CRM User Forum

January 17, 2024

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Cornelia Ellis ~ Don Day

Objectives

- Contribution Statements
- Pledge Write-Offs
- PY – inbound Channel
- Event Mapping
- Reminders and Acknowledgements Selection review
- Uncommitted batches
- Questions – Answers

Creating the Annual Contribution Statements

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Contribution Statements

- Should be mailed to donors by the last day of January.
- Contribution statement template in CRM is ready for use.
- Before you start – download the Job Aid and read it.
- Job Aid can be found in the CRM User Guides under Marketing and communications.

IRS Publication 1771, Charitable Contributions–Substantiation and Disclosure Requirements

- A donor must have a bank record or written communication from a charity for any monetary contribution before the donor can claim a charitable contribution on his/her federal income tax return

- A donor is responsible for obtaining a written acknowledgment from a charity for any single contribution of $250 or more

- A charitable organization is required to provide a written disclosure to a donor who receives goods or services in exchange for a single payment in excess of $75

- Recipient organizations typically send written acknowledgments to donors no later than January 31 of the year following the donation.
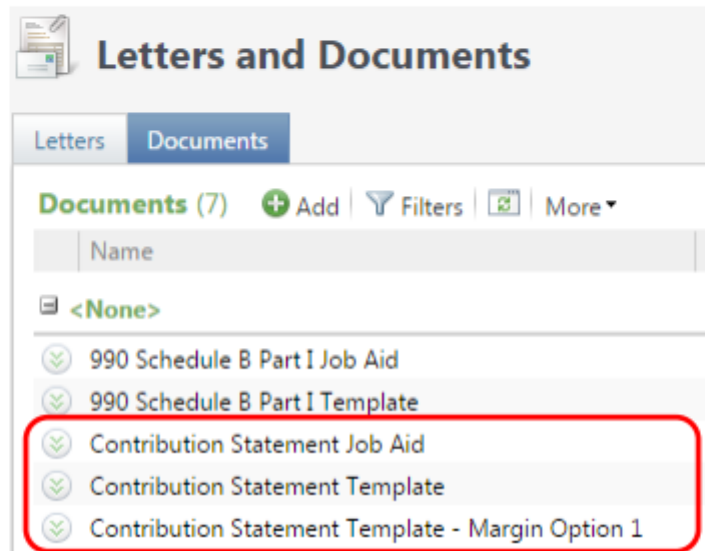
Process Overview
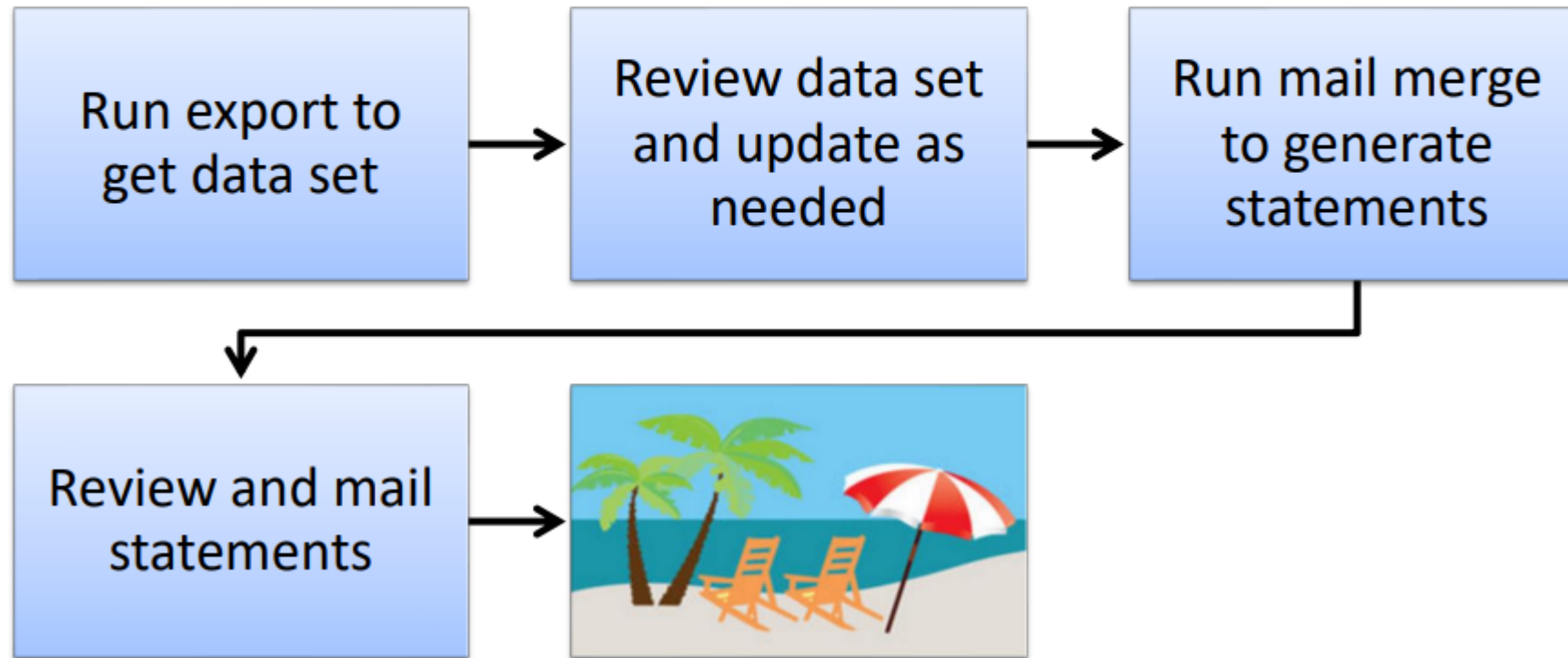
Process Overview

