

# 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: |                          |         |                                |

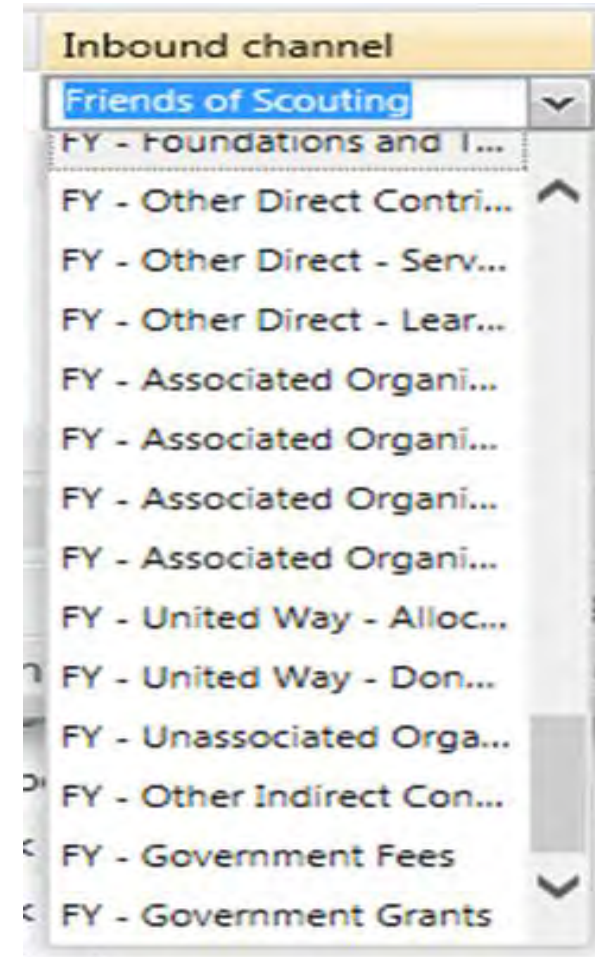
**Application details** 

**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



**Appeal: (999) 2021 Friends of Scouting**

|   |                      |
|---|----------------------|
| Description: FOS                              | 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: Boy Scouts of America                   | Membership:          |

Payments Revenue Details (Splits) Matching Gift Claims Designations Mailings Documentation Mismatch

**Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction**

Constituent equal to:  Transaction equal to:  Application:

| Inbound Channel          | Revenue Category             | Giving Category |
|--------------------------|------------------------------|-----------------|
| FY - Friends of Scouting | Temporarily restricted by... | Friend Division |





# 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:

Address:

City:

State:

ZIP:

Phone number:

Search  
Clear

☐ Match all criteria exactly

Show advanced search options

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      |             |             |        |       |

Help

Select Cancel



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## 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.







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.

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

Relationships Relationship Tree

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

Relationship type: Employee ▾ ☐ Only display current relationships ☐ Only display contacts Apply Reset

Show relationships with: ☒ Individuals ☐ Organizations ☐ Groups ☐ Households

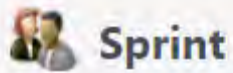
| Name ▴              | Constituent type | Type | Relationship | Start date | End date |
|---------------------|------------------|------|--------------|------------|----------|
| Dondi W. Reed       | Individual       |      | Employee     | 6/1/2007   |          |
| George A. Selleck   | Individual       |      | 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

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





Organization Lookup ID: 8-13274150

Constituencies: Relation Only

↓ Show more

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

Constituencies Organization

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.



Prepare

**Add matching gift condition** [X]

|                  |                                   |                     |                                     |
|------------------|-----------------------------------|---------------------|-------------------------------------|
| Type:            | <input type="text"/>              | Min match per gift: | <input type="text" value="\$0.00"/> |
| Revenue type:    | Gifts                             | Max match per gift: | <input type="text" value="\$0.00"/> |
| Matching factor: | <input type="text" value="0.00"/> | Max match per year: | <input type="text" value="\$0.00"/> |
| Matching amount: | Tax deductible portion only       | Max match total:    | <input type="text" value="\$0.00"/> |

Apply to:

| Relationship type | Job schedule | Career level |
|-------------------|--------------|--------------|
| <div>+</div>      |              |              |

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.

