CRM User Forum

February 16, 2022

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Objectives

- Finishing up Year 2021
  - Global write-off process – timing and how-to
  - Reports for the council's 990 & fiscal audit
  - Prior-year payments
  - Beginning of the year GL transactions (PeopleSoft)
- Batch
  - Using Group ID to credit units in FOS appeal
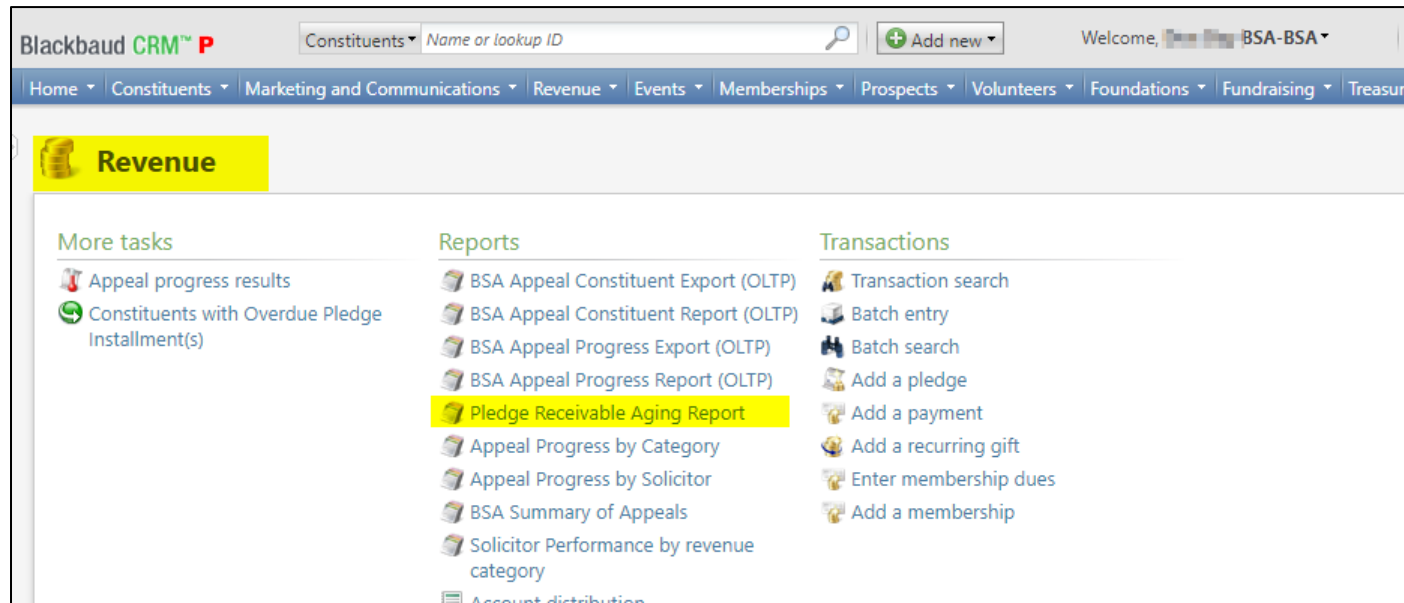- Using Appeal Progress feature for quick updates

Finishing Up 2021

Global Write Offs

- Determine collectible value
- Create the Pledges Receivable Aging Report
- Blackbaud CRM ~ Revenue ~

Determine collectible value

Create the Report

1. BSA Organization – your council

2. Report Code – year

3. Appeal – must be run for each open appeal with outstanding donor pledge values

4. Click "View Report"

5. Wait…

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Pledge Receivable Aging Report

Pledge Aging Receivable Report

- Print report and give to management to review:
  - All open pledges
  - Determine who will still pay
  - Sign and date
- After management review, proceed to Pledge Write-Off process

Pledge Write-off Procedure

- Determine when your council needs to write-off pledges.
- Pledges written off by appeal
- You will use your current Global Pledge Write-off business process
- You will edit the selection in your current business process

Global Pledge Write-off

edge write-off processes (276) ⊕ Add

Name	Description
L144	Pledge Write-Off Proc
L144 Abraham Linco...	Just change the select
L003	Pledge Write-Off Proc
L022	Pledge Write-Off Proc
L583	Pledge Write-Off Proc
L382	Pledge Write-Off Proc

