CRM User Forum

November 17, 2021

Cornelia Ellis – Rich White

John Kuehn – Don Day

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

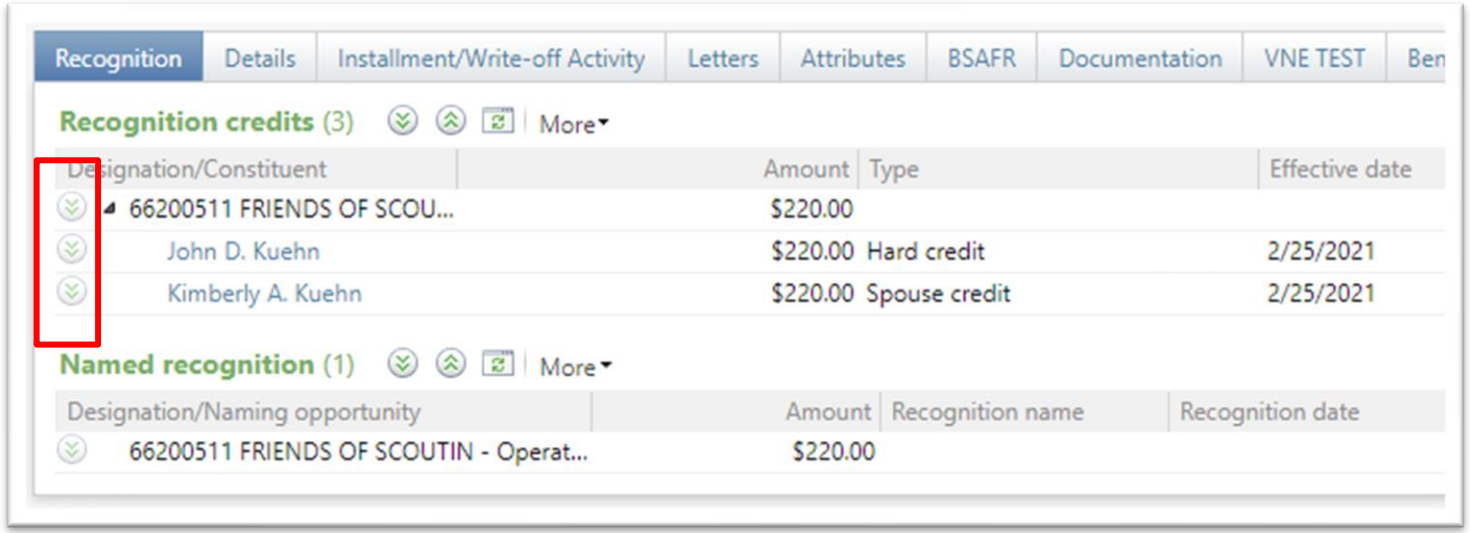
Recognition Credits

- 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

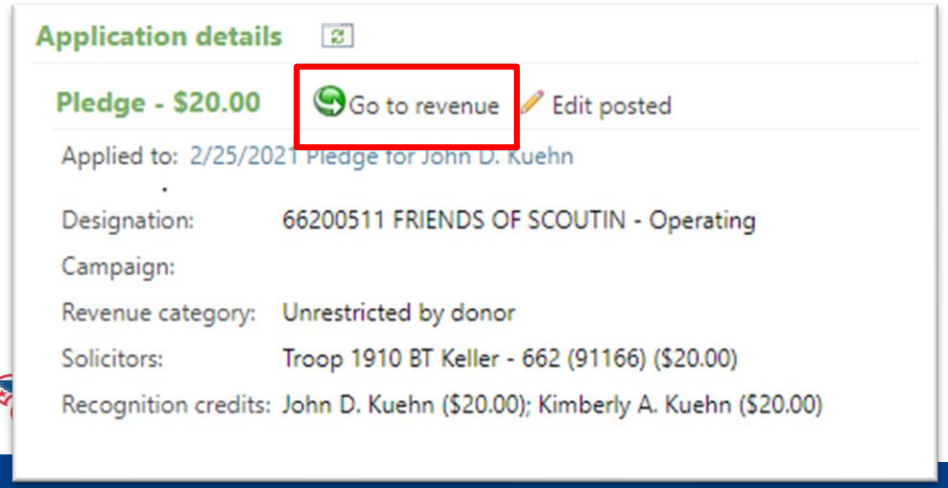
Recognition Credits Available

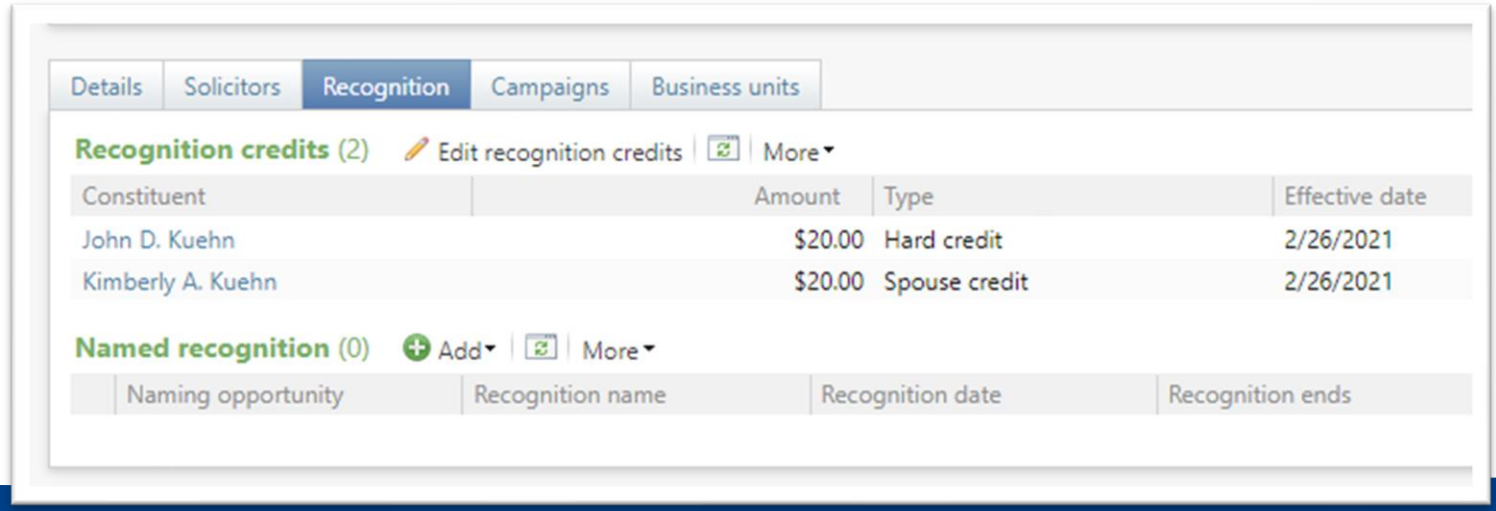
Consolidated federal credit	Yes	All sites
Day Giving Credit	Yes	All sites
Donor Advised Fund	Yes	All sites
Donor Challenge Credit	Yes	All sites
Employee giving credit	Yes	All sites
Estate gift credit	Yes	All sites
Family foundation credit	Yes	All sites
Family Member	Yes	All sites
Hard credit	Yes	All 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



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.





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

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

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

	Special Event Fundraising
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.

