

CRM User Forum

December 15, 2021

Cornelia Ellis – Rich White

John Kuehn – Don Day



Prepared. For Life.™

Objectives

- Year-End close “to do” list
- Setting BSAFR group goals in CRM
- Preparing for year-end –
 - understanding the correct selections for Inbound Channel and Designations
 - events – using future year & current year
 - creating new appeals and creating designations
- Questions



PREPARING FOR YEAR-END CLOSE



Prepared. For Life.™

CRM – Year-End Close

- Run the Pledges Aging Receivable report
 - Ask management to review

Global Pledge Write-off should be done at the beginning of next year.

Write off the Pledges from previous years.



Reports To Run


- Pull year end reports the morning after entry for end of year.
 - Pledge Receivable Aging Report
 - Appeal Progress by Category
 - Appeal Progress by Solicitor
 - BSA Summary of Appeals



CRM – Year-End Close

- Getting ready for New Year in CRM
 - Appeals for 2022 set up for receiving funds Use FY inbound channels to ensure funds are going to Future Year

Details Installment/Write-off Activity Benefits Recognition Solicitors Letters Attributes

Details 


Original amount: \$500.00 Send reminders: Yes

Subtype: Pledge Receivable Revenue reference:

Source code: Effort:

Inbound channel: FY - Friends of Scouting Appeal: (999) FS22 - Friends of Scouting

Revenue category: Temporarily restricted by donor

Designations (1)  More ▾

Designation	Amount
-------------	--------



FY – Inbound Channels

Inbound channel

FY - Friends of Scouting

FY - Friends of Scouting

FY - Direct Mail

FY - Project Sales

FY - Capital Contributio...

FY - Special Event Fund...

FY - Legacies and Bequ...

FY - Foundations and T...

FY - Other Direct Contri...

FY - Other Direct - Serv...

FY - Other Direct - Lear...

FY - Associated Organi...

FY - Associated Organi...

FY - Associated Organi...

FY - Associated Organi...

Inbound channel

Friends of Scouting

FY - Foundations and I...

FY - Other Direct Contri...

FY - Other Direct - Serv...

FY - Other Direct - Lear...

FY - Associated Organi...

FY - Associated Organi...

FY - Associated Organi...

FY - Associated Organi...

FY - United Way - Alloc...

FY - United Way - Don...

FY - Unassociated Orga...

FY - Other Indirect Con...

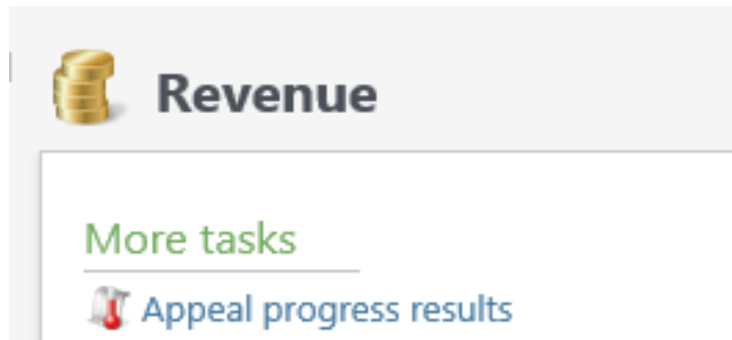
FY - Government Fees

FY - Government Grants



Appeal Progress Results

- Before closing December - Under “Appeal Progress Results” check transaction on future year appeals to verify FY inbound channels have been used



Appeal: (999) FS22 - Friends of Scouting

Description: 2022 Friends of Scouting Start date: 11/30/2021
Business unit: End date: 12/31/2022
Category: Annual Giving (Friends of Scouting) Goal: \$0.00
Report code: 2022 Status: Active
Site: Boy Scouts of America Membership:

Revenue Summary Balances Contributions Payments **Revenue Details (Splits)** Matching Gift Claims Designations Ma

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (1)

Constituent equal to: Transaction equal to: Application not equal to:

Amount	Pay Meth...	GL Post ...	GL Post Da...	Deposit	Bal...	D...	Inbound Channel ▲	Revenue Category
\$500.00	None	Not Pos...	12/13/2021		\$500...	0...	FY - Friends of Scouting	Temporarily restricted by ...