🌀 Start process | ✏ Edit | ✖ Delete | 📋 As

L618	Pledge Write-Off Proc
L104	Pledge Write Off Proc
L303	Pledge Write-Off Proc
L157	Pledge Write-Off Proc
L468	Pledge Write-Off Proc
L092	Pledge Write-Off Proc
L368	Conversion Pledge Wr
L220	Pledge Write-Off Proc
L574	Pledge Write-Off Proc
L635	Pledge Write-Off Proc
L695	Global Write-Off
L449	Pledge Write-Off Proc
L006	Pledge Write-Off Proc

Edit pledge write-off process ✖

General

Name: L382

Description: Pledge Write-Off Process

Selection: L382 Global Write Off Query (Ad   🔍 ✏

Post status: Do not post ▼

Post date: mm/dd/yyyy 📅

Site: Allegheny Highlands Council ▼ 🔍

Write-off reason

Reason code: UNC - Uncollectable ▼

Details: 2017 Write Off

Output
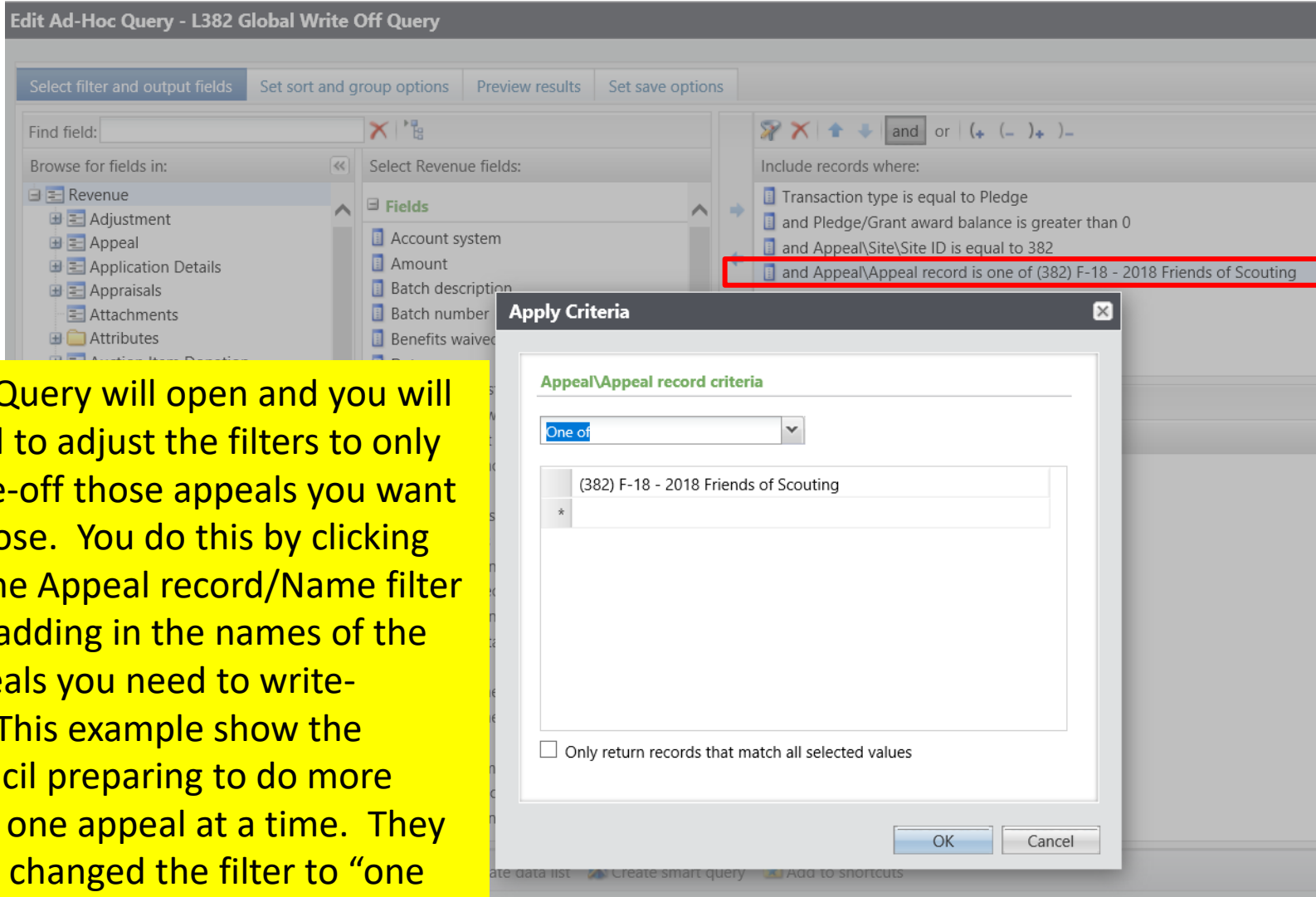
☐ Create output selection

☐ Overwrite existing selection

Selection name:

❓ Help   Save   Cancel

Go to the Global Pledge Write-off processes and edit your routine. No need to create a new routine. When the edit window opens click the pencil to edit the query attached as the selection.