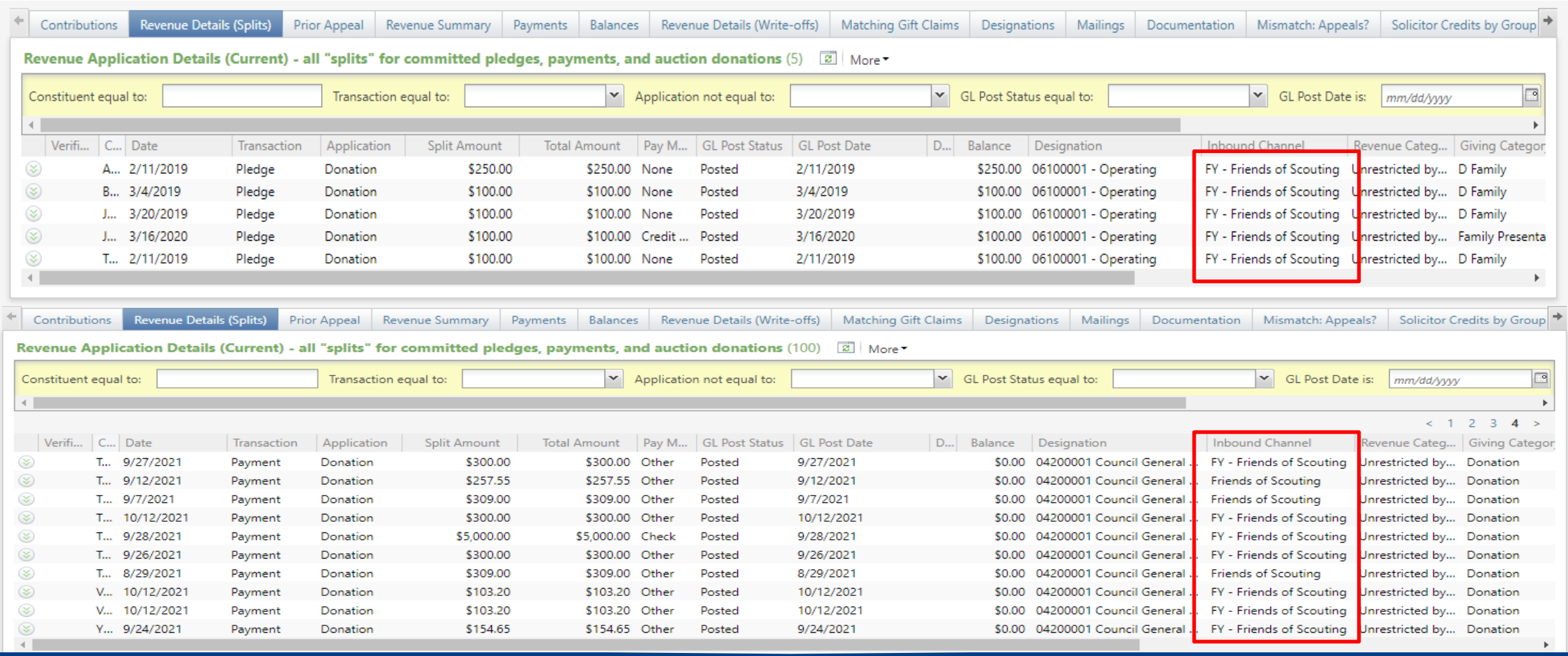
Appeal Prior Year Tab

- 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

< 1 2 3 4 >

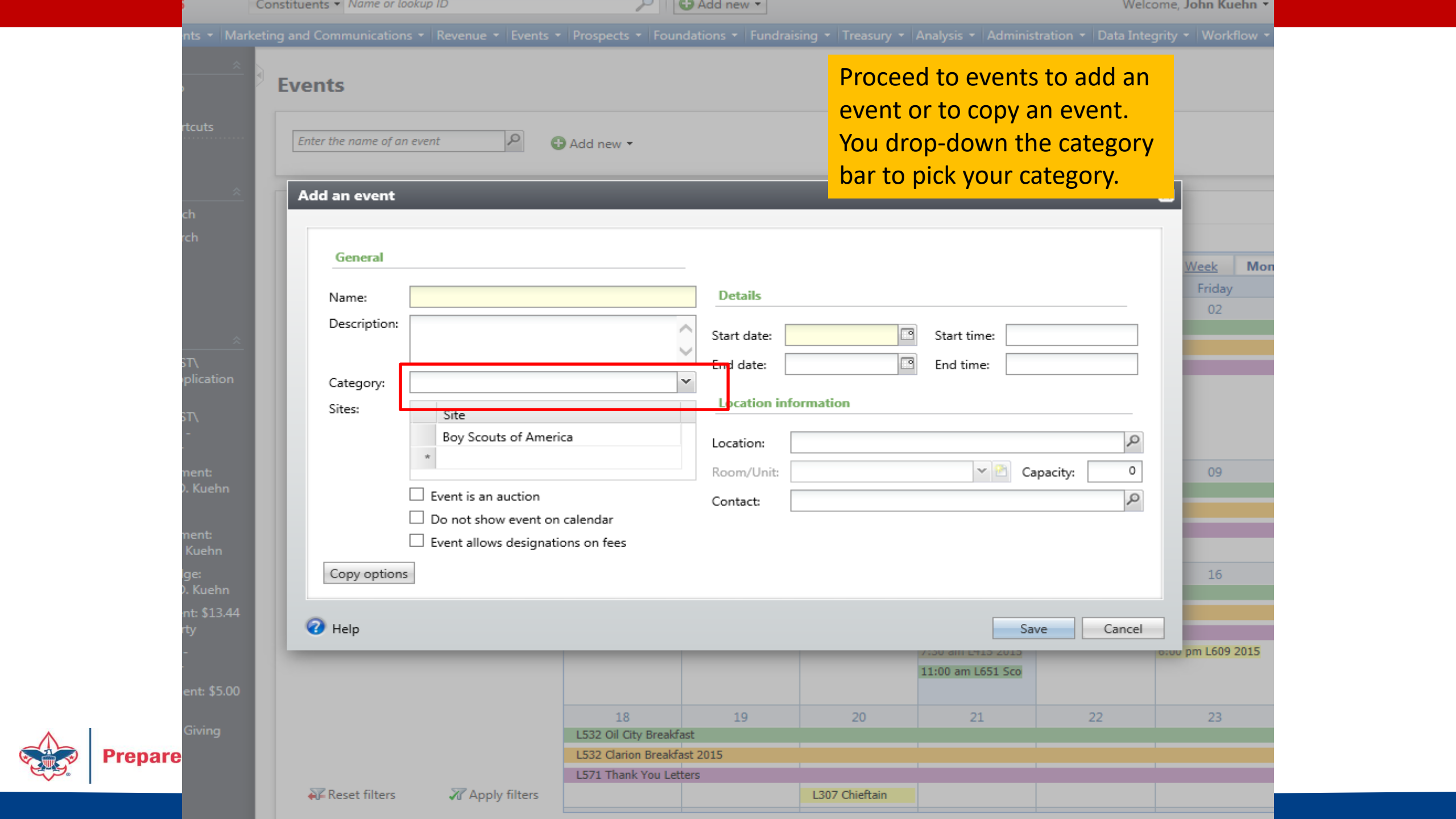
Verifi...	C...	Date	Transaction	Application	Split Amount	Total Amount	Pay M...	GL Post Status	GL Post Date	D...	Balance	Designation	Inbound Channel	Revenue Categ...	Giving Categor
	T...	9/27/2021	Payment	Donation	$300.00	$300.00	Other	Posted	9/27/2021		$0.00	04200001 Council General ...	FY - Friends 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