---

|                    |        |
|--------------------|--------|
| sprint corporation | Search |
|--------------------|--------|



# 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.



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**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:

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.

Help Save Cancel





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

**Constituencies:** Relation Only

↓ Show more

[Contact](#) | 
 [Organization Info](#) | 
 [Relationships](#) | 
 [Security](#) | 
 [Revenue](#) | 
 [History](#) | 
 [Attributes](#) | 
 [Documentation and Interactions](#) | 
 [Memberships](#) | 
 [Comments](#)

Constituencies      **Organization**

☒ Expand all   
 ☐ Collapse all

☒ **Organization details**   
 Edit   
 Mark inactive

☒ **Aliases** (0)   
 Add

☒ **Demographics**   
 Edit

☒ **Matching gift conditions**   
 Add   


**Matching Gift Condition**   
 Edit   
 Delete

table
 | 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.



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

 **Sprint**

Organization

Lookup ID: 8-13274150

Constituencies: Relation Only

Show more








Contact | Organization Info | Relationships | Security | Revenue | History

Relationships | Relationship Tree

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

Relationship type: Employee 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 |
|---|------------------|------|--------------|------------|----------|
| 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 |          |

Employment history (5) + Add Filters More

☒ Include inactive Apply Reset

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.





**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 Relationship Tree

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

Relationship type: Employee ▾   ☐ 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

Relationship

Comments

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 |



Prepare

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: ▾

Recognition credit match percent: 100.00

☐ Apply to Dondi W. Reed for revenue from Sprint

Recognition

Recognition

**Comments**

The feature I am turning on is the check box in front of the phrase “The organization will match contribution 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.



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## Batch L0525040

Main

Revenue

Batch



Save



Save and close



Export

Constituent



Solicit codes

Constituent



Edit



Go to

Configuration



Properties



Customize fields

Processes



Validate



Update status



Validate addresses (all rows)



Update projected totals

### 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
-  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



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

### 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             |

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











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## 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 Query)

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

Total matched payments: \$605.00 Total MG claim amount: \$605.00 Total MG claim balance:  
Total number of MG claims: 8 Total paid: \$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.



Prepare

**Batch L0525041**

Main **Revenue**

Payment: Apply

Pledge & recurring gift: Edit installments, Split designations, Payment

Credit card reader: Capture card info

Revenue details: Tributes, Matching gifts, Benefits, Solicitors, Recognitions, Business units

Note: Add note, Delete note

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

Properties

### 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 |
|-------------|-------------|-------------|---------|----------|------------|-----------------|------------|
|-------------|-------------|-------------|---------|----------|------------|-----------------|------------|

Page 1 of 1

No records displayed

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

Help

Constituents window

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: sprint Address: Search

First name: City: overland Park Clear

Lookup ID: 8-13274150 State: KS

☐ 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.



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Batch L0525041

Main Revenue

Payment

Apply

Properties

### 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: \$530.00
Unapplied amount: \$0.00
Apply by: ☒ Amount ☐ Percent

Search: Designation, constituent name, or any amount column
Apply
Reset

Date due: From: mm/dd/yyyy To: mm/dd/yyyy

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

Page 1 of 1

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:     | netbsa\jkuehn        | 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.



Prepare



## Matching Gift Claim Summary

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

Constituent query: L307 Constituents (Ad-hoc Quer

Date: This Month from: 10/1/2020 to: 10/31/2020

1 of 1 Find | Next

### Matching Gift Claim Summary

Selection: L307 Constituents (Ad-hoc Query)

Date range: This Month

Total matched payments: \$605.00 Total MG claim amount: \$605.00 Total MG claim balance: \$75.00

Total number of MG claims: 8 Total paid: \$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



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Resources

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[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](#)

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[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](#) –  
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# Questions & Answers



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