  Add a recurring gift
-  Enter membership dues
-  Add a membership

### Configuration

-  Blackbaud Payment Service merchant accounts
-  Default gift fees
-  Gift-in-kind appraisal settings
-  Lockboxes
-  MatchFinder Online integration
-  Matching gift preferences
-  Pledge overpayment options
-  Pledge subtypes
-  Reason codes
-  Recognition settings
-  Recurring gift settings
-  Revenue categories
-  Reporting filters

### Processing

-  Post revenue to GL
-  Global pledge write-off
-  EFT
-  Generate revenue update batch

### Reports

-  Account distribution
-  Adjusted revenue
-  Giving activity
-  Giving detail
-  Giving detail group/household
-  Lockbox reconciliation
-  Giving dynamics
-  Matching gift claim summary
-  Pledge receivables report
-  Projected income
-  Recognition credits
-  Reconcile deposits
-  Recurring gift missed payments

### Manage matching gifts

-  Reconcile matching gifts
-  Search MatchFinder Online
-  Generate MatchFinder updates
-  Clear matching gift claims

Now pop over to the Revenue functional area and look at the “Matching gifts claim summary” to review what claims are in the system.





## Matching Gift Claim Summary

Constituent query: L307 All Constituents (Ad-hoc Q)

Date: This Month from: 10/1/2020 to:

1 of 1 Find | Next

### Matching Gift Claim Summary

Selection: L307 All Constituents (Ad-hoc Query)

Date range: This Month

|                                   |          |                               |          |                                |  |
|-----------------------------------|----------|-------------------------------|----------|--------------------------------|--|
| <b>Total matched payments:</b>    | \$605.00 | <b>Total MG claim amount:</b> | \$605.00 | <b>Total MG claim balance:</b> |  |
| <b>Total number of MG claims:</b> | 8        | <b>Total paid:</b>            | \$0.00   |                                |  |

| Organization<br>Constituent  | Matched<br>Payments | Total MG<br>Claims | MG Claim<br>Amount | Paid   | MG<br>E |
|--|---------------------|--------------------|--------------------|--------|---------|
| <input checked="" type="checkbox"/> Sprint                             | \$530.00            | 6                  | \$530.00           | \$0.00 |         |
| <a href="#">James A. Clark</a>   | \$200.00            | 1                  | \$200.00           | \$0.00 |         |
| <a href="#">Kenneth J. Fisher</a>                                      | \$25.00             | 1                  | \$25.00            | \$0.00 |         |
| <a href="#">Zachery J. Gillihan</a>                                    | \$80.00             | 1                  | \$80.00            | \$0.00 |         |
| <a href="#">Guy E. Jacobs</a>  | \$75.00             | 1                  | \$75.00            | \$0.00 |         |
| <a href="#">Dondi W. Reed</a>  | \$100.00            | 1                  | \$100.00           | \$0.00 |         |
| <a href="#">George A. Selleck</a>                                      | \$50.00             | 1                  | \$50.00            | \$0.00 |         |
| <input checked="" type="checkbox"/> Sprint Foundation - Matching Gifts | \$75.00             | 2                  | \$75.00            | \$0.00 |         |
| <a href="#">Kenneth J. Fisher</a>                                      | \$25.00             | 1                  | \$25.00            | \$0.00 |         |
| <a href="#">George A. Selleck</a>                                      | \$50.00             | 1                  | \$50.00            | \$0.00 |         |

I populate my constituent query with my council's constituent selection to bring up those that relate to my council. Here I have 6 donors that have potential matching gifts. I put in 7 donations, but the \$10 donation did not meet the qualifications to be matched so it does not appear.



