CRM User Forum

April 28, 2021

Cornelia Ellis – John Kuehn – Don Day

Objectives

- Gifts of stock & procedures for acceptance
- Designation – changing in batch
- Taking anonymous donations
- Managing duplicate constituents
- New – Volunteer Award(s) data list

Gifts of Stock

- Stock is Payment Method
- Stock is not on year-end Contribution Statement
- Stock is an item donated. The donor gets letter thanking them for donating ## shares of stock from Company XYZ on date XX/XX/XXXX.
- Contribution value is determined by broker, based on the day they sent the stock to your council. What the BSA sells it for is not the value the donor receives.

Procedures for accepting Stock

- Can be a payment on a pledge.
- Can be a donation.
- Once stock is recorded, it must be sold to finish the process.
- GL Distribution page is printed and given to accounting to determine gains and losses via journal entries.

John D. Kuehn

3/23/2021 Pledge: $3,000.00

Transaction summary

Pledge amount: $3,000.00

Date: 3/23/2021

Batch number:

Revenue ID: rev-44176142

Summary

Balance: $0.00

Total paid: $3,000.00

Past due: $0.00

Status

Acknowledgements: Not acknowledged

Post status: Not posted

Post date: 3/23/2021

Post process ID:

Details | Letters | BSAFR | Attributes | Benefits | Documentation | GL Distributions | Tributes | VNE TEST | Installment/Write-

Details

Original amount: $3,000.00

Subtype:

Source code:

Inbound channel: Friends of Scouting

Send reminders: Yes

Revenue reference:

Effort:

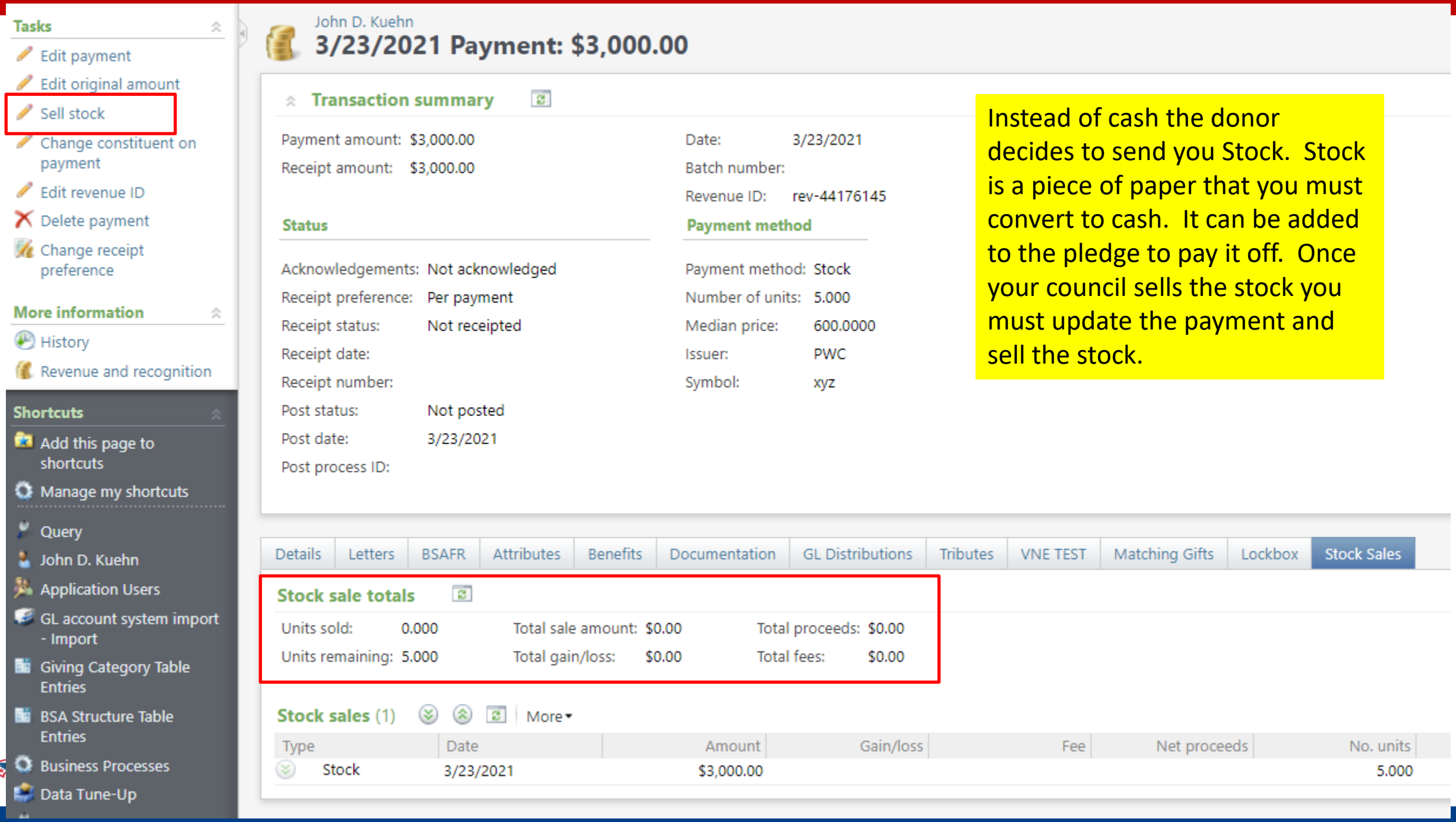
Appeal: (662) S21 - 2021 Friends of Scouting

Revenue category:

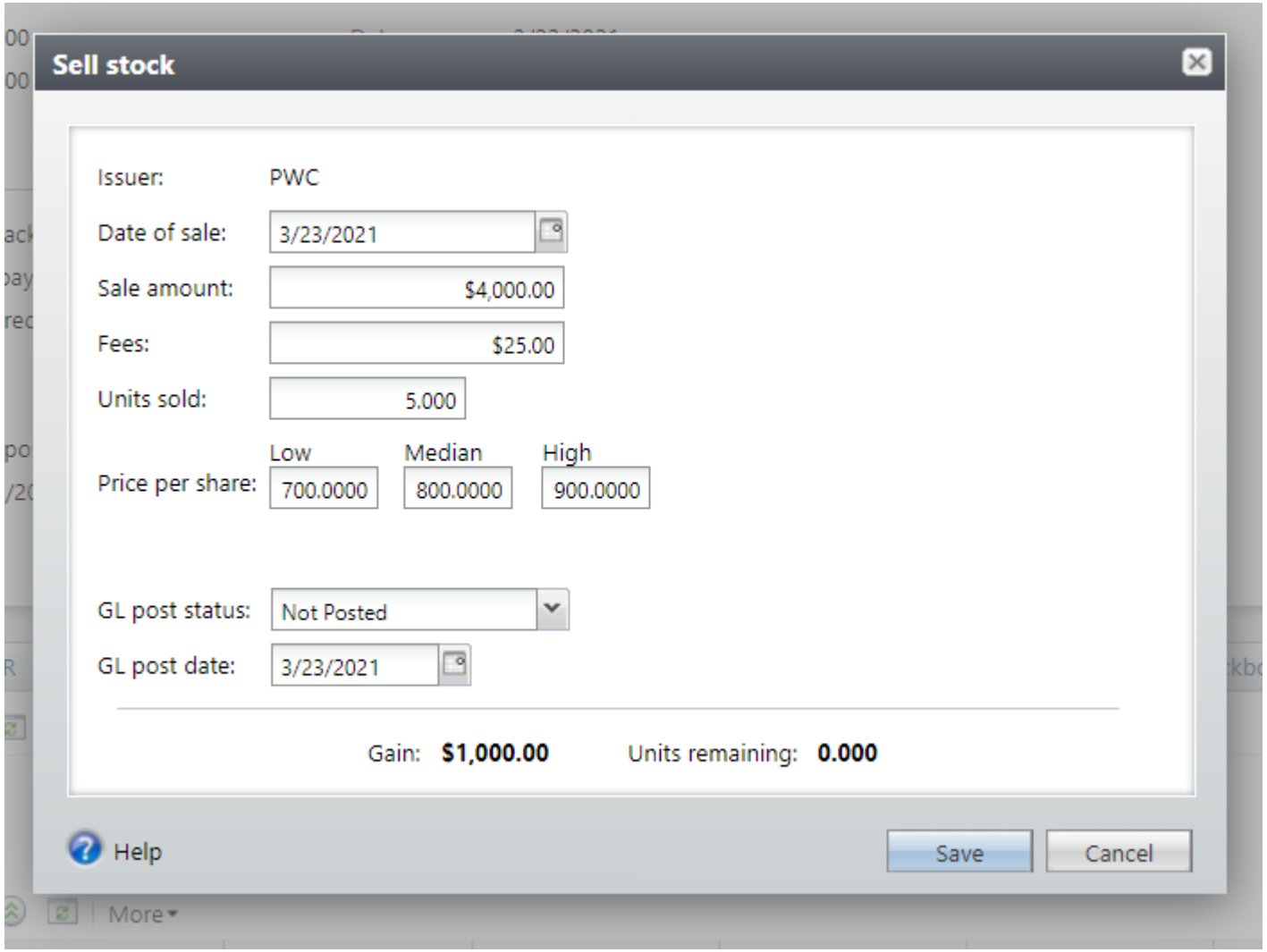
Designations (1)

More

Donor provides a pledge at the beginning of the year for your FOS Appeal.



