CRM User Forum

April 20, 2022

Cornelia Ellis – John Kuehn

Valerie Eaton – Don Day

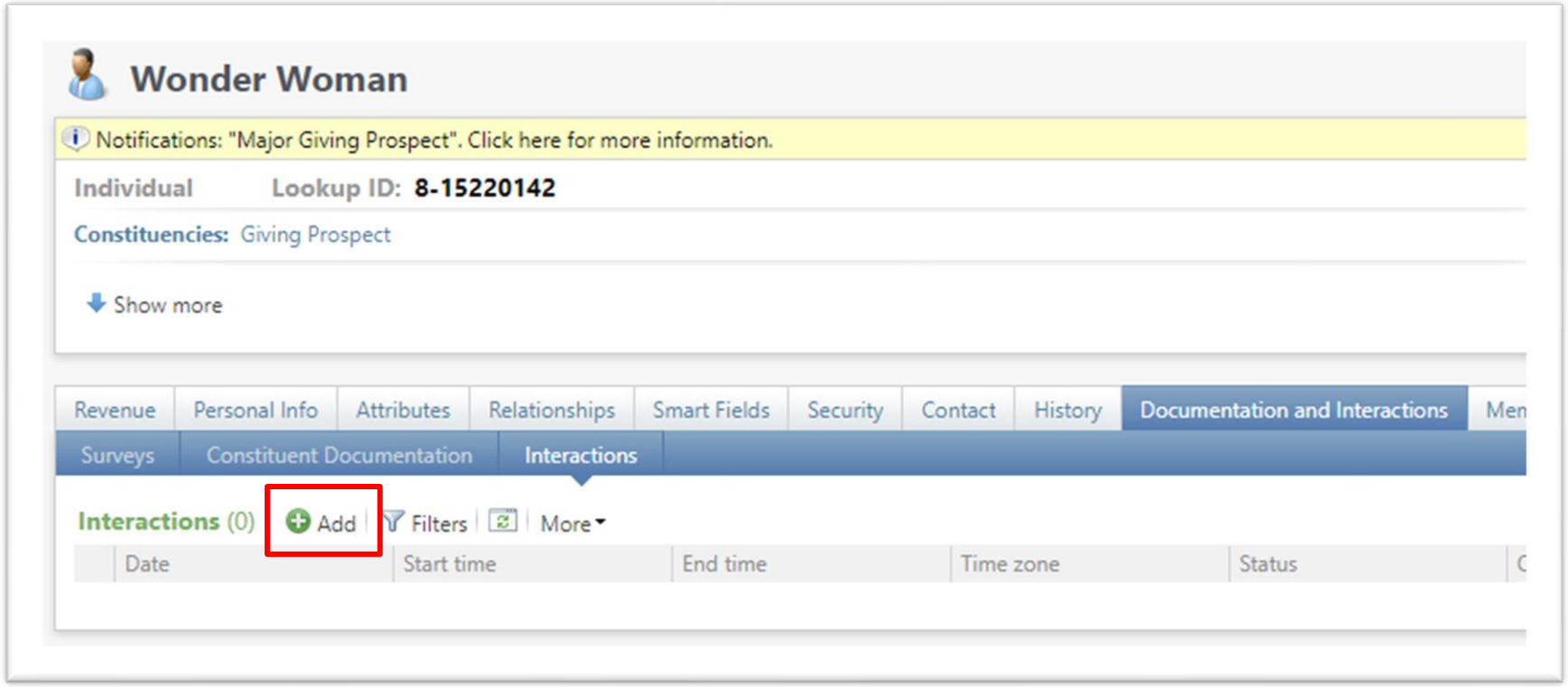
Objectives

- Creating Constituent Interactions
- Using the Constituent “Interaction” Data List
- Using the Development “Workspace”
- Scouting Gives:
  - Appeal setup
  - Event setup
- Using Appeal Progress feature for quick updates
- Questions – Answers

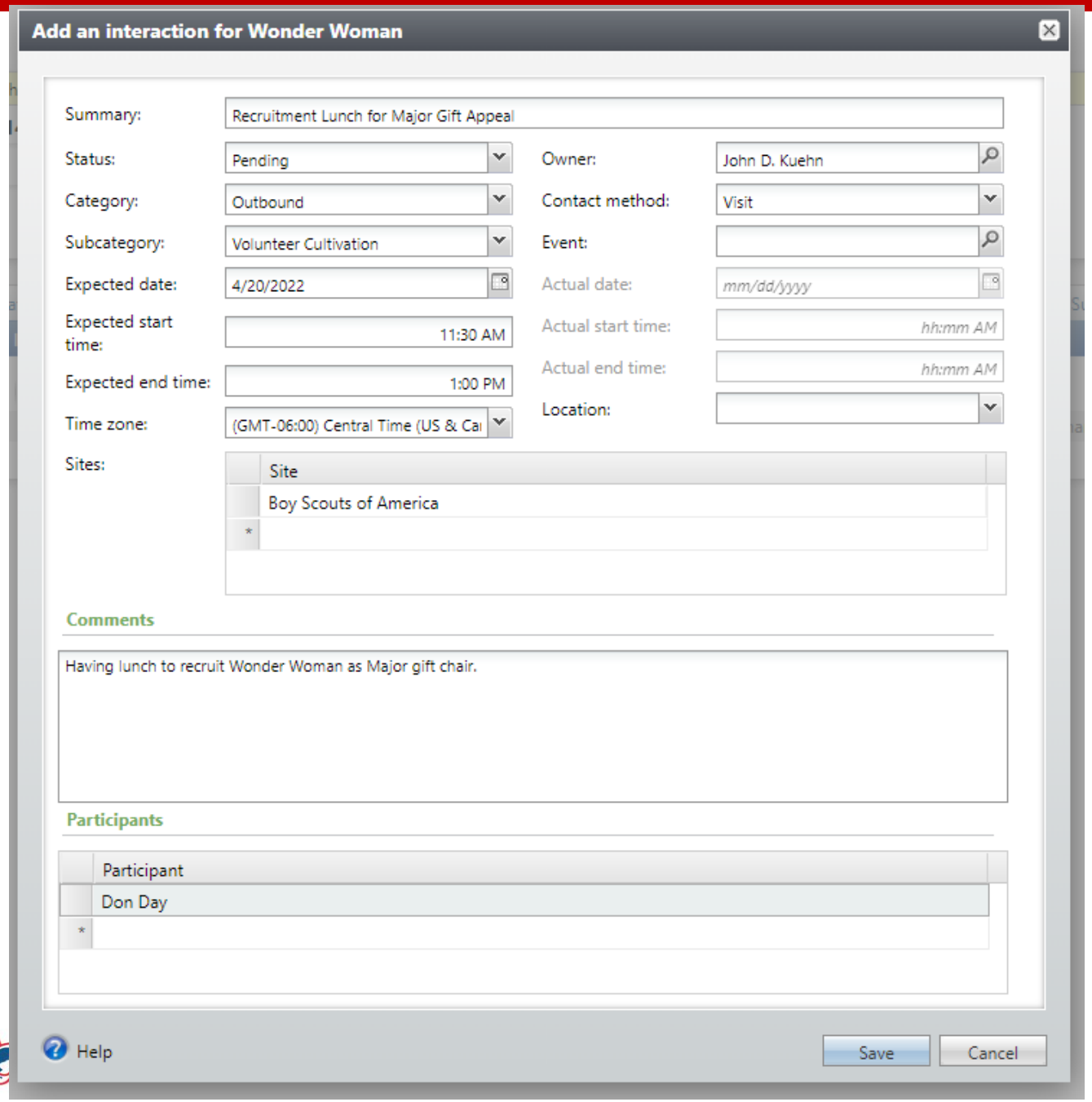
Why Use Constituent Interactions

- Site secured to your council
- Track activity with a constituent
- Can be assigned to other staff members
- Documents, notes and media can be connected to it
- Employees that come after you can have greater insights
- Promotes greatness in the council

Where to add interactions?



Navigate to your constituent and proceed to the document and interactions tab. On the interaction subtab you will find an add button.

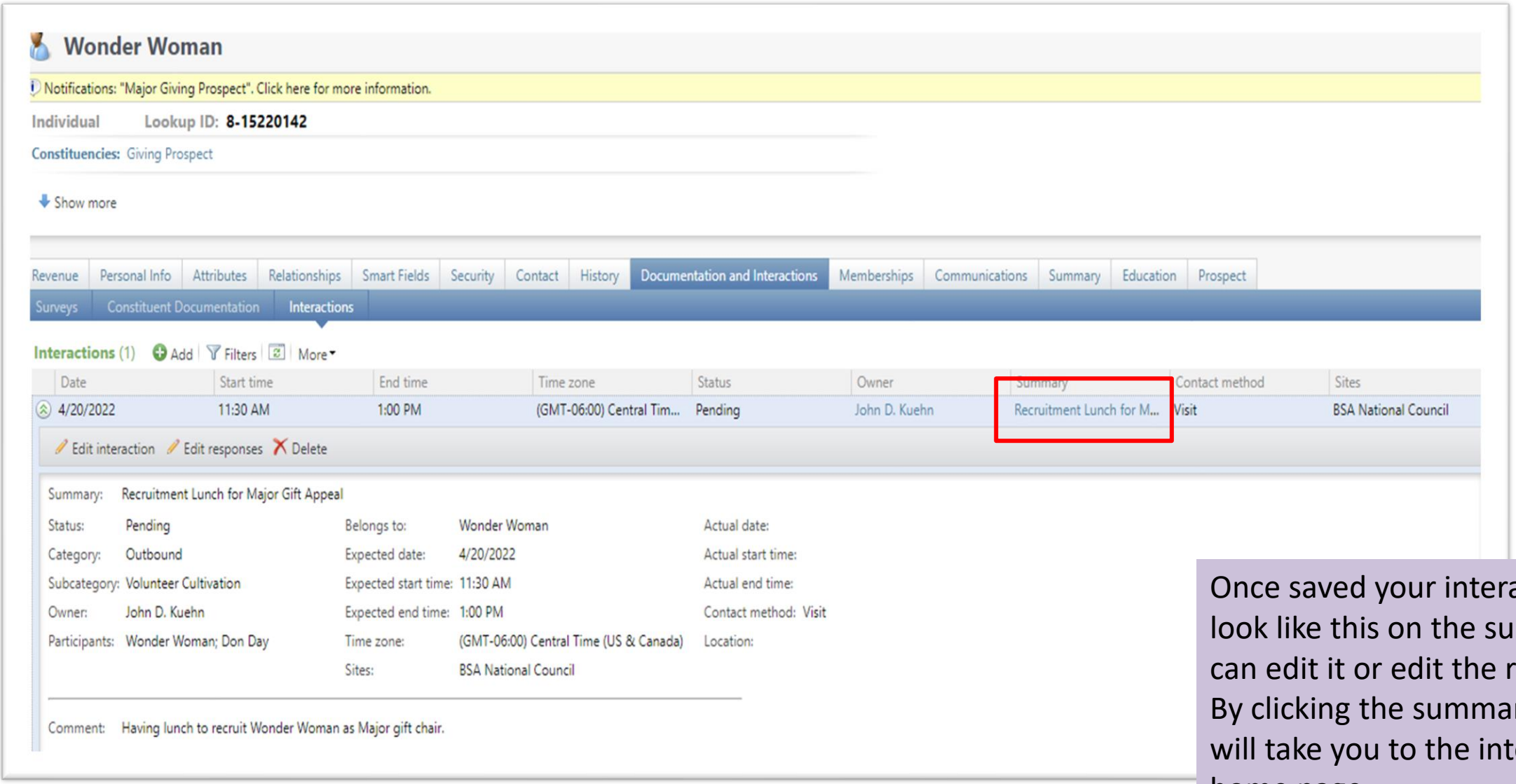


Provide a summary to your interaction and then fill in the needed fields. Needed fields will be highlighted in yellow. The interaction will automatically make the creator the owner. It can be assigned to someone else.

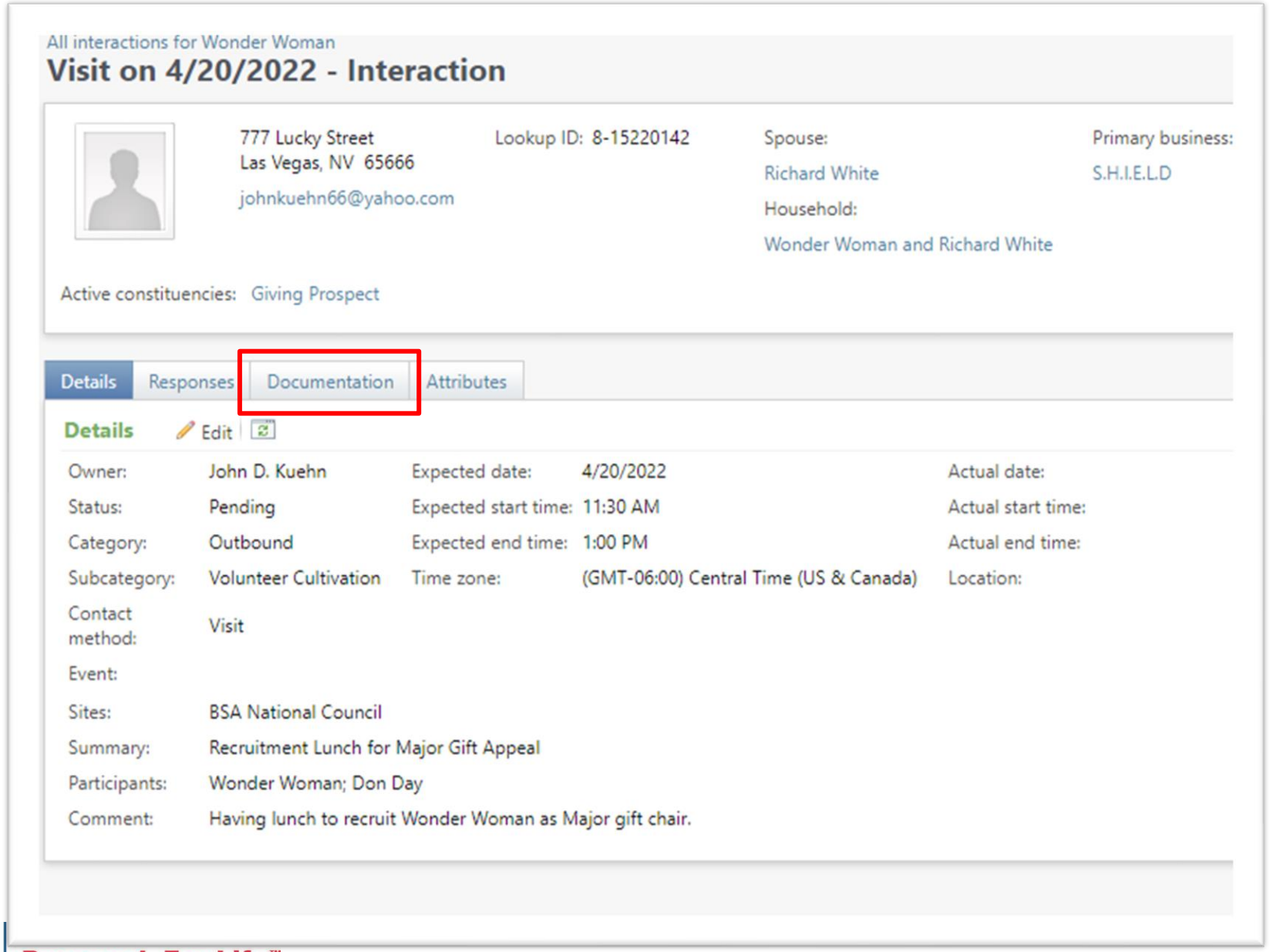
Provide comments to your interaction and select a participant. In this case I am taking Don Day to the meeting with me.

