

CRM User Forum

November 17, 2021

Cornelia Ellis – Rich White

John Kuehn – Don Day



Prepared. For Life.™

Objectives

- Using recognition credits with donors
- 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 year-end with EVENTS – using future year & current year
- Preparing for next year – creating new appeals and creating designations
- Questions



RECOGNITION CREDITS – WHY & HOW



Prepared. For Life.™

Recognition Credits

- Provides a way for you to recognize someone for a gift that came from someone else.
- Found on revenue record.
- System Defaults – Hard Credit, Spousal Credit, Matching Gift Credit.
- Other credits available to use are



Recognition Credits Available

Consolidated federal credit	Yes	All sites
Day Giving Credit	Yes	All sites
Donor Advised Fund	Yes	All sites
Donor Challenge Credit	Yes	All sites
Employee giving credit	Yes	All sites
Estate gift credit	Yes	All sites
Family foundation credit	Yes	All sites
Family Member	Yes	All sites
Hard credit	Yes	All sites
Household credit	Yes	All sites
Matching gift - volunteer hours	Yes	All sites
Matching gift credit	Yes	All sites
Organization to organization credit	Yes	All sites
Owner credit	Yes	All sites
Soft credit	Yes	All sites
Spouse credit	Yes	All sites
United Way credit	Yes	All sites



Use of Recognition Credits

Recognition	Details	Installment/Write-off Activity	Letters	Attributes	BSAFR	Documentation	VNE TEST	Ben
Recognition credits (3) More ▾								
Designation/Constituent		Amount	Type	Effective date				
	66200511 FRIENDS OF SCOU...	\$220.00						
	John D. Kuehn	\$220.00	Hard credit	2/25/2021				
	Kimberly A. Kuehn	\$220.00	Spouse credit	2/25/2021				
Named recognition (1) More ▾								
Designation/Naming opportunity		Amount	Recognition name	Recognition date				
	66200511 FRIENDS OF SCOUTIN - Operat...	\$220.00						

Picture to the left shows credits on a pledge that are in the system due to a person having a spouse. The pictures at the bottom references a payment and by clicking **Go to Revenue** one can navigate to the recognition tab.

Application details	
Pledge - \$20.00	Go to revenue Edit posted
Applied to: 2/25/2021 Pledge for John D. Kuehn	
Designation:	66200511 FRIENDS OF SCOUTIN - Operating
Campaign:	
Revenue category:	Unrestricted by donor
Solicitors:	Troop 1910 BT Keller - 662 (91166) (\$20.00)
Recognition credits:	John D. Kuehn (\$20.00); Kimberly A. Kuehn (\$20.00)

Details	Solicitors	Recognition	Campaigns	Business units
Recognition credits (2) Edit recognition credits More ▾				
Constituent		Amount	Type	Effective date
John D. Kuehn		\$20.00	Hard credit	2/26/2021
Kimberly A. Kuehn		\$20.00	Spouse credit	2/26/2021
Named recognition (0) Add ▾ More ▾				
Naming opportunity		Recognition name	Recognition date	Recognition ends

Why use Recognition Credits

- You can see on a person's revenue recognition tab how they are related to other people and entities regarding revenue.
- It's a way to pull a third-party list out of the system and thank them.
- Examples
 - United Way Designator – Thank them for designating to your council
 - Matching Gift Donors – Thank them for filling out the paperwork



BATCH ENTRY – NEVER DELETE COMMITTED



Prepared. For Life.™

NEVER DELETE a Committed Batch

- 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



Prepared. For Life.™

Batch Entry and Account # Creation

- Let's take the mystery out of CRM to Peoplesoft GL Account creation
- You create the journal entries that send revenue to PeopleSoft
- You are an important part of your council's accounting team



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 only
made by donor:**

- **time**
- **purpose**



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
- After adding the new Appeal go to the Prior Year tab
- 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 YEAR-END & EVENTS



Prepared. For Life.™

Special Events – Future Year

- When setting up an event, as you enter money in this year for next year, the event category needs to be FY – “Choice”
- When January 1 rolls around you need to edit your event and change this to just “Choice”



Events

Enter the name of an event

+ Add new ▾

Add an event

General

Name:

Description:

Category:

Sites:

Site

Boy Scouts of America

- ☐ Event is an auction
- ☐ Do not show event on calendar
- ☐ Event allows designations on fees

Copy options

Details

Start date:

Start time:

End date:

End time:

Location information

Location:

Room/Unit:

Capacity:

0

Contact:

? Help

Save

Cancel

Proceed to events to add an event or to copy an event. You drop-down the category bar to pick your category.



Prepare

Reset filters

Apply filters

			7:30 am L413 2015		6:00 pm L609 2015
			11:00 am L651 Sco		
18	19	20	21	22	23
L532 Oil City Breakfast					
L532 Clarion Breakfast 2015					
L571 Thank You Letters					
		L307 Chieftain			

Enter the name of an event

+ Add new

Add an event

General

Name:

Description:

Category:

Sites:

Copy options



Help

- Auction
- Cultivation/Recognition (no revenue)
- Distinguished Citizens Dinner
- Friends of Scouting (no registration revenue)
- Golf
- Special Fundraising Event
- Sporting Clays
- FY - Auction
- FY - Distinguished Citizens Dinner
- FY - Golf
- FY - Special Fundraising Event
- FY - Sporting Clays
- GM Pinewood Derby

Details

Start date:

End date:

Location information

Location:

Room/Unit:

Contact:

Pick future year (FY) with the corresponding category. This is done for an event that will have registrations now but is not happening until next year.

When January 1 rolls around you need to come back and edit this field and change it back to the current year setting.

You process your event revenue in a batch using the correct FY Inbound Channels.