**Batch L0525041**

Main **Revenue**

Payment    Pledge & recurring gift    Credit card reader    Revenue details    Note

Apply    Edit installments    Capture card info    Tributes    Matching gifts    Add note

Split designations    Benefits    Solicitors    Delete note

Payment    Recognitions    Business units

Properties

|   | Constituent       | Lookup ID  | Group ID | Amount   | Receipt... | Date      | GL post date | Deposit Refer... | Revenue type | Applicati |
|---|-------------------|------------|----------|----------|------------|-----------|--------------|------------------|--------------|-----------|
| 1 | Sprint Foundation | 8-12175648 |          | \$530.00 | \$530.00   | 10/6/2020 | 10/6/2020    |                  | Payment      | Donation  |

Because the employees matched fill out their matching notice on-line at work, we get a check from the Sprint Foundation telling us which gifts are matched. The money needs to be recorded under the entity that donated it. The employees work for Sprint and not the Sprint Foundation. I next click the Revenue Tab.

**If the check is to satisfy more than one claim attached to different appeals, structure, giving categories or groups break the check into multiple lines.**



Batch L0525041

Main Revenue

Payment Apply

### Apply to commitments for Sprint Foundation

Payment amount: \$530.00    Apply by:  Amount  
Unapplied amount: \$530.00     Percent

Search:

Date due: From:  To:

| Application          | Constituent | Description | Balance | Date due | Amount due | Applied amou... | Applied pe |
|----------------------|-------------|-------------|---------|----------|------------|-----------------|------------|
| No records displayed |             |             |         |          |            |                 |            |

Page 1 of 1

| Additional applications | Applied amount | Applied percent | Designation | Other type | Opportu... | Revenue ... | Campaig... |
|-------------------------|----------------|-----------------|-------------|------------|------------|-------------|------------|
| *                       |                |                 |             |            |            |             |            |

Help

On the revenue tab no claims show up for the Sprint Foundation. I need to click "Load Commitments" and find the company that the employees work for. This is where the claims are located.

Barch L0525041

Constituent (with commitment details) Search

Last/Org/Group name:  Address:

First name:  City:

Lookup ID:  State:

Match all criteria exactly ZIP/Postal code:

Show advanced search options

**Results (1 record found)**

| Lookup ID  | Name   | Constituent ty... | Address           | City          | State  | ZIP/Postal code | Commitments       |
|------------|--------|-------------------|-------------------|---------------|--------|-----------------|-------------------|
| 8-13274150 | Sprint | Organization      | 6050 Sprint Pk... | Overland Park | Kansas | 66209           | Matching Gift ... |

Select Cancel

I can now search for the company that has the employees that have the claims. I wrote down the Lookup ID earlier. Select the constituent.



Batch L0525041

Main Revenue

Payment **Apply to commitments for Sprint Foundation**

Payment amount:  Apply by:  Amount  Percent

Unapplied amount: \$530.00

Search:

Date due: From:  To:

+ Add Edit Load commitments Auto apply Apply to row

| Application         | Constituent                    | Description                         | Balance  | Date due  | Amount due | Applied amou... | Applied pe |
|---------------------|--------------------------------|-------------------------------------|----------|-----------|------------|-----------------|------------|
| Matching gift claim | Sprint - Guy E. Jacobs (8-...  | 30708011 Invest in Charactor-Cou... | \$75.00  | 10/6/2020 | \$75.00    | \$0.00          |            |
| Matching gift claim | Sprint - Zachery J. Gilliha... | 30708011 Invest in Charactor-Cou... | \$80.00  | 10/6/2020 | \$80.00    | \$0.00          |            |
| Matching gift claim | Sprint - George A. Sellec...   | 30708011 Invest in Charactor-Cou... | \$50.00  | 10/6/2020 | \$50.00    | \$0.00          |            |
| Matching gift claim | Sprint - James A. Clark (8...  | 30708011 Invest in Charactor-Cou... | \$200.00 | 10/6/2020 | \$200.00   | \$0.00          |            |
| Matching gift claim | Sprint - Dondi W. Reed (...)   | 30708011 Invest in Charactor-Cou... | \$100.00 | 10/6/2020 | \$100.00   | \$0.00          |            |
| Matching gift claim | Sprint - Kenneth J. Fisher...  | 30708011 Invest in Charactor-Cou... | \$25.00  | 10/6/2020 | \$25.00    | \$0.00          |            |

Page 1 of 1

Additional applications Applied amount Applied pe

\*

Help

Page 1 of 1

This will load in the matching gift claims that are under Sprint. If it was a check from the corporation, then these would have auto populated under Sprint. We had to load them so they can be cleared using the payment from the Sprint Foundation.