Instead of cash the donor decides to send you Stock. Stock is a piece of paper that you must convert to cash. It can be added to the pledge to pay it off. Once your council sells the stock you must update the payment and sell the stock.



The info inputted for the sale is the amount it sold for, the fees paid, the units sold and the low, median, and high the day it sold. Median x Unit Sold = Sale amount.

John D. Kuehn

3/23/2021 Payment: $3,000.00

Transaction summary

Payment amount: $3,000.00
Receipt amount: $3,000.00

Date: 3/23/2021
Batch number:
Revenue ID: rev-44176145

Status

Acknowledgements: Not acknowledged
Receipt preference: Per payment
Receipt status: Not receipted
Receipt date:
Receipt number:
Post status: Not posted
Post date: 3/23/2021
Post process ID:

Payment method

Payment method: Stock (sold $4,000.00)
Number of units: 5.000
Median price: 600.0000
Issuer: PWC
Symbol: xyz

Once the stock is sold, the stock sales tab will be complete. One can see the gain or loss for the stock. The amount the council receives may be higher or lower than what the donor records as a charitable contribution on the day he or she donated the shares.

Details | Letters | BSAFR | Attributes | Benefits | Documentation | GL Distributions | Tributes | VNE TEST | Matching Gifts | Lockbox | Stock Sales

Stock sale totals

Units sold: 5.000
Units remaining: 0.000
Total sale amount: $4,000.00
Total gain/loss: $1,000.00
Total proceeds: $3,975.00
Total fees: $25.00

Stock sales (2)

More

Type	Date	Amount	Gain/loss	Fee	Net proceeds	No. units	Low price	Median price	High price
Stock	3/23/2021	$3,000.00				5.000	500.0000	600.0000	700.0000
Sold stock	3/23/2021	$4,000.00	$1,000.00	$25.00	$3,975.00	5.000	700.0000	800.0000	900.0000

Details | Letters | BSAFR | Attributes | Benefits | Documentation | **GL Distributions** | Tributes | VNE TEST | Matching Gifts | Lockbox | Stock Sales

Transaction history by post date

Account system: Local Cour

All dates | 3/23/2021 Payment | 3/23/2021 Sold stock

GL distributions (10) Filters More

View: All Apply Reset

Account	Description	Debit amou...	Credit amo...	Reference	Post date	Status
Pledge	Edit					
L662-1-1001-015-00	L662-1-FOSC-STOC-L66200511-UNR. : FRIENDS OF SCOUTING	$3,000.00		Kuehn-Pledge Payment for bookabl...	3/23/2021	Not posted
L662-1-1301-051-00	L662-1-FOSC-PAPL-L66200511-UNR. PAYMENT-on-Pledge-Receivable(CY): FRIENDS OF SCOUTIN		$3,000.00	Kuehn-Pledge Payment for bookabl...	3/23/2021	Not posted
Sold stock - 3/23/2021 - $4,...	Edit					
xxxx-x-8006-xxx-xx	Expense: Brokerage Services (8006) - fees on sale	$25.00		Kuehn-Fees	3/23/2021	Not posted
xxxx-x-CASH-xxx-xx	Council's "Cash" Checking/Deposit Account where check/wire transfer from asset sale is deposited	$1,000.00		Kuehn-Gain	3/23/2021	Not posted
xxxx-x-CASH-xxx-xx	Council's "Cash" Checking/Deposit Account where check/wire transfer from asset sale is deposited	$3,000.00		Kuehn-Sold Stock	3/23/2021	Not posted
xxxx-x-6601-xxx-xx	Stock Sale: Gain/Loss On Investment (6601)		$1,000.00	Kuehn-Gain	3/23/2021	Not posted
xxxx-x-CASH-xxx-xx	Council's "Cash" Checking/Deposit Account where check/wire transfer from asset sale is deposited		$25.00	Kuehn-Fees	3/23/2021	Not posted
xxxx-x-STOC-xxx-xx	Deposit Account at Broker (where securities were received by the broker); may be same as CASH.		$3,000.00	Kuehn-Sold Stock	3/23/2021	Not posted

The GL Distribution tab can be printed and provided to the controller to help with entries in PeopleSoft. Gains and Losses are manual journal entries.

Designations

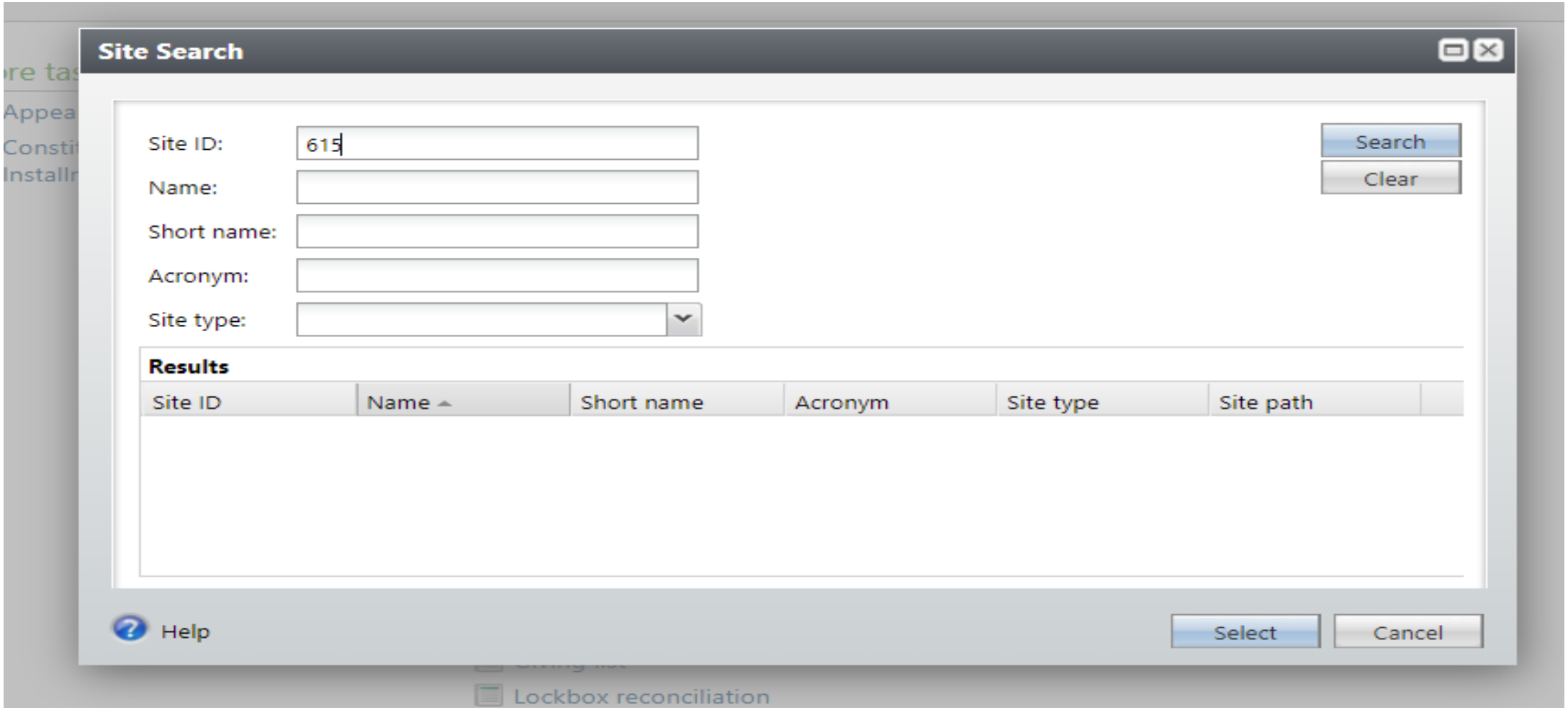
CRM Designation

Designations have 3 set of numbers 06209812

- The **red digits** represent the Council Number. This tells CRM which PeopleSoft Account the transaction should go to.
- The **green digits** represent the "Project Code" in PeopleSoft the transaction should record against.
- The **black digit** is the Fund. In the example above we have a "2". This number will send it to your Capital fund.
- The **Inbound Channel** determines the account number. "Friends of Scouting = 4001"
- The **Revenue Category** determines "Restriction" or the sub-account for "Special Events".