- Marketing and Communications>Packages>Letters and documents>View letters and documents>Documents tab

- **Job Aids** have detailed, step-by-step instructions

To Download Document

- Click the Chevron
- Either click "View document" or click the document hyperlink to download.
- ==DO NOT edit and/or change the site from LC Global to your council.==
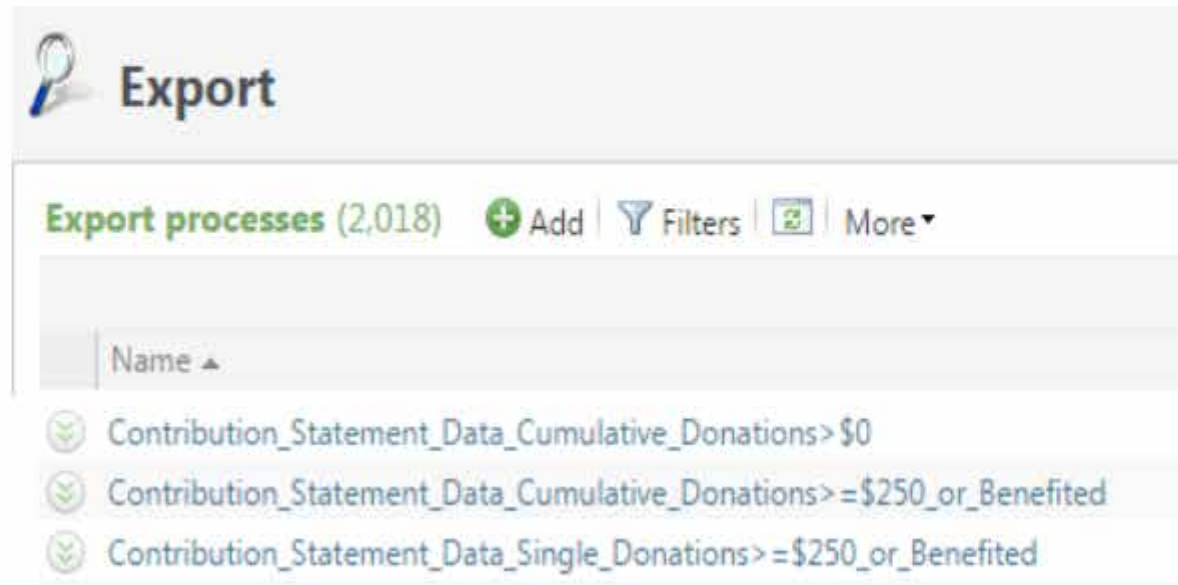

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Run Export

3 Choices

- Cumulative contributions > $0
  - All donors get statements

- Cumulative contributions >= $250 or Benefited
  - Donors that give $250 or more, cumulatively, and any donors that received benefits get statements

- Single contribution >= $250 or Benefited
  - Donors that give a single gift of $250 or more and any donors that received benefits get statements

Run Export

- Administration>Tools>Export

Run Export

- Because you are site secured <u>only your</u> <u>records</u> will be returned when you run this.

Review and Update

- Review your data and make updates as needed

- Add a dummy record at end of the file

Review and Update

- Review Columns W and X
    - Possible benefit issue
    - Possible receipt or benefit amount issue
    - These issues depend on how you have been using the system
    - Giving category column is on the sheet to help with benefits in column Y

Review and Update

(089) S17	$250.00	$250.00			rev-37312	440403	FALSE	FALSE	Sebring
(089) S17	$250.00	$250.00			PAS-13989	61788	FALSE	FALSE	Sebring
(089) S17	$250.00	$250.00			PAS-13975	60848	FALSE	FALSE	Family
(089) S17	$250.00	$250.00			PAS-13969	60470	FALSE	FALSE	Community - DCA
(089) A17	########	$0.00			rev-41589	491027	TRUE	TRUE	Mexico Trip
(089) A17	$120.00	$0.00			rev-41598	497003	TRUE	TRUE	Kendra Scott Necklace a
(089) A17	$500.00	$0.00			rev-41598	497682	TRUE	TRUE	Golf Clubs and Bag
(089) A17	$100.00	$100.00			rev-41598	498645	FALSE	FALSE	Sponsor
(089) A17	$40.00	$0.00			rev-41599	499007	TRUE	TRUE	Play and Music Lesson
(089) S17	$250.00	$250.00			PAS-13985	61326	FALSE	FALSE	Community - DCA
(089) S17	########	########			PAS-13985	61364	FALSE	FALSE	Citrus County

