

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



Batches




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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**

Uncommitted Batches | Committed Batches

Uncommitted batches (1)  Add  Batch search  More ▾

Date range: Last 30 days ▾ Sites: All sites ▾  ☐ Show only batches with exceptions  Apply  Reset

 Columns ▾  Clear all filters

Batch number	Owner	Date added	Batch template	Status
 L0760130	Jim McMullen BSA-376	7/14/2021	zAPTG Local Council Recurring Gift Payment Batch	1. Data En



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

Batch Entry

Uncommitted Batches | Committed Batches

Uncommitted batches (9) + Add | Batch search | More ▾

Date range: ▾ Sites: All sites ▾ ☐ Show only batches with exceptions **Apply** **Reset**

Search + Columns ▾ Clear all filters

	Batch number	Owner	Date added ▲	Batch template	Status
📁	L0679374	Jim McMullen BSA-376	12/14/2020	zAPTG Local Council Recurring Gift Payment Batch	1. Data Ent
📁	L0691381	Jim McMullen BSA-376	1/14/2021	zAPTG Local Council Recurring Gift Payment Batch	1. Data Ent
📁	L0702266	Jim McMullen BSA-376	2/14/2021	zAPTG Local Council Recurring Gift Payment Batch	1. Data Ent
📁	L0713253	Jim McMullen BSA-376	3/14/2021	zAPTG Local Council Recurring Gift Payment Batch	1. Data Ent
📁	L0725700	Jim McMullen BSA-376	4/14/2021	zAPTG Local Council Recurring Gift Payment Batch	1. Data Ent
📁	L0734851	Jim McMullen BSA-376	5/4/2021	zAPTG Local Council Donation Batch	1. Data Ent
📁	L0739098	Jim McMullen BSA-376	5/14/2021	zAPTG Local Council Recurring Gift Payment Batch	1. Data Ent
📁	L0750519	Jim McMullen BSA-376	6/14/2021	zAPTG Local Council Recurring Gift Payment Batch	1. Data Ent
📁	L0760130	Jim McMullen BSA-376	7/14/2021	zAPTG Local Council Recurring Gift Payment Batch	1. Data Ent



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



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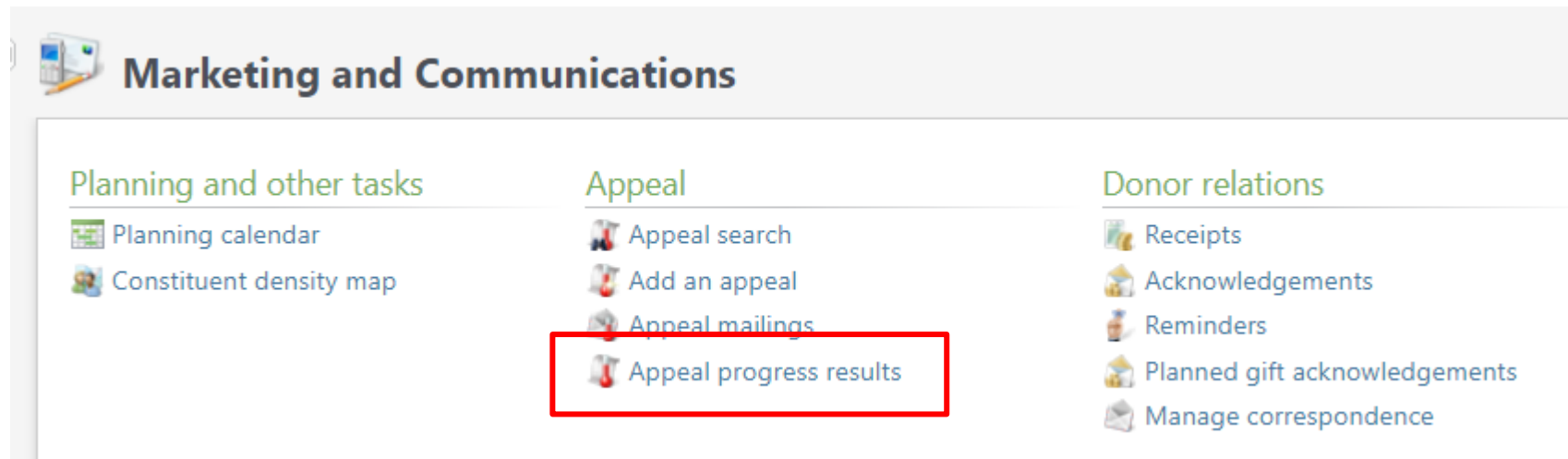
Appeal & Event Hygiene