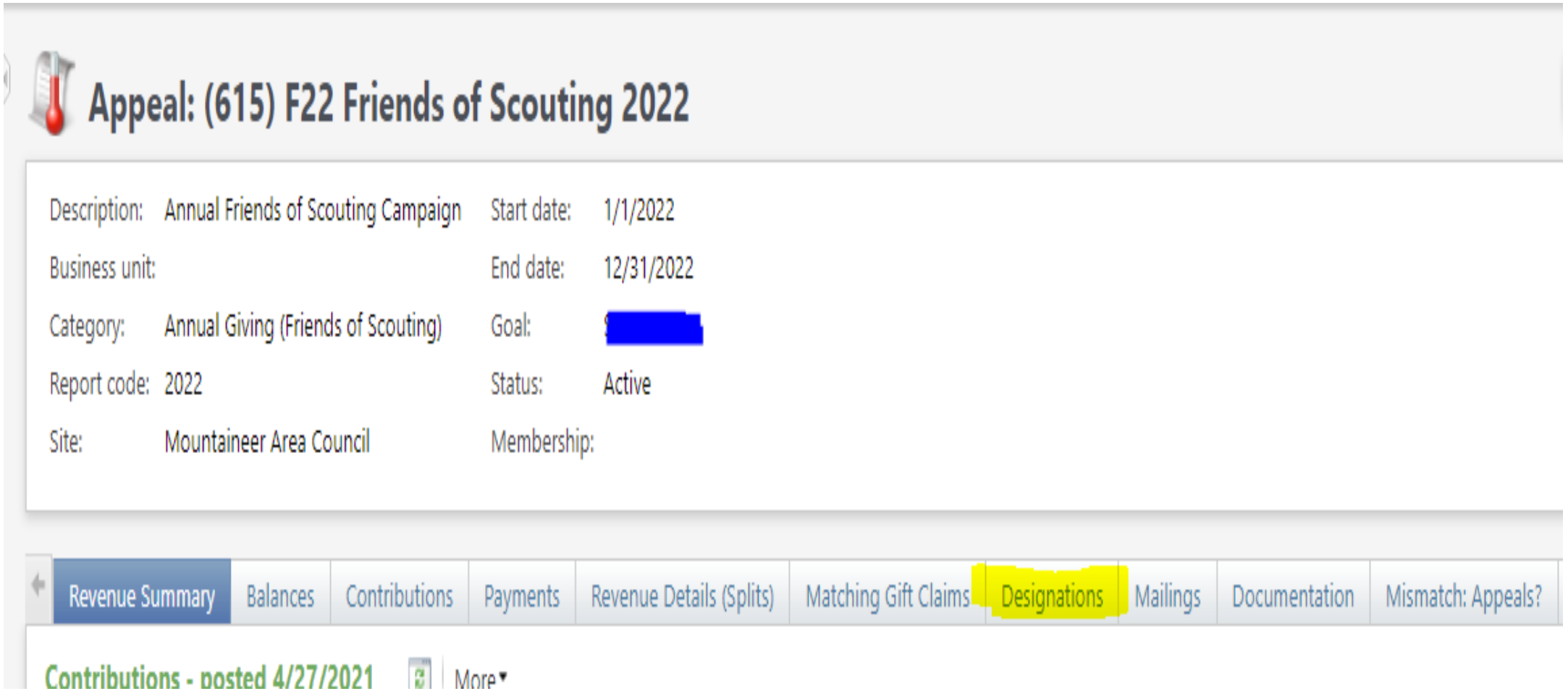
Go To: Appeal Progress Results Under Revenue

Enter the Council Number then click Search
Highlight the Council Number then click Select