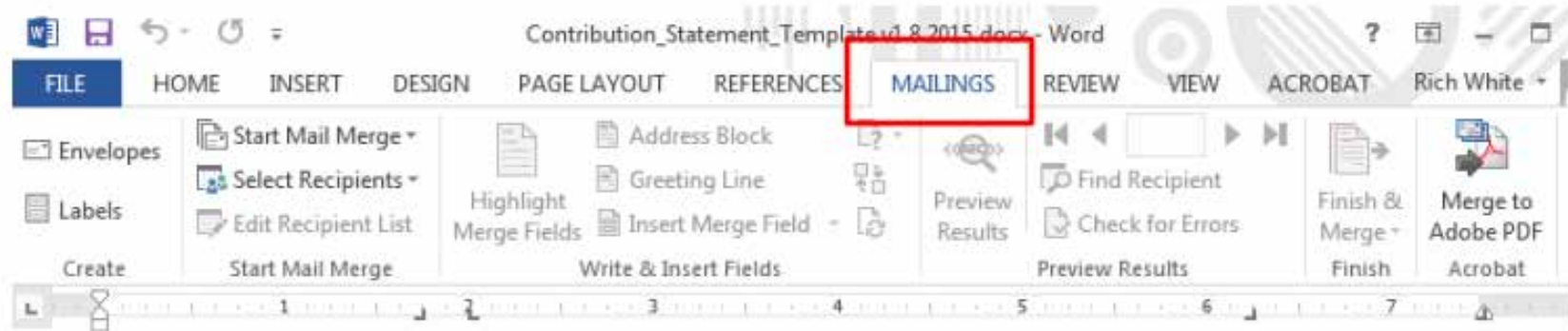|									
(89) S1	$50.00	$50.00			rev-41607	554852	FALSE	FALSE	Community - DCA
(89) S1	$50.00	$50.00			rev-41706	585076	FALSE	FALSE	Community - DCA
(89) X1	$500.00	$500.00			rev-34061	431701	FALSE	FALSE	1/2 PAGE AD
(89) X1	$1,300.00	$980.00	$320.00	Table Sponsor	rev-34061	431585	FALSE	FALSE	Table Sponsors
(89) S1	$500.00	$500.00			rev-41640	533302	FALSE	FALSE	Family
(89) S1	$500.00	$500.00			PAS-13959	59990	FALSE	FALSE	Board Division
(89) S1	$250.00	$250.00			PAS-13969	60492	FALSE	FALSE	Community - DCA

