CRM User Forum

June 15, 2022 Cornelia Ellis – John Kuehn Valerie Eaton – Don Day



Objectives

- Blackbaud Merchant Services
 - New username and password needed
- Blackbaud CRM Hosting Migration items changing
- Automating Credit Card processes
- Creating an "unworked constituent" listing
- Using the "Volunteer Award" data list
- Questions Answers

Changes to Blackbaud Merchant Services



BBMS Platform Upgrade

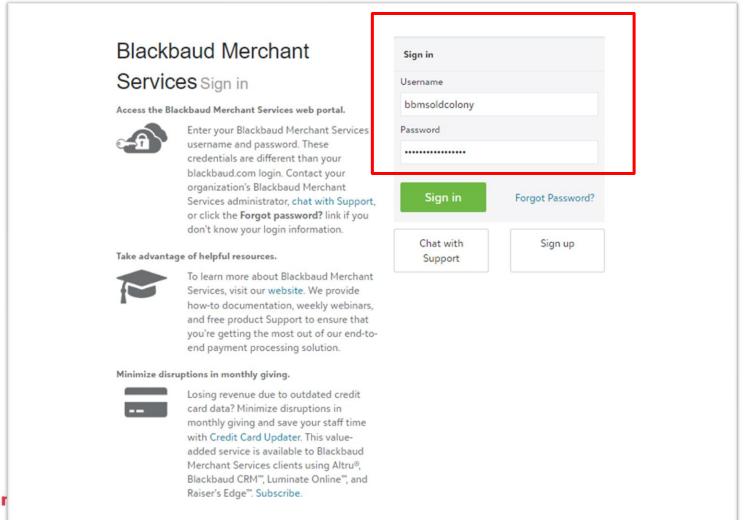
- Blackbaud Merchant Service Platform Upgrade
- Improves security
- Provides single sign-on if you use multiple Blackbaud products
- Moves BBMS to the cloud



BBMS Platform Upgrade

- Steps
 - BSA users will need to follow prompts to link account to new platform
 - You will also create a <u>blackbaud.com</u> User ID and Password replacing your current Username and Password for BBMS
 - You will go to blackbaud.com to sign in after you complete this process
 - If not done by 8/1/22, your current passwords may stop working

Proceed to sign into your BBMS Account



Fill in your current username and password provided by National when your account was created or what it is currently.



Blackbaud Merchant Services

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This page is only available until 8/1/2022. For compliance, you must link your account before this date.

We've moved to Blackbaud ID (BBID) for the Blackbaud Merchant Services Web Portal. To simplify your login process and comply with the latest software security standards, you will no longer enter your Blackbaud Merchant Services Web Portal credentials after you link your account. You'll access the Blackbaud Merchant Services Web Portal and your other Blackbaud solutions with a single login.

On this page, you can link your Blackbaud ID to your existing account, sign in using Blackbaud ID if you've already linked your account, or use the classic sign-in.



Link account

Link your Blackbaud ID to your Blackbaud Merchant Services account.



Blackbaud ID sign in

Already linked your account? Sign in using your Blackbaud ID.



Classic sign in

Not ready to link your account? Sign in using your Blackbaud Merchant Services account. This screen appears.
We may have told you to use "Classic sign in" at the bottom.
You now need to link your account to a blackbaud.com username and password.
Click the square that says, "Link account"

Blackbaud Merchant Services

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Blackbaud Merchant Services is moving to Blackbaud ID

With Blackbaud ID, you can access Blackbaud Merchant Services and your other Blackbaud solutions with a single login.

Select Sign in with Blackbaud ID to link your Blackbaud Merchant Services account to your existing Blackbaud ID. If you don't have a Blackbaud ID, select Sign up with Blackbaud ID. For more information, see Blackbaud ID.

Sign in with Blackbaud ID

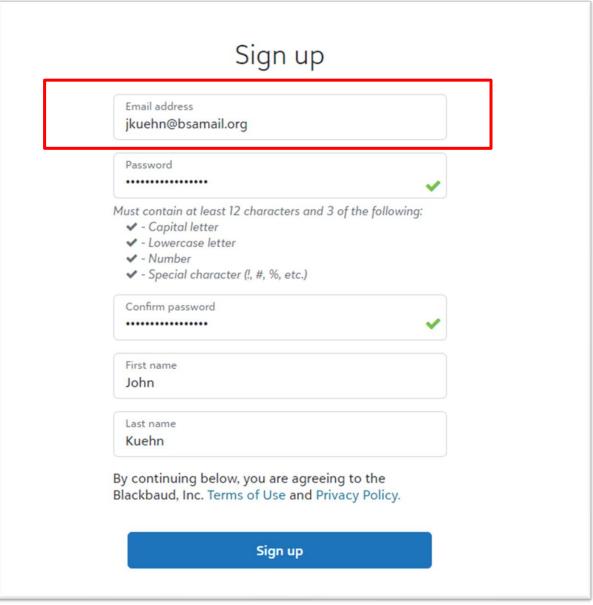
or

Sign up with Blackbaud ID

Use classic sign-in instead

This screen will appear.
Select "Sign up with
Blackbaud ID".
This will prompt you to
create a Blackbaud ID so
that you can then link
your BBMS account to it.