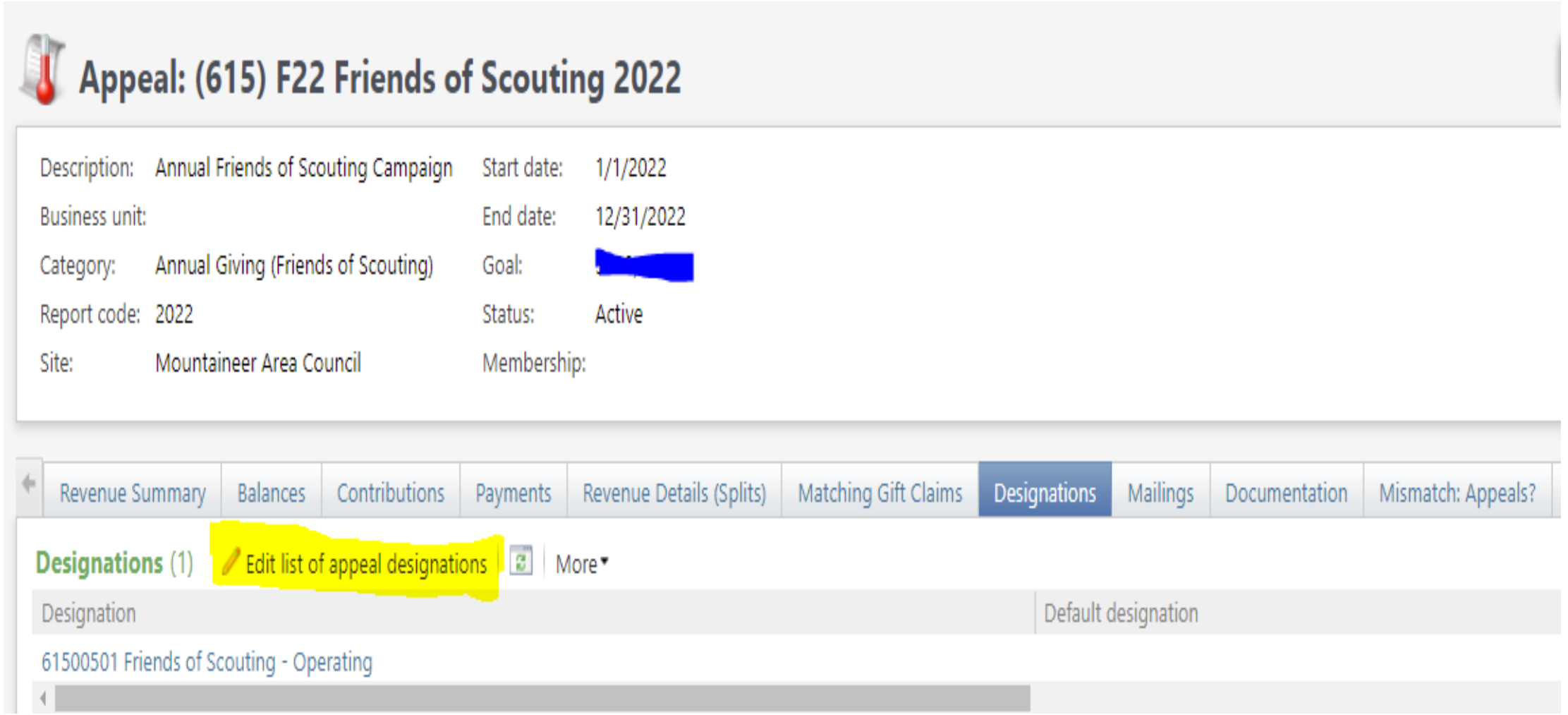


Select the Appeal
Click on the chevron next to the Appeal

Click on the “Designations” tab

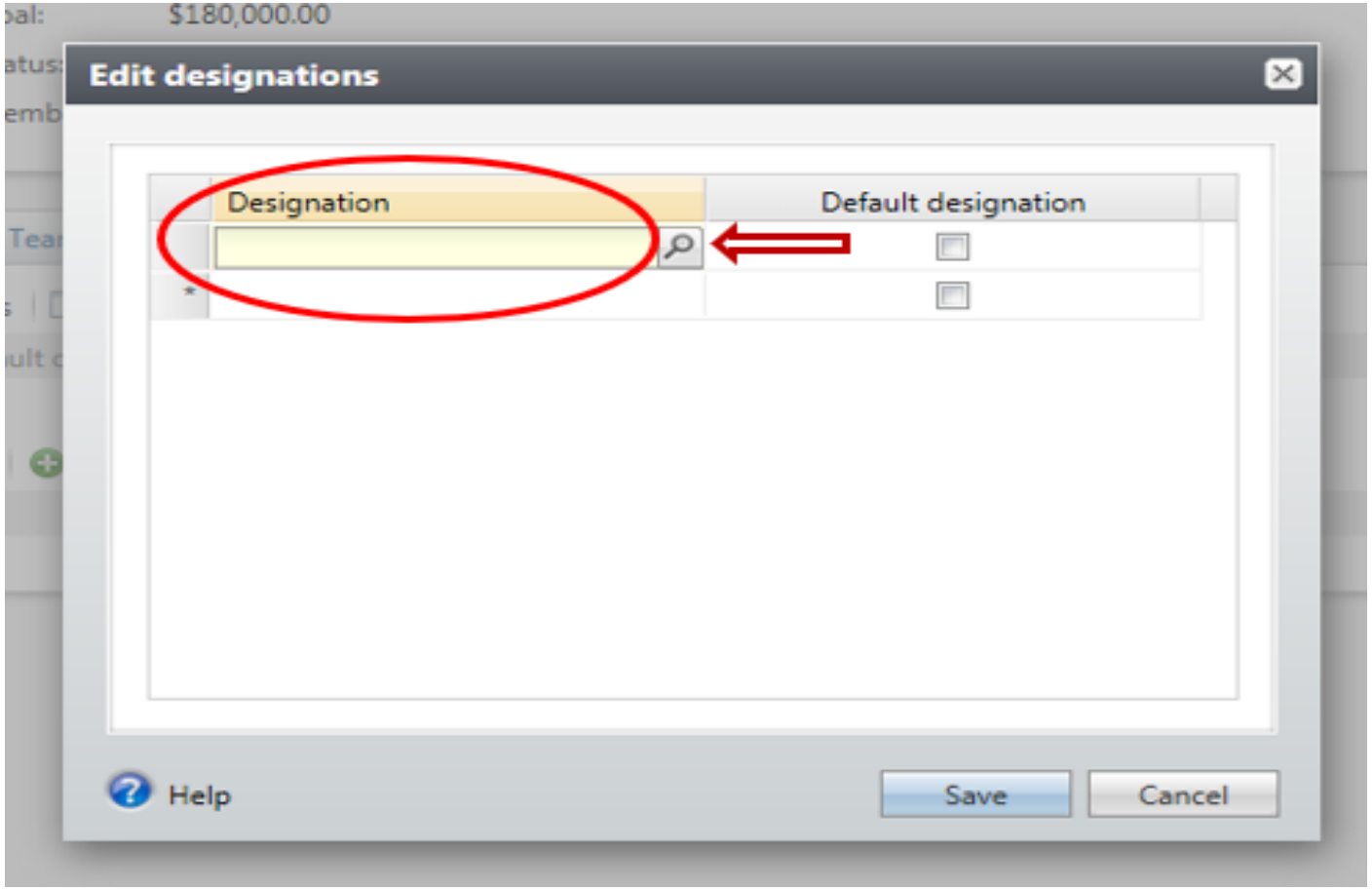


Adding the Designation as the Default

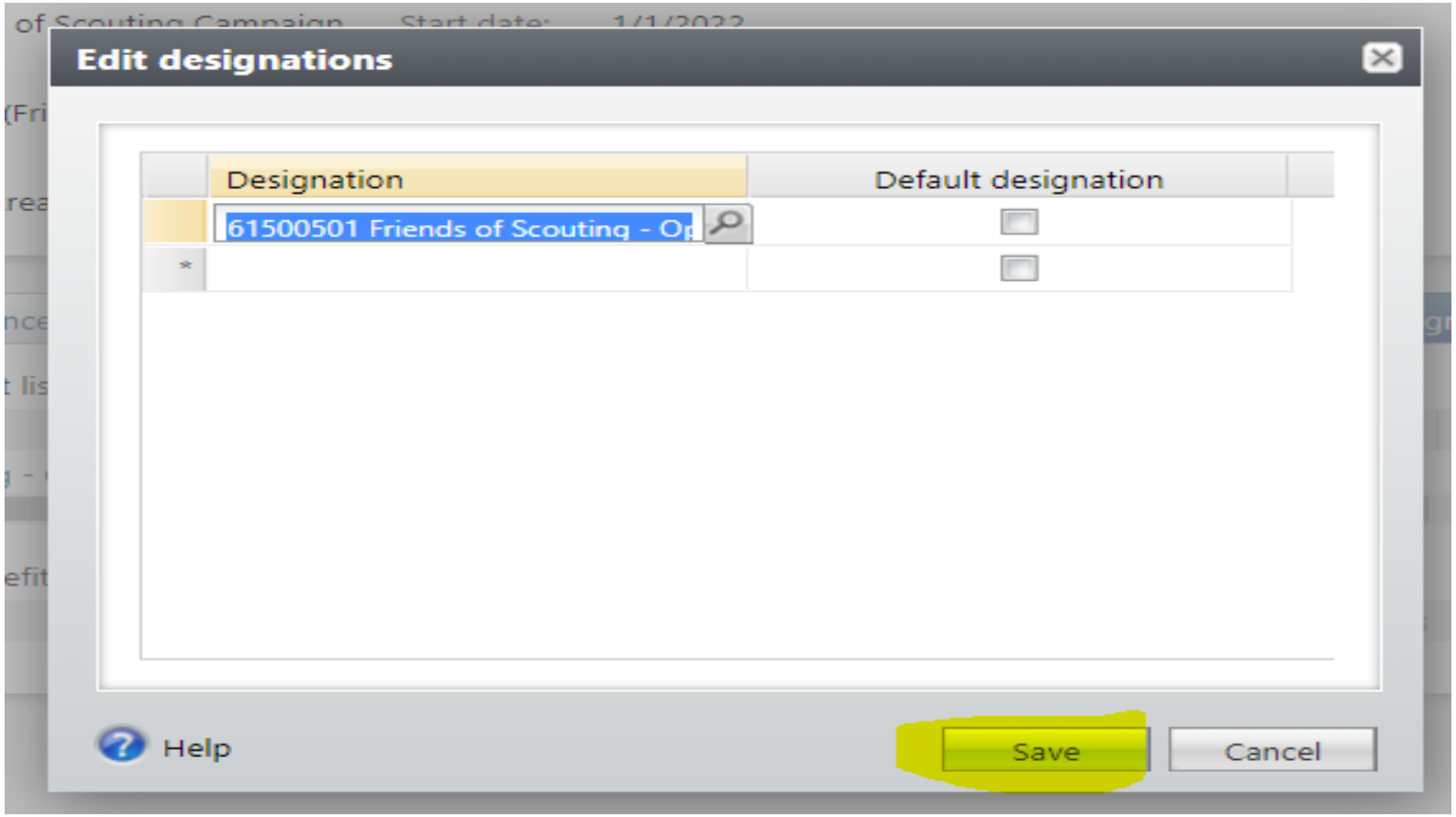


Edit Designations

Search for Designation by typing in box or search for number



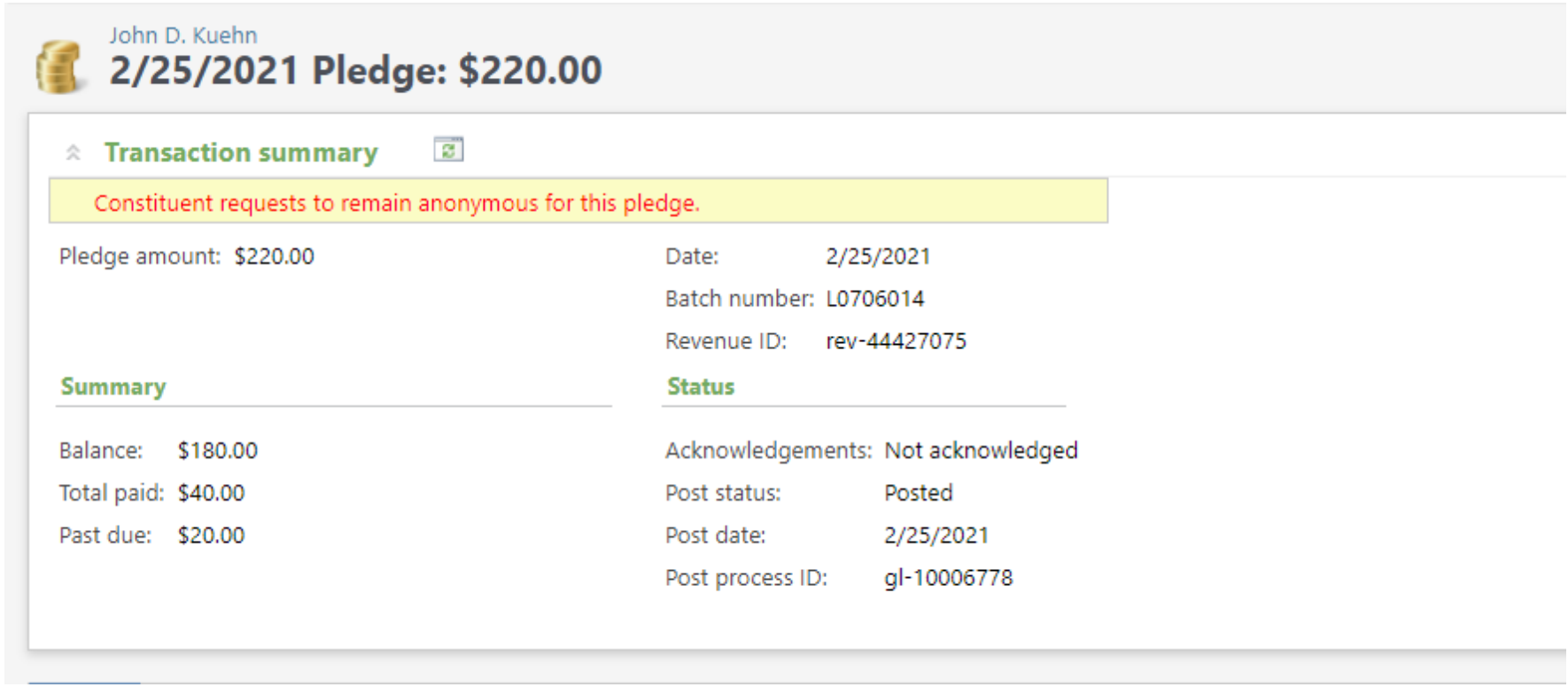
Add as many designations for this Appeal but only one can be the Default