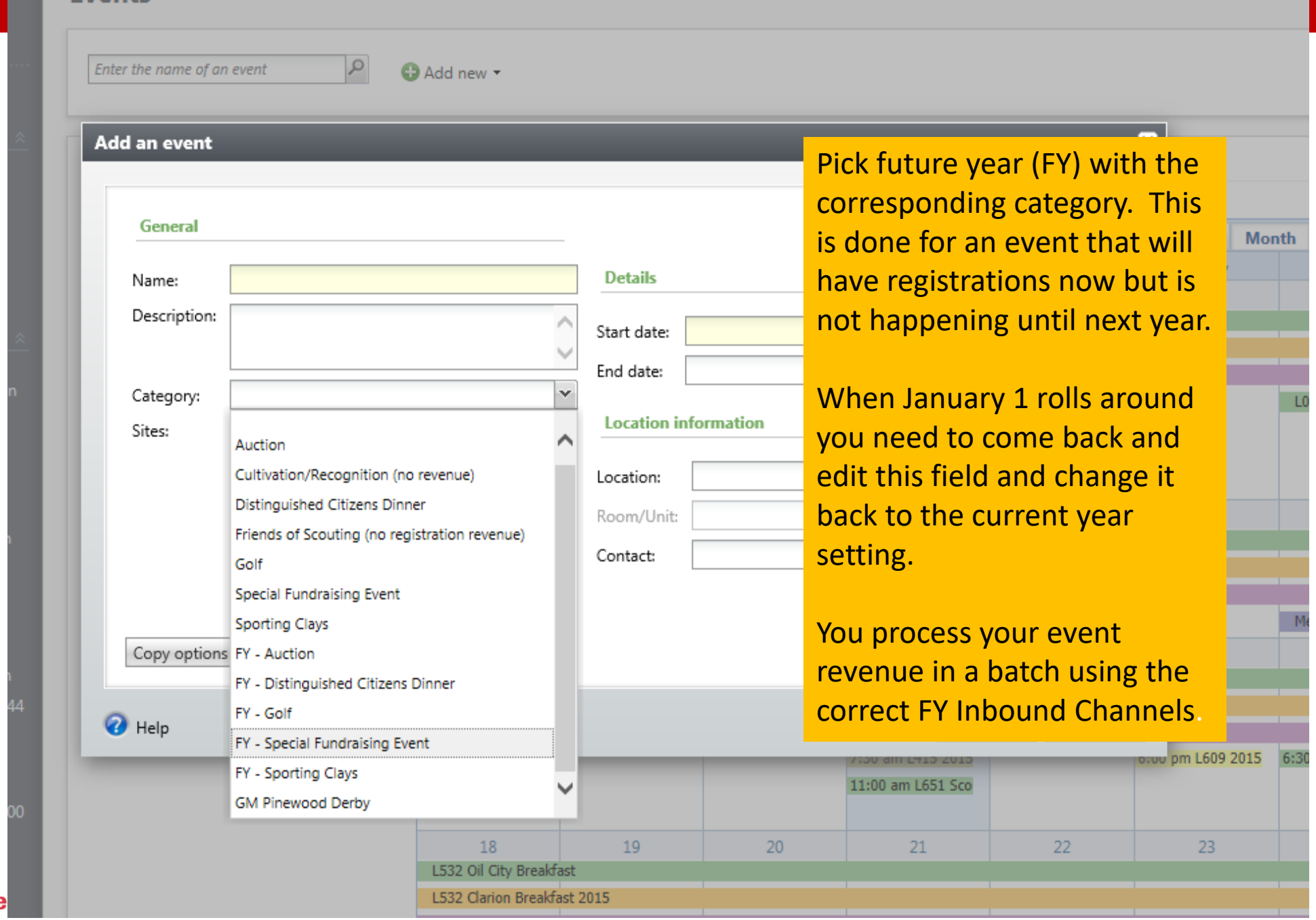
PREPARING FOR YEAR-END & EVENTS

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”


Proceed to events to add an event or to copy an event. You drop-down the category bar to pick your category.
Events
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:
Contact:
Help
Save
Cancel
Reset filters
Apply filters
L532 Oil City Breakfast
L532 Clarion Breakfast 2015
L571 Thank You Letters