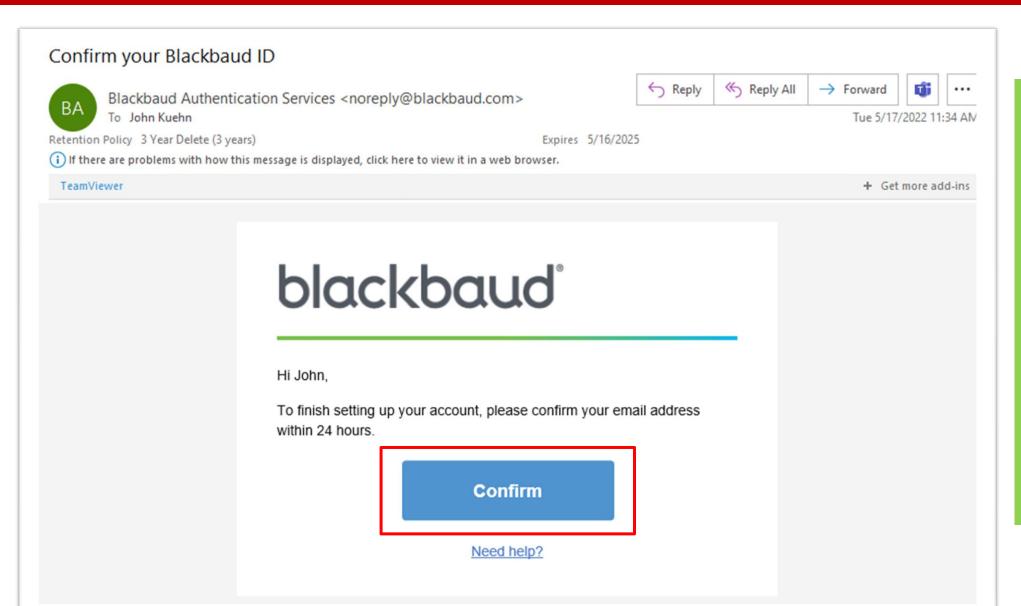


Create your Blackbaud ID by filling in the blanks.

Use your scouting.org email address.

NOTE: The person creating the slide had a previous Blackbaud ID created so for demo purpose a different BSA email address is being used.

Create your password and enter your first and last name.

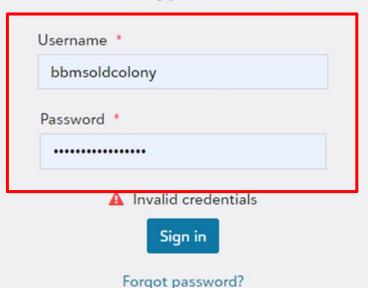


You will receive an email to verify your email and activate your Blackbaud.com account. Find the email and click the confirm button. It may go to your other email or your spam folder. My confirmation email went to my Other folder.

Link your Blackbaud Merchant Service Account to your Blackbaud ID

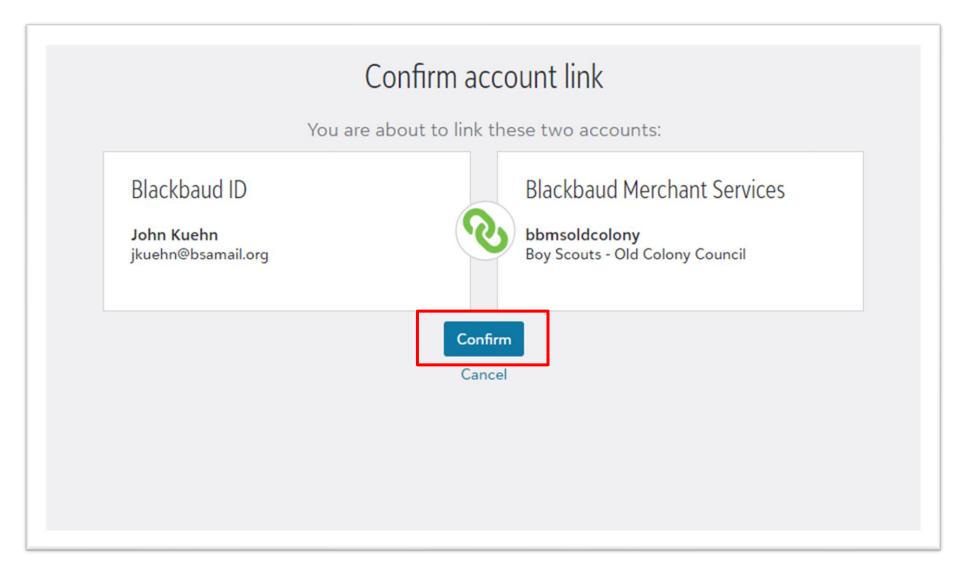
To link your Blackbaud Merchant Services account to your Blackbaud ID, sign in using your existing Blackbaud Merchant Services credentials.

This is the last time you will use these credentials to sign in. After you link your account, you will sign in to Blackbaud Merchant Services using your Blackbaud ID.



After you click the confirm button it will take you to a page asking you to log into your BBMS account. Use your current username and password to do this. This is not your Blackbaud ID. This will be the last time you use these credentials to enter your account.





Once you type in your current username and password for BBMS, this screen will ask you if you want to link your BBMS account with your Blackbaud ID. You will click the "Confirm" button.