- 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 Reset

<input type="checkbox"/>	Missing A Field?	Active?	Appeal	Goal	Prior Appeal	Missing Report Code?	Report Co...	Missing Start Date?	Start Date
--------------------------	------------------	---------	--------	------	--------------	----------------------	--------------	---------------------	------------

<None>

<input type="checkbox"/>		Yes	Yes	(194) C01 - Capital Land Acquisition	\$200,000.00		Yes	No	1/1/2002
<div> Go to appeal Edit appeal Edit prior appeal Mark inactive</div>									
<input type="checkbox"/>		Yes	Yes	(194) C02 - Capital Campaign (Land)	\$200,000.00	(194) C97 - Capital Campaign	Yes	No	1/25/2002
<input type="checkbox"/>		Yes	Yes	(194) C97 - Capital Campaign	\$600,000.00		Yes	No	1/1/1997
<input type="checkbox"/>		Yes	No	(194) D13 - Direct Mail 2013	\$0.00		Yes	No	8/1/2013
<input type="checkbox"/>		Yes	No	(194) D14 - Direct Mail 2014	\$0.00	(194) D13 - Direct Mail 2013	Yes	No	8/1/2014
<input type="checkbox"/>		Yes	Yes	(194) D15 - Direct Mail 2015	\$0.00	(194) D14 - Direct Mail 2014	Yes	No	8/1/2015
<input type="checkbox"/>		Yes	No	(194) E01 - Endowment James E West	\$0.00		Yes	No	12/1/2001
<input type="checkbox"/>		Yes	No	(194) E02 - Endowment James E West	\$0.00	(194) E01 - Endowment James E...	Yes	No	12/1/2002
<input type="checkbox"/>		Yes	No	(194) E03 - Endowment James E West	\$0.00	(194) E02 - Endowment James E...	Yes	No	12/1/2003
<input type="checkbox"/>		Yes	No	(194) E04 - Endowment James E West	\$0.00	(194) E03 - Endowment James E...	Yes	No	12/1/2004
<input type="checkbox"/>		Yes	No	(194) E05 - Endowment James E West	\$0.00	(194) E04 - Endowment James E...	Yes	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.


<input type="checkbox"/>	<input checked="" type="checkbox"/>	No	Yes	(194) S21 - Investment in Character	\$68,000.00	(194) S20 Investment in Character	No	2021	No	1/1/2021
<input type="checkbox"/>	<input checked="" type="checkbox"/>	No	Yes	(194) U21 - United Way 2021	\$19,000.00	(194) U20 United Way	No	2021	No	1/1/2021
Multi-year										
<input type="checkbox"/>	<input checked="" type="checkbox"/>	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

 **Events**

Enter the name of an event   Add new

Find an event  

Name:

Location:



Category:

Date:

From:

To:

Sites:

Search

Clear

Results (30 records found)

Name	Lookup ID	Start date	End date	Contact	Site	Location	Category
2021 Broome DCAD	8-10001720	1/1/2021	12/31/2021		Baden-Powell C...		Special Fund
2021 Chenango DCAD	8-10001723	1/1/2021	12/31/2021		Baden-Powell C...		Special Fund
2021 Delahanna DCAD	8-10001724	1/1/2021	12/31/2021		Baden-Powell C...		Special Fund
2021 Tompkins DCAD	8-10001722	1/1/2021	12/31/2021		Baden-Powell C...		Distinguished
L368 2015 Corporate Derby	8-10000174	11/19/2015	11/19/2015		Baden-Powell C...		Special Fund
L368 2016 Broome DCAD	8-10000189	5/4/2016	5/4/2016		Baden-Powell C...	The McKinley	Special Fund
L368 2016 Chenango DCAD	8-10000197	5/29/2016	3/30/2017		Baden-Powell C...	Canasawacta Co...	Special Fund
L368 2016 Corporate Derby	8-10000201	1/1/2016	1/1/2016		Baden-Powell C...		Special Fund
L368 2016 Cortland DCAD	8-10000200	5/5/2016	5/5/2016		Baden-Powell C...	Cortland Countr...	Distinguished
L368 2016 Delahanna DCAD	8-10000198	5/1/2016	3/2/2017		Baden-Powell C...	Elk Lake School ...	Special Fund
L368 2016 Racefest	8-10000212	6/1/2016	12/31/2016		Baden-Powell C...	Holiday Inn Bin...	Special Fund
L368 2016 Tompkins DCAD	8-10000199	3/28/2016	1/27/2017		Baden-Powell C...	Country Club of ...	Special Fund
L368 2017 Broome DCAD	8-10000250	5/3/2017	5/3/2017		Baden-Powell C...	The McKinley	Special Fund
L368 2017 Chenango DCAD	8-10000251	5/28/2017	5/28/2017		Baden-Powell C...	Canasawacta Co...	Special Fund
L368 2017 Cortland Derby	8-10000240	5/4/2017	5/4/2017		Baden-Powell C...		Special Fund