Run Mail Merge

- Download mail merge template
- Edit merge field values for your council
- Start a <u>Directory mail merge</u>
- Select the contribution statement data file
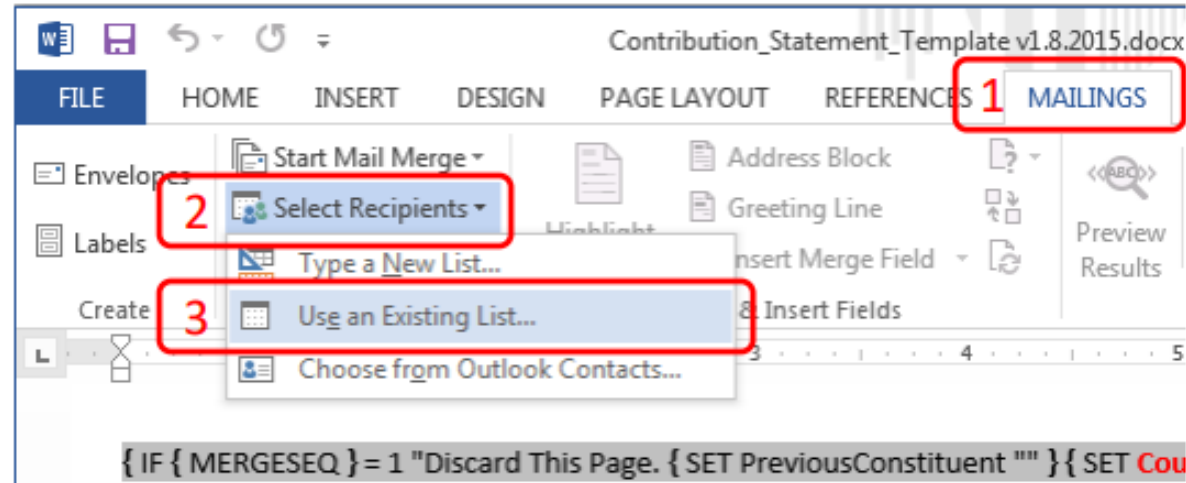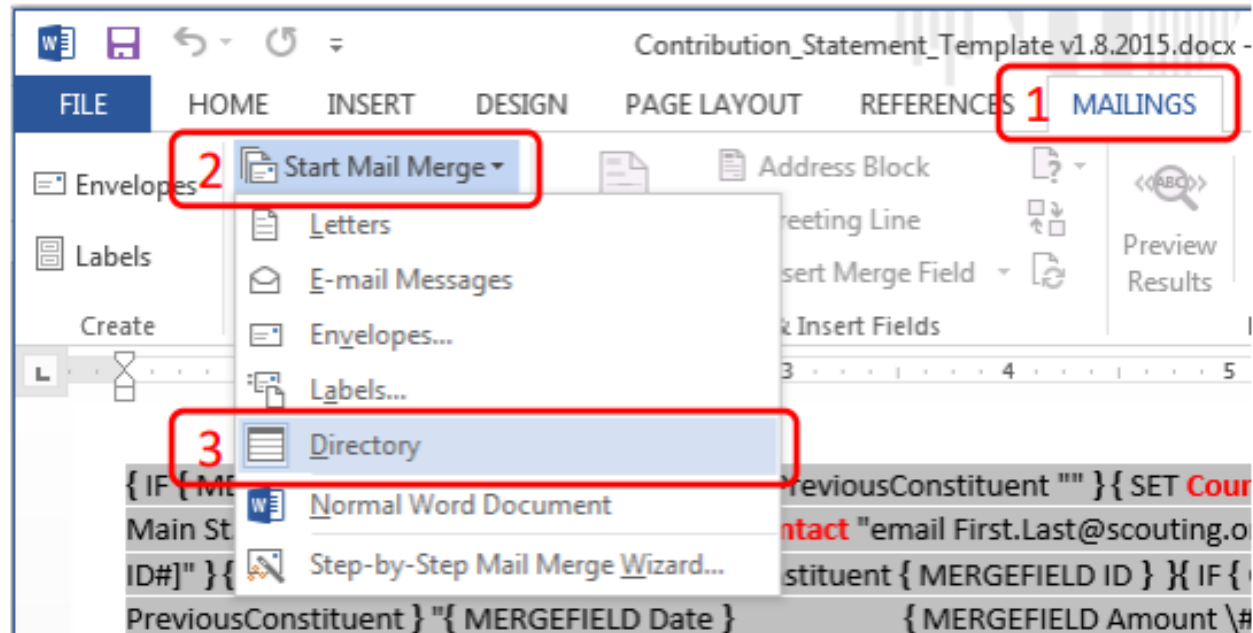- Finish the merge

Run Mail Merge

Run Mail Merge

- Navigate to your downloaded data file and select it

Run Mail Merge

Run Mail Merge

Run Mail Merge

Review and Mail

- Print, fold, stuff and mail per your council's usual procedure
- Discard the first and last pages from the merge file

Global Write Offs

- Determine collectible value

- Create the Pledges Receivable Aging Report

- Blackbaud CRM ~ Revenue ~
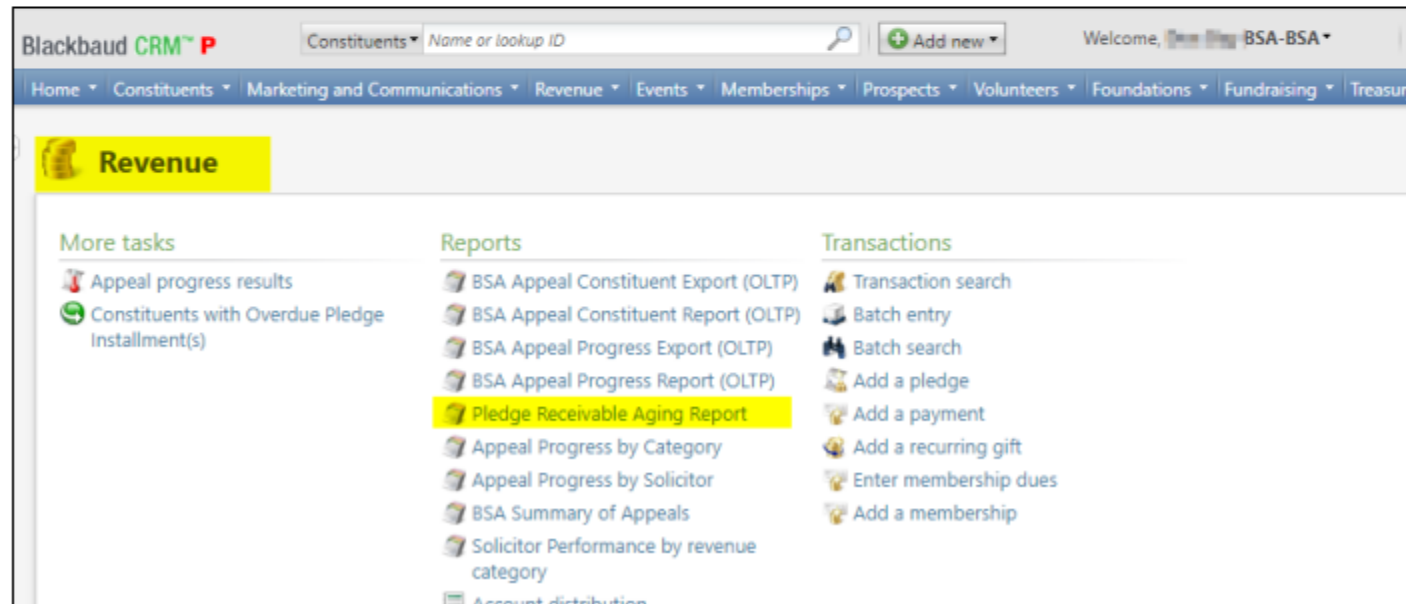
Determine collectible value

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...