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3 oy Scouts - Old Colony Council

Welcome

The new Blackbaud Merchant Services Web Portal improves your day-to-day experience, streamlines processes, and applies the latest security standards. From the portal, you can:

- · Manage multiple merchant accounts under one login.
- · Easily add, view, and manage transactions.
- Review disputed transactions including both chargebacks and direct debit returns from a consolidated location.
- · Add and manage users and customize their level of access with preset roles.
- Update your organization's Blackbaud Merchant Services account info, such as contact details, disbursement
 information, email settings, and more.

In addition to the features available today, soon you'll be able to:

- · Add and manage account configurations
- · Order and register Payment Terminal and MobilePay Terminal devices
- Download a transaction report PDF

Note: In the meantime, you can still access these features by logging in to the classic web portal and choosing 'Classic sign in.'

Stay tuned for more enhancements and what's coming soon in the next generation Blackbaud Merchant Services Web Portal.

Link additional accounts to Blackbaud ID

The new *Blackbaud Merchant Services* Web Portal uses Blackbaud ID for easier access with more security. You link all your individual accounts to your Blackbaud ID. If you used multiple accounts in the classic portal, you'll link each account to your Blackbaud ID separately. Select *Link another account* to associate each account with your Blackbaud ID.

Note: You can only link one account at a time.

Link another account

Updates

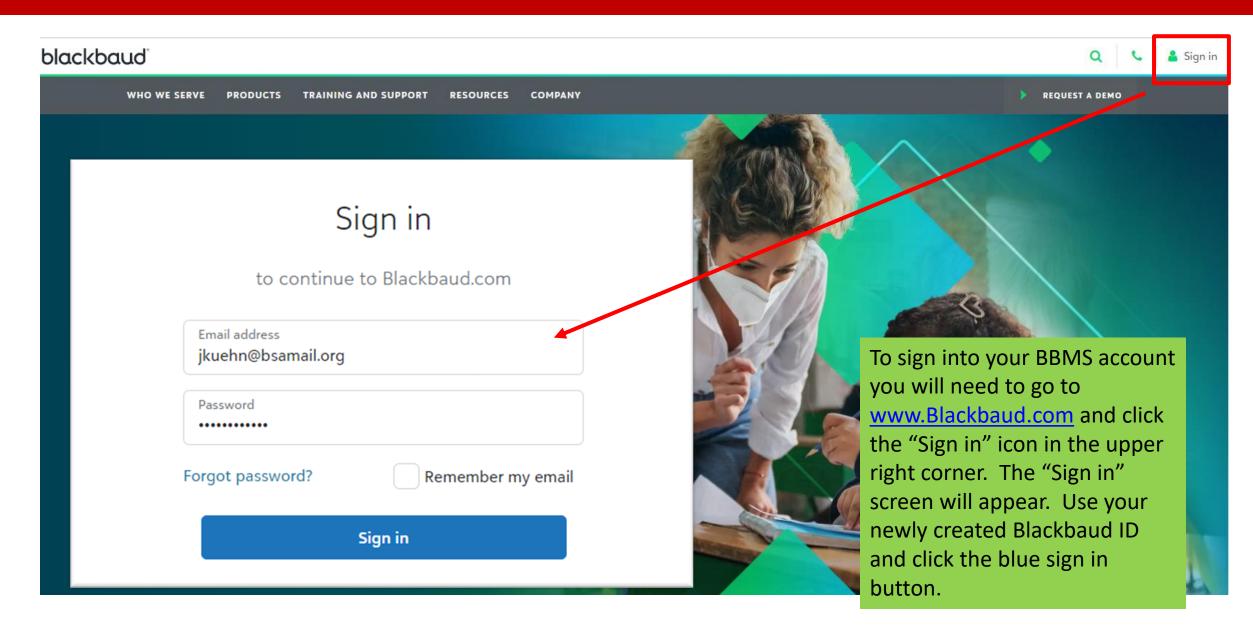
Your disbursements are currently being withheld a

5/10/2022 -- Important End of Support Notification (1)

1/1/2022 -- Disbursement Schedule - 2022 🚺

You will now be logged in. You will no longer see Your old username of bbms(councilname). You will see your initials. When you log out you will log back in with your Blackbaud User ID. The site will look very similar. Notifications are now under control panel. You will now sign in at blackbaud.com





Blackbaud CRM is moving



Blackbaud CRM is moving

- Expect very few changes in CRM
- Moving to a new hosting site to save \$\$
- Expect no change in speed or service
- Items which you may need to review:
 - A new URL for signing into CRM will be provided
 - Links to "O-Data" feeds will change and will need to be refreshed
 - CRM will be shut down over a weekend in June

Automating Your Credit Card Process

Credit Card Processing Change

- Automates Credit Card Processing
- Processes Credit Cards first then sends the batch to you to edit and commit
- Editing the batch entails:
 - Entering Post date
 - Confirming inbound channel
 - Removing lines that do not have an authorization code because of failure of the Credit Card
- Follow up with donors of the cards that did not work to fix the pledge or recurrence.

What Changes?

- Eliminates the Generate Payment Processes
- Creates new Credit Card processes
- Ensures that a donor's recurrence or installment gets completed on the date that they request
- Ensures that the payment is completed even when an employee is on vacation
- Piloted by Chief Seattle, Erie Shores, Del Mar-Va

New Process

- Three Credit Card processes
- Two run by themselves
- Third is used as normal or eliminated if you put your single CC transaction in as a pledge and let the system take the payment when runs.