Once completed, click save.

This interaction is in a pending state. Once the meeting is over, you should mark as complete and add any meeting notes that are needed.

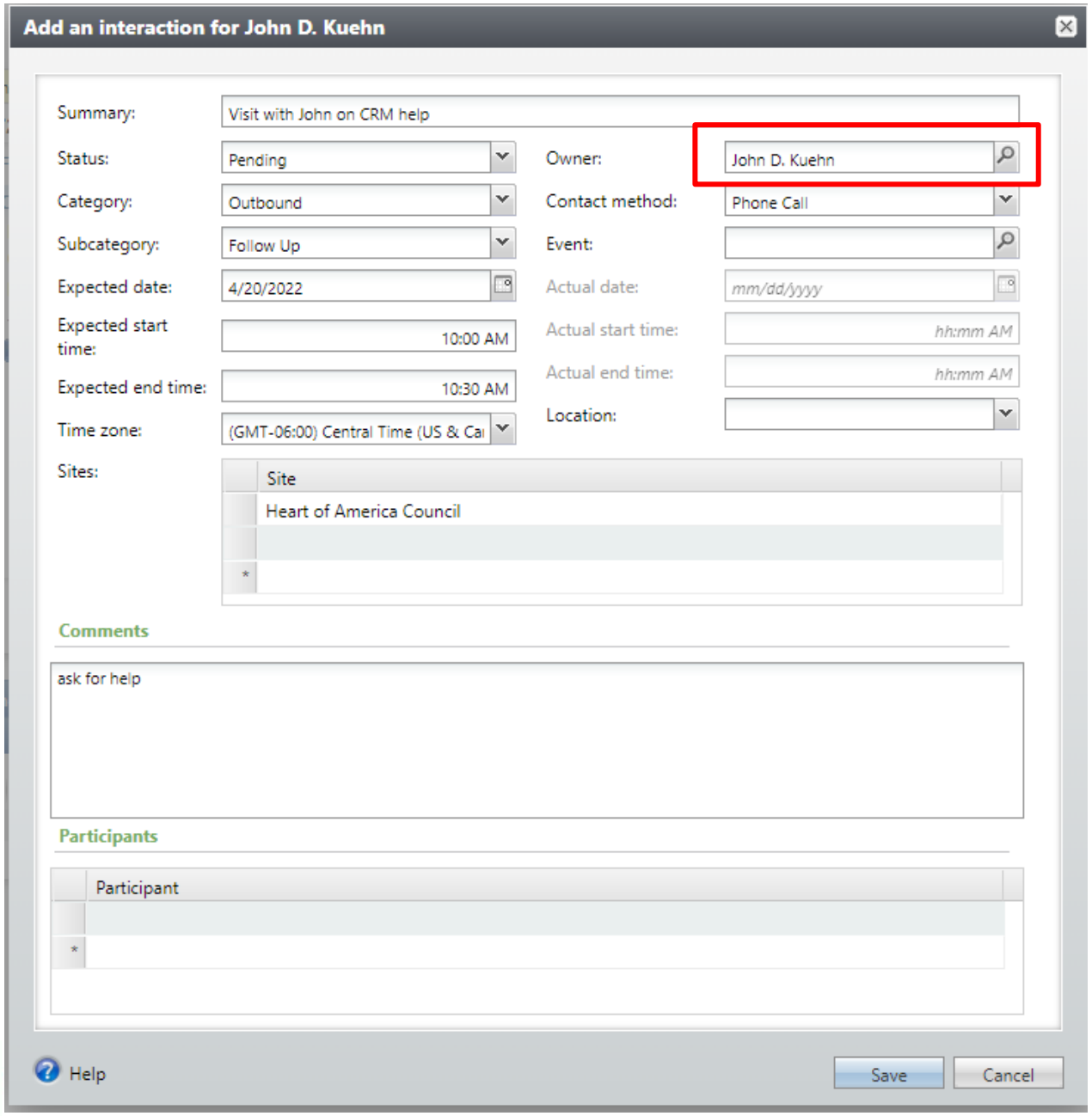


Once saved your interaction will look like this on the subtab. You can edit it or edit the response. By clicking the summary link, it will take you to the interaction home page.



This is the interaction home page once you click the summary link.

You can click the document tab and add items such as pdf, documents or media links. Items added here are site secured to your council because the interaction is site secured to your council.



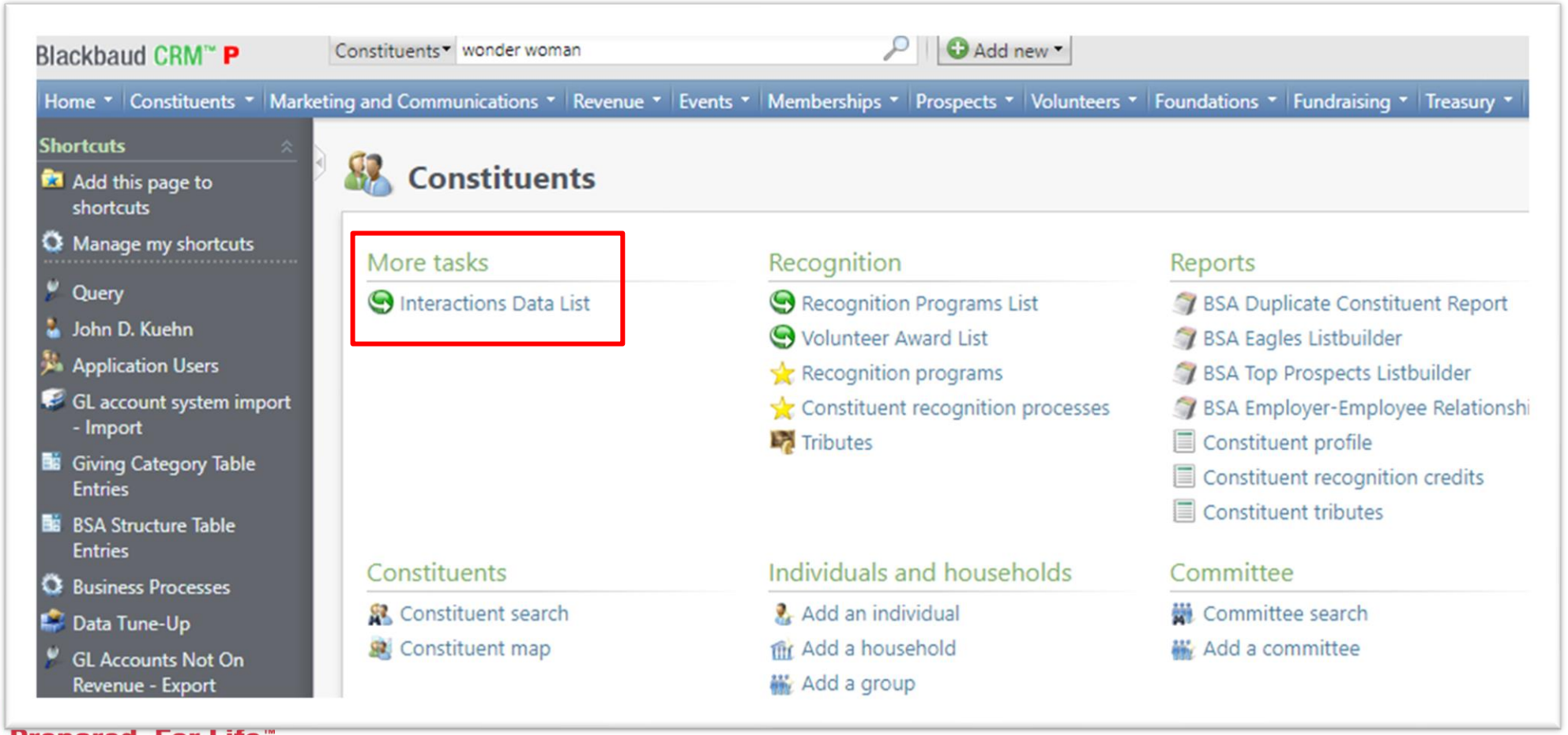
This is an interaction create by a person in Heart of America Council but assigned to me as the owner.

This will show on my interaction tab on my constituent record in CRM as well as my Development Workspace in CRM as an action item for me to complete.

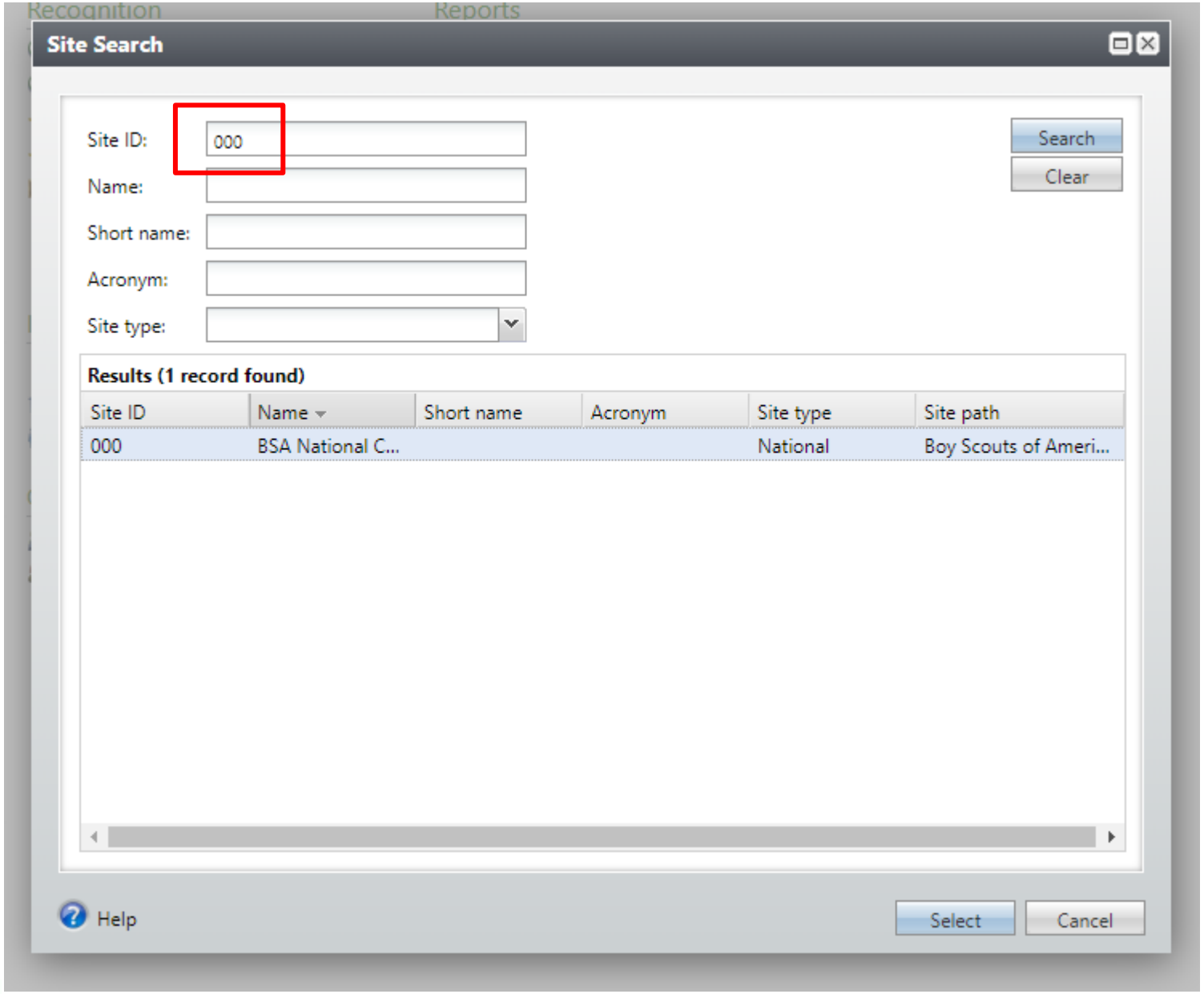
Interaction Data List

- Allows you to see all constituent interactions in your council
  - You can see who created them
  - You can see who they were assigned to
  - You can see if the activity was completed
- Provides a tool for management to use

Interaction Data List Location



Found on home page of Constituent Functional Area.



To access data list type in the site ID of your council. This would be your council number.

Your council will populate at the bottom. Select your council and click select. This will take you to the Data List page.

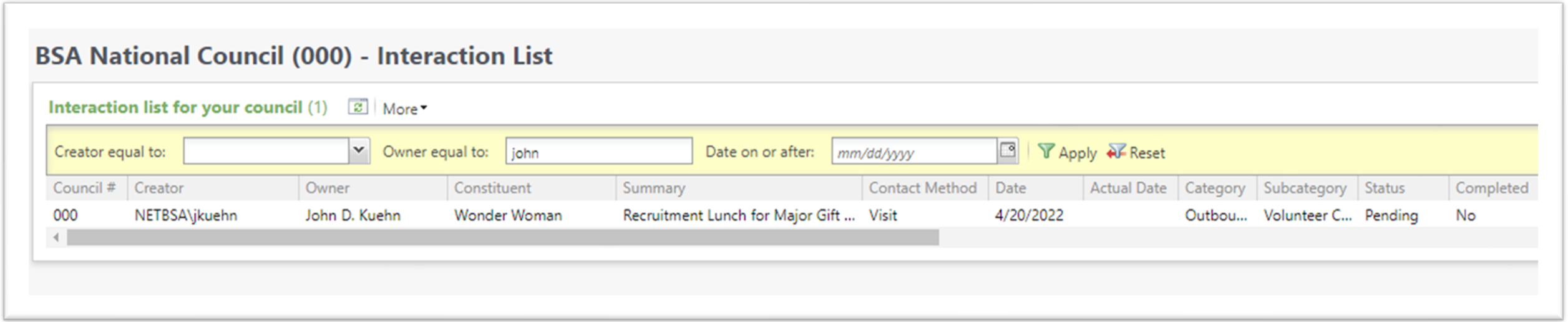
BSA National Council (000) - Interaction List

Interaction list for your council (10,000) | More

Creator equal to: | Owner equal to: | Date on or after: mm/dd/yyyy | Apply | Reset

Council #	Creator	Owner	Constituent	Summary	Contact Method	Date	Actual Date	Category	Subcategor
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Email	2/4/2008	2/4/2008	Outbou...	Announce..
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Email	4/7/2009	4/7/2009	Outbou...	Thank You
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Email	4/16/2009	4/16/2009	Inbound	Announce..
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Email	4/16/2009	4/16/2009	Outbou...	Pledge
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Email	4/16/2009	4/16/2009	Outbou...	Thank You
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Email	4/27/2009	4/27/2009	Outbou...	Meeting N.
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Fax	9/4/2008	9/4/2008	Outbou...	Attendance
000	Blackbaud Conversions	Mark V. Moshier	ExxonMobil Foundati...	TPAS Conversion	Mailing	4/10/2008	4/10/2008	Inbound	Inquiry
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Visit	4/7/2009	4/7/2009	Outbou...	Thank You
000	NETBSA\anmoran	Anna Marie Moran	Samuel R. Walton	Analysis meeting	Meeting	11/3/2020	11/3/2020	Other	Follow Up
000	NETBSA\anmoran	Anna Marie Moran	Ray T. Capp	stepping back from Scouting	Mailing	2/9/2022	2/9/2022	Ot	
000	NETBSA\asholder	Ashley N. Holder	Paul Kolensky	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Robert N. Trumpis	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Lori Hamming	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Paula Anderson	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Clint R. Cox	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Jude C. Gorski	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Danielle Reilly	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Tina L. Wolfe	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Robert A. McCabe	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	John D. Carlson	2020 December Holiday Email	Email	12/18/2020	12/18/2020		

You will need to click apply to run the data list. If you have items, they will populate. You can filter by an on or after a specific date, owner and creator. Other filters can be added for sorting. You can also download into excel.