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

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.

Edit Ad-Hoc Query - L382 Global Write Off Query

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

Find field: ✕

Browse for fields in:
- Revenue
  - Adjustment
  - Appeal
  - Application Details
  - Appraisals
  - Attachments
  - Attributes

Select Revenue fields:
- Fields
  - Account system
  - Amount
  - Batch description
  - Batch number
  - Benefits waiver

Include records where:
- Transaction type is equal to Pledge
- and Pledge/Grant award balance is greater than 0
- and Appeal\Site\Site ID is equal to 382
- and Appeal\Appeal record is one of (382) F-18 – 2018 Friends of Scouting

Apply Criteria

Appeal\Appeal record criteria

One of ▾

| (382) F-18 - 2018 Friends of Scouting |

☐ Only return records that match all selected values

OK | Cancel

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.

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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...	$30.00

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'

and or (( ))

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

Σ ▾

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, go to Revenue/More Tasks/ Write-Offs Data list. Search for your site and then filter by the date the you ran your write-offs. It will provide a list of those written-off on or after the date that you used the write-off process.

PY – Inbound Channel

- Used with Prior Year Pledge Payments
- Payment is connected to a Prior Appeal
- PY Payment clears the Prior Year Receivable Account
- There is no such thing as a prior year pledge or donation.

Event Revenue Mapping

- Create your event Appeal.
- Create your event – add event appeal and designation.
- Grab the "Event Revenue Setup Request" and complete.
- Submit "Event Revenue Setup Request" via a Member Care ticket to have your appeal and event GL mapped for event registrations.

Events

Add an Event

Auction Setup

Event Revenue set up

Event Revenue Setup Request

Event Invitation and Registration

Event Registration Options

Bulk add Event Registrants

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Look for Instructions - Read

Please follow the steps below on the "New_Events" tab of this spreadsheet tool.
Enter all relevent information, so BSA National staff can configure BCRM GL mapping for your event(s).
Then use "Save As..." and give this Excel file a new name that includes your Council number and the date.
Finally, submit a Support Ticket to Member Care, and make sure to attach this new file.

Note: You can only enter information on the New_Events tab. Other tabs are locked
for use by BSA National staff to complete your Council's Event GL mapping in Blackbaud CRM.

STEP	DESCRIPTION
1	**IMPORTANT:** Before completing the "New_Events" tab of this spreadsheet tool, please make sure that all of your Council's revenue events -- and any related Appeal records needed for the fiscal year -- already exist in Blackbaud CRM. *(See screenshots on this tab.)* You will need to copy the exact names of each of these records (Events, Appeals, Designations) from BCRM to the "New_Events" tab. If any of these Events, Appeals or Designations are missing from BCRM (or if any record names entered in this tool differ from actual BCRM record names), then revenue from those Event's Registrations will not commit in BCRM or post to GL/PeopleSoft.
2	**"New_Events" tab (Cell A1):** Confirm the Default Event Contribution Account used by your Council. *("4201" is most common.)*
3	**Column B (Cell B4):** Enter your Council's PeopleSoft **Business Unit**. This 4-character text (ex: L999) should auto-populate for all event rows.
4	**Column C:** Enter the **Start Date** for each Event.
5	**Column D:** For each Event this fiscal year, copy-and-paste the **Event Name** from BCRM. *See directions and screenshot on this tab for steps to add a new BCRM event. When adding a new event, make sure to check both "**Event is an auction**" and "**Event allows designations on fees**".*
6	**Column E:** From BCRM, copy-and-paste the **Appeal Name** associated with this Event. *Every Appeal in BCRM should include Appeal Category, Appeal Report Code, Site, and Start Date.*
7	**Column F:** From BCRM, copy-and-paste the **Designation Name** needed for this Event. *Note: If an Event will receive revenue for 2+ Designations (multiple Peoplesoft Projects/Fund Types)...*

HOW TO ADD AN EVENT in Blackbaud CRM (screenshot example, required fields highlighted in green)
These fields are the minimum necessary to create a "bare bones" event in BCRM, so BSA National can complete your Event GL.
Later you can go back to the Event in BCRM and add details including Invitations, Expenses, Tasks, Registrants, etc.

IMPORTANT: Before adding any registrations for an Event, on the Event make sure you have (1) competely configured all
Registration Options on that tab including Fee amounts and any zero-dollar benefit items, (2) linked all necessary Designations
and sub-designations on the Designations tab, and (3) linked the related Appeal(s) on the Appeals tab.