L307 Chieftain
Prepare



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.

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.

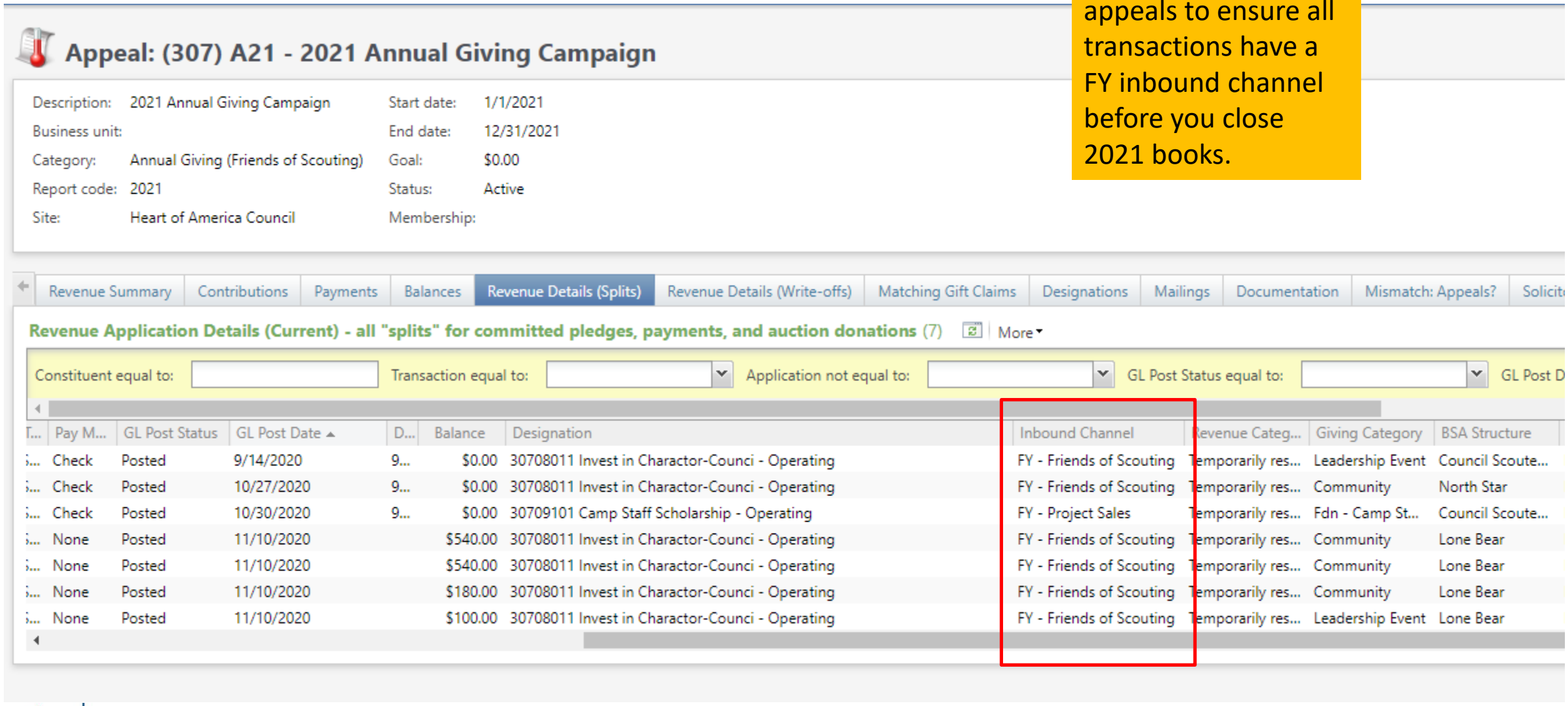
For example, if your Controller “closes” the 2021 fiscal year in PeopleSoft on 1/8/2022, and now considers 2022 to be the “Current” year, then you start using Inbound types:

- 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.

