

# CRM User Forum

October 27, 2021

Cornelia Ellis – Rich White

John Kuehn – Don Day



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# Objectives

- Batch entry – using the “combined batch”
- Batch entry – why you should NEVER DELETE a committed batch
- Preparing for year-end – understanding the correct selections for Inbound Channel and Designations
- Preparing for next year – creating new appeals and creating designations (only if needed)
- Questions



# BATCH ENTRY – REVIEW COMBINED BATCH



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# The Combined Batch

- Allows you to process
  - Donations and pledges with or without credit card information in the same batch template
- Partial pledge payment would be entered separately
- First installment on recurring gifts and pledges paid by credit card would be picked up by the generate payment routines.



Constituents Name or lookup ID  [+ Add new](#) Welcome, John Kuehn BSA-BSA

Marketing and Communications Revenue Events Memberships Prospects Volunteers Foundations Fundraising Treasury Web Analysis Administration Data Integrity Workflow

### Batch Entry

Uncommitted Batches **Committed Batches**

**Uncommitted batches (0)** [+ Add](#) [Batch search](#) [More](#)

Date range: Last 7 days Sites: All sites  Show only batches with exceptions [Apply](#) [Reset](#)

Search [+ Columns](#) [Clear all filters](#)

Batch number	Batch template	Owner	Status	Date added	Category	Site	Custom	Description
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To find new batch go to batch entry and click add to add a new batch.



Constituents Name or lookup ID Add new Welcome, John Kuehn BSA-BSA

Batch Entry

Uncommitted Batches Committed Batches

Uncommitted batches (0) Add Batch search More

Date range: Last 7 days Sites: All sites Show only batches with exceptions Apply Reset

Search Columns Clear all filters

Batch number Batch template Owner Status Date added Category Site Custom Description

**Add a batch**

Batch template: LC Combined Field options

Batch number: Override

Description:

Owner: John Kuehn BSA-BSA

Enable auto-save

Projected #: 0

Projected amount: \$0.00

Help Save Cancel

From your drop down list pick LC Combined. This will open the combined batch template. Fill in the other items in the “Add a batch” form and click save.



# Fields Contained in the Batch

Barcode	Constituent	Lookup ID	Group ID	Amount	Date	GL post date
				\$0.00		

Revenue type	Installment frequency	No. installments	Installment start date	Installment end date	First payment processed	Send reminders
						<input checked="" type="checkbox"/>
						<input type="checkbox"/>

Payment method	Other method	Check number	Card type	Name on card	Card number	Expires on
None						

Authorization code	Rejection message	Application	Appeal	Designation	Inbound channel	Revenue category
					Friends of Scouting	Unrestricted by donor

Giving Category	BSA Structure	Given anonymously	Reference	Do not acknowledge	Acknowledgee	BSA structure for revenue
		<input type="checkbox"/>		<input type="checkbox"/>		
		<input type="checkbox"/>		<input type="checkbox"/>		

Giving category	BSAFR current solicitor

The batch contains all of the fields except for those found in the stock and gift in kind batches.



As you add lines, fields are greyed out unless they are needed. The receipt amount is greyed out for the pledges and recurring gift. The post date is greyed out for the recurring gift.

The second set of lines demonstrates that the pledge information is greyed if it is donation or a pledge payment.

Constituent	Lookup ID	Group ID	Amount	Receipt amount	Date	GL post date	Revenue type
John D. Kuehn	8-14225721	Troop 0149 Bonner Spri...	\$100.00	\$100.00	9/19/2018	9/19/2018	Payment
Bruce Coleman	8-13208128	Troop 0149 Bonner Spri...	\$100.00	\$100.00	9/19/2018	9/19/2018	Payment
John D. Kuehn	8-14225721	Troop 0149 Bonner Spri...	\$100.00	\$100.00	9/19/2018	9/19/2018	Pledge
John D. Kuehn	8-14225721	Troop 0149 Bonner Spri...	\$120.00	\$120.00	10/1/2018	10/1/2018	Pledge
Bruce Coleman	8-13208128	Troop 0149 Bonner Spri...	\$10.00	\$10.00	10/1/2018		recurring gift
Bruce Coleman	8-13208128	Troop 0149 Bonner Spri...	\$50.00	\$50.00	10/1/2018	10/1/2018	Payment

- Pledge Payment
- Donation
- Pledge
- Pledge with CC
- Recurring Gift
- Donation with CC

Installment frequency	No. installments	Installment start date	Installment end date	First payment processed	Send reminders
					<input checked="" type="checkbox"/>
					<input checked="" type="checkbox"/>
Monthly	1	9/19/2018			<input checked="" type="checkbox"/>
Monthly	2	10/1/2018			<input checked="" type="checkbox"/>
Monthly		10/1/2018			<input checked="" type="checkbox"/>
					<input checked="" type="checkbox"/>