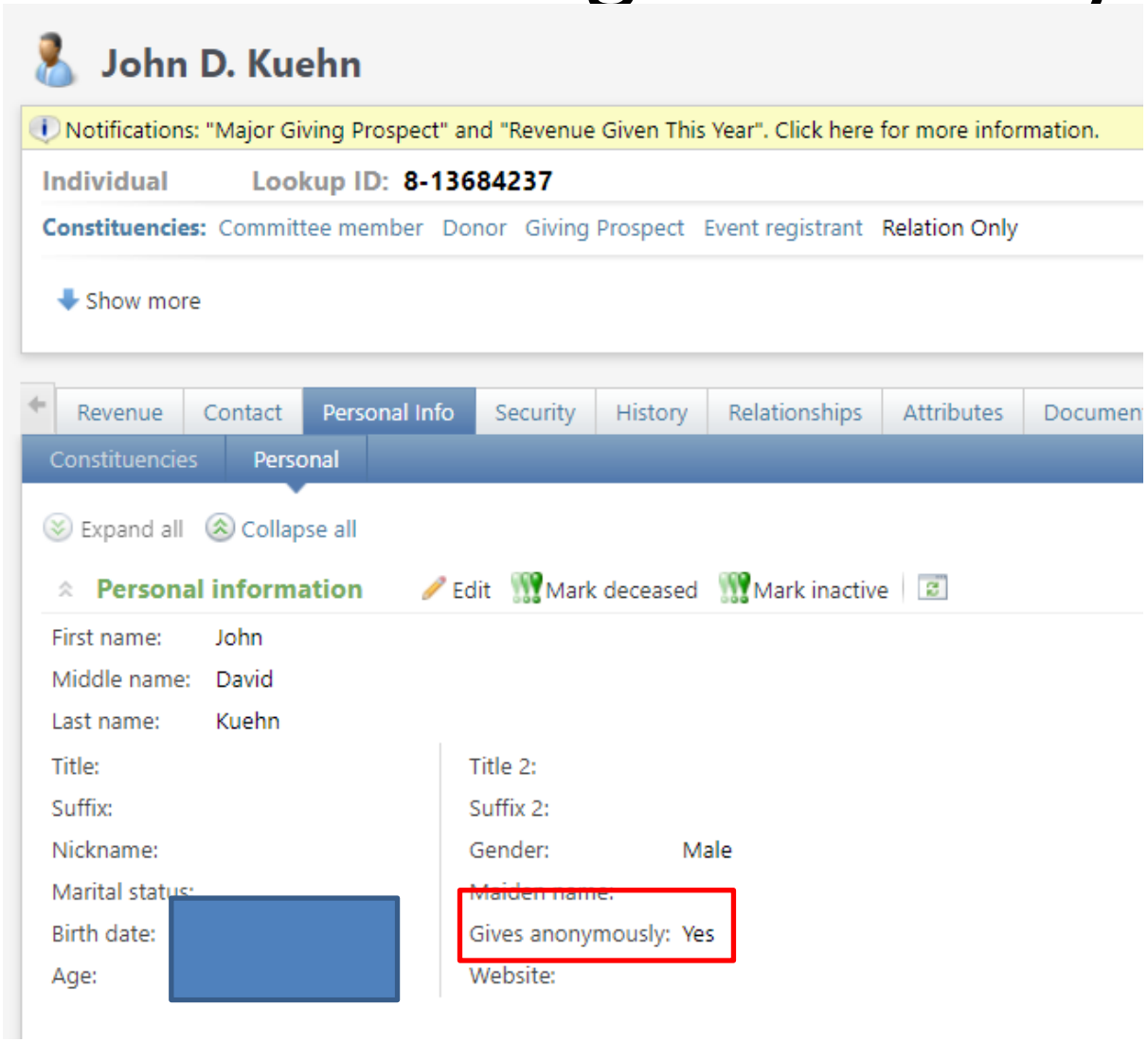
Anonymous Donors

- Identified individual that does not want gifting published
- Monies received that one does not know the donor

Pledge marked as Anonymous



Constituent marked as gives Anonymously



Managing duplicate constituents

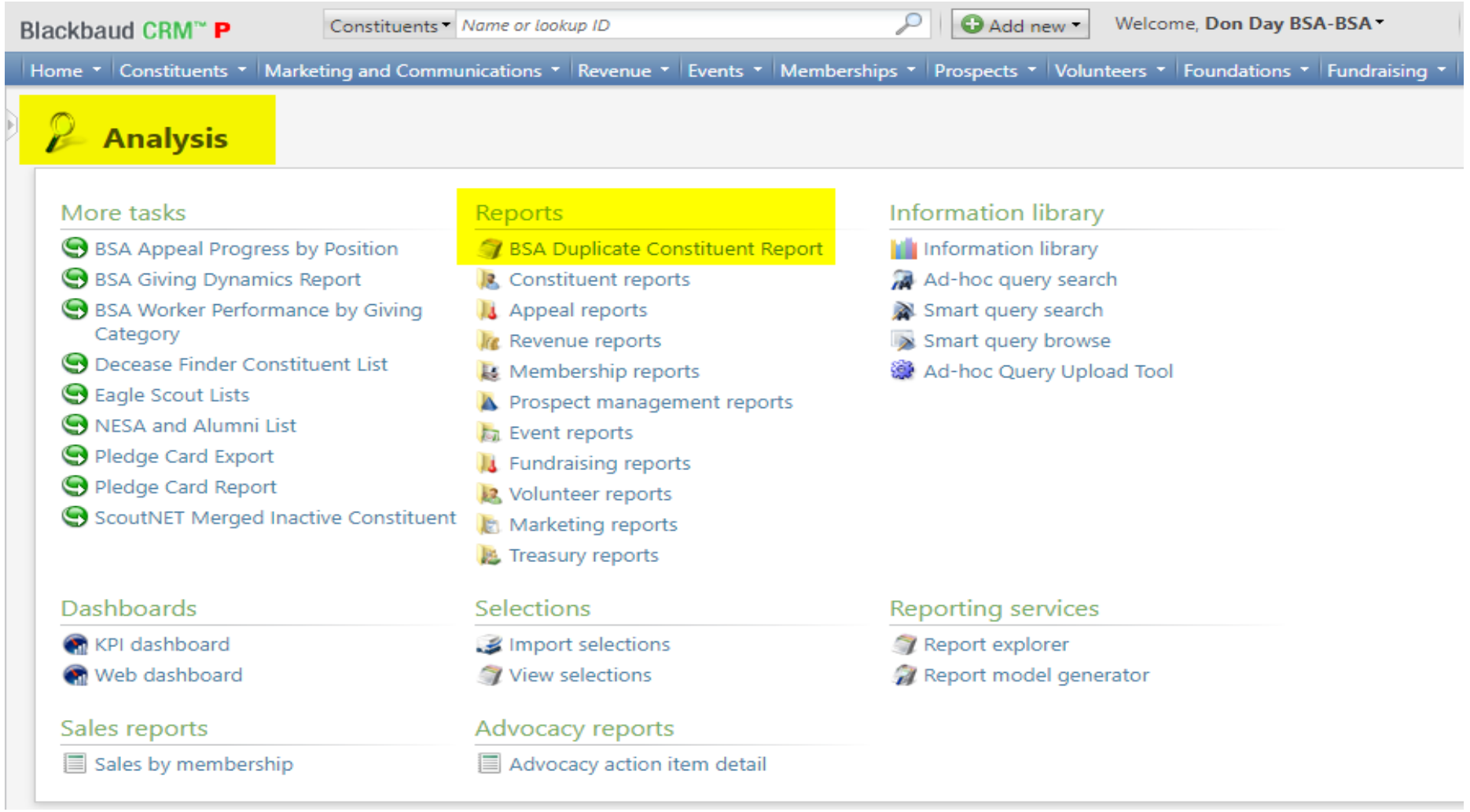
Duplicate constituents

- Duplicates are common in any database
  - Multiple people adding records
  - People using nicknames on materials
  - Data being fed from other systems
- How do we minimize this
  - Review constituent records
  - Review “ScoutNET Merged Inactive Constituent” data list or create “BSA Duplicate Constituent Report”
  - Find in daily constituent searches