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



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:	

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

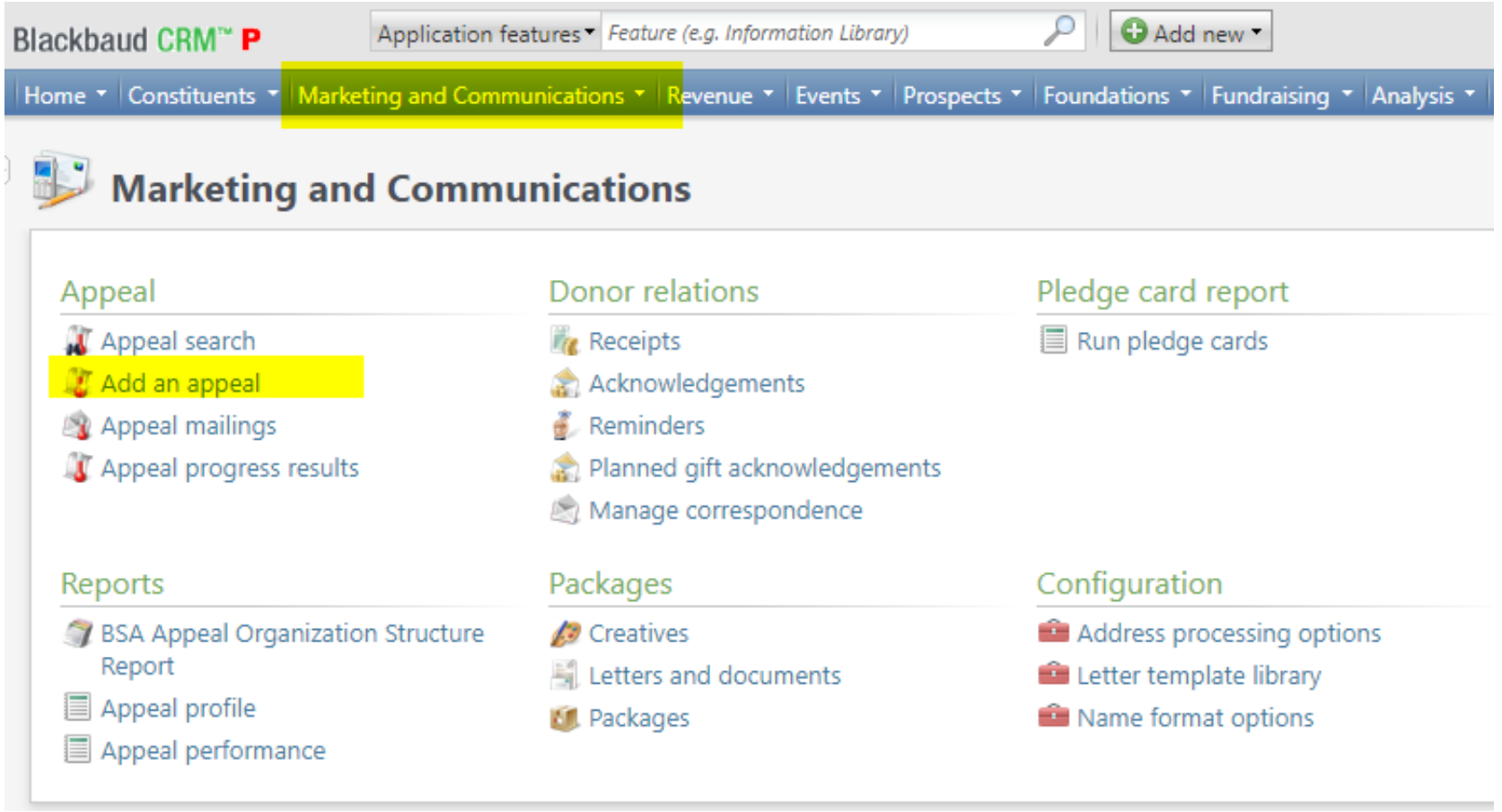
Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (7) More