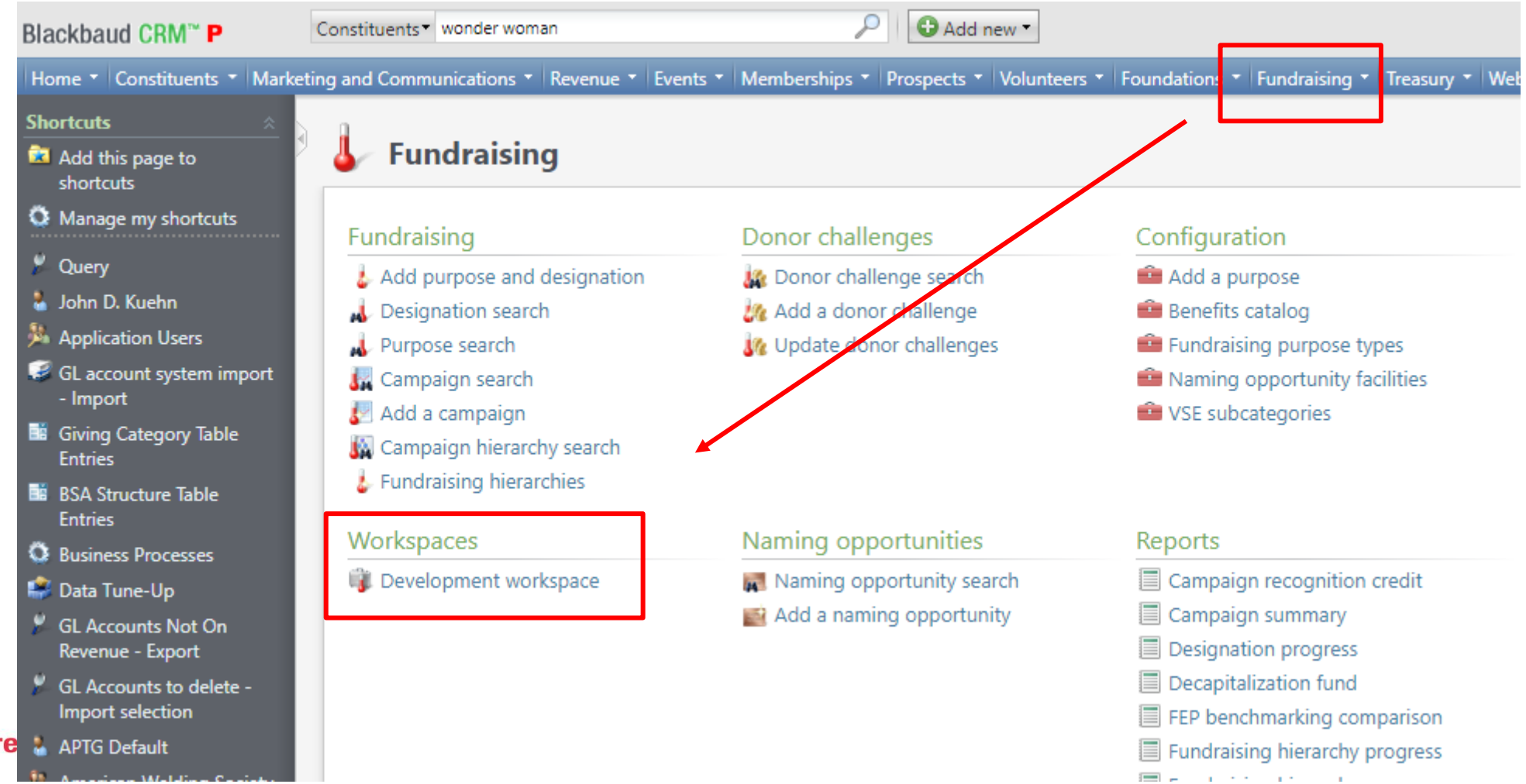


This is filtered by owner. It show the interaction I created earlier for my recruitment meeting with Wonder Woman.

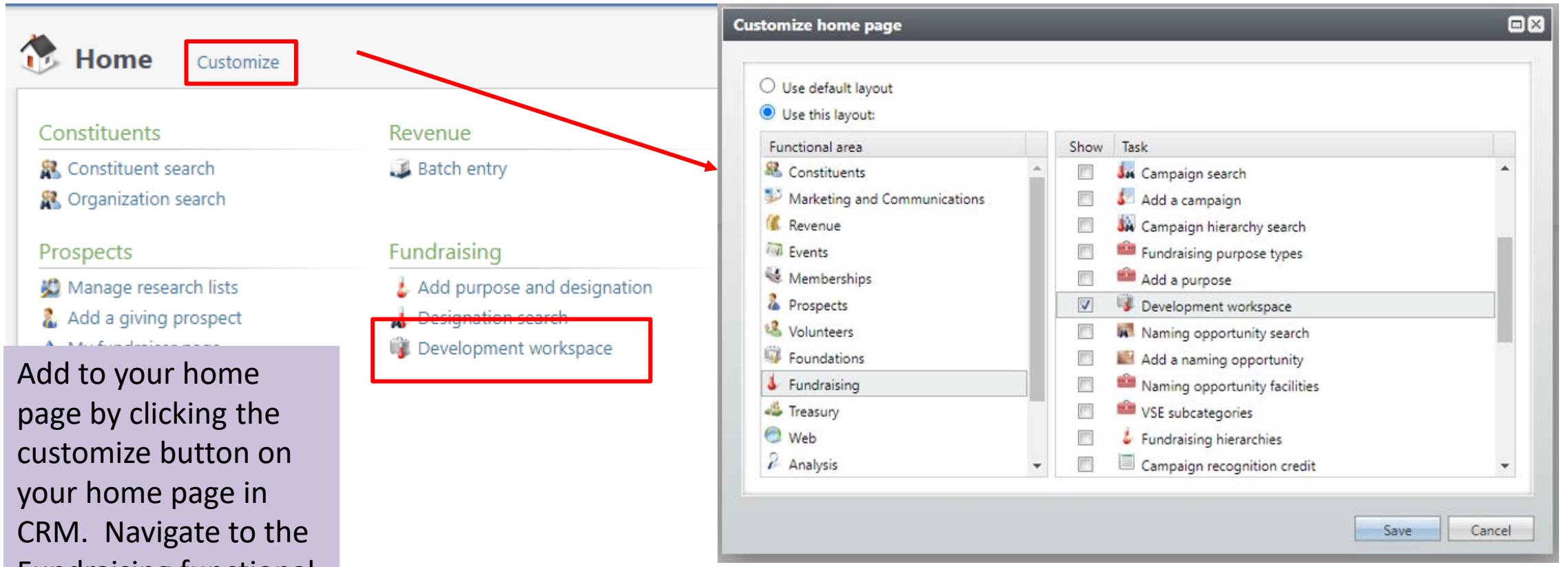
Development Workspace

- Newly permissioned area in CRM
- Lies under the Fundraising Tab
- This brings together all action items that are your responsibility
  - Batches
  - Interactions
  - Event Activities
  - Appeal Mailing Activities

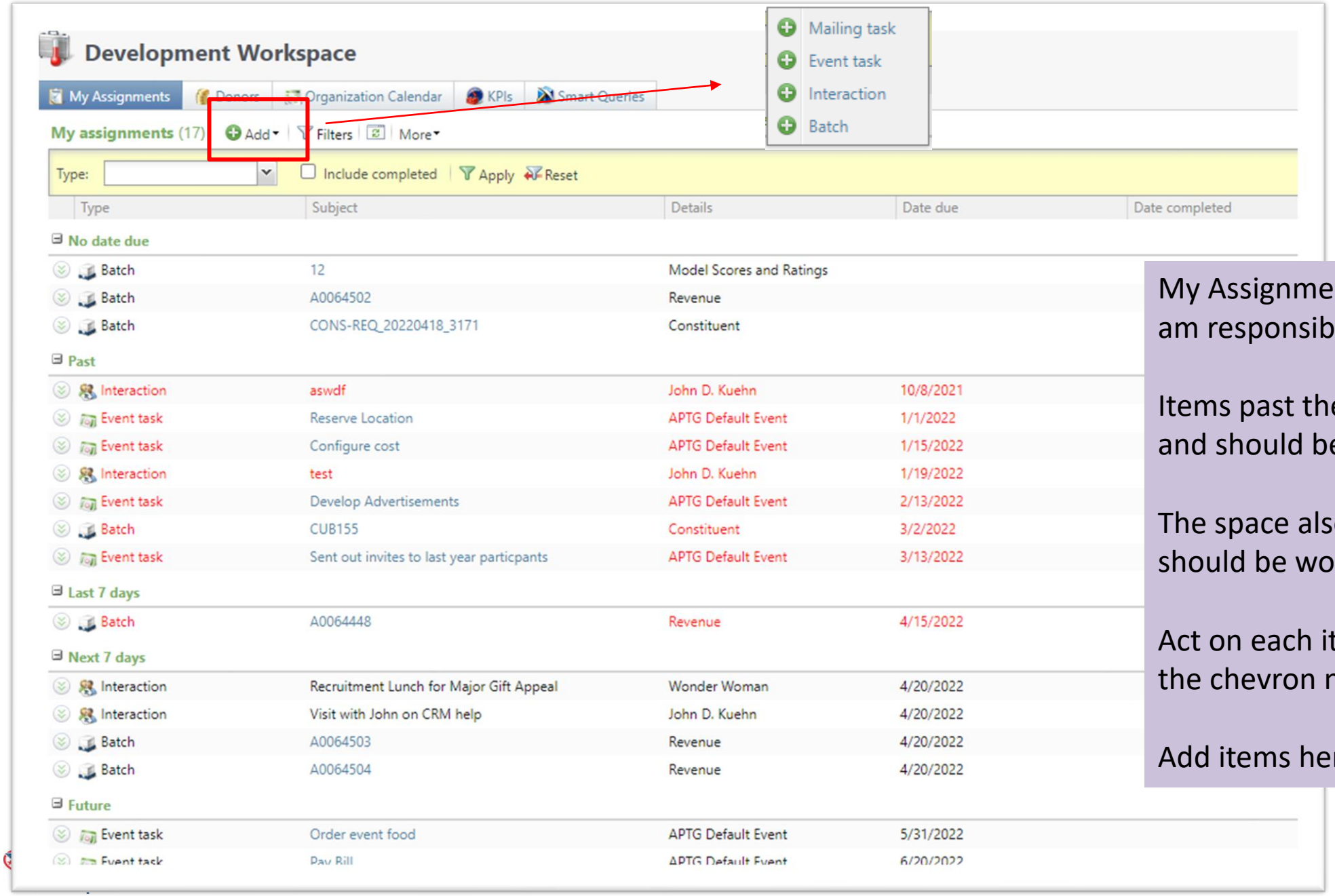
Workspace Location



Add to your home page



Add to your home page by clicking the customize button on your home page in CRM. Navigate to the Fundraising functional area and then select Development Workspace.



My Assignment tab shows those items I am responsible for.

Items past the due date are coded in red and should be addressed.

The space also shows those items that should be worked on in the future.

Act on each item from here by dropping the chevron next to the item.

Add items here by using the add button.