Help

Select

Cancel



Use the “Mark inactive” button

Tasks

- Edit event
- Edit lookup ID
- Edit event management options
- Configure seating layout
- Assign seats
- View seating summary
- Add team fundraising appeal
- Update event attendance
- Do not show event on event calendar
- Mark inactive**
- Delete event
- Configure email alerts

More information

L368 2016 Delahanna DCAD Event hierarchy ▾

Start date: 5/1/2016 - 5:00 PM Status: **Active** 100%

End date: 3/2/2017 - 10:00 PM 50%

Site: Baden-Powell Council Lookup ID: 8-10000198 0%

Location: Elk Lake School Gymnasium
2380 Elk Lake School Rd.
Springville, PA 18844

Room/Unit:

Contact:

Coordinator:

Category: Special Fundraising Event

Registrations Tasks/Coordinators Speakers Expenses Options Invi

Registrations (122) + Add More ▾



SCOUTING “GIVES”



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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.

 **APTG Default**

Individual **Lookup ID: 8-46000804**

Constituencies: [Committee member](#) [Loyal donor](#) [Major donor](#) [Recognized donor](#) [Event registrant](#)

[↓ Show more](#)

Revenue

Contact

Personal Info

Security

History

Relationships

Attributes

Documentation and Interactions

Memberships

Communications

...

Revenue History

Revenue Summary

Recognition

Recognition Summary




Recognition History

Gifts

Tributes

Accounts

...

Revenue history (23)    [More](#)

Group by:

Type:

All

Date range:

All dates

Revenue type:

All

Campaigns:

All campaigns

Start date:

mm/dd/yyyy

Revenue filter:


End date:

mm/dd/yyyy

Sites:

All sites

[Apply](#) [Reset](#)

Date	Amount	Balance	Transaction	Application	Revenue type	Detail	Catego
 6/3/2021	\$0.00		Payment	Donation	Gift	70207081 Golf Outing - Operating	



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Adjusting Revenue



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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



Click *Save*



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

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Prospects ▾ Foundations ▾ Fundraising ▾ Treasury ▾ Analysis ▾ Administration ▾ Data Integrity ▾ Workflow ▾

Batch Entry

Uncommitted Batches | Committed Batches

Uncommitted batches (5) + Add [?] M

Date range: Last 7 days ▾ Batch
Owner: ▾ Sites: ▾

Batch number	Batch template
L0006184	LC Pledge Commi
A0000860	LC Revenue Upda
GLAcct_00078x1	Account by Accol
L0006185x1	LC Pledge Commi
A0000861	LC Revenue Upda

Edit ▾ Update status Commit

Batch type: Revenue Update Batch
Date changed: 3/31/2015

Batch A0000861

Main | Revenue

Batch | Constituent | Configuration | Processes | Messages

Save Save and close Export Edit Go to Properties Customize fields Validate Update projected totals Update status Set row message Clear row Clear all Show all

Properties

Owner: Chuck Kehoe BSA Projected No.: 1 Current No.: 1
Projected total: 76.0000 Current total: 0.0000

Revenue	Revenue ID	Constituent	Lookup ID	Amount
1				

Constituent Window

Information

Applications Matching gifts

Application	Application amount	Organization	Amount
-------------	--------------------	--------------	--------

