CRM User Forum

July 21, 2021

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Objectives

- Summer cleanup:
  - Batches – ensuring all old batches are committed.
  - Appeals & Events – Inactivating appeals and events
  - Scouting Gives constituent cleanup
- Adjusting Revenue
- New National Service Territories and how they impact CRM
- Questions

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Batches

Batch Hygiene

- Ensure all batches are committed
  – Keeps PeopleSoft current
  – Keeps donor records current
- As of 7.20.21 - 550 uncommitted Batches in CRM
  – Oldest uncommitted batch is on 3.20.20
  – 231 are Online Batches created by Scouting Gives
  – 121 are generated payment batches that need to be ran through a credit card processor

Batch Entry – Clear Filters to view all batches

Before

Batch Entry – Clear Filters to view all batches

After

Clear the date range box and click apply. The system will remember this setting when you log back in

Employee departures

Ensure the BSABatchAssignee role is move to new clerk

Update Generate Payment process to new clerk

Review batch entry that all batches created are committed before departure

Member Care can reassign batches to new person if needed.

APPEALS & EVENTS

Appeal & Event Hygiene

- Helps with appeal and event searches.

- Enhances revenue search using query.

- Use appeal category or report code to grab the same "types" of appeals or all appeals in the same year.

Appeal Cleanup

- Use the Appeals Progress Results list

- Found under Marketing & Communications / Appeals / Appeals Progress Results

- Search for your site and select it to open
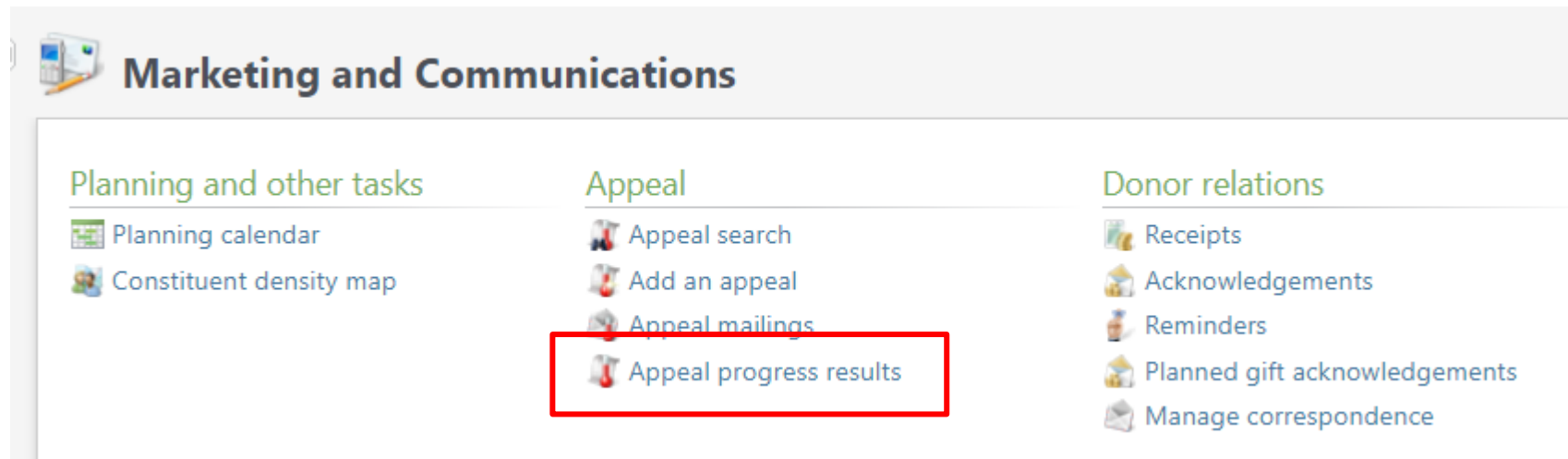
Appeal Data Integrity Tab

Provides a list of all appeals in your council

If lines are red, the appeal needs to be updated

Drop Chevron and Edit the appeal

> Add Appeal Category and Appeal report code

Once updated, the line will turn black

If an old appeal, mark it inactive to make your list of appeals return in a search to be smaller.

Leave future, current and last three years of appeals active.

Santa Fe Trail Council (194) – Appeal Progress Results

| Appeal Data Integrity | Contribution Summary | Payment Summary | Write-off & Balance Summary | Contributions by Segment | Payments by Segment | Write-offs & Balances by Segment | Appeal Designations |

Appeal Data Integrity ... STEPS: (1) Filter/Sort/Group to find Appeals missing data (2) Click chevron to edit Appeal record (80) | More▾

| Active equal to: | ▼ | Appeal equal to: | | Report Code equal to: | ▼ | Category equal to: | ▼ | ▼ Apply ▼ Rese |