L609 Credit Card Processing Batch	Use for Batch Processing
L609 Credit Card Processing Pledges	Finds payments, takes credit cards, creates Pledge Payment batch
L609 Credit Card Processing Recurring	Finds Payments, takes credit cards, creates recurring batch to commit

Interested in Change

- Create Jira Ticket with Member Care
- Have it assigned to John Kuehn
- You will be contacted if questions arise
- Generate payment process will be turned off when new Credit Card Processors are created.

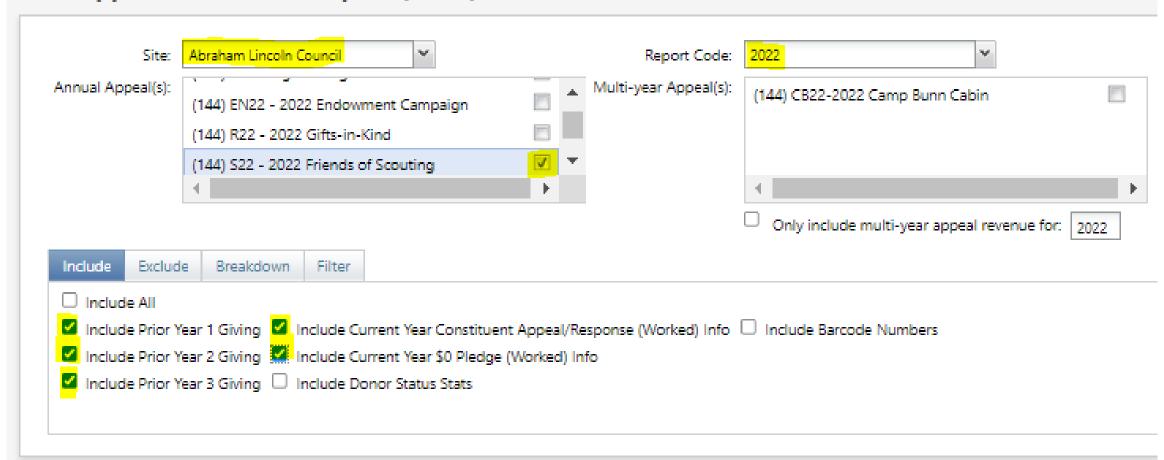
Creating an Unworked Constituent Listing