BSAFR GROUP GOALS



Prepared. For Life.™

Fundraising Goals in CRM

- Placed on BSAFR Groups
- Add then as a Fundraising Goal
- Goals are cumulative
- Reports reads the Appeal name associated with the goal when creating reports
- Goals show on these reports
 - Solicitor Performance by revenue category
 - Appeal Progress by Solicitor
 - BSA Appeal Progress Export/Report (OLTP)



Adding a goal

- Determine the groups that need a goal by reviewing your BSAFR groups.
- Create your appeal and have the exact appeal name handy when creating goals.
- Have a list of goals ready to input.
- Adding goals to units are optional.



BSAFR Group Structure

- Use a BSAFR Group query to pull to see list of groups. Search your query folder before you create another BSAFR Group query.
- If structure has been cleaned up, you can also run the BSA Appeal Organization Structure report found under Marketing & Communications.
- See example on the next slide of the report.
- Add goal on the Fundraising Goals tab





BSA Appeal Organization Structure

Site: Louisiana Purchase Council

Appeal: (213) S22 - 2022 FOS Campaign

Single Group:

Group Selection:

1 of 2 Find | Next

----- Selected Options -----

Appeal: (213) S22 - 2022 FOS Campaign
Donor Group(s): All Records

BSAFR Group Name	Reporting Level	BSA Structure	Giving Category	Solicitor	Presenter	Current Member Count	Solicit for BSAFR	Current or Snapshot
Louisiana Purchase Council 213 (8-23003973)	Council	Council		No Constituent	No Constituent	46	False	C
Louisiana Purchase Council Board Division (8-25210163)	Council	Louisiana Purchase Council	Board Division	No Constituent	No Constituent	148	True	C
Attakapas 06 (8-23330858)	District	Attakapas		No Constituent	No Constituent	4	True	C
Attakapas Community (8-25210000)	District	Attakapas	Community Campaign	No Constituent	No Constituent	107	True	C
Attakapas Scouter (8-25209950)	District	Attakapas	Scouter Campaign	No Constituent	No Constituent	55	True	C
Attakapas Family (8-25209999)	District	Attakapas	Family Campaign	No Constituent	No Constituent	162	True	C
Crew 0101 NA Bunkie - 213 (100270614) (8-25046994)	Unit	Attakapas	Family Campaign	Crew 0101 NA Bunkie - 213 (100270614)	No Constituent	23	True	C
Pack 0006 BP Alexandria - 213 (154706) (8-24783233)	Unit	Attakapas	Family Campaign	Pack 0006 BP Alexandria - 213	No Constituent	76	True	C

This council places goals on the top groups in each district.
If they added a goal for each unit, they would not place one on the top family group.



Sample Committee with Goals

The screenshot shows the BSAFR system interface for the Attakapas Community. The 'Committee' tab is selected, and the 'Fundraising Goals' sub-tab is active. A table lists two fundraising goals: (213) S21 - 2021 FOS Campaign and (213) S22 - 2022 FOS Campaign. The 'Add goal' button is highlighted with a red box. A red arrow points from the 'Add goal' button to the 'Edit a goal' window.

Attakapas Community

Group Lookup ID: 8-25210000

Constituencies: Committee

Show more

Committee Fundraising Goals Committee Goals Campaigns Events

Fundraising goals (2) Add goal More

Name	Goal	Start date	End date
(213) S21 - 2021 FOS Campaign	\$15,000.00	11/1/2020	12/31/2021
(213) S22 - 2022 FOS Campaign	\$20,000.00	1/1/2022	12/31/2022

The 'Edit a goal' window shows the details for the goal (213) S22 - 2022 FOS Campaign. The fields are: Name: (213) S22 - 2022 FOS Campaign, Goal: \$20,000.00, Start date: 1/1/2022, End date: 12/31/2022, and Description: Attakapas Community Campaign. The 'Name' field is highlighted with a red box. The 'Save' and 'Cancel' buttons are at the bottom.