Prepare

The Inbound Channel type (CY/FY/PY) used for new revenue in BCRM should always align with what your accounting staff considers CY/FY/PY in PeopleSoft.

At the beginning of January, continue using the same BCRM Inbound CY/FY/PY you used in December ... as long as accounting still considers the recently completed year to be “Current” in PeopleSoft. It is very important to keep CY/FY/PY balances aligned between BCRM and PeopleSoft.

For example, on 1/1/2022, when accounting still considers “2021” to be “Current”, use:

- PY = 2020 and earlier appeal years pledge payment
- CY = 2021 appeal year
- FY = 2022 appeal year

A few days later, when accounting “closes” the 2021 fiscal year in PeopleSoft, they also manually transfer all year-end CY receivables to PY (and all year-end FY receivables to CY). When these receivable balances are moved in PeopleSoft, at that point in BCRM you begin using updated Inbound types for new revenue to post to GL.

For example, if your Controller “closes” the 2021 fiscal year in PeopleSoft on 1/8/2022, and now considers 2022 to be the “Current” year, then you start using Inbound types:

- PY = 2021, 2020 and earlier appeal years pledge payments
- CY = 2022 appeal year
- FY = 2023 appeal year



Summary

- Gifts for next year need to be placed into the system using FY inbound channels
- Events need to be tweaked for FY and current year at Jan 2 before additional registrations are added.
- Payment for Prior Year pledges should use PY inbound channels.



Appeal: (307) A21 - 2021 Annual Giving Campaign

Description: 2021 Annual Giving Campaign Start date: 1/1/2021
Business unit: End date: 12/31/2021
Category: Annual Giving (Friends of Scouting) Goal: \$0.00
Report code: 2021 Status: Active
Site: Heart of America Council Membership:

Review all 2022
appeals to ensure all
transactions have a
FY inbound channel
before you close
2021 books.

Revenue Summary Contributions Payments Balances **Revenue Details (Splits)** Revenue Details (Write-offs) Matching Gift Claims Designations Mailings Documentation Mismatch: Appeals? Solicit

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (7) More ▾

Constituent equal to: Transaction equal to: ▾ Application not equal to: ▾ GL Post Status equal to: ▾ GL Post D

T...	Pay M...	GL Post Status	GL Post Date ▲	D...	Balance	Designation	Inbound Channel	Revenue Categ...	Giving Category	BSA Structure
...	Check	Posted	9/14/2020	9...	\$0.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Leadership Event	Council Scoute...
...	Check	Posted	10/27/2020	9...	\$0.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Community	North Star
...	Check	Posted	10/30/2020	9...	\$0.00	30709101 Camp Staff Scholarship - Operating	FY - Project Sales	Temporarily res...	Fdn - Camp St...	Council Scoute...
...	None	Posted	11/10/2020		\$540.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Community	Lone Bear
...	None	Posted	11/10/2020		\$540.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Community	Lone Bear
...	None	Posted	11/10/2020		\$180.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Community	Lone Bear
...	None	Posted	11/10/2020		\$100.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Leadership Event	Lone Bear



Prepared. For Life.™

PREPARING FOR NEXT YEAR



Prepared. For Life.™

Add an Appeal

The screenshot displays the Blackbaud CRM P web application interface. At the top, the header includes the Blackbaud CRM P logo, a search bar with the text 'Application features' and 'Feature (e.g. Information Library)', and a '+ Add new' button. Below the header is a navigation bar with tabs for 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 a grid of links organized into four columns. The first column, 'Appeal', includes 'Appeal search', 'Add an appeal' (highlighted in yellow), 'Appeal mailings', and 'Appeal progress results'. The second column, 'Donor relations', includes 'Receipts', 'Acknowledgements', 'Reminders', 'Planned gift acknowledgements', and 'Manage correspondence'. The third column, 'Pledge card report', includes 'Run pledge cards'. The fourth column, 'Configuration', includes 'Address processing options', 'Letter template library', and 'Name format options'. Below the 'Appeal' column, there is a 'Reports' section with links for 'BSA Appeal Organization Structure Report', 'Appeal profile', and 'Appeal performance'. Below the 'Donor relations' column, there is a 'Packages' section with links for 'Creatives', 'Letters and documents', and 'Packages'.

Blackbaud CRM™ P

Application features ▾ Feature (e.g. Information Library) 🔍 + Add new ▾

Home ▾ Constituents ▾ **Marketing and Communications ▾** Revenue ▾ Events ▾ Prospects ▾ Foundations ▾ Fundraising ▾ Analysis ▾

Marketing and Communications

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



Add an Appeal

The screenshot shows a software window titled "Add an appeal" with a close button (X) in the top right corner. The window contains the following fields and controls, each marked with a red circle number:

- 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**: A field showing "\$0.00".

Additional controls include "Split evenly" and "Split fully" buttons between the description and category fields, and a "Help" button with a question mark icon at the bottom left. "Save" and "Cancel" buttons are at the bottom right.



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  More ▾


Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
---------------------	--------------------	----------------------	---------------------	-----------------------

Payments Received - posted 8/21/2019  More ▾

Payments Received	# of Payments	Average Payment	Most Recent Payment	Mismatch: Appeal?	Mismatch: Inbound Channel?
-------------------	---------------	-----------------	---------------------	-------------------	----------------------------

Write-offs - will not post (manual PeopleSoft journal entry required)  More ▾

Loading...

Outstanding Balances - through 8/21/2019  More ▾

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




Prepared. For Life.™


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:	 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
--	-------	------	----	----------

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

December 15, 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”



Prepared. For Life.™

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



Prepared. For Life.

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



Prepared. For Life.™

Questions & Answers



Prepared. For Life.™