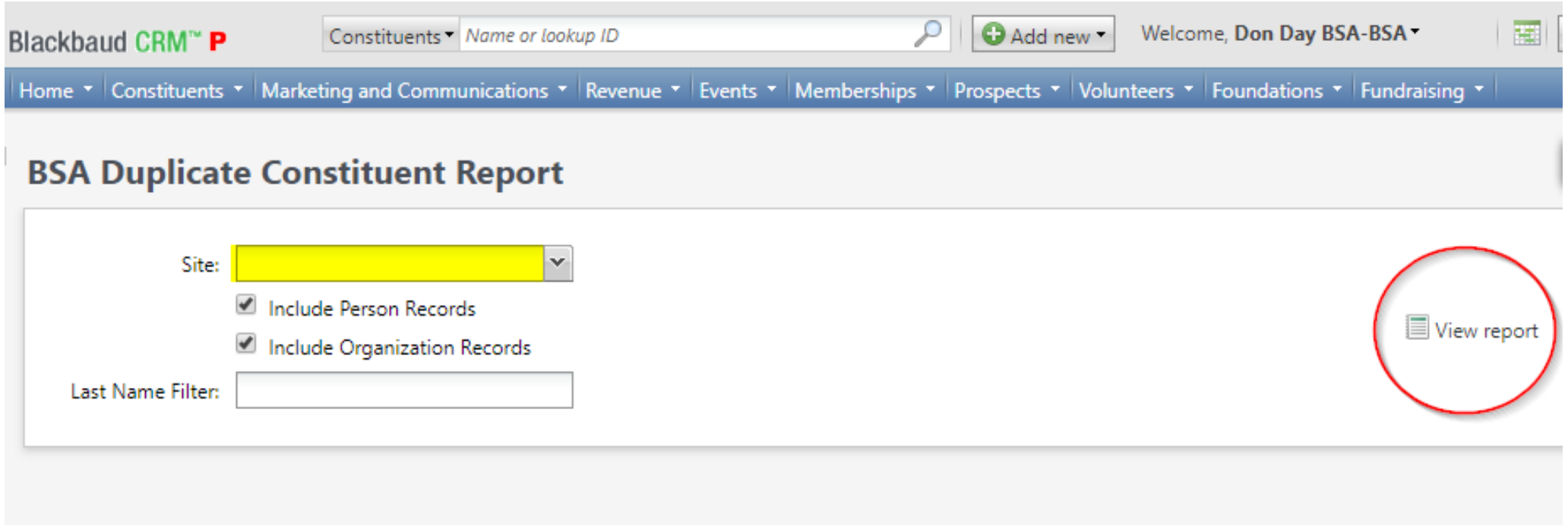
BSA Duplicate Constituent Report

- Customized tool that looks at the following:
  - identifies constituent records that have:
    - the same name and address AND
    - a ‘matching’ date of birth (a missing/blank DOB is considered a match).
  - the report displays key information for each constituent record that is helpful in determining which record to keep and which record(s) to merge/inactivate.

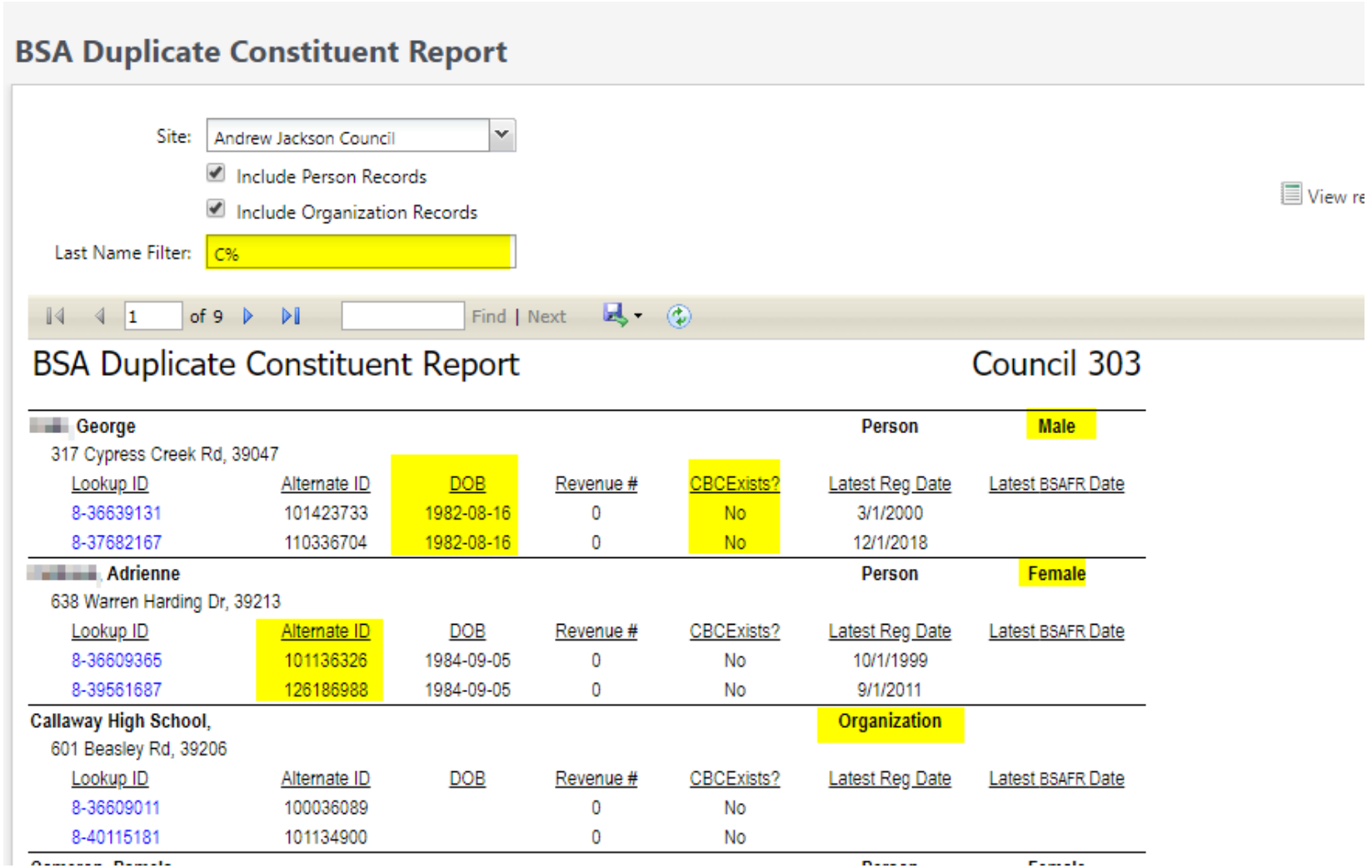
BSA Duplicate Constituent Report



BSA Duplicate Constituent Report



BSA Duplicate Constituent Report



BSA Duplicate Constituent Report

Site: Andrew Jackson Council

Include Person Records

Include Organization Records

Last Name Filter: C%

1 of 9 Find | Next

BSA Duplicate Constituent Report — Council 303

[redacted] George — Person — Male

317 Cypress Creek Rd, 39047

Lookup ID	Alternate ID	DOB	Revenue #	CBCExists?	Latest Reg Date	Latest BSAFR Date
8-36639131	101423733	1982-08-16	0	No	3/1/2000	
8-37682167	110336704	1982-08-16	0	No	12/1/2018	

[redacted] Adrienne — Person — Female

638 Warren Harding Dr, 39213

Lookup ID	Alternate ID	DOB	Revenue #	CBCExists?	Latest Reg Date	Latest BSAFR Date
8-36609365	101136326	1984-09-05	0	No	10/1/1999	
8-39561687	126186988	1984-09-05	0	No	9/1/2011	

Callaway High School, — Organization

601 Beasley Rd, 39206

Lookup ID	Alternate ID	DOB	Revenue #	CBCExists?	Latest Reg Date	Latest BSAFR Date
8-36609011	100036089		0	No		
8-40115181	101134900		0	No		

BSA Duplicate Constituent Report

[redacted], Michael — Person — Male

261 Willow Ln, [redacted]

Lookup ID	Alternate ID	DOB	Revenue #	CBCExists?	Latest Reg Date	Latest BSAFR Date
8-40243967	12024204	1970-11-04	0	Yes	1/1/2020	
8-40052987	130318920	1970-11-04	8	No		3/4/2014

Revenue ID	Date	Amount	Appeal
rev-43417811	7/31/2019	$0.00	(303) 19FOS - 2019 Friends of Scouting
rev-42339229	5/31/2018	$0.00	(303) 18FS - 2018 Friends of Scouting
rev-41660296	12/5/2017	$0.00	(303) 17FS - 2017 Friends of Scouting
124369441	5/12/2016	$150.00	(303) 16FS - 2016 Friends of Scouting
123118139	2/24/2015	$300.00	(303) 15FS - 2015 Friends of Scouting
PAS-136353411	2/24/2015	$300.00	(303) 15FS - 2015 Friends of Scouting
122087834	3/4/2014	$150.00	(303) 14FS - 2014 FOS
PAS-134471398	3/4/2014	$150.00	(303) 14FS - 2014 FOS

BSA Duplicate Constituent Report

- Similar to Duplicate Persons Report in ScoutNET
  - ScoutNET report ignores gender differences
  - CRM Report ignores suffix differences
  - CRM Report ignores middle name differences
- Each report is useful but can provide differing results