Page 1 of 1

Owner: Chuck Kehoe BSA | Current #: 1 | Projected #: 1 | Current amount: \$0.00 | Projected amount: \$76.00

Tasks

- Configure email alerts
- Batch search
- Generate revenue update batch
- Generate step update batch

Configuration

- Batch numbering schemes
- Batch workflows
- Batch templates
- Revenue batch constituent security

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts

Recent searches

- Constituent search
- Batch search
- Event search
- Smart query search
- Ad-hoc query search

Recently accessed

- 3/11/2015 Payment:



Update the transaction as needed

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

The screenshot displays the PeopleSoft Batch A0000861 interface. The top navigation bar includes links for Home, Constituents, Marketing and Communications, Revenue, Events, Prospects, Foundations, Fundraising, Treasury, Analysis, Administration, Data Integrity, and Workflow. The left sidebar contains sections for Tasks (Configure email alerts, Batch search, Generate revenue update batch, Generate step update batch), Configuration (Batch numbering schemes, Batch workflows, Batch templates, Revenue batch constituent security), Shortcuts (Add this page to shortcuts, Manage my shortcuts), Recent searches (Constituent search, Batch search, Event search, Smart query search, Ad-hoc query search), and Recently approved.

The main window is titled "Batch A0000861" and has tabs for Main and Revenue. The "Main" tab is active, showing a toolbar with icons for Save, Save and close, Export, Edit, Go to, Properties, Validate, Update projected totals, Update status, Set row message, Clear row message, Clear all, Show all, Select previous, Select next, and Filter..

Below the toolbar, the "Properties" section shows the following information:

- Owner: Chuck Kehoe BSA
- Projected No.: 1
- Current No.: 1
- Projected total: 76.0000
- Current total: 125.0000

The "Revenue" section displays a table with the following data:

Revenue	Revenue ID	Constituent	Lookup ID	Amount	Date	Revenue type	Application	Opp
1	125.00 Payment - Chuck...	rev-14557736	Chuck Kehoe	8-15191338	\$125.00	3/11/2015	Payment	<multiple>

Below the table, the "Constituent Window" section shows a notification: "Notifications: 'Recent Address Change'. Click here for more information." The "Individual" tab is active, showing the "Personal" section with the following information:

- Last name: Kehoe
- Address: Business












The bottom of the interface shows the following summary information:

Owner: Chuck Kehoe BSA | Current #: 1 | Projected #: 1 | Current amount: \$125.00 | Projected amount: \$76.00



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.

Constituent		Configuration		Processes		Messages				
			Properties		Validate		Update projected totals			Clear row message
Edit	Go to		Customize fields		Update status			Set row message		Clear all
										Show all


Projected No.: 0	Current No.: 1
Projected total: 0.0000	Current total: 1,000.0000

ment date	Adjustment reason	Adjustment details	Adjustment post status	Adjustment post date	
3/25/2020	Error - Data Entry Error	Wrong appeal	Not posted	3/25/2020	Not





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**

 **Batch Entry**

Uncommitted Batches

Committed Batches

Uncommitted batches (1)  Add  More ▾

Date range:

Last 7 days ▾

Batch template:

▾

Category:

▾



Owner:


▾






Sites:

All sites ▾

☐ Show only batches with exceptions

 Apply  Reset

Batch number	Batch template	Description	Owner	Status	Date added	Category
 L0000181	LC Cash/Check Payment	test	Terri Twine BSA	Data Entry	3/31/2015	Revenue

 Edit ▾  Update status  Commit  Validation report  Delete

Batch type: Enhanced Revenue Batch

Date changed: 3/31/2015



Click Commit

In the Commit parameters screen, click Start

Commit parameters

Batch number: L0006162

Batch commit instructions

- ☒ Validate batch before committing
- ☒ Check for duplicate constituents
- ☐ Delete batch after committing

Exception batch number:

☐ Override

Results

- ☒ Create control report
- ☐ Create output selection

Selection name:

☐ Overwrite existing selection

Help



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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



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 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

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



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User Name – Application - Attachments

Council #

006 Black Warrior Council

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

User Name

 Don Day

User ID *(optional)*


example: Jodavis

Application

Blackbaud CRM

Example: Blackbaud, Peoplesoft, Membership, etc.

Attachment *(optional)*

 Drag and drop files, paste screenshots, or
browse

Create Cancel



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Questions & Answers



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