☐	Missing A Field?	Active?	Appeal	Goal	Prior Appeal	Missing Report Code?	Report Co...	Missing Start Date?	Start Date
⊟ **<None>**									
☐ ⊗	Yes	Yes	(194) C01 - Capital Land Acquisition	$200,000.00		Yes		No	1/1/2002
	🔄 Go to appeal	✏️ Edit appeal	✏️ Edit prior appeal	🎯 Mark inactive					
☐ ⊗	Yes	Yes	(194) C02 - Capital Campaign (Land)	$200,000.00	(194) C97 - Capital Campaign	Yes		No	1/25/2002
☐ ⊗	Yes	Yes	(194) C97 - Capital Campaign	$600,000.00		Yes		No	1/1/1997
☐ ⊗	Yes	No	(194) D13 - Direct Mail 2013	$0.00		Yes		No	8/1/2013
☐ ⊗	Yes	No	(194) D14 - Direct Mail 2014	$0.00	(194) D13 - Direct Mail 2013	Yes		No	8/1/2014
☐ ⊗	Yes	Yes	(194) D15 - Direct Mail 2015	$0.00	(194) D14 - Direct Mail 2014	Yes		No	8/1/2015
☐ ⊗	Yes	No	(194) E01 - Endowment James E West	$0.00		Yes		No	12/1/2001
☐ ⊗	Yes	No	(194) E02 - Endowment James E West	$0.00	(194) E01 - Endowment James E...	Yes		No	12/1/2002
☐ ⊗	Yes	No	(194) E03 - Endowment James E West	$0.00	(194) E02 - Endowment James E...	Yes		No	12/1/2003
☐ ⊗	Yes	No	(194) E04 - Endowment James E West	$0.00	(194) E03 - Endowment James E...	Yes		No	12/1/2004
☐ ⊗	Yes	No	(194) E05 - Edowment James E W					No	12/1/2005

The Edit Appeal button opens the edit appeal form where you can add the report code and appeal category. You can use the Mark Inactive button to make appeal inactive.

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Edit an appeal

Name: (194) C01 - Capital Land Acquisition

Description: Capital Land Acquisition

Split evenly | Split fully

Category: Capital Campaign

Report code: Multi-year

Site: Santa Fe Trail Council

Start date: 1/1/2002

End date: 12/15/2011

Goal: $200,000.00

Help | Save | Cancel

The edit appeal form is to the left. The category and report code has been added. Once saved, the line will become black and it will sort to the correct report code if you have your data list columns sort in that manner. See list at the bottom of the screen.

ment James E West   *$0.00   (194) E07 - Endowment James E...*   *Yes*

| | No | Yes | (194) S21 - Investment in Character | $68,000.00 | (194) S20 Investment in Character | No | 2021 | No | 1/1/2021 |
| | No | Yes | (194) U21 - United Way 2021 | $19,000.00 | (194) U20 United Way | No | 2021 | No | 1/1/2021 |

Multi-year

| | No | Yes | (194) C01 - Capital Land Acquisition | $200,000.00 | | No | Multi-year | No | 1/1/2002 |

Event Cleanup

- Reduces what is returned in event search.
- Leave future, current and last year events active.
- Mark other events inactive.
- Inactive events do not show on the events calendar.

Conduct Events Search in Events

Use the "Mark inactive" button

SCOUTING "GIVES"

APTG Default

- The is the name of constituent used in a Scouting Gives batch.
- The constituent must be changed to the donor before you commit a Scouting Gives batch.
- The donor can be found in the batch attributes
- Monies committed to this constituent will not post to PeopleSoft

APTG Default

- Don't panic if you did not change the constituent.

- Create a case with the ID# for the correct constituent.

- We can change the constituent on the revenue for you.

- This constituent is reviewed weekly for mistakes and the constituent on the revenue is update for you.

- This revenue does not need to be deleted. Adding the correct constituent will post it.

Constituent not to commit revenue on.

Adjusting Revenue

LC Revenue Update Batch

- **GL-Triggering Adjustments**
- Changes to the following fields trigger an adjustment in the GL:
  - Amount
  - Application
  - Benefits
  - Revenue - Constituent (Not *Recognition credit* constituent)
  - Designation - generates a reversal and updated GL distribution
  - Events
  - Inbound Channels
  - Payment method
  - Payment method subtypes
  - Revenue category

LC Revenue Update Batch

- Pledge
  - *When you adjust the designations on a pledge, you are prompted to adjust the installment schedule*
- Pledge Payment
- Recurring Gift
- Recurring Gift Payment
- Matching Gift Payment
- Event Registration Payment
- Any other Payment

Batch template: Select **LC Revenue Update Batch**

Enter a Description in the box

Click *Save*

- Search for the *Revenue* **record to be adjusted**; the fields will automatically fill in the batch

Update the transaction as needed

a. If the entire transaction was entered in error, change the ***Amount* to $0.00** and fill out
   all fields that are highlighted.

b. It is important to use the correct **Adjustment *Post date*** because post date changes
   made in batch can affect a closed accounting period in PeopleSoft.

Make sure that Adjustment reason, Adjustment details and Adjustment post date is filled out.

Make sure the accounting person is asked what Adjustment Post date.

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In the batch header, click *Update projected totals* in the Processes section, and click *OK*

In the batch header, click *Validate* **in the Processes** section, and click *OK*

Click Commit

In the Commit parameters screen, click Start

Adjustment History

To review GL-triggering adjustments on the transaction, navigate to the **Adjustment History** tab:

1. Login to CRM, and navigate to the Revenue area

2. Click **Transaction** *search*
    a. Search for the transaction that has been adjusted
    b. Click the transaction row to select

3. On the **Transaction summary** page, click on the **Adjustment History** tab.

4. Click **View report** in the top right corner of the tab
    a. The report will display Adjustment details including date, field that was adjusted, and
       the values before and after the adjustment was made
    b. Click the *Save icon* in the toolbar to export the report to Excel
    c. Click the *Print icon* in the toolbar to print the report

National Service Territories

- Started June 1
- Gone – Regions & Area
- Sixteen National Service Territories
- CRM will work the same
- Information Library – Queries will be grouped in 100s
  - 000-099
  - 100-199
  - Etc.

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

August 18, 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

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Member Care Self-Service

- http://membercare.scouting.org

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

&+ New Council User or Transfer
Account & Access

National Support

Scout Shops/NDC Support

👥 Council Account Termination
Account & Access

Choose

"Council Support"

Then on right side:

"General Assistance"

Summary – Description – Council

User Name – Application - Attachments

Questions & Answers

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