- Pledge Payment
- Donation
- Pledge
- Pledge with CC
- Recurring Gift
- Donation with CC





As you select different payment methods the field remain grey or are exposed to type information into. Check number, CC information and other method. The application changes based on the type of transactions **One always need to assure an Appeal, Designation, Giving Category and BSA structure.**

Payment method	Other method	Check number	Card type	Name on card	Card number	Expires on	
Check		888					Pledge Payment
Credit card			Visa	bruce coleman	*****1111	9/19/2018	Donation
None							Pledge
Credit card			Visa	John Kuehn	*****1111	10/1/2018	Pledge with CC
None							Recurring Gift
Other	Wire Transfer						Donation with CC

Authorization code	Rejection message	Application	Appeal	Designation	Inbound channel	Revenue category	
		Pledge for John D. Kueh...	(307) A18 - 2018 Annual...		Friends of Scouting		Pledge Payment
		Donation	(307) A18 - 2018 Annual...	30708011 Invest in Char...	Friends of Scouting	Unrestricted by donor	Donation
			(307) A18 - 2018 Annual...	30708011 Invest in Char...	Friends of Scouting	Unrestricted by donor	Pledge
			(307) A18 - 2018 Annual...	30708011 Invest in Char...	Friends of Scouting	Unrestricted by donor	Pledge with CC
			(307) A18 - 2018 Annual...	30708011 Invest in Char...	Friends of Scouting	Unrestricted by donor	Recurring Gift
		Donation	(307) A18 - 2018 Annual...	30708011 Invest in Char...	Friends of Scouting	Unrestricted by donor	Donation with CC

Giving Category	BSA Structure	Given anonymously	Reference	Do not acknowledge	Acknowledgee	
Family	Kaw	<input type="checkbox"/>		<input type="checkbox"/>		Pledge Payment
Family	Kaw	<input type="checkbox"/>		<input type="checkbox"/>		Donation
Family	Kaw	<input type="checkbox"/>		<input type="checkbox"/>		Pledge
Family	Kaw	<input type="checkbox"/>		<input type="checkbox"/>		Pledge with CC
Family	▼ Kaw	<input type="checkbox"/>		<input type="checkbox"/>		Recurring Gift
Family	Kaw	<input type="checkbox"/>		<input type="checkbox"/>		Donation with CC



# Important

- Use GIK batch when appropriate
- Use Stock batch when appropriate



# Important

- Appeal added to: New Pledges, Donations
- Revenue Attributes of Giving Category and BSA Structure added to: New Pledges, Donations
- You will need to populate the inbound channel, transaction types, payment methods – batch does not default these.



**BATCH ENTRY – NEVER DELETE COMMITTED**



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# NEVER DELETE a Committed Batch

- The data is lost forever
- Cannot be retrieved
- Removes important donor contribution details
- Revenue changes should be done through a Revenue Update Batch only



# PREPARING FOR YEAR-END



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# Batch Entry and Account # Creation

- Let's take the mystery out of CRM to Peoplesoft GL Account creation
- You create the accounts that send revenue to PeopleSoft
- You are important to your bookkeeper/controller



# Inbound Channels = Contribution Accounts in PeopleSoft

4001	Friends of Scouting
4010	Direct Mail
4071	Project Sales
4101	Capital Contributions

	<i>Special Event Fundraising</i>
4201	Sponsorship/Donation
4202	Participant/ Ticket

4301	Legacies and Bequests
4401	Foundations and Trusts
4501	Other Direct Contributions
4531	Other Direct - Service Contributions
4551	Other Direct - Learn for Life

4701	United Way - Allocations
4702	United Way - Donor Designations
4801	Unassociated Organizations
4901	Other Indirect Contributions

5001	Government Fees
5001	Government Grants





# Revenue Category = Restrictions or Special Event Sub Accounts

- 4201 = Sponsorship
- 4202 = Participant/Ticket
- 4203 = Program Item
- 4204 = Advertising
- 4205 = Concessions
- 4209 = Auction Donations
- 4231 = Other Revenue
- 4250 = Fees
- 2761 = State Sales Tax
- 90 = Unrestricted
- 91 = Temporarily Restricted
- 92 = Permanently Restricted

Restrictions are by donor,  
time or project.