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The Query will open and you will need to adjust the filters to only write-off those appeals you want to close. You do this by clicking on the Appeal record/Name filter and adding in the names of the appeals you need to write-off. This example show the council preparing to do more than one appeal at a time. They have changed the filter to "one of" and then can now list multiple appeals.

Edit Ad-Hoc Query - L382 Global Write Off Query

| Select filter and output fields | Set sort and group options | Preview results | Set save options |

Results (78 records found)

Appeal\Name	Pledge/Grant award balance
(382) F-18 - 2018 Friends of Scout...	$250.00
(382) F-18 - 2018 Friends of Scout...	$600.00
(382) F-18 - 2018 Friends of Scout...	$500.00
(382) F-18 - 2018 Friends of Scout...	$40.00
(382) F-18 - 2018 Friends of Scout...	$30.00
(382) F-18 - 2018 Friends of Scout...	$20.00
(382) F-18 - 2018 Friends of Scout...	$1,200.00
(382) F-18 - 2018 Friends of Scout...	$1,000.00
(382) F-18 - 2018 Friends of Scout...	$95.00
(382) F-18 - 2018 Friends of Scout...	$30.00
(382) F-18 - 2018 Friends of Scout...	$60.00
(382) F-18 - 2018 Friends of Scout...	$100.00
(382) F-18 - 2018 Friends of Scout...	$720.00
(382) F-18 - 2018 Friends of Scout...	$45.45
(382) F-18 - 2018 Friends of Scout...	$75.00
(382) F-18 - 2018 Friends of Scout...	$20.00

Always preview your query before saving it and running your routine to make sure only your appeals are showing and that only the appeals you want to write-off are listed.

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If you need to exclude specific constituents from the write-off process, you can add the line Constituent\Lookup ID to the Include records where window, then change the operator from 'Equal to' to 'Not one of', then list as many Lookup IDs as necessary. If you want to exclude specific pledges, you can do the same with the field 'Revenue ID is not one of'

Include records where:

- Appeal\Site\Site ID is equal to 027
- and Appeal\Appeal record is one of (027) F19 - 2019 Friends of Scouting, (027) F20 - 2020 Friends of Scouting, (027) FG21 - 2021 Fresno Golf Tournament, (027) F21 - 2021 Friends of Scouting
- and Transaction type is equal to Pledge
- and Pledge/Grant award balance is greater than 0
- and Constituent\Lookup ID is not one of 8-12345678, 8-87654321 or is blank

Results fields to display:

- Appeal\Name
- Pledge/Grant award balance
- Constituent\Name
- Constituent\Lookup ID

If you need a list of what was written off after the process has been run, go to Analysis>Information Library>LXXX Example Council Folder, then copy the LXXX Written Off Revenue query. Double click the Write-off\Details line, then replace what is in there with what you had listed under Details. That will show a list of who and what was written off.

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IRS 990 Schedule B

IRS 990 Schedule B

- Creation process like creation of contribution statements
- Download and review data via export
- Merge Excel data to Word template provided
- User guide is under Administration with the CRM User Guides on MyBSA or in CRM in Marketing Communication under Letters and Documents.

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Location of CRM Tools

Remember:

- 990 Schedule B are based on contributions (pledges/straight donations/etc.) a person has given during the year. Pledge Payments do not count towards this, so if a donor is missing from the results, they may not have made any new contributions during the year. We use an accrual basis instead of a cash basis, which means that if a donor pledged $5,000 but only paid $4,000, they will show up as a $5,000 donor.

- Don't worry if businesses on your 990s show as 'individuals' in the spreadsheet. Column D of the 990 Schedule B Part 1 form shows the type of contribution, not the type of constituent. The 3 choices are Person, Payroll and Noncash. The mail merge assumes "Person" for all contribution types.

Prior Year Pledge Payment

Prior Year Pledge Payment

- Why do them?
- How do they feed to the GL?
- How do I make PY payment show as current year contributions?
- Did you write-off all pledges in PeopleSoft at year end?

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Reasons to use this function

Accuracy of Donor Record

If you use a payment as a new donation in 2022, you may fail to ask the donor for their 2022 gift.

Follow the intentions of your donors

Eventually the donor will be able to see their records and this can help reduce unnecessary question from the donor.

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Prior Year Payment Process

- You should use this feature until the end of March.