Edit a goal

Name: (213) S22 - 2022 FOS Campaign

Goal: \$20,000.00

Start date: 1/1/2022

End date: 12/31/2022

Description: Attakapas Community Campaign

Help Save Cancel

On the BSAFR Group, go to the Committee / Fundraising Goals tab and Add Goal. When the window opens, the name of the goal is the Appeal Name. It must be spelled exactly how it is in the system. Dates are calendar year. Dates need to match appeal dates.



Solicitor Performance Report with Goal

---- Selected Options ----

BSA Structure: All
 Appeal: (213) S22 - 2022 FOS Campaign
 Giving Category: All

Solicitor Name	YTD		Goal	Goal %	Constituents			
	Contributions	Payments			Total	Worked		
BSA Structure: Attakapas								
Giving Category: Community Campaign								
Attakapas Community	\$0.00	\$0.00	\$20,000.00	0.00 %	0	0		
Community Campaign total:	\$0.00	\$0.00	\$20,000.00	0.00 %	0	0		
Giving Category: Family Campaign								
Attakapas Family	\$0.00	\$0.00	\$8,500.00	0.00 %	0	0		
Family Campaign total:	\$0.00	\$0.00	\$8,500.00	0.00 %	0	0		
Giving Category: Scouter Campaign								
Attakapas Scouter	\$0.00	\$0.00	\$6,500.00	0.00 %	0	0		
Scouter Campaign total:	\$0.00	\$0.00	\$6,500.00	0.00 %	0	0		
Attakapas total:	\$0.00	\$0.00	\$35,000.00	0.00 %	0	0		



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 creates 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:

Auction

Cultivation/Recognition (no revenue)

Distinguished Citizens Dinner

Friends of Scouting (no registration revenue)

Golf

Special Fundraising Event

Sporting Clays

Copy options

FY - Auction

FY - Distinguished Citizens Dinner

FY - Golf

FY - Special Fundraising Event

FY - Sporting Clays

GM Pinewood Derby

? Help

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.



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



Appeal: (438) FSC22 - 2022 Friends of Scouting Council

Description: 2022 Friends of Scouting Council Start date: 2/3/2021
Business unit: End date: 12/31/2022
Category: Annual Giving (Friends of Scouting) Goal: \$0.00
Report code: 2022 Status: Active
Site: Dan Beard Council Membership:

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

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (12) More ▾

Constituent equal to: Transaction equal to: Application not equal to: GL Post Status equal to: GL Post Date is:

Verifi...	Constituent	Date	Transaction	Application	Split Amount	Total Amount	Pay Method	GL Post S...	GL Post D...	D...	Balance	Designation	Inbound Channel ▲	Revenue Categ...	G
		12/7/2021	Payment	Pledge	\$100.00	\$100.00	Check	Posted	12/7/2021		\$0.00	43806761 Friends of Scout...	FY - Friends of Scouting	Unrestricted by...	M
		11/5/2021	Pledge	Donation	\$2,500.00	\$2,500.00	None	Posted	11/5/2021		\$2,500.00	43806761 Friends of Scout...	FY - Friends of Scouting	Unrestricted by...	Bc
		11/5/2021	Pledge	Donation	\$1,200.00	\$1,200.00	None	Posted	11/5/2021		\$1,100.00	43806761 Friends of Scout...	FY - Friends of Scouting	Unrestricted by...	M
		11/5/2021	Pledge	Donation	\$500.00	\$500.00	None	Posted	11/5/2021		\$500.00	43806761 Friends of Scout...	FY - Friends of Scouting	Unrestricted by...	M
		11/5/2021	Pledge	Donation	\$350.00	\$350.00	None	Posted	11/5/2021		\$350.00	43806761 Friends of Scout...	FY - Friends of Scouting	Unrestricted by...	M
		11/5/2021	Pledge	Donation	\$130.00	\$130.00	None	Posted	11/5/2021		\$130.00	43806761 Friends of Scout...	FY - Friends of Scouting	Unrestricted by...	M
		11/5/2021	Pledge	Donation	\$56.00	\$56.00	None	Posted	11/5/2021		\$56.00	43806761 Friends of Scout...	FY - Friends of Scouting	Unrestricted by...	M
		11/5/2021	Pledge	Donation	\$40.00	\$40.00	None	Posted	11/5/2021		\$40.00	43806761 Friends of Scout...	FY - Friends of Scouting	Unrestricted by...	M
		11/5/2021	Pledge	Donation	\$20.00	\$20.00	None	Posted	11/5/2021		\$20.00	43806761 Friends of Scout...	FY - Friends of Scouting	Unrestricted by...	M
		11/5/2021	Pledge	Donation	\$10.00	\$10.00	None	Posted	11/5/2021		\$10.00	43806761 Friends of Scout...	FY - Friends of Scouting	Unrestricted by...	M