# Designations

## 3 Parts of PeopleSoft Account

- Sample Designation = 30500891
- 305 – Council #
- 0089 = PeopleSoft Project Code / Cost Center
- 1 = Accounting Fund
  - 1 = Operating 2 = Capital 3 = Endowment



# GL Account

- CRM = L305-1-4001-089-90
- Council #-Fund-Inbound Channel-Project code-Rev. Category
  - Inbound Channel = Friends of Scouting Rev. Category - Unrestricted
- PeopleSoft = 1-4001-089-90
  - The nightly process moves the CRM account to your council and remove the L305 piece from the account during the move.



# Appeal Prior Year Tab

- Final Process to setting up next year's Appeal
- Click Edit on tab and add the appeal that relates to your 2022 appeal from 2021
- This connection create your history on your reports and pledge cards



# Year End Revenue Checks

- Use the Appeals Revenue Details Splits Tab
- Review Future year Appeals (2022 Report Code)
- Looking to ensure all revenue is marked as FY.



# Examples = Top Good – Bottom Bad

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

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (5) More

Constituent equal to: Transaction equal to: Application not equal to: GL Post Status equal to: GL Post Date is: mm/dd/yyyy

Verifi...	C...	Date	Transaction	Application	Split Amount	Total Amount	Pay M...	GL Post Status	GL Post Date	D...	Balance	Designation	Inbound Channel	Revenue Categ...	Giving Categor...
⊕	A...	2/11/2019	Pledge	Donation	\$250.00	\$250.00	None	Posted	2/11/2019		\$250.00	06100001 - Operating	FY - Friends of Scouting	Unrestricted by...	D Family
⊕	B...	3/4/2019	Pledge	Donation	\$100.00	\$100.00	None	Posted	3/4/2019		\$100.00	06100001 - Operating	FY - Friends of Scouting	Unrestricted by...	D Family
⊕	J...	3/20/2019	Pledge	Donation	\$100.00	\$100.00	None	Posted	3/20/2019		\$100.00	06100001 - Operating	FY - Friends of Scouting	Unrestricted by...	D Family
⊕	J...	3/16/2020	Pledge	Donation	\$100.00	\$100.00	Credit ...	Posted	3/16/2020		\$100.00	06100001 - Operating	FY - Friends of Scouting	Unrestricted by...	Family Presenta
⊕	T...	2/11/2019	Pledge	Donation	\$100.00	\$100.00	None	Posted	2/11/2019		\$100.00	06100001 - Operating	FY - Friends of Scouting	Unrestricted by...	D Family

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

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (100) More

Constituent equal to: Transaction equal to: Application not equal to: GL Post Status equal to: GL Post Date is: mm/dd/yyyy

Verifi...	C...	Date	Transaction	Application	Split Amount	Total Amount	Pay M...	GL Post Status	GL Post Date	D...	Balance	Designation	Inbound Channel	Revenue Categ...	Giving Categor...
⊕	T...	9/27/2021	Payment	Donation	\$300.00	\$300.00	Other	Posted	9/27/2021		\$0.00	04200001 Council General	FY - Friends of Scouting	Unrestricted by...	Donation
⊕	T...	9/12/2021	Payment	Donation	\$257.55	\$257.55	Other	Posted	9/12/2021		\$0.00	04200001 Council General	Friends of Scouting	Unrestricted by...	Donation
⊕	T...	9/7/2021	Payment	Donation	\$309.00	\$309.00	Other	Posted	9/7/2021		\$0.00	04200001 Council General	Friends of Scouting	Unrestricted by...	Donation
⊕	T...	10/12/2021	Payment	Donation	\$300.00	\$300.00	Other	Posted	10/12/2021		\$0.00	04200001 Council General	FY - Friends of Scouting	Unrestricted by...	Donation
⊕	T...	9/28/2021	Payment	Donation	\$5,000.00	\$5,000.00	Check	Posted	9/28/2021		\$0.00	04200001 Council General	FY - Friends of Scouting	Unrestricted by...	Donation
⊕	T...	9/26/2021	Payment	Donation	\$300.00	\$300.00	Other	Posted	9/26/2021		\$0.00	04200001 Council General	FY - Friends of Scouting	Unrestricted by...	Donation
⊕	T...	8/29/2021	Payment	Donation	\$309.00	\$309.00	Other	Posted	8/29/2021		\$0.00	04200001 Council General	Friends of Scouting	Unrestricted by...	Donation
⊕	V...	10/12/2021	Payment	Donation	\$103.20	\$103.20	Other	Posted	10/12/2021		\$0.00	04200001 Council General	FY - Friends of Scouting	Unrestricted by...	Donation
⊕	V...	10/12/2021	Payment	Donation	\$103.20	\$103.20	Other	Posted	10/12/2021		\$0.00	04200001 Council General	FY - Friends of Scouting	Unrestricted by...	Donation
⊕	Y...	9/24/2021	Payment	Donation	\$154.65	\$154.65	Other	Posted	9/24/2021		\$0.00	04200001 Council General	FY - Friends of Scouting	Unrestricted by...	Donation