Volunteer Award List

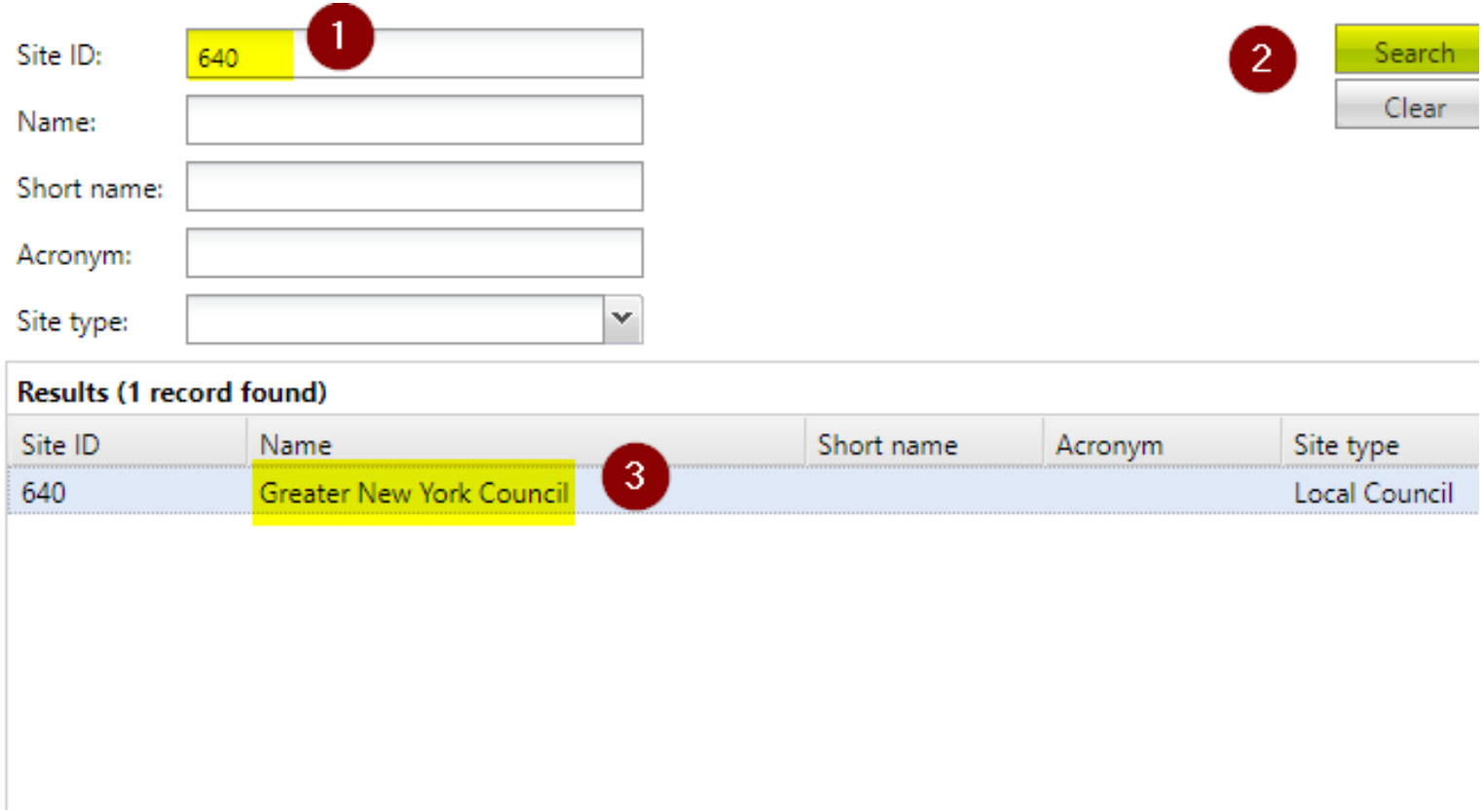
- Found under Constituents / Recognition
- This is a data list
- Site secured via council site
- Constituents show on the list because the award was updated in ScoutNet

How To Run

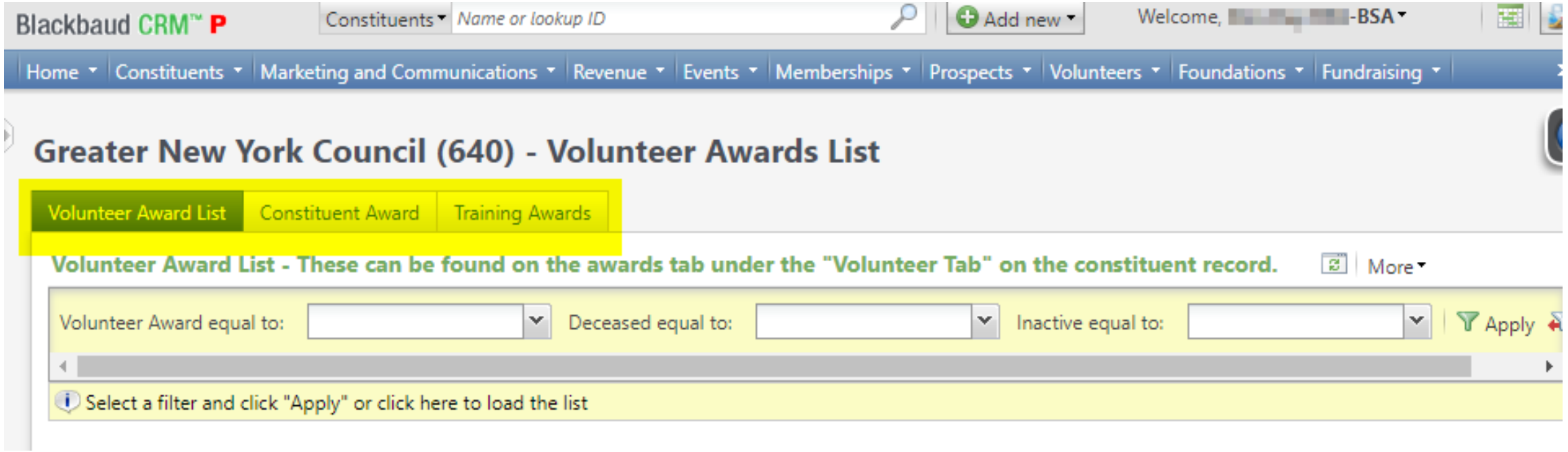
- Click Link
- Search and select the council
- Select which volunteer award you are seeking a list for
- Click Apply
- List may be downloaded and contains primary address, phone and email

Volunteer Awards Data List

Site ID – Search - Select



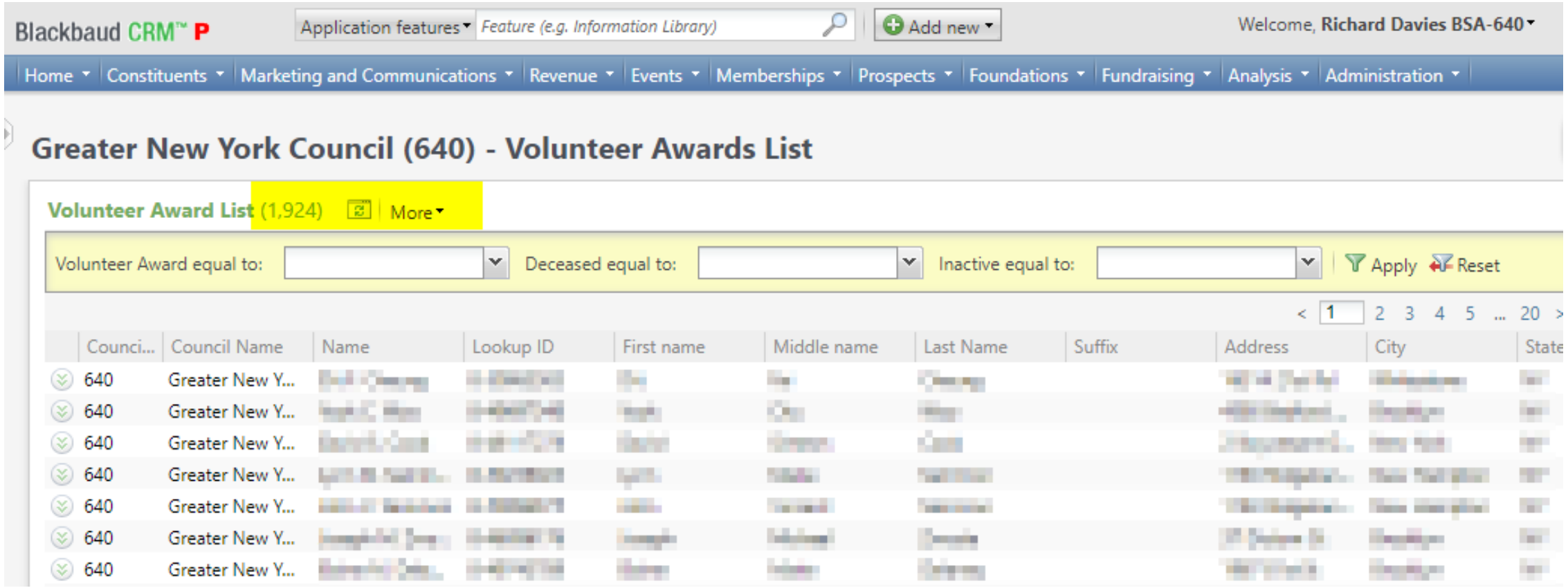
Choose Award Type
Volunteer Award – Constituent Award – Training Awards
Filter by Award or Deceased or Inactive



Volunteer Awards List(s)

- **Volunteer Awards**
  - can be found on the awards tab under the "Volunteer Tab" on the constituent record.
- **Constituent Awards**
  - can be found as a constituent attribute on the "Attributes Tab" on the constituent record.
- **Training Awards**
  - can be found as a constituent attribute on the "Attributes Tab" on the constituent record.