Creating an "Unworked Constituent" list

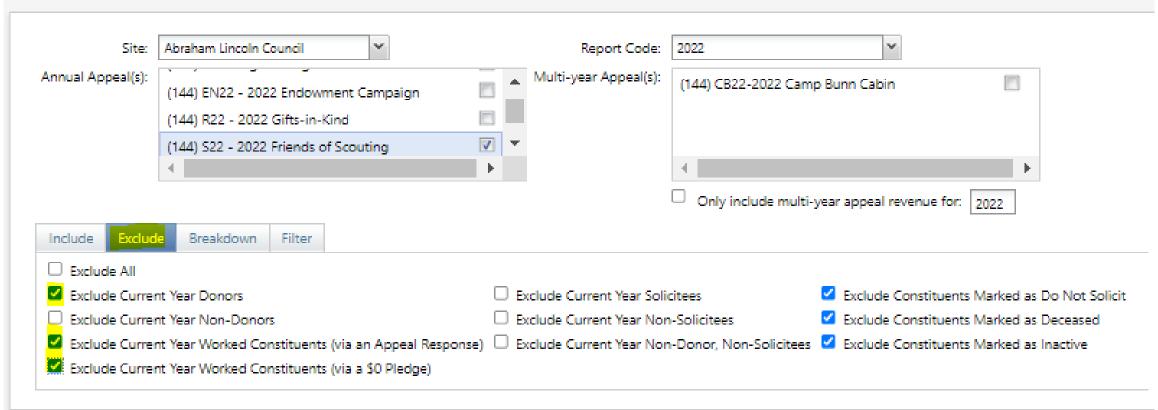


Include

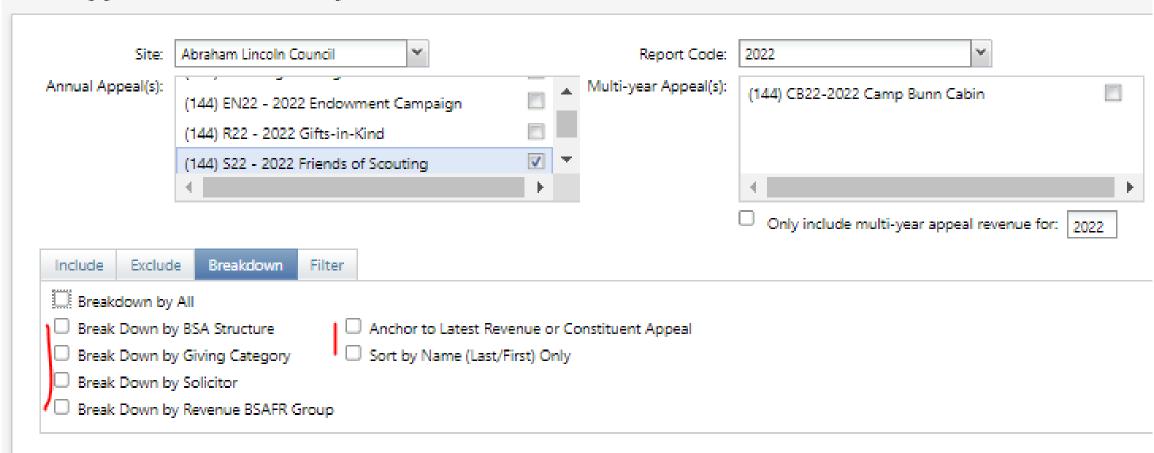




Exclude

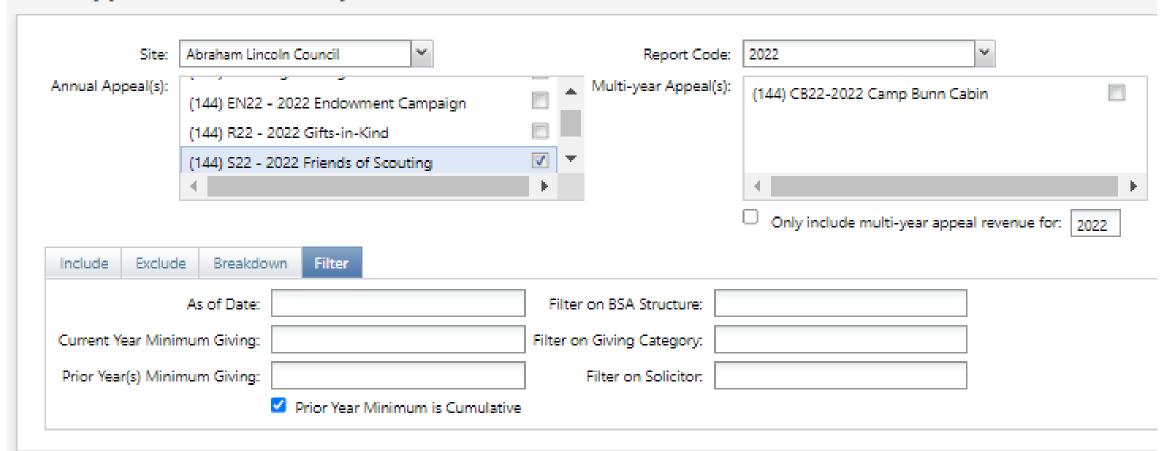


Breakdown





Filter

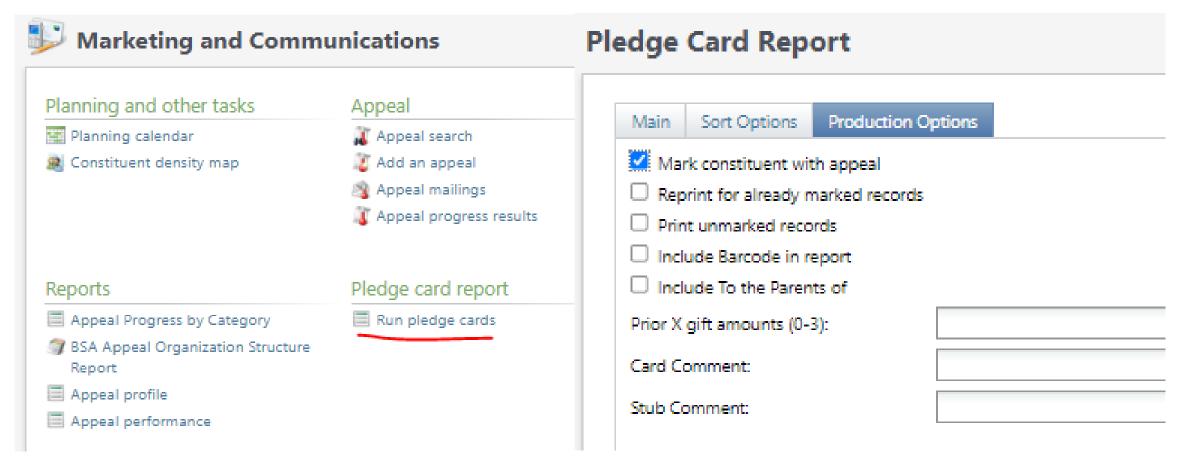




Saving the Output

Include Exclud	de Breakdown Filter														
	As of Date:		Filter	on BSA Structure:											
Current Year Mini	mum Giving:		Filter or	n Giving Category:											
Prior Year(s) Mini	mum Giving:			Filter on Solicitor:											
☑ Prior Year Minimum is Cumulative															
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			XML	file with report data											
			CSV	(comma delimited)	1										
			PDF	_											
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				2022 Friends of Scouting						Friends of Scouting					

Marking Constituents with Appeal



Using "Volunteer Award" data list

Volunteer Award List

- Found under Constituents / Recognition
- This is a Data List
- Site secured via your council site
- Constituents show on the list because you have updated the award in ScoutNet / My Scouting Tools