Development Workspace

My Assignments | Donors | Organization Calendar | KPIs | Smart Queries

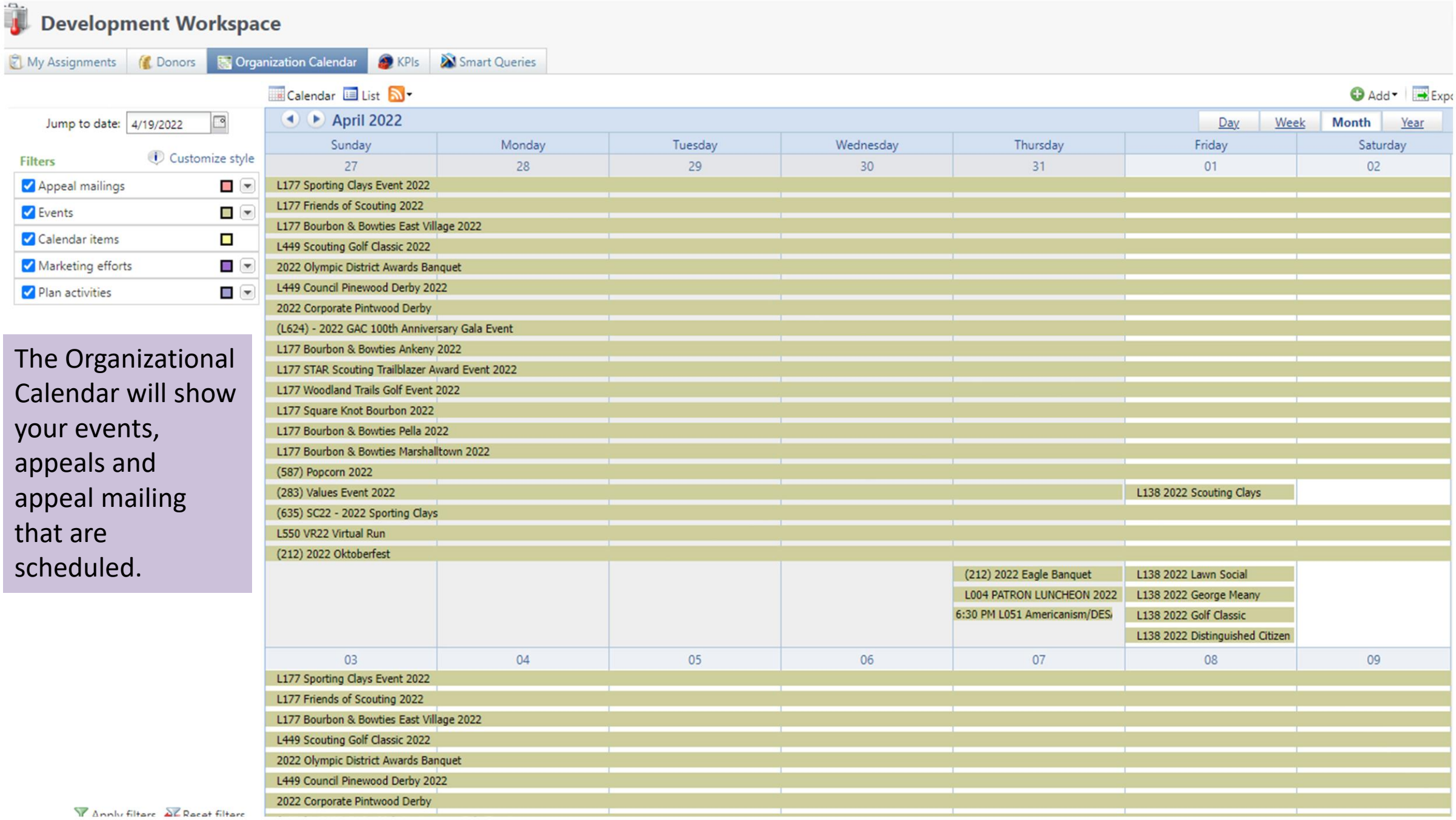
Donors (36) Filters | More

Show giving: Today Greater than: $0.00 Apply Reset

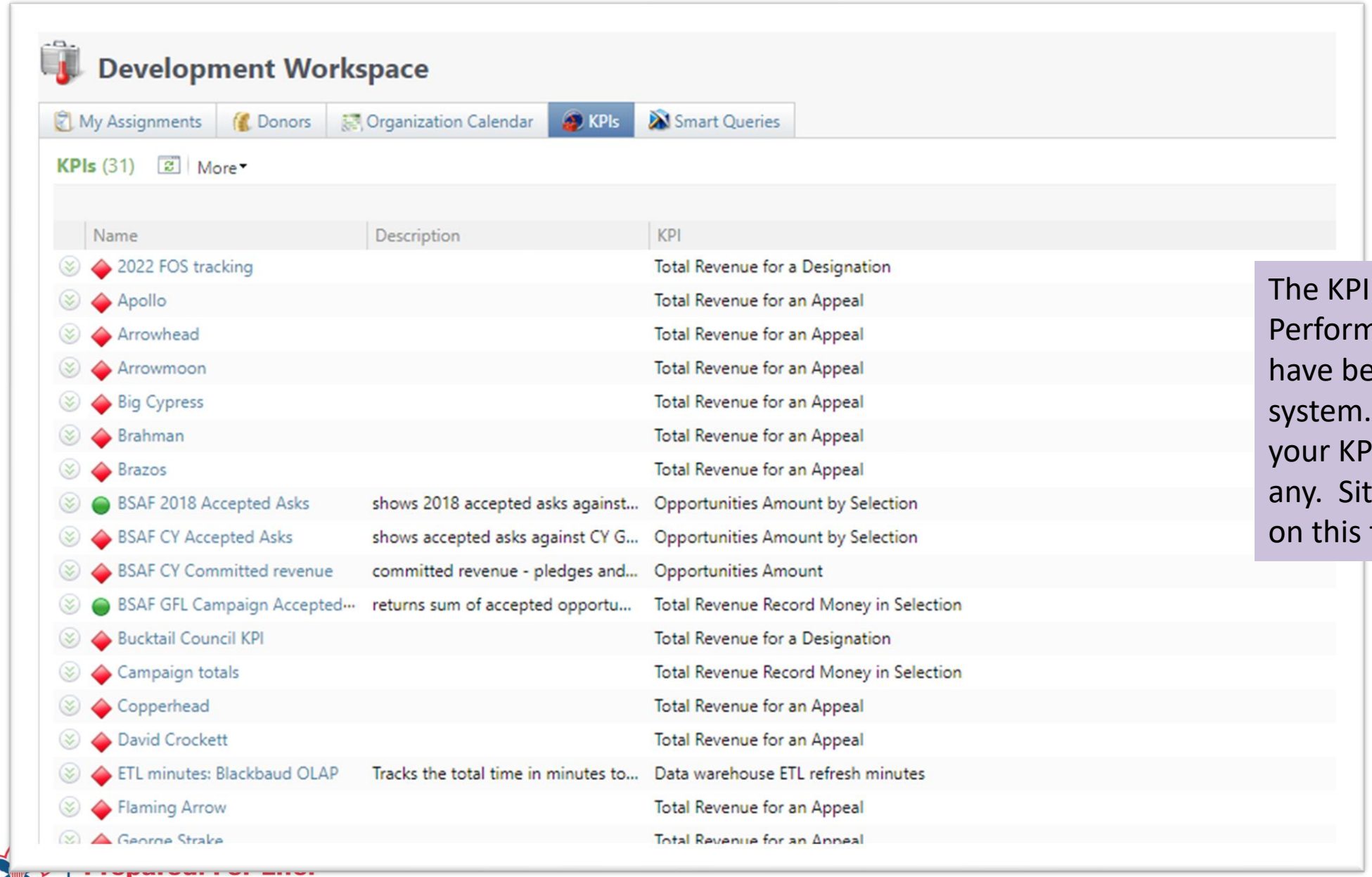
Date	Name	Amount	Designation	Transaction type
4/19/2022		$25,000.00	55100001 Council Genera - Opera...	Payment
4/19/2022		$15,000.00	55100001 Council Genera - Opera...	Payment
4/19/2022		$700.00	54608031 Moby Dick Golf Classi -...	Payment
4/19/2022		$500.00	54600001 Council Genera - Opera...	Payment
4/19/2022		$500.00	54600001 Council Genera - Opera...	Payment
4/19/2022		$365.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		$365.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		$330.00	61500501 Friends of Scouting - O...	Payment
4/19/2022		$200.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		$120.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		$100.00	54600353 Yawgoog Alumn - Endo...	Payment
4/19/2022		$100.00	61500501 Friends of Scouting - O...	Payment
4/19/2022		$84.16	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		$50.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		$50.00	54600353 Yawgoog Alumn - Endo...	Payment
4/19/2022		$50.00	54600353 Yawgoog Alumn - Endo...	Payment
4/19/2022		$50.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		$50.00	61500501 Friends of Scouting - O...	Payment
4/19/2022		$50.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		$50.00	54600353 Yawgoog Alumn - Endo...	Payment

The Donor tab can display a list of donations that have been processed by date. This is a listing of items for 4.19 as of the time I took my screen shot.

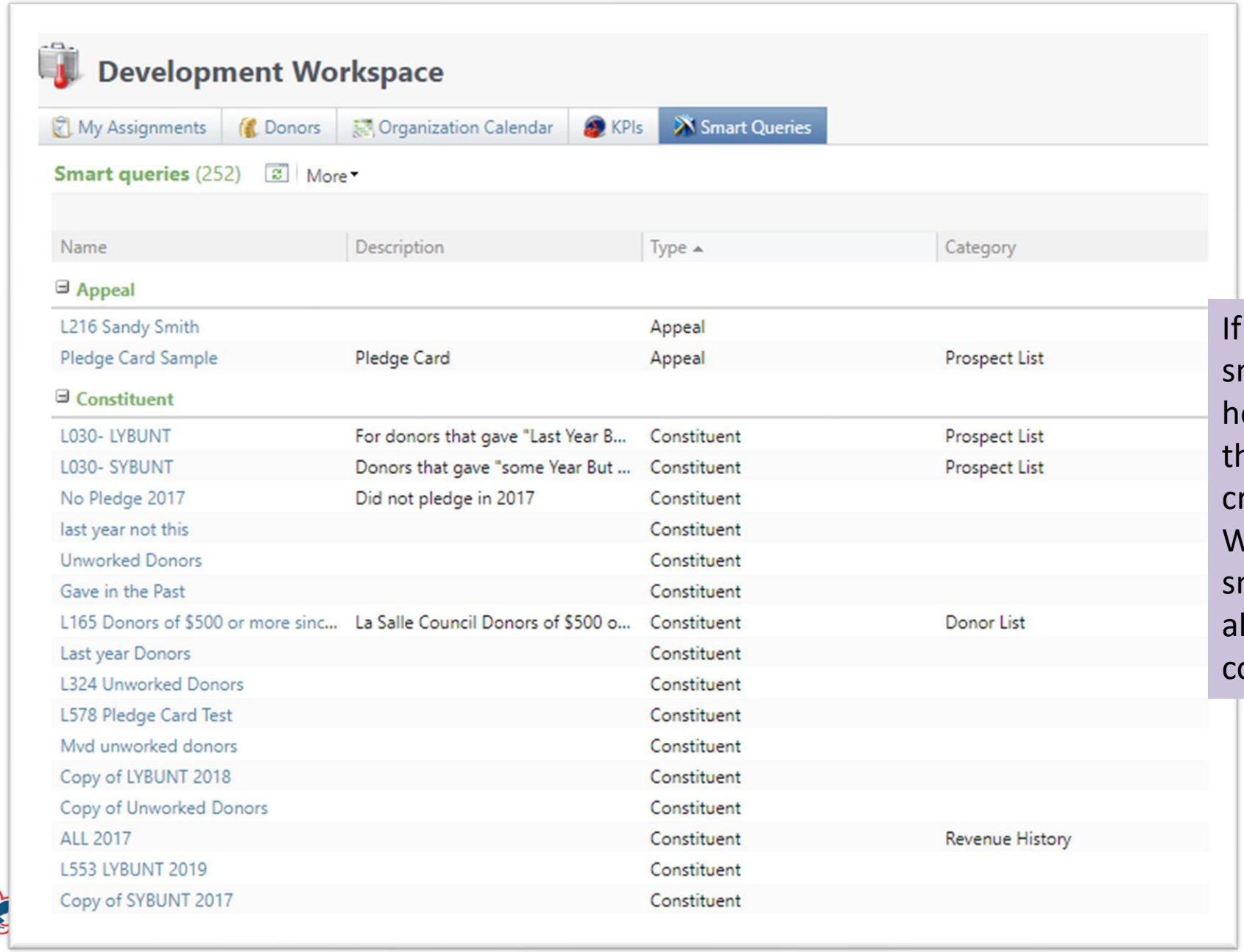
36 items had been committed for the day.



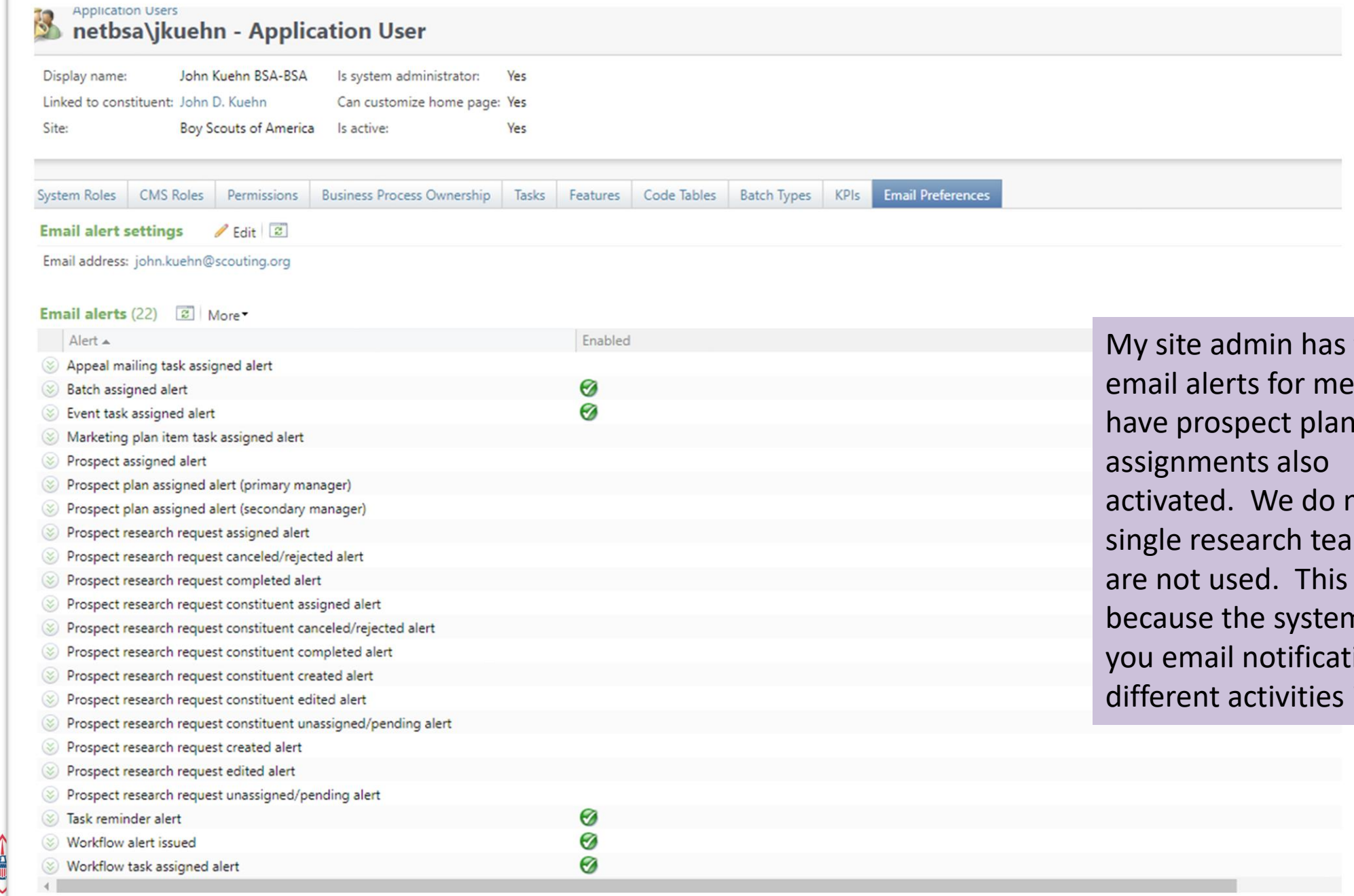
The Organizational Calendar will show your events, appeals and appeal mailing that are scheduled.



The KPI tab will show Key Performance indicators that have been created in the system. You should only see your KPI's if you have created any. Site security is enabled on this tab.

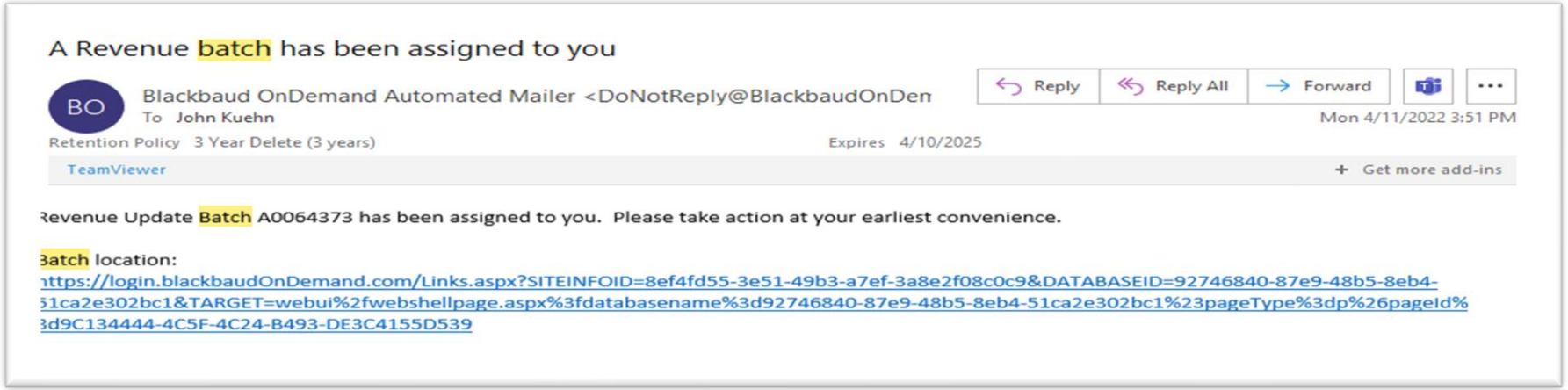


If your council has created a smart query, they will show here. You will also see items that other councils have create but did not site secure. When creating queries or smart queries you should always site secure it to your council.