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 a placeholder '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' (which is 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

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

Add an appeal

Name: (###) F## Nation's Best Fundraising Appeal 1

Description: Nation's Best Fundraising Appeal 2

Split evenly Split fully

Category: Annual Giving 3

Report code: 2022 4

Site: Council 5

Start date: 1/1/2022 6

End date: 12/31/2022

Goal: \$0.00 7

? Help Save Cancel



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 Event 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






Gift In Kind Data List

- Located under Revenue / Task
- Provides all GIK's entered
- Filter allows you to sort via Post Date returning items on or after the date used. Use 1/1/2021 to get all items in 2021
- After export, delete those not needed from 2022.



Gift In Kind List

For a GIK list for the current year, select first day of the year and click apply. Then download and remove those not needed. (21)  More ▾

GL post date on or after:   Apply  Reset

Date	GL post date ▲	Donor ID	Donor Name	Donor Address	Donor City	Donor State	Donor Zip	GIK Item	GIK FMV Per ...	GIK # of Items	GIK Total Val...
1/2021	2/3/2021						80525-7588	Ad in BizWest Media	\$1,750.00	1	\$1,750.00
1/2021	2/3/2021						82414-3306	payroll	\$0.00	0	\$20.83
1/2021	2/3/2021						82609-3074	payroll	\$0.00	0	\$13.33
1/2021	2/3/2021						82609-4156	payroll	\$0.00	0	\$13.33
1/2021	2/3/2021						82604-4776	payroll	\$0.00	0	\$20.83
1/2021	2/24/2021						80525-1423	Coffee Coupons	\$500.00	1	\$500.00
1/2021	4/8/2021						80631-3913	Advertising	\$2,500.00	1	\$2,500.00
1/2021	4/20/2021						80631	Computer services	\$5,400.00	1	\$5,400.00
1/2021	4/20/2021						80631-8531	Weld Dinner invites	\$581.50	1	\$581.50
1/2021	4/20/2021						82001-4419	Banquet Room	\$2,000.00	1	\$2,000.00
1/2021	6/30/2021						80631-8531	Printing of Program	\$312.00	1	\$312.00
1/2021	6/30/2021						80634	Flowers for dinner	\$75.00	1	\$75.00
1/2021	6/30/2021						80538-5335	Repairs & Equipment	\$877.50	1	\$877.50
1/2021	8/6/2021						82609-3074	Payroll	\$0.00	0	\$80.00
1/2021	8/6/2021						82609-4156	Payroll	\$0.00	0	\$66.65
1/2021	8/6/2021						82604-4776	payroll	\$0.00	0	\$66.65
1/2021	8/30/2021						80504	Uncrustables Sandwiches f...	\$1,600.00	1	\$1,600.00
1/2021	9/2/2021						69361-5007	Booklets	\$400.00	1	\$400.00
1/2021	12/11/2021						80538-8401	Daisy Inflatable Range	\$1,062.50	1	\$1,062.50
1/2021	12/11/2021						82009-9306	Vehicle Repair & Parts	\$3,900.00	1	\$3,900.00
1/2021	12/11/2021						82604	Lawn mowing services - C...	\$750.00	1	\$750.00



Prepared. For Life.™

Next Forum

January 19, 2022

10:00 am or 2:00 pm CT



Prepared. For Life.™



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.™