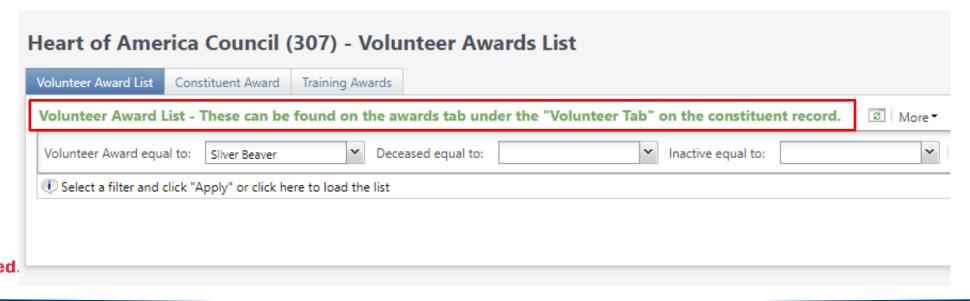


How to Run

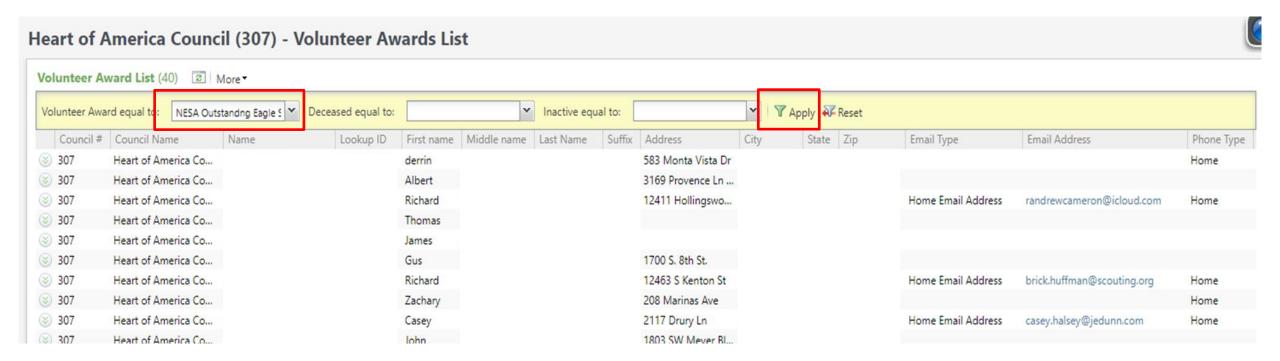
- Click Link
- Search and select your council
- Select which volunteer award you are seeing a list for
- Click "Apply"
- List may be downloaded and contains primary address, phone and email.

Data List Tabs

- List has three tabs.
- Each tab explains where the item can be found on the constituent record in CRM.
- Selective items sync to CRM for ScoutNet / My Scouting Tools