HOW TO ADD AN APPEAL in Blackbaud CRM (screenshot example, required fields highlighted in yellow)

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Fill In Event Tab

	A	B	C	D	E	F
4201		= Default Event Contribution Account		First Create Records in Blackbaud CRM. Then Copy-&-Paste Record Names Below.		
	New Event Row	**Business Unit**	**Event Start Date**	**Event Name** *First create each Event in BCRM. Then copy-&-paste each Event name here. Use 2 rows if an Event needs 2 Designations.*	**Appeal Name** *First create each Appeal record in BCRM. Then copy-&-paste each Appeal name here. An Appeal can only be linked to 1 Event.*	**Designation Name** *Designations should already exist in BCRM. Use the exact same Designations as last year. Request new Designations for any new Projects.*
	Ex:	L999	10/10/2018	L999 Sporting Clays 2018 (example)	L999 R18 - Sporting Clays 2018 (example)	99907771 Sporting Clays - Operating (example)
	4	l067	3/1/2024	L067 2024 Sporting Clay	(067) SC24 - Sporting Clay 2024	06707801 Sporting Clays - Operating
	5	l067	4/15/2024	L067 2024 Eagles and Adult Recognition	(067) GOE24 - Gathering of Eagles Adult Recognition 2024	06705121 Gathering of Eagles and Adult - Operating
	6	l067	7/15/2024	L067 2024 Golf	(067) G24 - 2024 Golf Tournament	06707551 Golf Tournamen - Operating
	7	l067	3/15/2024	L067 2024 Pinewood Derby Social	(067) AP24 - Adult Pinewood Derby 2024	06707511 Adult Pinewood Derby - Operating

Copy and paste the appeal name, event name and designation into the form from the events you have create.

Revenue Contribution Account Codes Needed For Each Special Event (PeopleSoft Account							
4201 Sponsorship/ Donation	**4202** Participant/ Ticket	**4203** Program Items	**4204** Event Advertising	**4205** Event Concessions	**4209** Auction/ Resale Items	**4231** Other (raffle, mulligans, etc.)	**4250** Fees - Fair Market Value
YES	no	no	maybe	no	Y	no	yes
YES	Yes	no	Yes	no	yes	no	Yes
YES	Yes	no	Yes	no	Yes	no	yes
YES	Yes	no	Yes	no	Yes	no	yes
YES	Yes	no	Yee	no	Yes	no	yes
no	no	no	no	no	no	no	no
no	no	no	no	no	no	no	no

Place a "Yes" into the accounts you plan to use with your event options

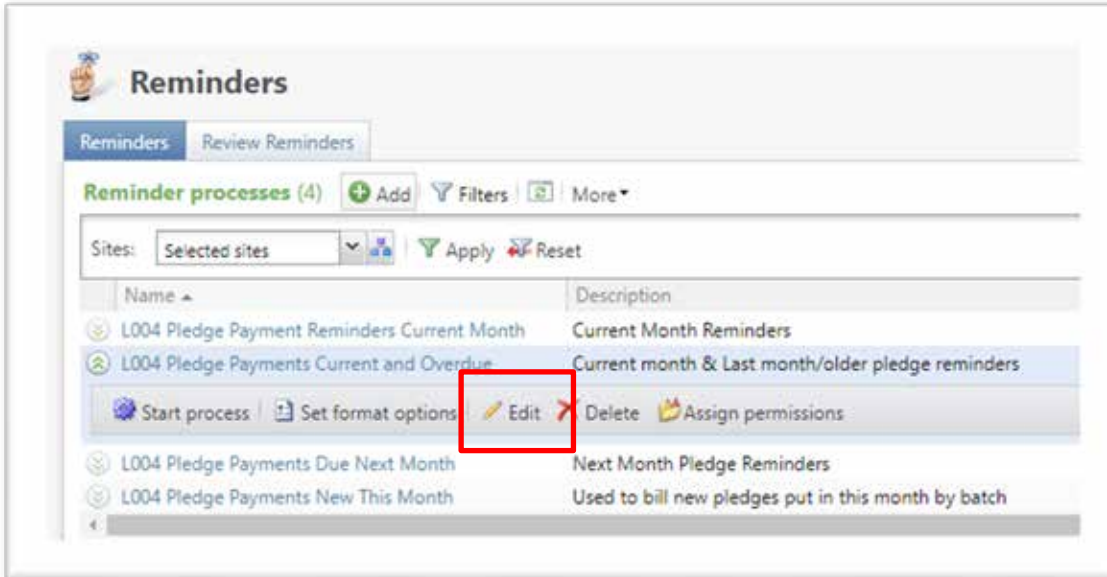Prepared. For Life.™

Updating Donor Communications for 2024

Updating Reminders and Acknowledgements

- New appeals mean new revenue
- Selections that creates donor communication needs to be updated
- Add new appeals
- Add report code 2024