# PREPARING FOR NEXT YEAR



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# Add an Appeal

The screenshot displays the Blackbaud CRM P interface. At the top, the logo 'Blackbaud CRM™ P' is visible on the left, and a search bar with the text 'Application features' and 'Feature (e.g. Information Library)' is on the right. Below the search bar is a navigation menu with items: Home, Constituents, Marketing and Communications (highlighted in yellow), Revenue, Events, Prospects, Foundations, Fundraising, and Analysis. The main content area is titled 'Marketing and Communications' and contains several sections:

- Appeal**
  - Appeal search
  - Add an appeal** (highlighted in yellow)
  - Appeal mailings
  - Appeal progress results
- Donor relations**
  - Receipts
  - Acknowledgements
  - Reminders
  - Planned gift acknowledgements
  - Manage correspondence
- Pledge card report**
  - Run pledge cards
- Reports**
  - BSA Appeal Organization Structure Report
  - Appeal profile
  - Appeal performance
- Packages**
  - Creatives
  - Letters and documents
  - Packages
- Configuration**
  - Address processing options
  - Letter template library
  - Name format options





# Add an Appeal

The screenshot shows a software dialog box titled "Add an appeal" with the following fields and callouts:

- 1**: Name field containing "(###) F## Nation's Best Fundraising Appeal"
- 2**: Description field containing "Nation's Best Fundraising Appeal"
- 3**: Category dropdown menu showing "Annual Giving"
- 4**: Report code dropdown menu showing "2022"
- 5**: Site dropdown menu showing "Council"
- 6**: Start date field showing "1/1/2022"
- 7**: End date field showing "12/31/2022"
- Goal field showing "\$0.00"

Additional elements include "Split evenly" and "Split fully" buttons, a "Help" icon, and "Save" and "Cancel" buttons at the bottom.



# Assign Designation & Prior Appeal (if one)

Blackbaud CRM™ T Application features Feature (e.g. Information Library) + Add new Wel

Home Constituents Marketing and Communications Revenue Events Prospects Foundations Fundraising Analysis Administration

## Appeal: Nation's Best Fundraising Appeal

Description: We raise more \$\$ than anyone else Start date: 1/1/2020  
 Business unit: End date: 12/31/2020  
 Category: Other Support Goal: \$100,000.00  
 Report code: 2020 Status: Active  
 Site: Black Warrior Council Membership:

1 2

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

**Contributions - posted 8/21/2019** [2] More ▾

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
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**Payments Received - posted 8/21/2019** [2] More ▾

Payments Received	# of Payments	Average Payment	Most Recent Payment	Mismatch: Appeal?	Mismatch: Inbound Channel?
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**Write-offs - will not post (manual PeopleSoft journal entry required)** [2] More ▾

Loading...

**Outstanding Balances - through 8/21/2019** [2] More ▾

Total Balances	# Pledges with Balance	Average Balance	Final Installment Due	Mismatch: Appeal?
----------------	------------------------	-----------------	-----------------------	-------------------



# Designations

- Only request new designations for new
- The appeal may change but the designation stays the same



# Create Appeal in CRM

## Appeal: 2019 SG19 Special Event Appeal

Description: Appeal for Scouting Give Set Up Demo    Start date: 1/1/2019  
Business unit:    End date: 12/31/2019  
Category: Special Events    Goal: \$100,000.00  
Report code: 2019    Status: Active  
Site: [Redacted] Council    Membership:

Revenue Summary | Contributions | Payments | Balances | Revenue Details (Splits) | Revenue Details (Write-offs)

**Designations (3)** | Edit list of appeal designations | More ▾

Designation ▲	Default designation
63508521 SG Event	✓
63508521 SG Event \ 63508521-4202 SG Event - Operating (Ticket)	
63508521 SG Event \ 63508521-4250 SG Event - Operating (Fees)	

**Benefits (0)** | View benefits catalog | Add | More ▾

Level	From	To	Benefits
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Follow directions in the CRM user guide to create an event appeal. All monies in CRM must be connected to an appeal. The designation tab must be completed with at least the main designation. Sub-designation are not available until you have your designation event mapping completed.



# Data Clean Up

- Giving Categories
- BSA Structure values
  - Review list in batch or
    - Request list from Member Care
  - Determine giving categories OR structures to revise or delete
  - Create ticket with Member Care to have updated



# Next Forum

November 17, 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](http://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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