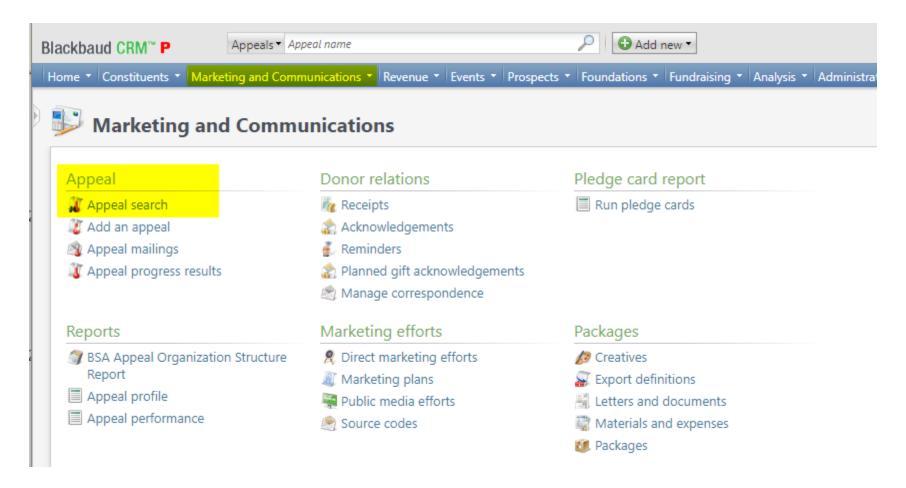
Sample Data



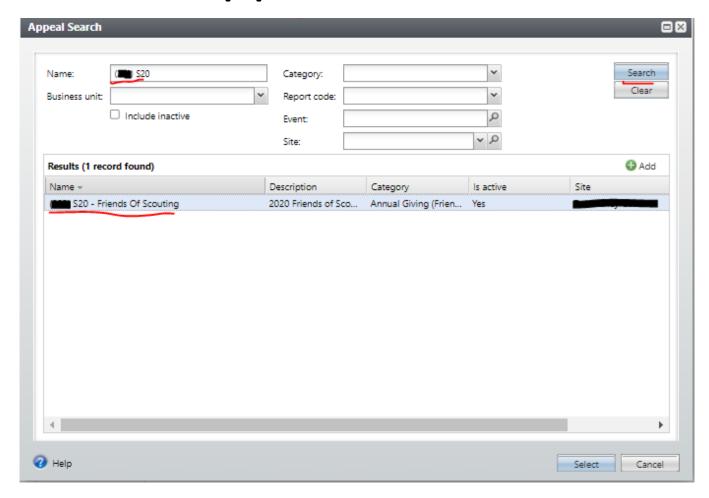
Tracking Your Appeal Progress



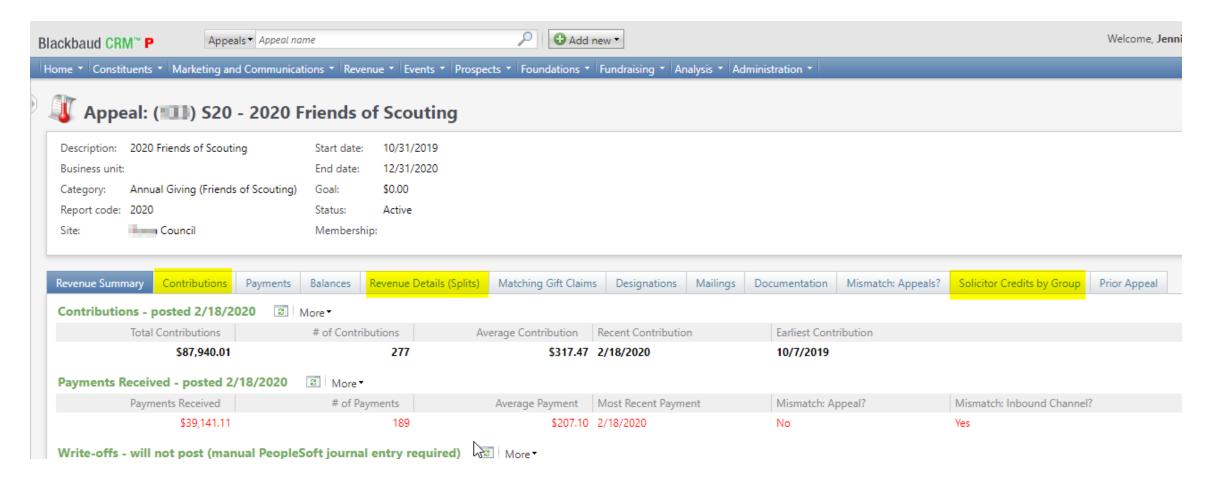
Navigating to the Appeal Record



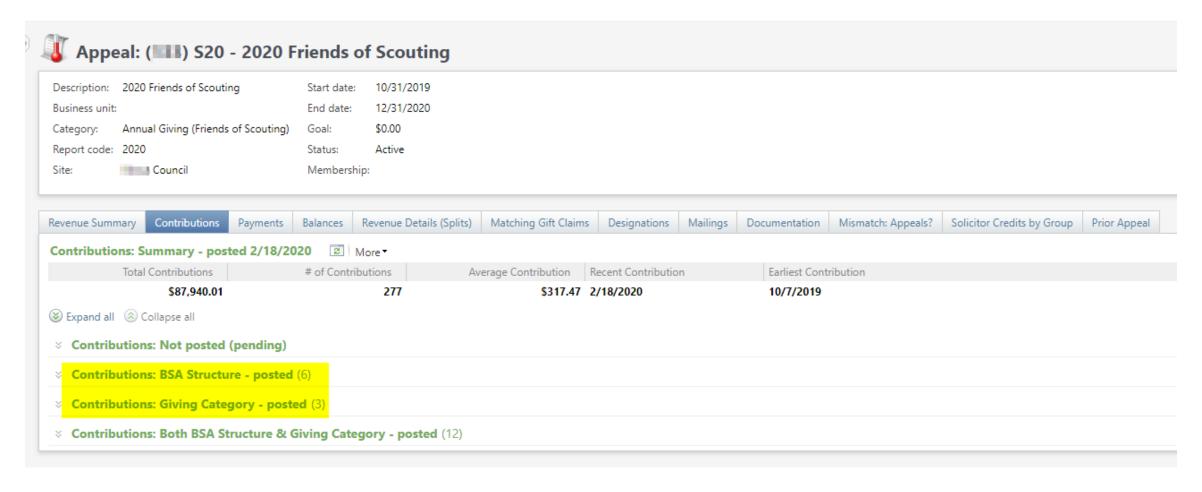
Appeal Search



Multiple tabs available



Contributions





By Giving Category or by Structure

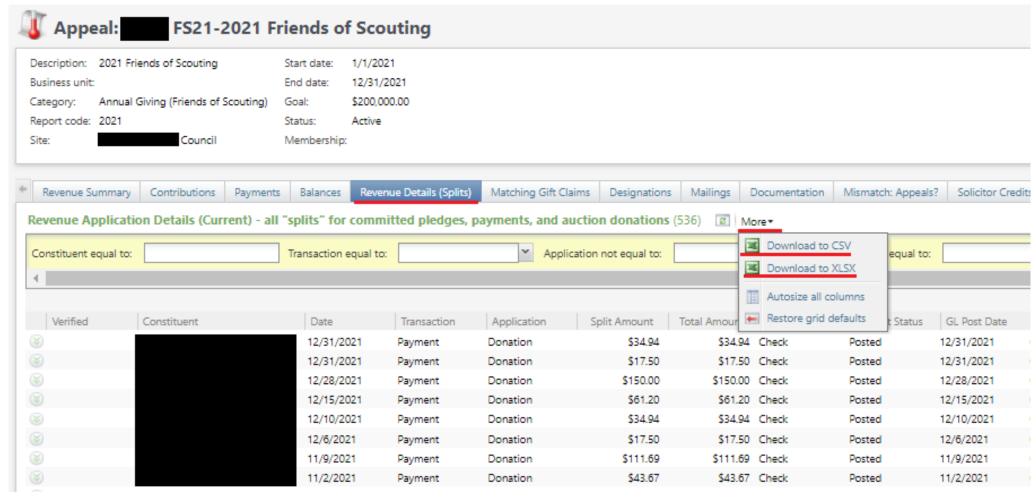




Solicitor Credits

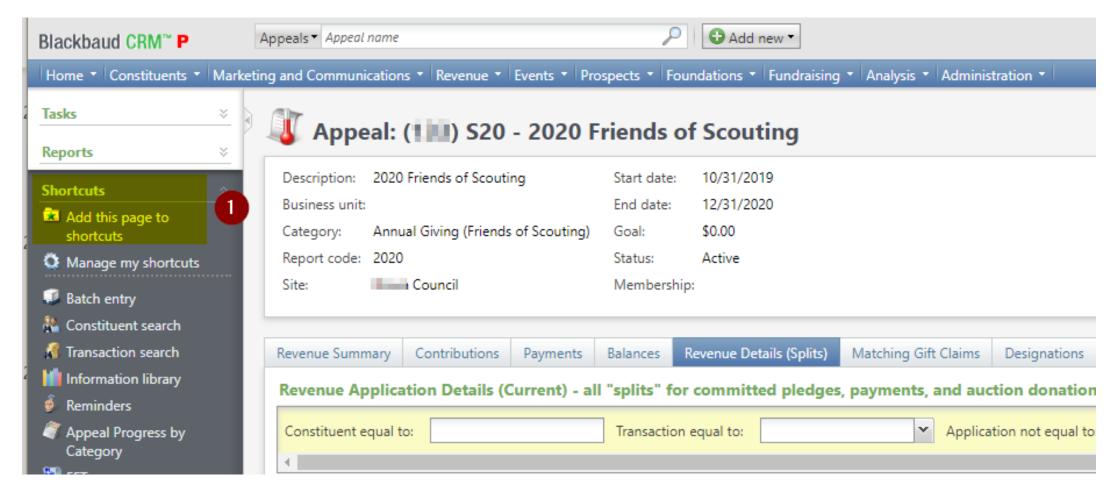
Revenue Summary	Contributions	Payments	Balances	Revenue Details (Splits)	Matching (Gift Claims	Designations	Mailings	Documentation
Appeal Solicitor	Credits by Sol	icitor Grou	pnote: s	colicitor's row is bold v	vhen fundr	aising go	al is achieved	(44)	More ▼
BSA Structure	Giving Cat	egory Ina	ctive?	Group Name		Group Pub	olic Name	Solicito	or Cre
∃ Hoover									
⊗ Hoover	Family	No		Pack 3151 BP Wilton - 133	(163962)	Pack 3151			\$25.00
	Family	No		Pack 3153 FP Durant - 133	(163963)	Pack 3153			\$195.00
	Family	No		Troop 0127 BT Muscatine	- 133 (164	Troop 0127	,		\$780.00
	Family	No		Troop 0151 BT Wilton - 13	3 (164235)	Troop 0151			\$25.00
	Family	No		Troop 0426 BT Muscatine	- 133 (100	Troop 0426	j		\$850.00
∀ Hoover	Family	No		Troop 1127 GT Muscatine	- 133 (100				\$250.00
E Council									
± Inali									
≝ Kittan									
■ Mesquakie									
∃ Saukenuk									

Revenue Details (Splits)





Add to Shortcuts





GIVE



Home > Council Support > Council Funding and Finance > Council Administration **Council Support** Council Management **Council Administration** Support The sections below provide tools for Council staff to assist them in the proper management of their Council. This is Contact Council designed for staff use but may provide detailed information to volunteers interested in the particular opics. Management Support **Accountable Plan Template** Council Assessments **Council Office Procedures Council Stewardship Policies** Council Board Resources FASB Accounting Changes and the BSA - new for 2018 Fiscal Management Procedures for Stewardship Council Business Fiscal Policies and