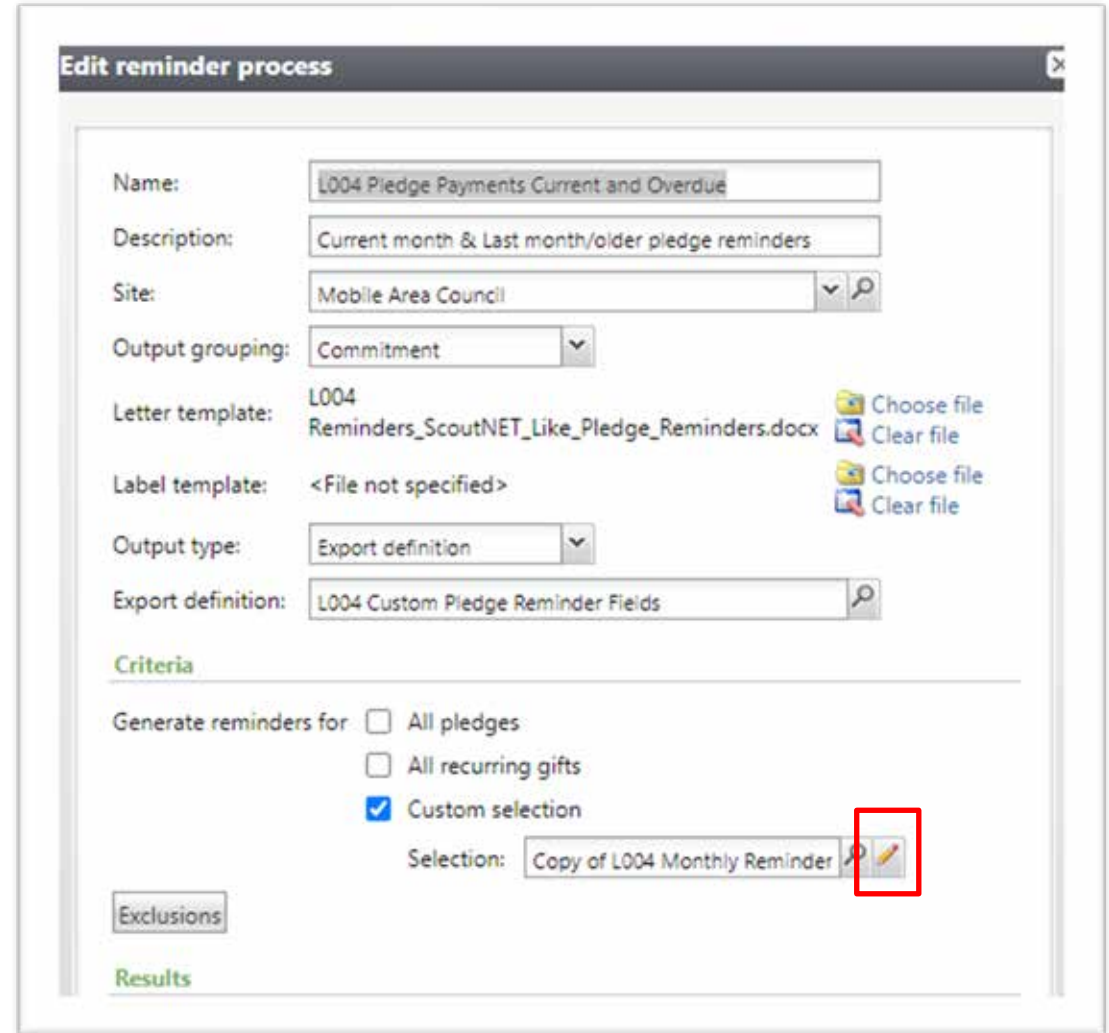# Finding your Reminder Selections

Reminders are found under Marketing & Communications / Donor Relations. You will need to edit each reminder process and update the selection for the next year.

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Updating your Appeal selections

We still need to remind current appeal but also need to start reminding those that pledge for 2023. Double click your appeal record box and add the 2023 appeal and save. You may need to change it to "One Of" to add multiple appeals.