Batch L0525041

Main Revenue

Payment

Apply

Properties

### Apply to commitments for Sprint Foundation

Payment amount:  Apply by:  Amount  Percent

Unapplied amount: \$0.00

Search:

Date due: From:  To:

+ Add Edit Load commitments Auto apply Apply to row

| Application         | Constituent                    | Description                         | Balance  | Date due  | Amount due | Applied amou... | Applied pe |
|---------------------|--------------------------------|-------------------------------------|----------|-----------|------------|-----------------|------------|
| Matching gift claim | Sprint - Guy E. Jacobs (8-...  | 30708011 Invest in Charactor-Cou... | \$75.00  | 10/6/2020 | \$75.00    | \$75.00         |            |
| Matching gift claim | Sprint - Zachery J. Gilliha... | 30708011 Invest in Charactor-Cou... | \$80.00  | 10/6/2020 | \$80.00    | \$80.00         |            |
| Matching gift claim | Sprint - George A. Sellec...   | 30708011 Invest in Charactor-Cou... | \$50.00  | 10/6/2020 | \$50.00    | \$50.00         |            |
| Matching gift claim | Sprint - James A. Clark (8-... | 30708011 Invest in Charactor-Cou... | \$200.00 | 10/6/2020 | \$200.00   | \$200.00        |            |
| Matching gift claim | Sprint - Dondi W. Reed (...)   | 30708011 Invest in Charactor-Cou... | \$100.00 | 10/6/2020 | \$100.00   | \$100.00        |            |
| Matching gift claim | Sprint - Kenneth J. Fisher...  | 30708011 Invest in Charactor-Cou... | \$25.00  | 10/6/2020 | \$25.00    | \$25.00         |            |

Page 1 of 1

Displaying records 1 - 6 of 6

| Additional applications | Applied amount | Applied percent | Designation | Other type | Opportu... | Revenue ... | Campaig... |
|-------------------------|----------------|-----------------|-------------|------------|------------|-------------|------------|
| *                       |                |                 |             |            |            |             |            |

Help

OK Cancel

Owner: John Kuehn BSA-BSA Current #: 1 Projected #: 0 Current amount: \$530.00 Projected amount: \$0.00

We now apply the monies to each of the Matching gift claims and click OK.





## Batch commit process parameters

Batch number: L0525041  
Validate batch before committing: Yes  
Check for duplicate constituents: Yes  
Delete batch after committing: No  
Create exception batch: Yes  
Exception batch number: L0525041x1  
Create control report: Yes  
Create output selection: No  
Output selection name:  
Overwrite existing selection: No

I then processed my batch with the check from the Sprint Foundation. I had success with the process.

## Batch commit status

Status:  Completed  
Status message: Completed

|             |                      |                                 |               |
|-------------|----------------------|---------------------------------|---------------|
| Started by: | netbsajkuehn         | Server name:                    | D2SBBISEC10BV |
| Started:    | 10/6/2020 1:37:43 PM | Total records processed:        | 1             |
| Ended:      | 10/6/2020 1:38:09 PM | Number of exceptions:           | 0             |
| Duration:   | 26 seconds           | Records successfully processed: | 1             |



## Revenue

### Transactions

-  Transaction search
-  Batch entry
-  Batch search
-  Add a pledge
-  Add a payment
-  Add a recurring gift
-  Enter membership dues
-  Add a membership

### Configuration

-  Blackbaud Payment Service merchant accounts
-  Default gift fees
-  Gift-in-kind appraisal settings
-  Lockboxes
-  MatchFinder Online integration
-  Matching gift preferences
-  Pledge overpayment options
-  Pledge subtypes
-  Reason codes
-  Recognition settings
-  Recurring gift settings
-  Revenue categories
-  Reporting filters