My site admin has turned on email alerts for me. You might have prospect plan assignments also activated. We do not have a single research team so those are not used. This is important because the system can send you email notification on different activities in CRM.

Email Alerts Examples from CRM



A Revenue batch has been assigned to you

BO Blackbaud OnDemand Automated Mailer <DoNotReply@BlackbaudOnDen

To John Kuehn

Reply | Reply All | Forward

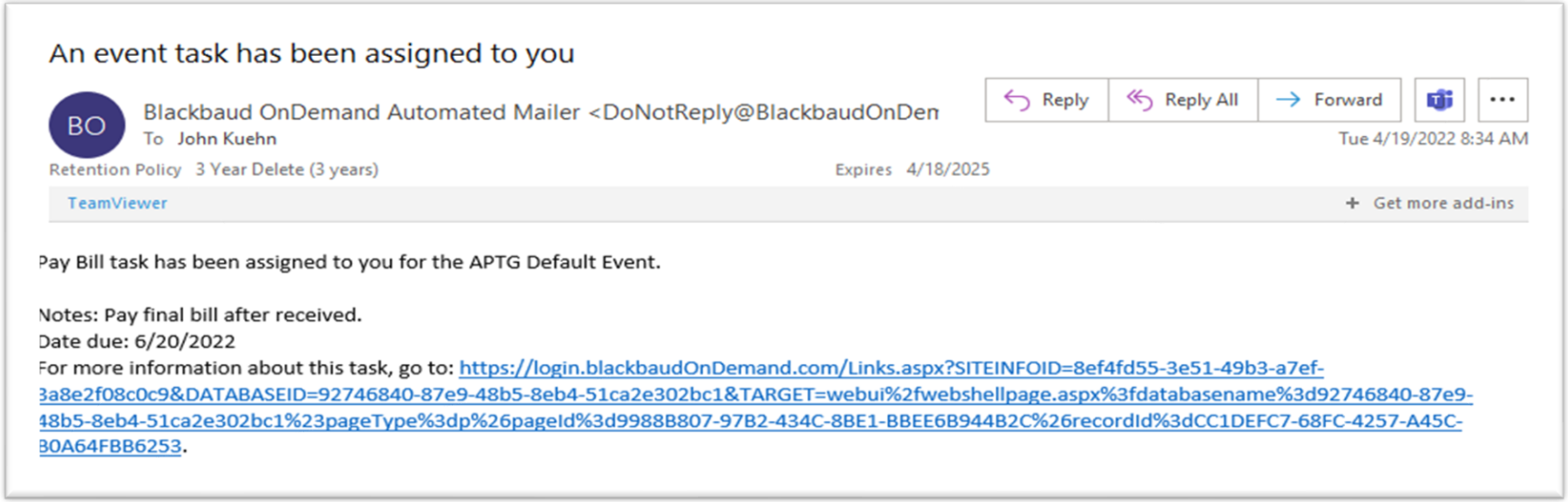
Mon 4/11/2022 3:51 PM

Retention Policy 3 Year Delete (3 years) Expires 4/10/2025

TeamViewer + Get more add-ins

Revenue Update Batch A0064373 has been assigned to you. Please take action at your earliest convenience.

Batch location:
https://login.blackbaudOnDemand.com/Links.aspx?SITEINFOID=8ef4fd55-3e51-49b3-a7ef-3a8e2f08c0c9&DATABASEID=92746840-87e9-48b5-8eb4-51ca2e302bc1&TARGET=webui%2fwebshellpage.aspx%3fdatabasename%3d92746840-87e9-48b5-8eb4-51ca2e302bc1%23pageType%3dp%26pageId%3d9C134444-4C5F-4C24-B493-DE3C4155D539



An event task has been assigned to you

BO Blackbaud OnDemand Automated Mailer <DoNotReply@BlackbaudOnDen

To John Kuehn

Reply | Reply All | Forward

Tue 4/19/2022 8:34 AM

Retention Policy 3 Year Delete (3 years) Expires 4/18/2025

TeamViewer + Get more add-ins

Pay Bill task has been assigned to you for the APTG Default Event.

Notes: Pay final bill after received.
Date due: 6/20/2022
For more information about this task, go to: https://login.blackbaudOnDemand.com/Links.aspx?SITEINFOID=8ef4fd55-3e51-49b3-a7ef-3a8e2f08c0c9&DATABASEID=92746840-87e9-48b5-8eb4-51ca2e302bc1&TARGET=webui%2fwebshellpage.aspx%3fdatabasename%3d92746840-87e9-48b5-8eb4-51ca2e302bc1%23pageType%3dp%26pageId%3d9988B807-97B2-434C-8BE1-BBEE6B944B2C%26recordId%3dCC1DEFC7-68FC-4257-A45C-30A64FBB6253.

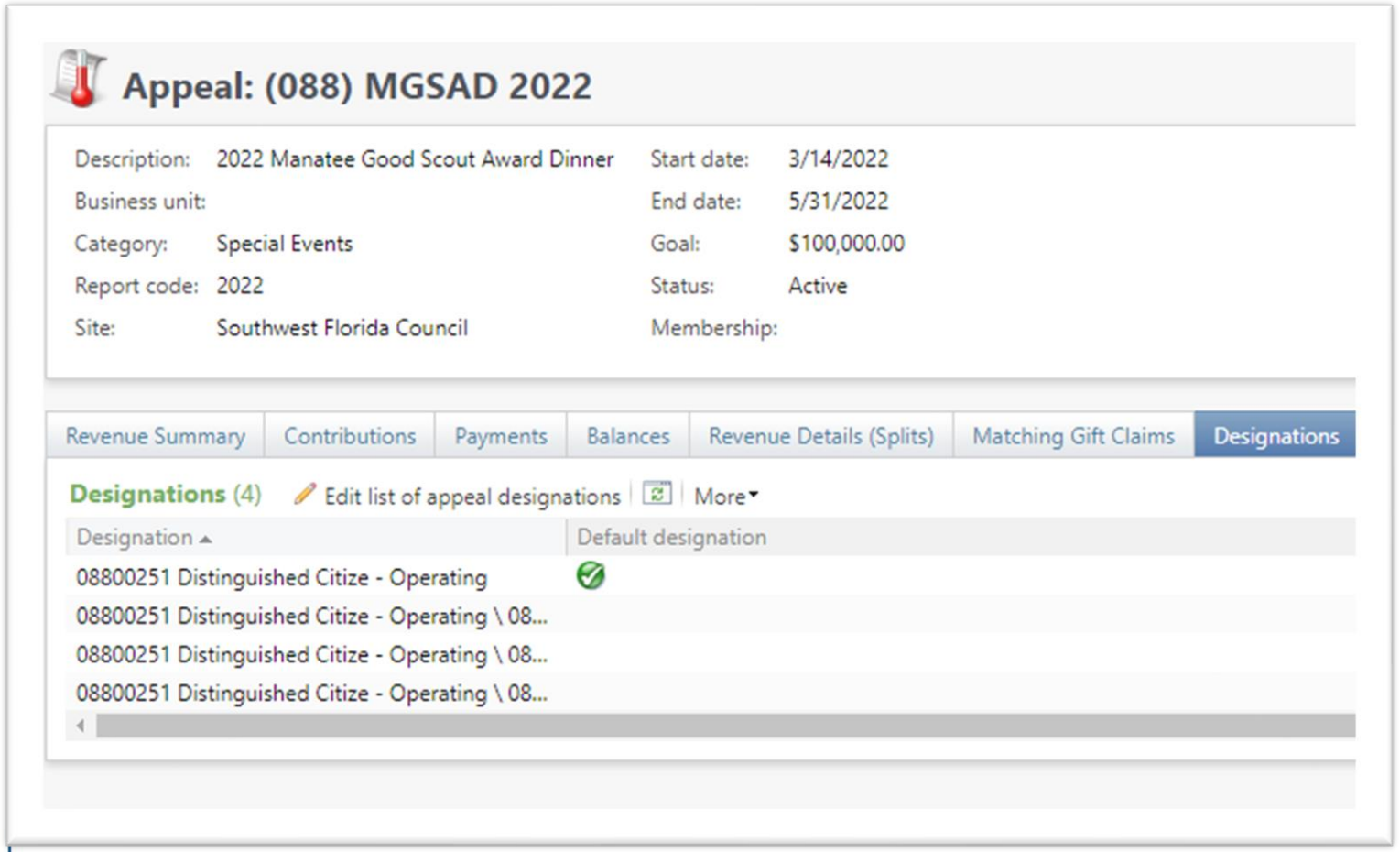
Scouting Gives CRM Setup

- Appeals
- Events

Appeal Requirements

- Appeal created in CRM
- Default designation on the appeal established
- Start and end date added to appeal
- Scouting Give's appeal will stop taking monies on CRM appeal end date

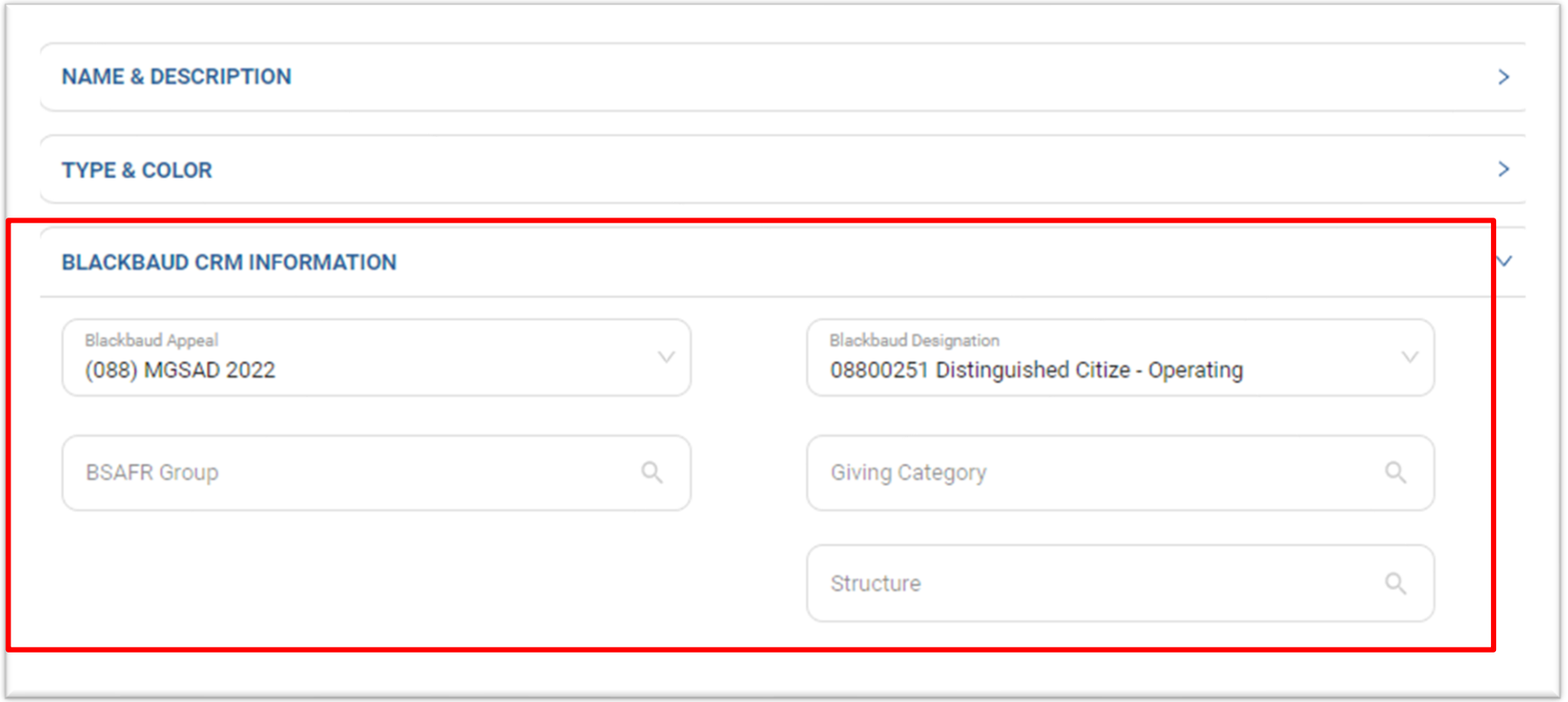
Created CRM Appeal



This appeal has the needed components on it to facilitate creation of a Scouting Gives appeal.

1. Start and End Dates
2. Defaulted Designation

Scouting Gives Add an Appeal Selections

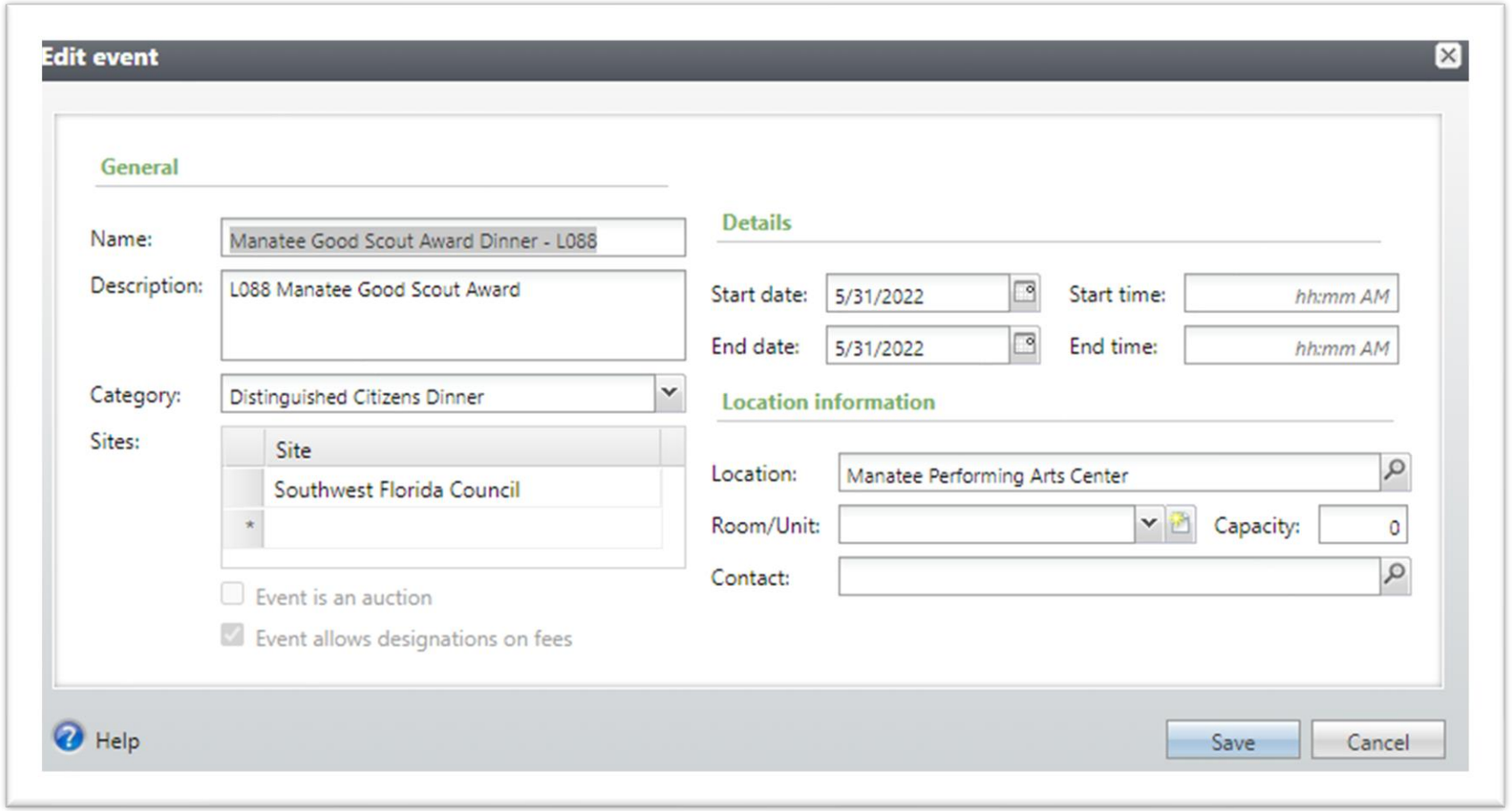


Once the appeal is added in CRM, you can proceed to Scouting Gives and create an appeal. When you get to Blackbaud CRM Information your appeal and designations will appear in the dropdowns to select. You can also search for a specific group, giving category and structure that will default in incoming CRM batches.