Finding your Acknowledgement Selections
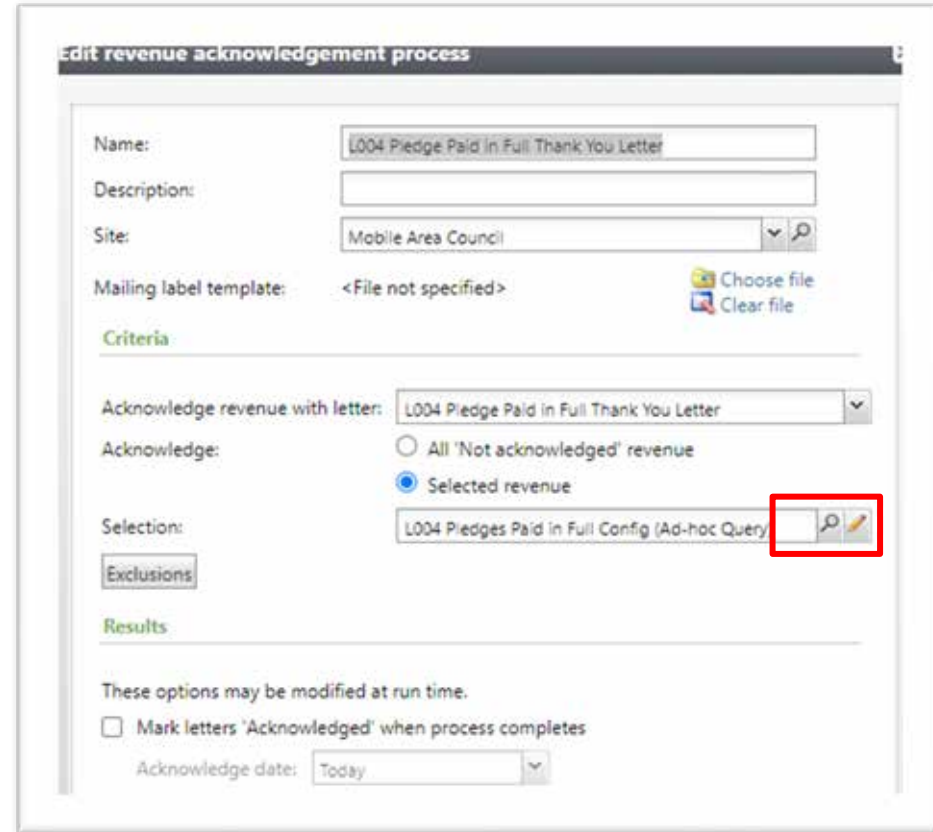
Acknowledgements are found under Marketing & Communications / Donor Relations. You will need to edit each acknowledgement process and update the selection for the next year.

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Updating Report Codes

We still need to thank current appeals with report code of 2023 but you also need to start reminding those that pledge for 2024. Double click your Report Code line add the 2024 Report Code and save. You may need to change it to "One Of" to add multiple Report Codes.

Uncommitted Batches

- Review batch entry for uncommitted batches.
- All batches created before 12/31/23 should either be committed or deleted before you close your 2023 books in PeopleSoft.
- Clear the Date Range filter and leave Sites filter to "All Sites".

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Before the filter is cleared there are 12 batches. Once the Date Range is cleared there are 15 batches. Nov. Dec. Batches appeared.

Council Support

- Council Management Support
  - Contact Council Management Support
  - Council Assessments
  - Council Board Resources
  - Council Business Practices
  - Council Fiscal Management and Training
  - Journey to Excellence
- Council Funding and Finance

CRM Resources

CRM Process Videos

CRM (Blackbaud) User Forum Presentations

Report Cookbook (for OLTP) BSA Appeal Progress & Appeal Constituent Reports

2022

January 2022 User Forum – **Slide Deck** – **recording**
February 2022 User Forum – **Slide Deck** – **recording**
March 2022 User Forum – **Slide Deck** – **recording**
April 2022 User Forum – **Slide Deck** – **recording**
  – Creating Constituent Interactions * Using the Constituent Interaction Data List * Using Development Workspace * Scouting Gives Setup

2021

Member Care Self-Service

- http://membercare.scouting.org

- Creating an incident directly in JIRA

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Welcome to the National IT Service Catalog

We value your feedback. Click Here

My Open Tickets | My Closed Tickets | Knowledge Base | Report Security Issue | Report Phishing Attempt | Password Reset | Office365 | HR Gateway | MyBSA

Announcements & Updates

Updates to My.Scouting and Registrar Tools (August 19th)
A list of updates can be found in Confluence. Click here!

My.Scouting
My.Scouting and associated applications are still experiencing issues It is recommended you work in smaller batches the next few days as the potential still exists that Registrar Tools and EMS could freeze up again. We will keep you updated.

IT Online Service Catalog

I am a National Employee

I am a Council Employee

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Service Categories

Accounts & Passwords

BSA Applications (Operations)

BSA Applications (Program)

Email, Communication & Collaboration

Network Services

Security Services

Hardware & Software

General Assistance

Welcome to the National Online Support Center Service Catalog.

This service catalog is a detailed list of services provided by the Information Services Group.

Each service will have the following information:

- A brief description
- How to request support
- Links to additional knowledge or training
- Highlighted Frequently Asked Questions

To go directly to the knowledge base, click here.

If there is something we can do to make this service catalog better, please let us know; click here.

All Council Services

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Service Categories

- Accounts & Passwords
- BSA Applications (Operations)
- BSA Applications (Program)
- Email, Communication & Collaboration
- Network Services
- Security Services
- Hardware & Software
- General Assistance

General Assistance

The General Assistance option should be used when the issue or question isn't Catalog.

When possible, open a ticket by selecting the service from the Service Catalog Request link. Doing so will ensure all the necessary information is collected and quickly routed.

Tickets opened using the general assistance option go into the general queue the order received.

Open A Request

http://membercare.scouting.org

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

Summary – Description – Council

User Name – Application - Attachments

Questions & Answers