### Processing

-  Post revenue to GL
-  Global pledge write-off
-  EFT
-  Generate revenue update batch

### Reports

-  Account distribution
-  Adjusted revenue
-  Giving activity
-  Giving detail
-  Giving detail group/household
-  Lockbox reconciliation
-  Giving dynamics
-  Matching gift claim summary
-  Pledge receivables report
-  Projected income
-  Recognition credits
-  Reconcile deposits
-  Recurring gift missed payments

### Manage matching gifts

-  Reconcile matching gifts
-  Search MatchFinder Online
-  Generate MatchFinder updates
-  Clear matching gift claims

Next, I popped back out to the Matching gift claim summary to check out the changes.



The report shows the claims and the amounts that have been paid on the claims.



## Matching Gift Claim Summary

Constituent query:

Date:  from:  to:

1 of 1 Find | Next

### Matching Gift Claim Summary

Selection: L307 Constituents (Ad-hoc Query)

Date range: This Month

|                                   |          |                               |          |                                |         |
|-----------------------------------|----------|-------------------------------|----------|--------------------------------|---------|
| <b>Total matched payments:</b>    | \$605.00 | <b>Total MG claim amount:</b> | \$605.00 | <b>Total MG claim balance:</b> | \$75.00 |
| <b>Total number of MG claims:</b> | 8        | <b>Total paid:</b>            | \$530.00 |                                |         |

| Organization<br>Constituent  | Matched<br>Payments | Total MG<br>Claims | MG Claim<br>Amount | Paid     | MG Claim<br>Balance |
|--|---------------------|--------------------|--------------------|----------|---------------------|
| <input checked="" type="checkbox"/> Sprint                             | \$530.00            | 6                  | \$530.00           | \$530.00 | \$0.00              |
| <a href="#">James A. Clark</a>   | \$200.00            | 1                  | \$200.00           | \$200.00 | \$0.00              |
| <a href="#">Kenneth J. Fisher</a>                                      | \$25.00             | 1                  | \$25.00            | \$25.00  | \$0.00              |
| <a href="#">Zachery J. Gillihan</a>                                    | \$80.00             | 1                  | \$80.00            | \$80.00  | \$0.00              |
| <a href="#">Guy E. Jacobs</a>  | \$75.00             | 1                  | \$75.00            | \$75.00  | \$0.00              |
| <a href="#">Dondi W. Reed</a>  | \$100.00            | 1                  | \$100.00           | \$100.00 | \$0.00              |
| <a href="#">George A. Selleck</a>                                      | \$50.00             | 1                  | \$50.00            | \$50.00  | \$0.00              |
| <input checked="" type="checkbox"/> Sprint Foundation - Matching Gifts | \$75.00             | 2                  | \$75.00            | \$0.00   | \$75.00             |
| <a href="#">Kenneth J. Fisher</a>                                      | \$25.00             | 1                  | \$25.00            | \$0.00   | \$25.00             |
| <a href="#">George A. Selleck</a>                                      | \$50.00             | 1                  | \$50.00            | \$0.00   | \$50.00             |



# Additional Information

- A “Matching gift claim” is created when a person pays their pledge or donate to you.
- A “Matching gift claim” is not created by a pledge. If the system did this, it would be creating a pseudo commitment on a pledge which would be a bad practice. If the first pledge, is unpaid the second would also be unpaid.



# Additional Information

- A “Matching gift claim” does not create GL that moves to PeopleSoft. It is a pseudo commitment that is awaiting confirmation/payment from employer.
- Payment on “Matching gift claims” creates GL when a payment arrives and clears them out.



# Additional Information

If you use the system, it can create a list that you can then create a mailing from to let the donor know that their gift could be matched and that they should act with their employer.



# 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



# Next Forum

January 20, 2021

10:00 am or 2:00 pm CT





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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