- This keeps donor records intact

- Prior year payment relieve pledge you hold open and have moved from 1301 to 1321

- Prior year payments build current year contributions with account 4002 through monthly journal entry if you have written off all pledges in the PeopleSoft.

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Account Flow for a PY Payment

Account	Debit	Credit	Debit	Credit
Beginning		200		0
1321		-20		-20
1001	20			
1321 Balance		180		-20
1321			20	
4002				20
1321 Balance				0

ccount ▼	Description	Debit amount	Credit amount
Pledge	🖉 Edit		
➡ L147-1-1321-000-00	L147-1-FOSP-PAPL-L14700001-UNR. PAYMENT-on-Pledge-Receivable(PY): Council General		$30.00
➡ L147-1-1001-000-00	L147-1-FOSP-CASH-L14700001-UNR. PAYMENT-Cash etc: Council General	$30.00	

Accounts

- 1321 is your Contributions Receivable Prior year account. This is populated with pledges you expect to be paid late after you close your books(GJ from 1301). If you write-off all pledges this will have a zero balance.

- 4002 is your Contributions-FOS-Prior Year account. Dollars are move to here if there is negative balance in 1321 as you reconcile monthly during current year.

In PeopleSoft

Beginning of the year in PeopleSoft, these GL transactions required:

- Journal entry to move balances to new accounts
- Run a Posted detail in PS and Pledge Receivable report in CRM

Contribution - Pledges

- 1331 (CR) to 1301 (DR) (move from future to current)
- 1301 (CR) to 1321 (DR) (move from current year to prior)
- Allowance
- 1391 (DR) to 1371 (CR) (move future to current)
- 1371 (DR) to 1381 (CR) (move current to prior)

Batches

Using Group ID in batch

- Why?
  - Improves solicitor reporting
  - Units
  - Groups

Revenue Batch
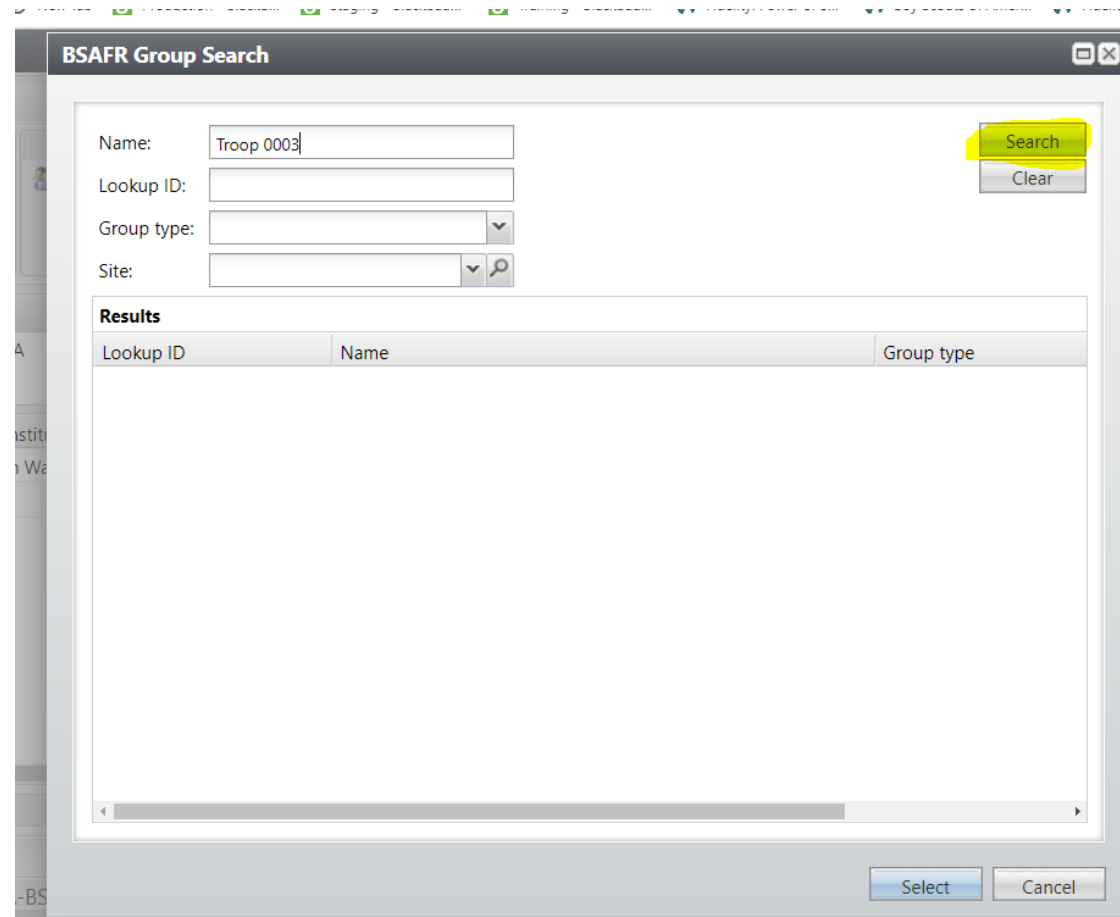
- When entering a Unit to a Revenue batch select the Constituent then in the Group ID enter the information of the Unit. (Troop 0003, etc)