CRM Event Requirements

- Event end date in the future
- Default designation added to your event
- Appeal attached to your event
- Registration Options added to your event

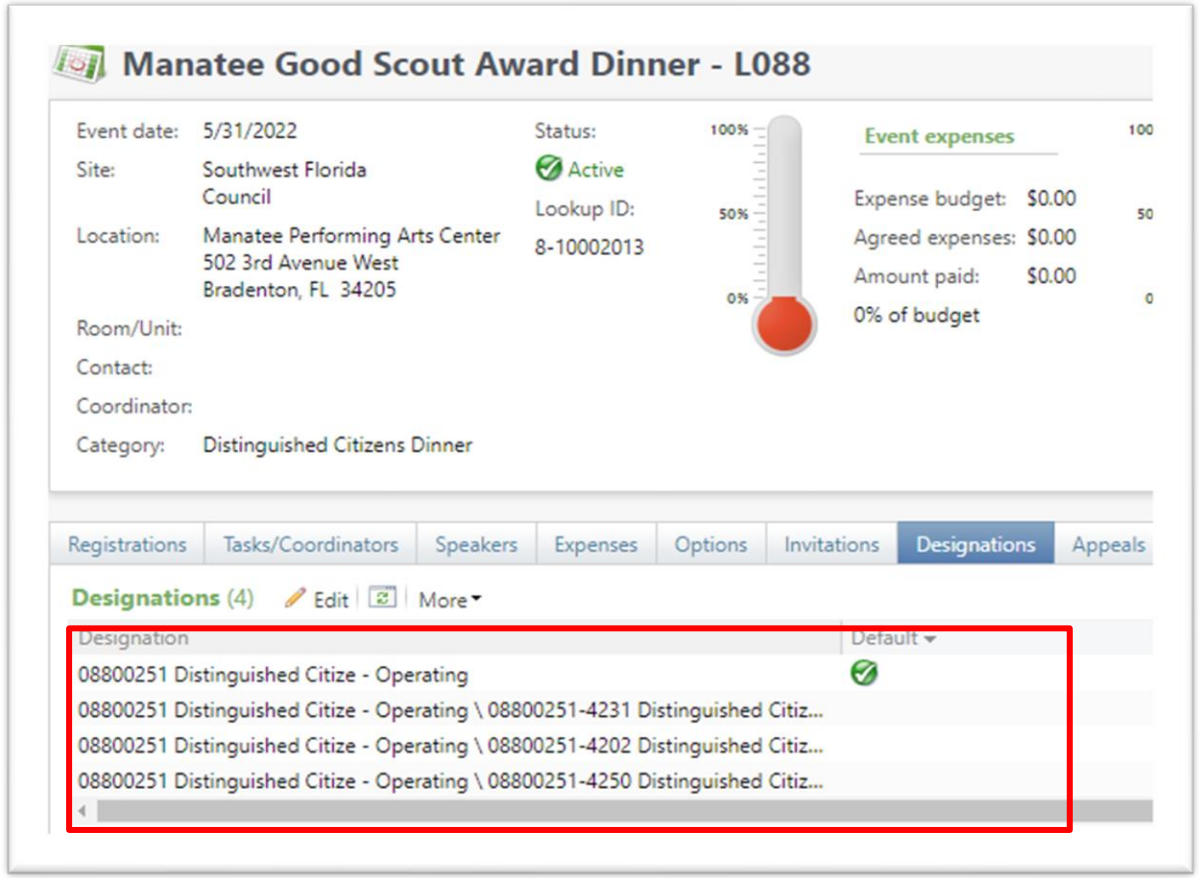
CRM Event Setup From



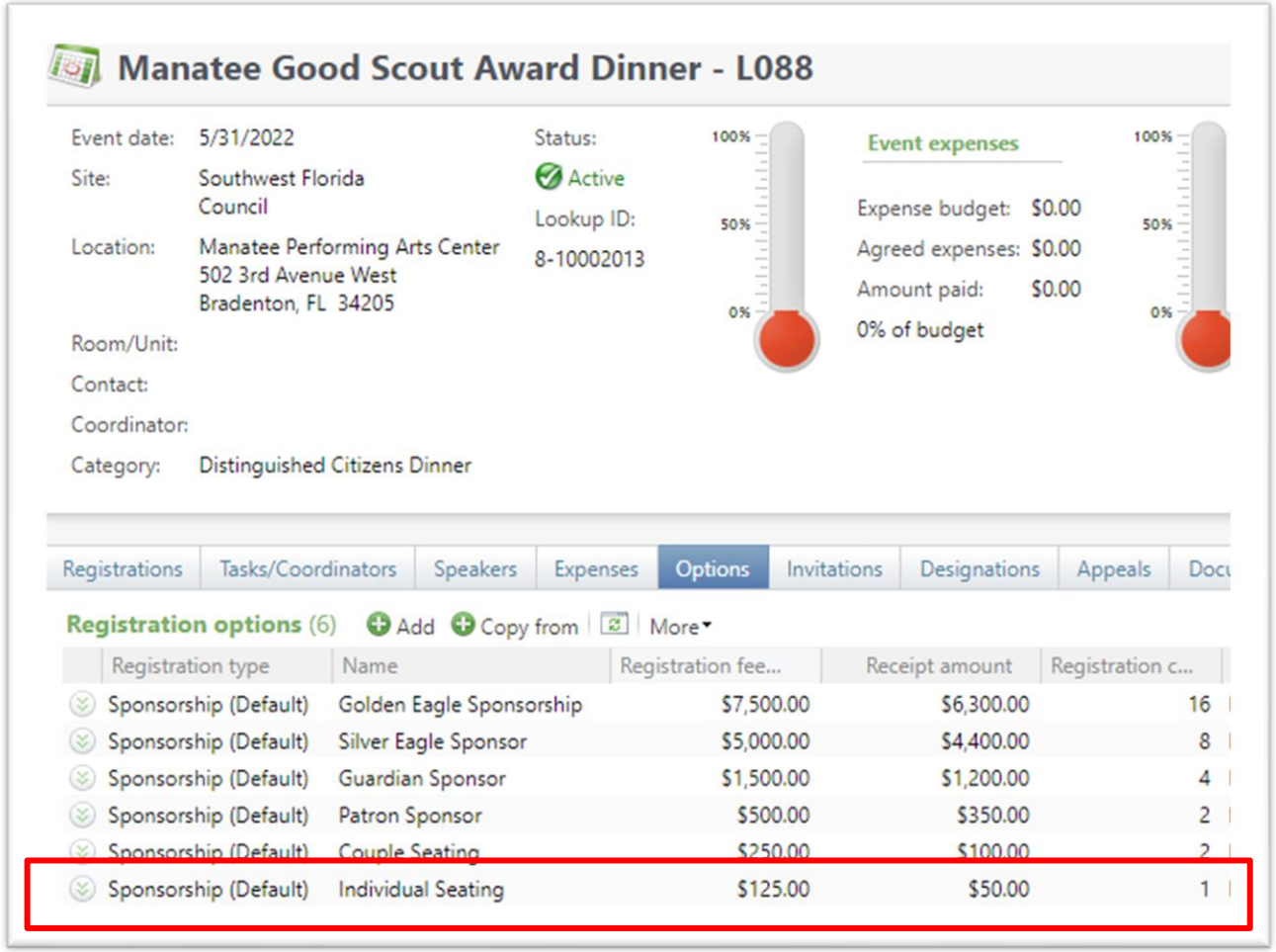
Create your event in CRM.
Provide:

- name
- description
- start and end date
- other pertinent information that you might have.

Attach Appeal and Default Designations



Create Registration Options



Scouting Gives Event

- You have multiple screens to complete your event in Scouting gives
- Screen one – select your appeal and designations
- Screen two – does not apply to CRM
- Screen three – select your CRM registration options
- Event and registration options can be named differently in Scouting Gives versus how you have them in CRM.

Event Name
Manatee Good Scout Dinner

Event to honor volunteers

Event Category
Dinner

Include meal options
Registrant will be able to select their meal preference. The following options will be provided: Food Allergy, Vegetarian, Vegan, Gluten-Free, Halal, Kosher, Lactose Intolerant, Other.

Event Location
Manatee Event Center

Room / Unit
Ball Room

Start Date
May 31, 2022

End Date
May 31, 2022

Start Time
5:00 pm

End Time
9:30 pm

Time Zone
US/Eastern

Blackbaud Appeal
(088) MGSAD 2022

Blackbaud Designation
08800251 Distinguished Citize - Operating

Activate Goal Progress

Event Contact

Contact Name
john kuehn

Position Title
DFS

Phone Number
2147386025

Email
john.kuehn@scouting.org

Event Capacity

Event Capacity
250

Deactivate Event

Deactivate event at full capacity

Deactivate event on a certain day

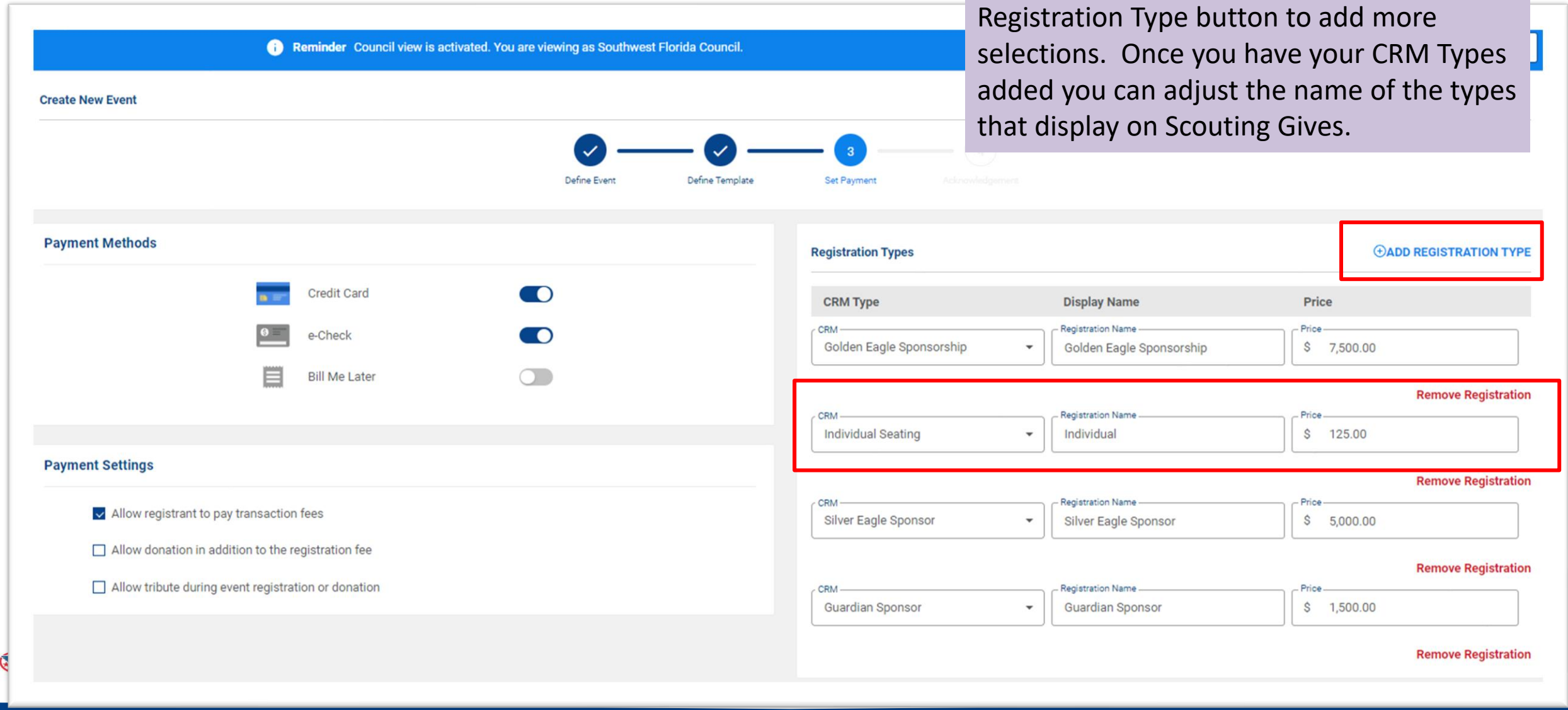
Day of Event Select Date

Select Date
Apr 20, 2022

Event Documents (ONLY PDF FORMAT)