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

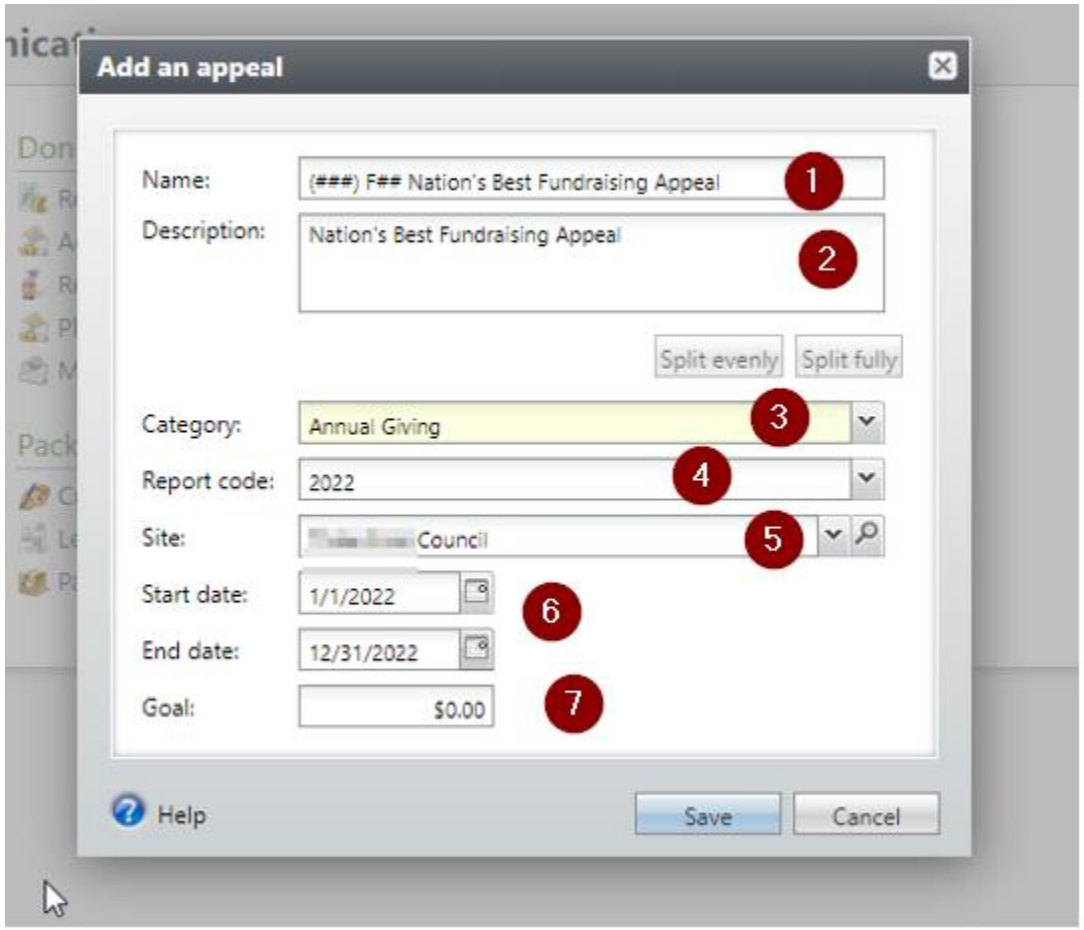
T...	Pay M...	GL Post Status	GL Post Date	D...	Balance	Designation	Inbound Channel	Revenue Categ...	Giving Category	BSA Structure
;...	Check	Posted	9/14/2020	9...	$0.00	30708011 Invest in Charactor-Counci - Operating	FY - Friends of Scouting	Temporarily res...	Leadership Event	Council Scoute...
;...	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