Click More to export



Volunteer Awards example

- Asian American Award
- Bronze Pelican
- Daniel C. Beard Masonic Scouter
- Distinguished Eagle Scout Award
- Distinguished Service Award
- District Award of Merit
- International Scouter's Award
- Kayaking BSA
- Medal of Merit (Adult)
- NESA Outstandng Eagle Scout (NOESA)
- Scouter's Award
- Scoutmaster Award of Merit
- Silver Antelope
- Silver Beaver
- Silver Buffalo
- Silver Fawn
- St. George (Catholic)
- St. George (Episcopal)
- Unit Leader Award of Merit - CM
- Unit Leader Award of Merit - NL
- Unit Leader Award of Merit - SM
- Unit Leader Award of Merit - VC
- Venturing Ldrship Awd. (Cncl. Adult)
- Veteran Award - 10 Years
- Veteran Award - 15 Years
- Veteran Award - 20 Years
- Veteran Award - 25 Years
- Veteran Award - 30 Years
- Veteran Award - 35 Years
- Veteran Award - 40 Years
- Veteran Award - 45 Years
- Veteran Award - 5 Years
- Veteran Award - 50 Years
- Veteran Award - 55 Years
- Veteran Award - 60 Years
- Veteran Award - 65 Years
- Veteran Award - 70 Years
- Veteran Award - 75 Years
- White Buffalo
- Whitney M. Young, Jr. Award
- William H. Spurgeon Award
- Woodbadge Complete
- Woodbadge Course
- Woodbadge Staff

Data Clean Up

- Giving Categories
- BSA Structure values

Giving Categories

- Review list in batch or
  - Request list from Member Care
- Determine giving categories to revise or delete
- Create ticket with Member Care to have updated

BSA Structure

- Review list in batch or
  - Request list from Member Care
- Determine structure to revise or delete
- Create ticket with Member Care to have updated

Next Forum

June 16, 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

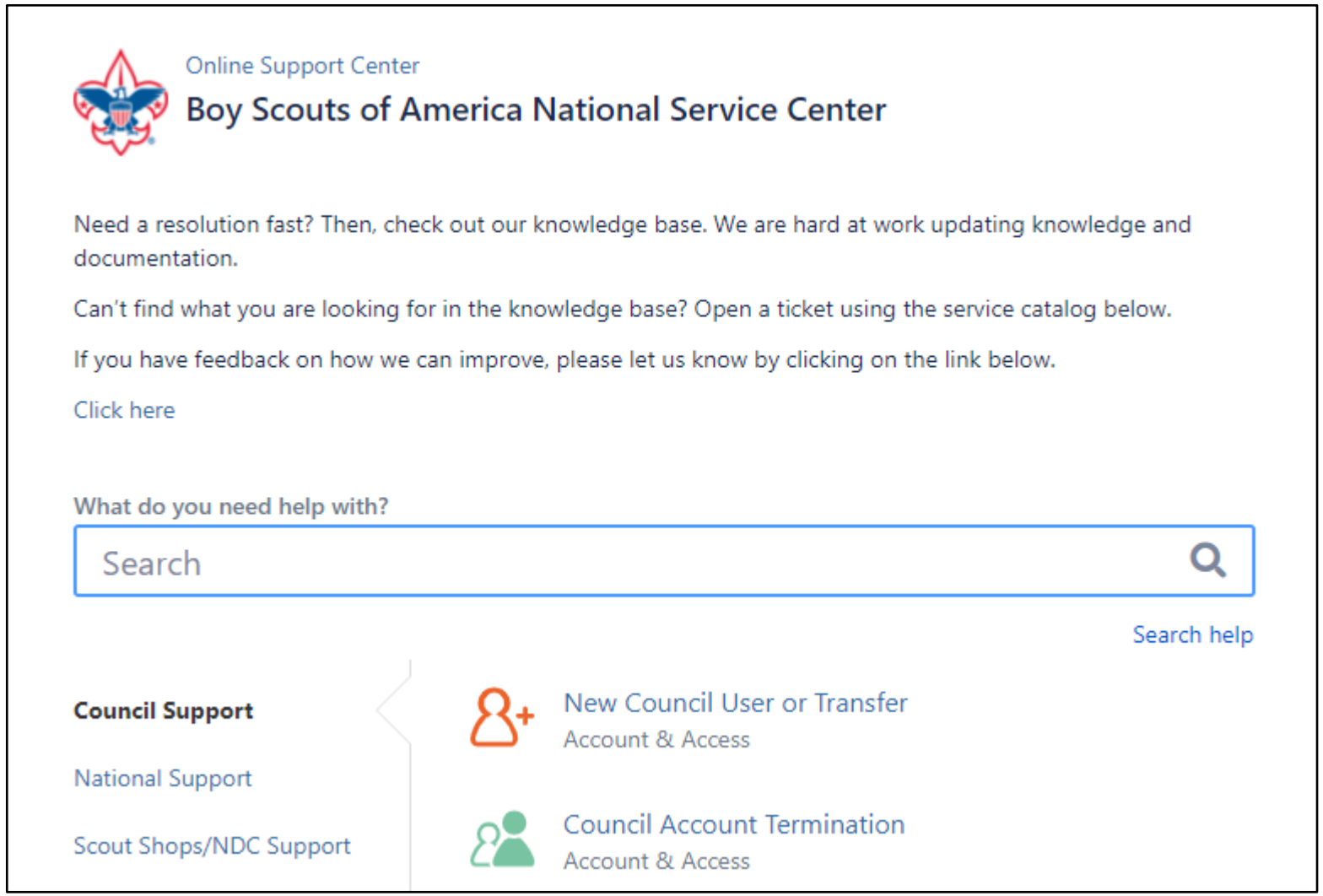
www.scouting.org/financeimpact

Prepared. For Life.™

Member Care Self-Service

- http://membercare.scouting.org

http://membercare.scouting.org



Choose

"Council Support"

Then on right side:

"General Assistance"

Summary – Description – Council

Summary

Blackbaud - need new giving category

A brief description of your problem.

Description - For quick resolutions please provide as much detail as possible.

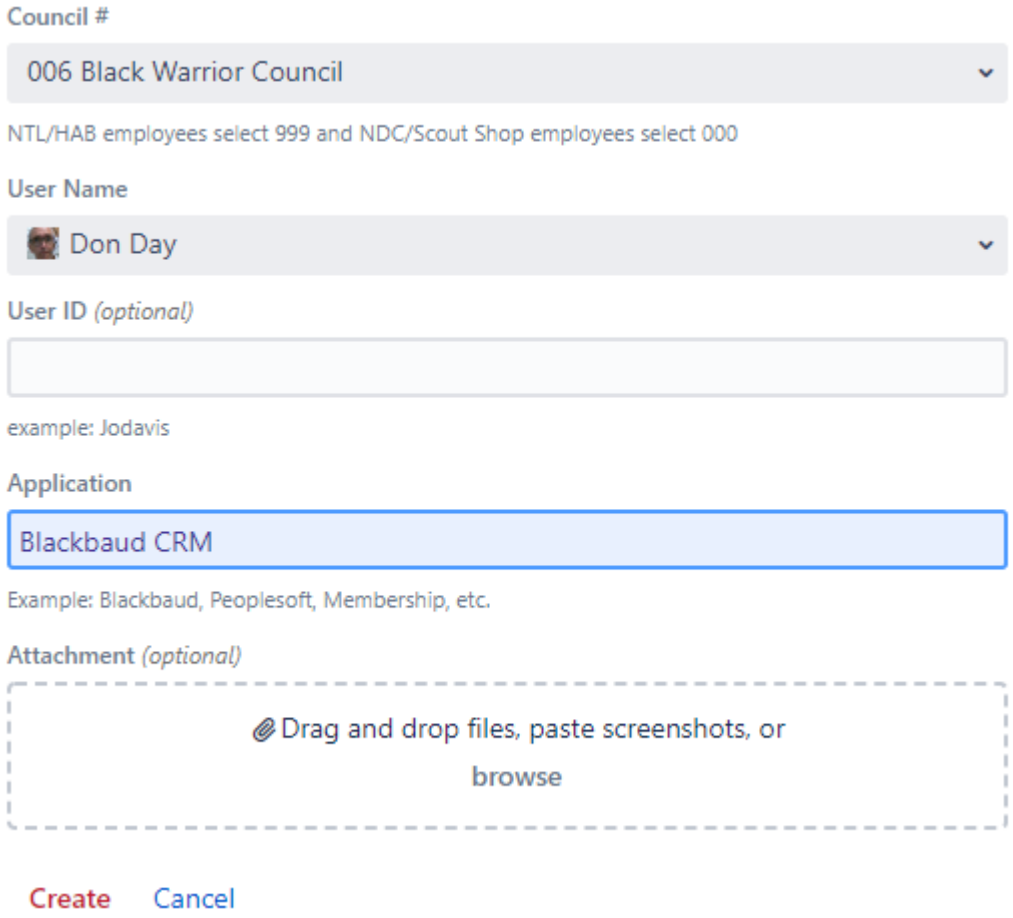
Please provide me a list of giving categories

Council #

006 Black Warrior Council

NTL/HAB employees select 999 and NDC/Scout Shop employees select 000

User Name – Application - Attachments



Questions & Answers