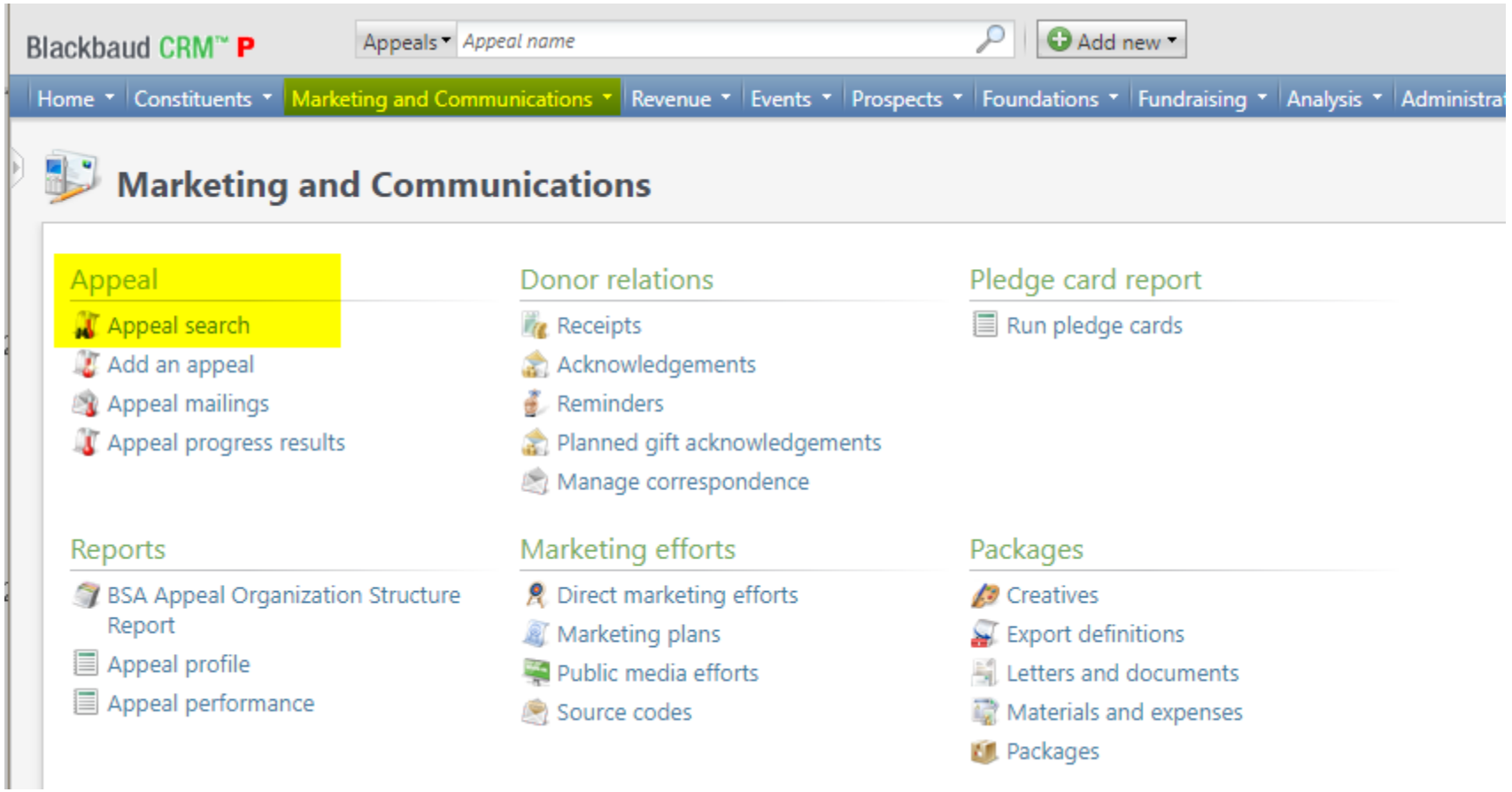
The Blackbaud Appeal and the Blackbaud Designation fields are populated via the CRM / Scouting Gives sync. When creating your event, you select your appeal and designation attached to your event.

On the payment screen you can select your CRM registration types from your event. To select more than one you use the Add Registration Type button to add more selections. Once you have your CRM Types added you can adjust the name of the types that display on Scouting Gives.



Tracking Your Appeal Progress

Using Appeal Progress



[redacted] Council ([redacted]) - Appeal Progress Results

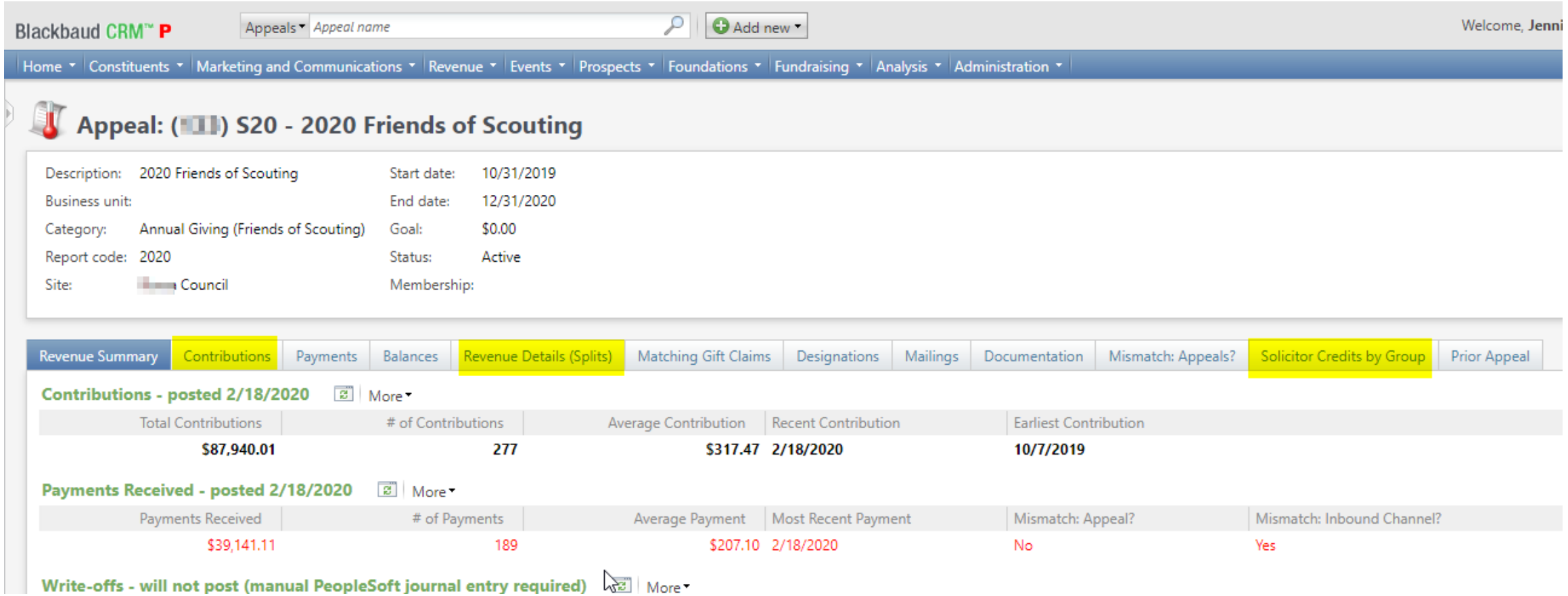
Contribution Summary | Payment Summary | [redacted]

Contribution Summary (posted 3/15/2022) ... note: View write-off and balance totals on 'Write-off & Balance Summary' tab (263) More

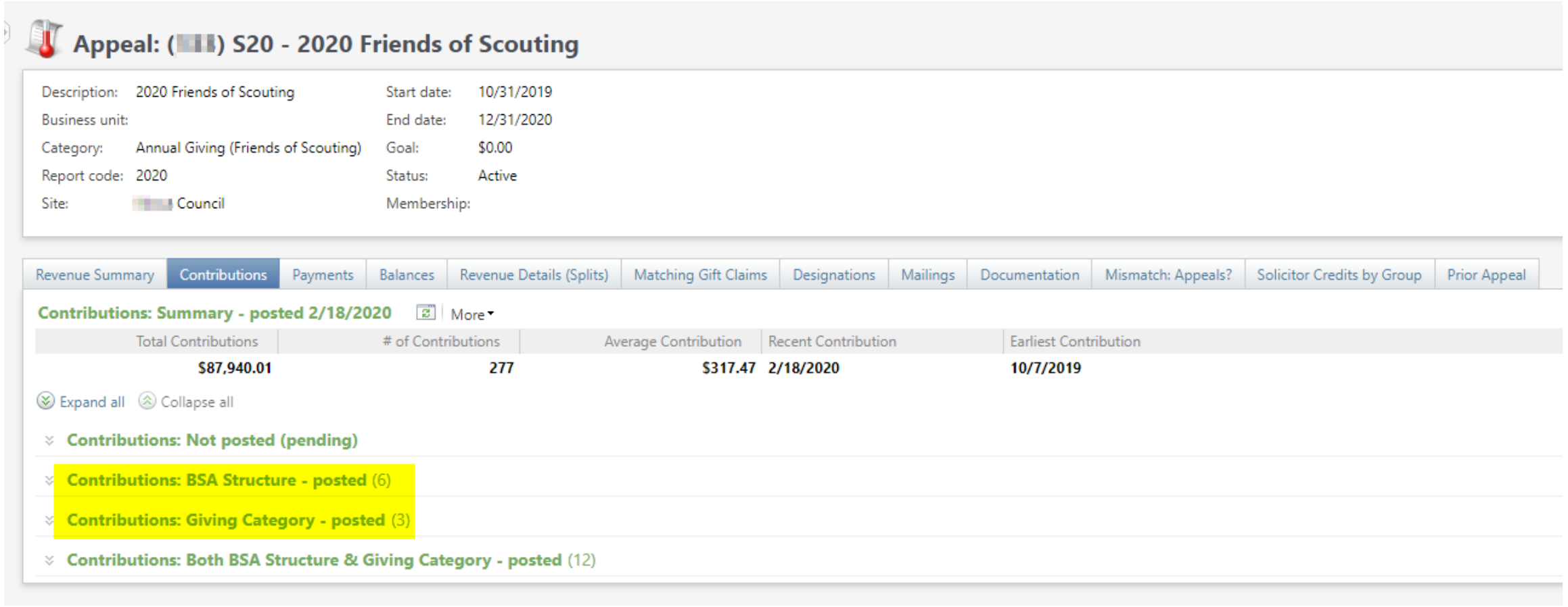
Active equal to: | Report Code equal to: | Category equal to: | Appeal equal to:

Site ID	Site Name	Report Cod...	Category	Active?	Appeal	Total Contr...	Goal
Multi-year							
[redacted]	[redacted]	Multi-year	Capital Campaign	Yes	C18 - 2018 Capital Campaign	$27,122.00	$0.00
[redacted]	[redacted]	Multi-year	Capital Campaign	Yes	CC18 - 2018 Capital Campaign	$1,391,005.08	$0.00
2022							
[redacted]	[redacted]	2022	Special Events	Yes	BG22 - Canton Brookside Golf	$4,300.00	$64,000.00
[redacted]	[redacted]	2022	Other Support	Yes	CA22 - 2022 Camperships	$500.00	$10,000.00
[redacted]	[redacted]	2022	Endowment	Yes	EN22 - 2022 Endowment	$4,497.06	$0.00
[redacted]	[redacted]	2022	Foundations & Trusts	Yes	FN22 - 2022 Foundations & Grants	$46,000.00	$155,000.00
[redacted]	[redacted]	2022	Annual Giving (Friends of Scoutin...	Yes	FS22 - 2022 Friends of Scouting	$239,708.40	$559,000.00
[redacted]	[redacted]	2022	Special Events	Yes	HD22 - 2022 Hill N Dale Sporting Clays	$10,000.00	$76,000.00
[redacted]	[redacted]	2022	Special Events	Yes	LA22 - 2022 Lawrence Sporting Clays	$11,750.00	$27,000.00
[redacted]	[redacted]	2022	Special Events	Yes	OE22 - 2022 Over the Edge	$15,973.75	$70,000.00
[redacted]	[redacted]	2022	Special Events	Yes	PG22 - 2022 Portage Golf	$10,000.00	$45,000.00
[redacted]	[redacted]	2022	Special Events	Yes	SA22 - 2022 Summit Adventure Weekend	$3,468.40	$18,100.00
[redacted]	[redacted]	2022	United Way - Allocations	Yes	UW22 - 2022 United Way	$3,056.28	$15,000.00
2021							
[redacted]	[redacted]	2021	Special Events	Yes	AU21 - 2021 Annual Auction	$35,801.81	$77,000.00
[redacted]	[redacted]	2021	Special Events	Yes	BG21 - 2021 Brookside Golf Outing	$66,422.00	$61,300.00
[redacted]	[redacted]	2021	Other Support	Yes	CA21 - 2021 Campership	$675.00	$0.00
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]

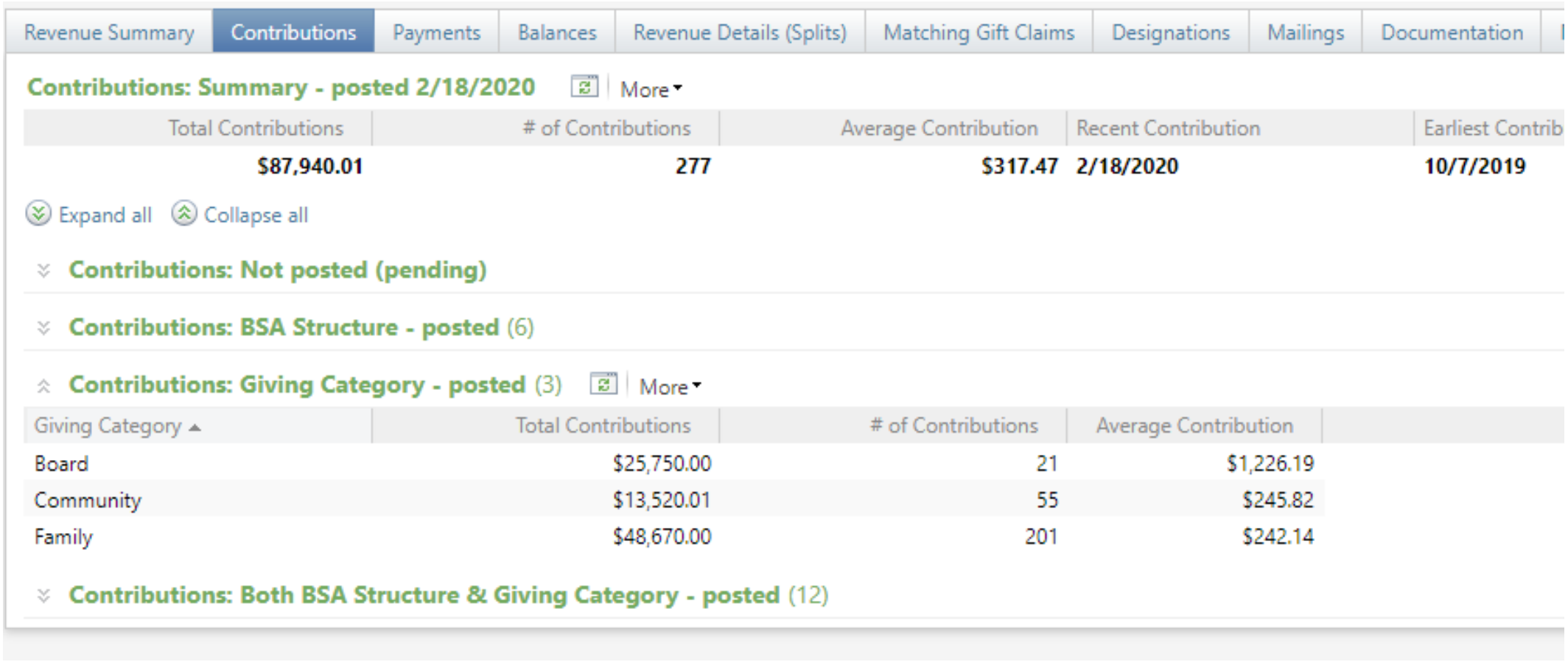
Multiple tabs available



Contributions



By Giving Category or by Structure



Revenue Summary | Contributions | Payments | Balances | Revenue Details (Splits) | Matching Gift Claims | Designations | Mailings | Documentation

Contributions: Summary - posted 2/18/2020 More

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contrib
$87,940.01	**277**	**$317.47**	**2/18/2020**	**10/7/2019**

Expand all | Collapse all

Contributions: Not posted (pending)

Contributions: BSA Structure - posted (6)