PREPARING FOR NEXT YEAR

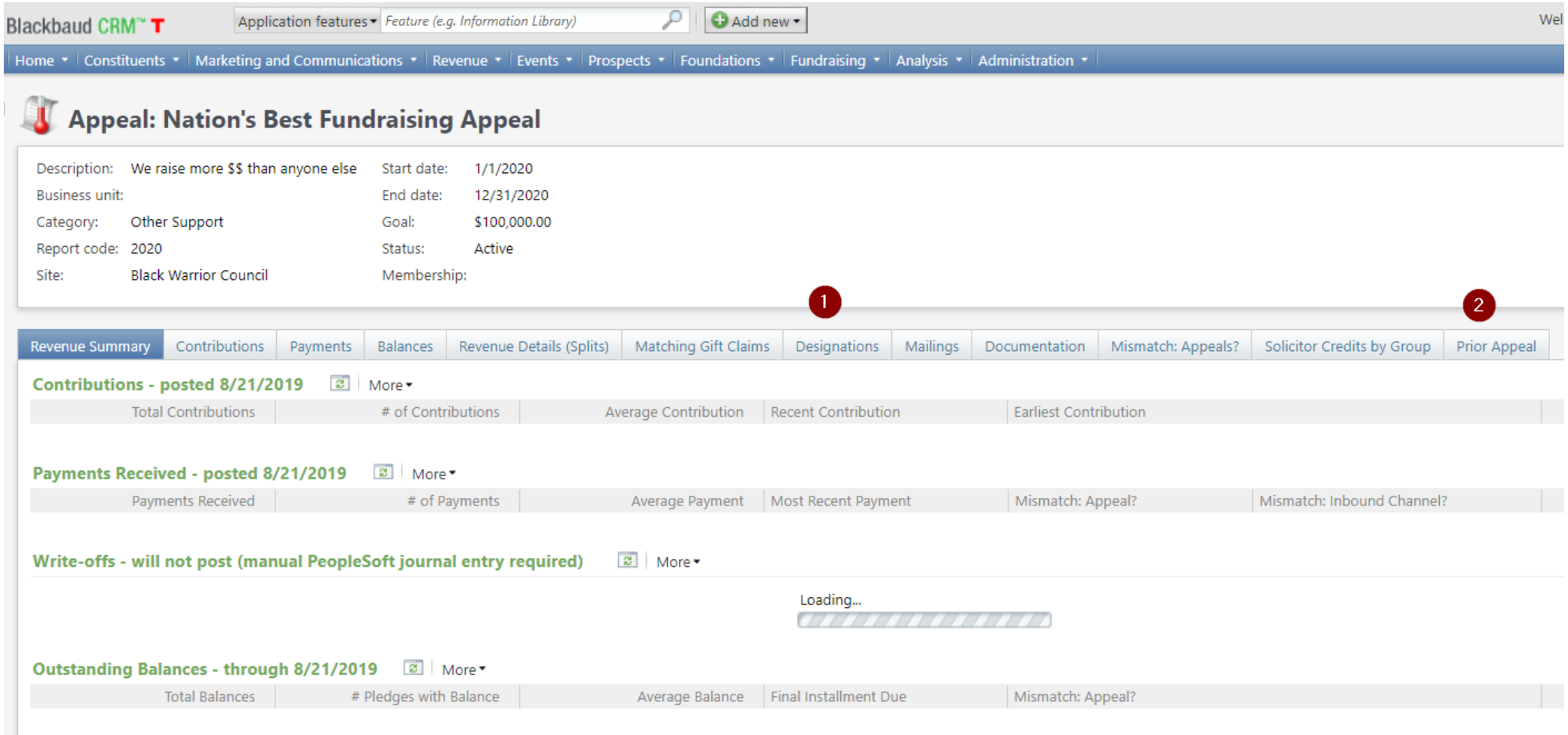
Add an Appeal



Add an Appeal



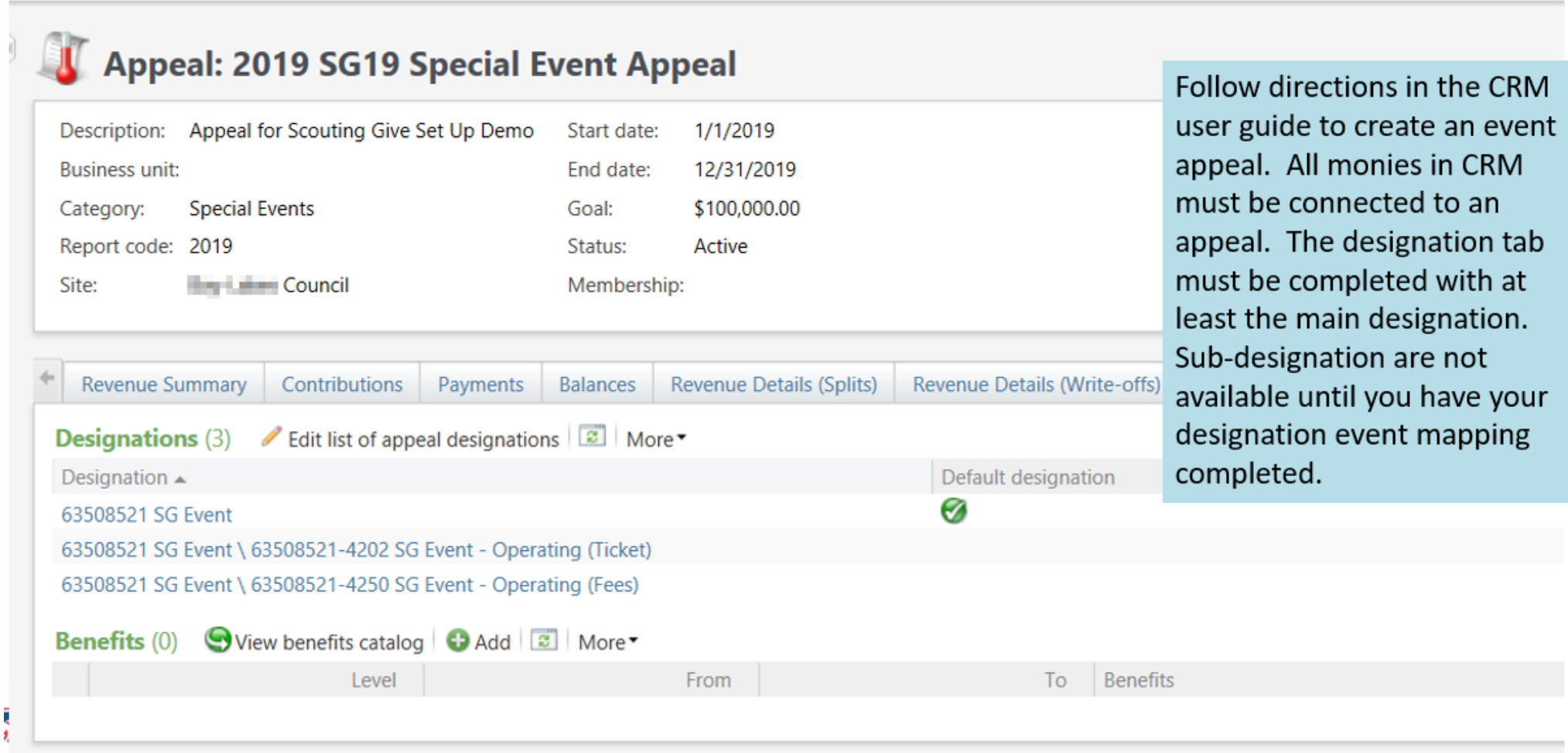
Assign Designation & Prior Appeal (if one)