Search for the BSAFR Group

Populate in the BSAFR Group

- The Group ID will populate with the Unit information. This will attach to the pledge or payment and will show on the Unit and Constituent's profile.

Using Appeal Progress

Multiple tabs available

Contributions

Appeal: (▓▓) S20 - 2020 Friends of Scouting

Description:	2020 Friends of Scouting	Start date:	10/31/2019
Business unit:		End date:	12/31/2020
Category:	Annual Giving (Friends of Scouting)	Goal:	$0.00
Report code:	2020	Status:	Active
Site:	▓▓ Council	Membership:	

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

Contributions: Summary - posted 2/18/2020 🔲 | More ▾

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
$87,940.01	277	$317.47	2/18/2020	10/7/2019

⊗ Expand all ⊗ Collapse all

≫ **Contributions: Not posted (pending)**

≫ **Contributions: BSA Structure - posted** (6)

≫ **Contributions: Giving Category - posted** (3)

≫ **Contributions: Both BSA Structure & Giving Category - posted** (12)

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By Giving Category or by Structure

Revenue Summary	Contributions	Payments	Balances	Revenue Details (Splits)	Matching Gift Claims	Designations	Mailings	Documentation

Contributions: Summary - posted 2/18/2020   🗐 | More▾

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contrib
$87,940.01	277	$317.47	2/18/2020	10/7/2019

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⋎ **Contributions: Not posted (pending)**

⋎ **Contributions: BSA Structure - posted** (6)

⋏ **Contributions: Giving Category - posted** (3)   🗐 | More▾

Giving Category ▲	Total Contributions	# of Contributions	Average Contribution	
Board	$25,750.00	21	$1,226.19	
Community	$13,520.01	55	$245.82	
Family	$48,670.00	201	$242.14	

⋎ **Contributions: Both BSA Structure & Giving Category - posted** (12)

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Solicitor Credits

	BSA Structure	Giving Category	Inactive?	Group Name	Group Public Name	Solicitor Cre...
Hoover						
	Hoover	Family	No	Pack 3151 BP Wilton - 133 (163962)	Pack 3151	$25.00
	Hoover	Family	No	Pack 3153 FP Durant - 133 (163963)	Pack 3153	$195.00
	Hoover	Family	No	Troop 0127 BT Muscatine - 133 (164...	Troop 0127	$780.00
	Hoover	Family	No	Troop 0151 BT Wilton - 133 (164235)	Troop 0151	$25.00
	Hoover	Family	No	Troop 0426 BT Muscatine - 133 (100...	Troop 0426	$850.00
	Hoover	Family	No	Troop 1127 GT Muscatine - 133 (100...		$250.00
Council						
Inali						
Kittan						
Mesquakie						
Saukenuk						

Appeal Solicitor Credits by Solicitor Group ...note: solicitor's row is bold when fundraising goal is achieved (44)

Revenue Summary | Contributions | Payments | Balances | Revenue Details (Splits) | Matching Gift Claims | Designations | Mailings | Documentation

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Revenue Details (Splits)

Add to Shortcuts

Consider using conventional BSA structure

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

Next Forum

March 16, 2022
10:00 am & 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**

www.scouting.org/financeimpact

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Member Care Self-Service

- http://membercare.scouting.org

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Online Support Center

Boy Scouts of America National Service Center

Need a resolution fast? Then, check out our knowledge base. We are hard at work updating knowledge and documentation.

Can't find what you are looking for in the knowledge base? Open a ticket using the service catalog below.

If you have feedback on how we can improve, please let us know by clicking on the link below.

Click here

What do you need help with?

Search

Search help

Council Support

National Support

Scout Shops/NDC Support

New Council User or Transfer
Account & Access

Council Account Termination
Account & Access

Choose

"Council Support"

Then on right side:

"General Assistance"

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Summary – Description – Council

User Name – Application - Attachments

Questions & Answers