Contributions: Giving Category - posted (3) More

Giving Category	Total Contributions	# of Contributions	Average Contribution
Board	$25,750.00	21	$1,226.19
Community	$13,520.01	55	$245.82
Family	$48,670.00	201	$242.14

Contributions: Both BSA Structure & Giving Category - posted (12)

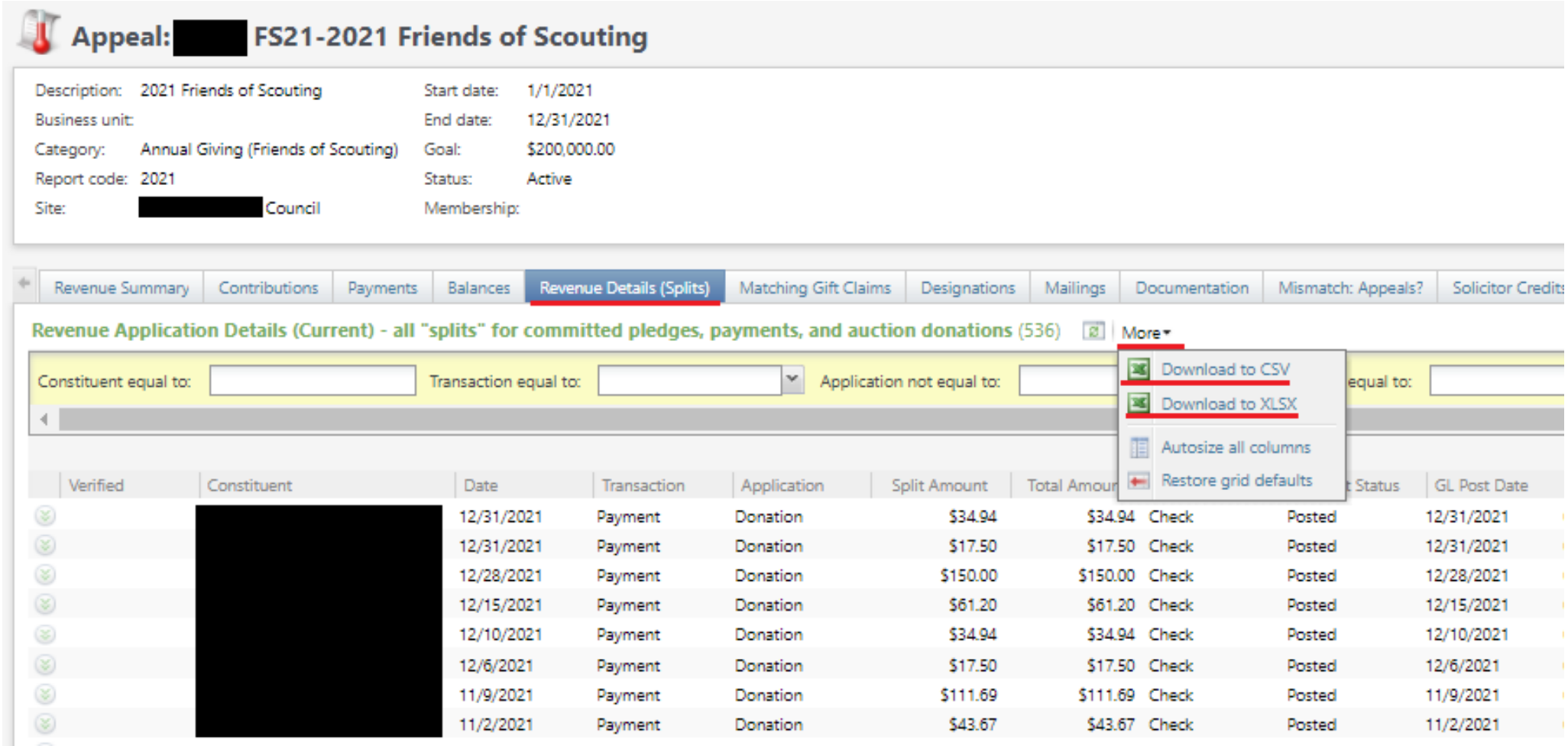
Solicitor Credits

Revenue Summary | Contributions | Payments | Balances | Revenue Details (Splits) | Matching Gift Claims | Designations | Mailings | Documentation

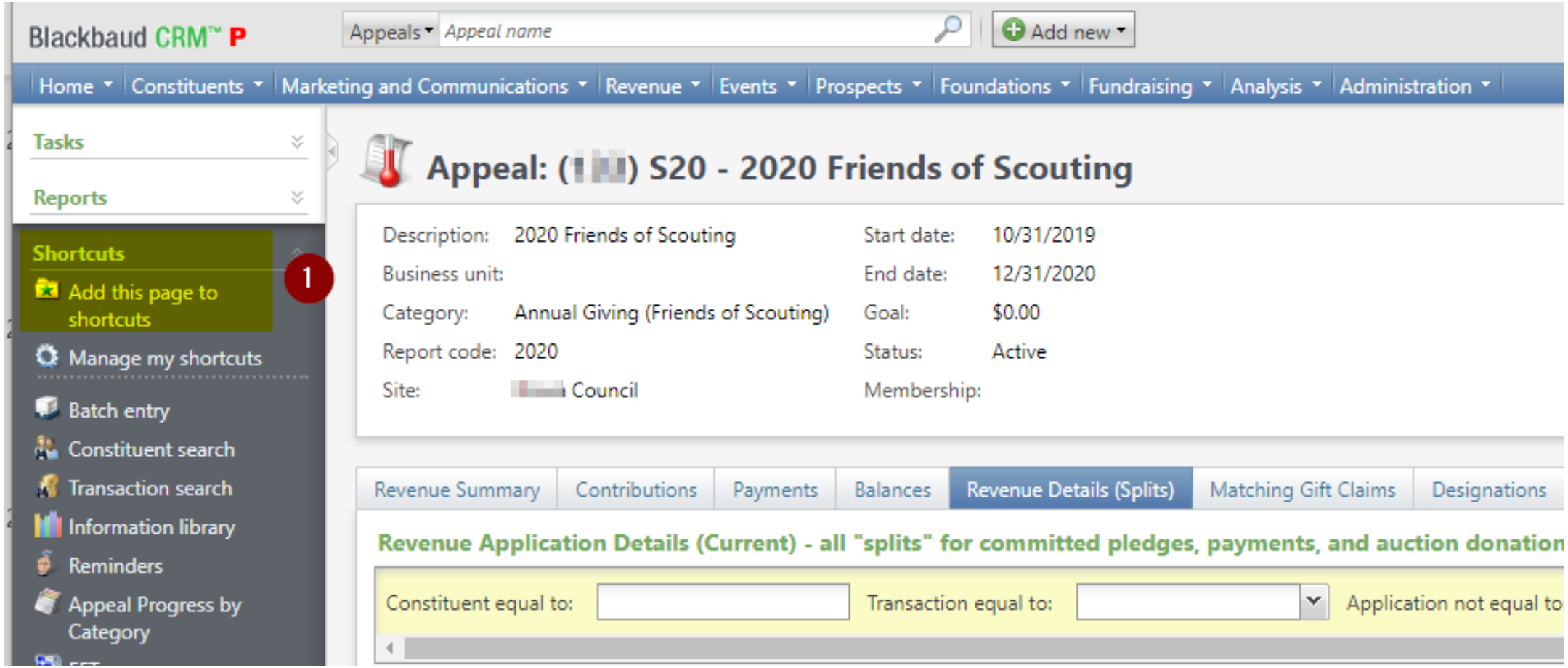
Appeal Solicitor Credits by Solicitor Group ...note: solicitor's row is bold when fundraising goal is achieved (44) More

BSA Structure	Giving Category	Inactive?	Group Name	Group Public Name	Solicitor Cre...
Hoover					
Hoover	Family	No	Pack 3151 BP Wilton - 133 (163962)	Pack 3151	$25.00
Hoover	Family	No	Pack 3153 FP Durant - 133 (163963)	Pack 3153	$195.00
Hoover	Family	No	Troop 0127 BT Muscatine - 133 (164...	Troop 0127	$780.00
Hoover	Family	No	Troop 0151 BT Wilton - 133 (164235)	Troop 0151	$25.00
Hoover	Family	No	Troop 0426 BT Muscatine - 133 (100...	Troop 0426	$850.00
Hoover	Family	No	Troop 1127 GT Muscatine - 133 (100...		$250.00
[redacted] Council					
Inali					
Kittan					
Mesquakie					
Saukenuk					

Revenue Details (Splits)



Add to Shortcuts



Next Forum

May 18, 2022
10:00 am & 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

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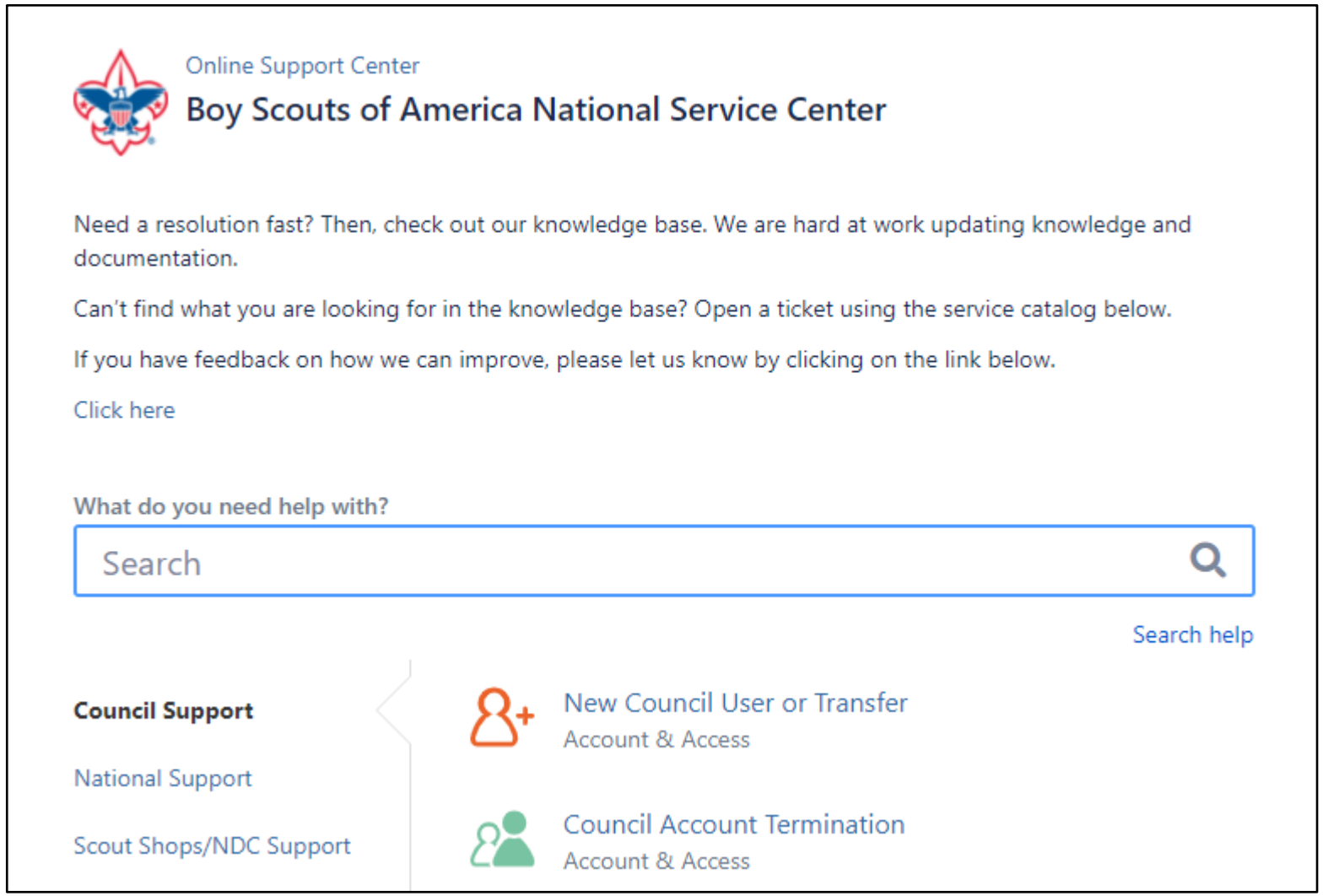
Member Care Self-Service

- 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.

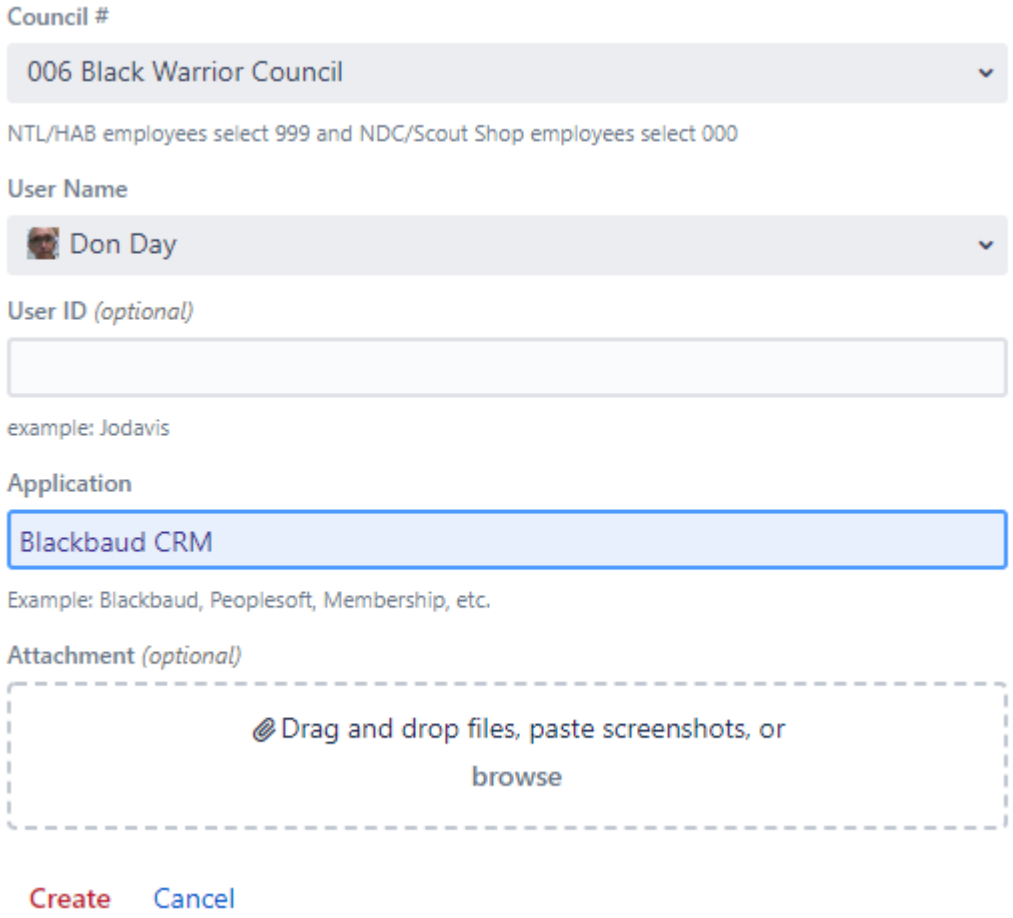
Please provide me a list of giving categories

Council #

006 Black Warrior Council

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

User Name – Application - Attachments



Questions & Answers