Designations

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

Create Appeal in CRM



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

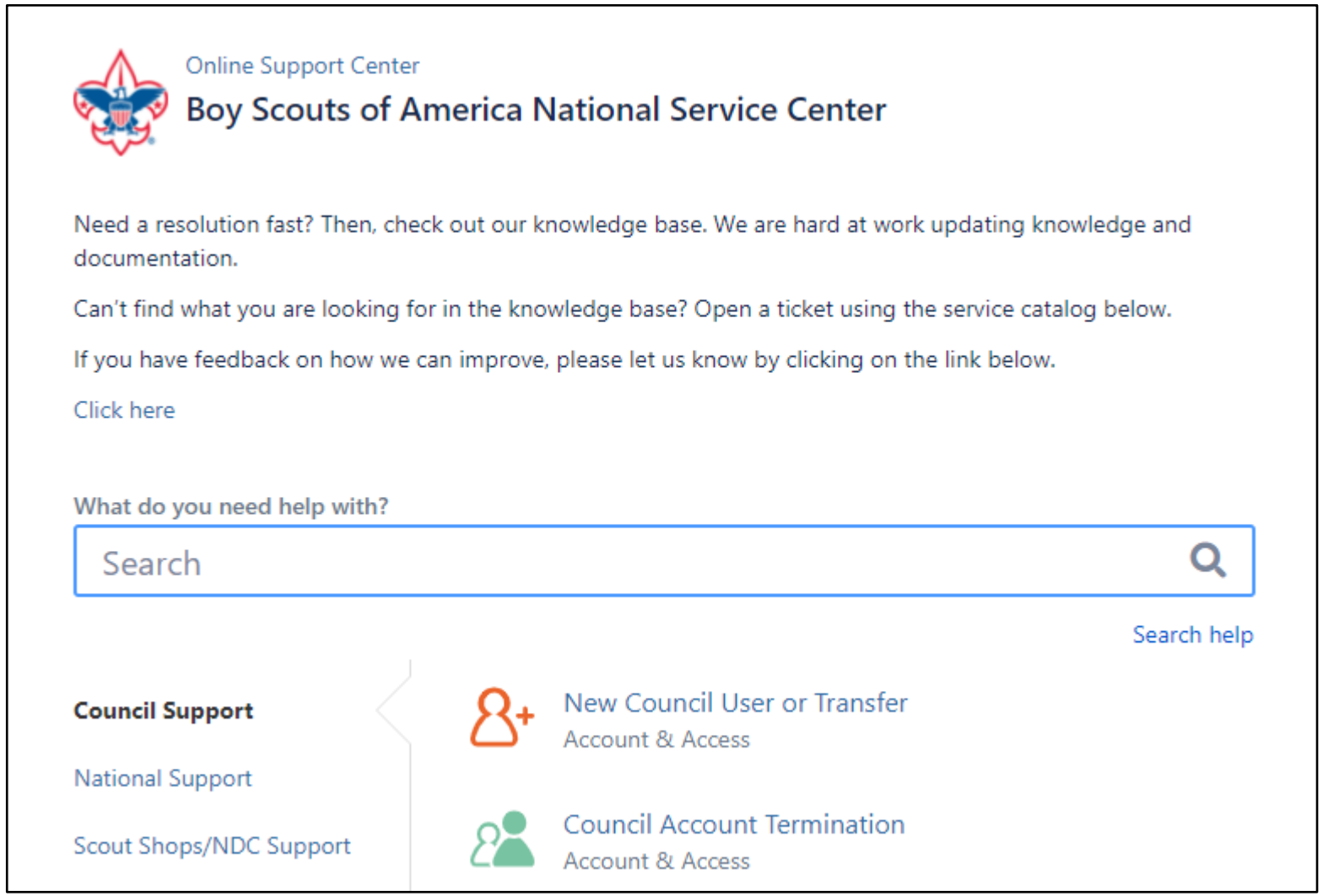
www.scouting.org/financeimpact

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.

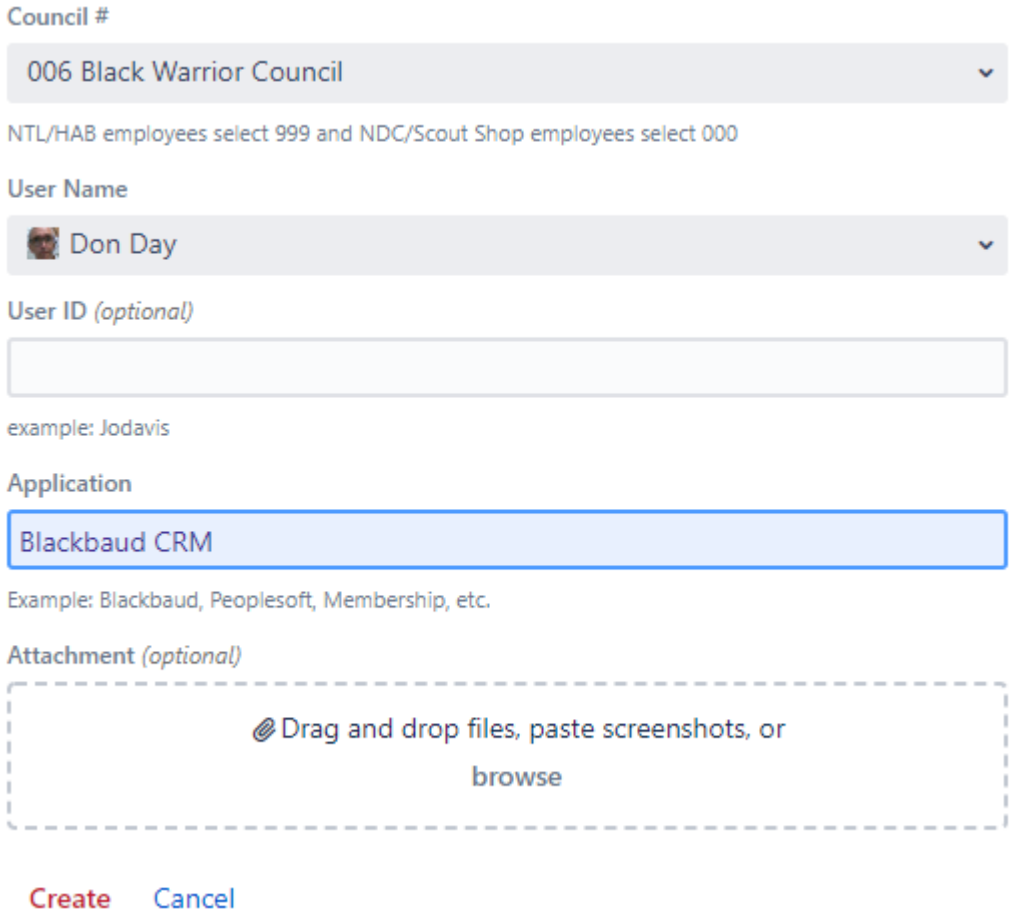
Please provide me a list of giving categories

Council #

006 Black Warrior Council

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

User Name – Application - Attachments



Questions & Answers