Procedures for BSA Units - Revised April 2022 Practices - - BSA Units PayPal and Venmo Reporting Update Council Fiscal **Interpreting Financial Statements** Management and Life Insurance Imputed Calculation **Local Council Accounting Manual** Training www.scouting.org/financeimpact **Local Council Financial Audit Tools** Journey to Excellence New York Conflict of Interest Policy—Updated March 20 New York Conflict of Interest Policy-March 2014 Council Funding and Finance Records Retention Policy - Updated January 2019 Presentation: Fringe Benefits: Employer-Prov ised Vehicles and Group-Term Life Insurance - Uploaded April 2014 Financial Planning Record Camp Card Transactions—PeopleS Record Product Sales in General Ledge **Funding The Council Time Study Forms** Council Administration **Blackbaud CRM Resources** Local Council Financial **BSA Fiscals Forum** Audits PeopleSoft Support

Accounts Payable



Back Office Business

Solutions

Q

Council Support

Council Management Support

BOY SCOUTS OF AMERICA

Contact Council
Management Support

Council Assessments

Council Board Resources

Council Business Practices

Council Fiscal Management and Training

Journey to Excellence

Council Funding and Finance

Home > Council Support > Council Funding and Finance > Council Administration > CRM Resources

CRM Resources

CRM Process Videos

CRM (Blackbaud) User Forum Presentations

Report Cookbook (for OLTP) BSA Appeal Progress & Appeal Constituent Reports

2022

January 2022 User Forum – Slide Deck – recording
February 2022 User Forum – Slide Deck – recording
March 2022 User Forum – Slide Deck – recording
April 2022 User Forum – Slide Deck – recording

- Creating Constituent Interactions * Using the Constituent Interaction Data List * Using Development Workspace
- * Scouting Gives Setup

2021



Member Care Self-Service

http://membercare.scouting.org

Creating an incident directly in JIRA

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



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"



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

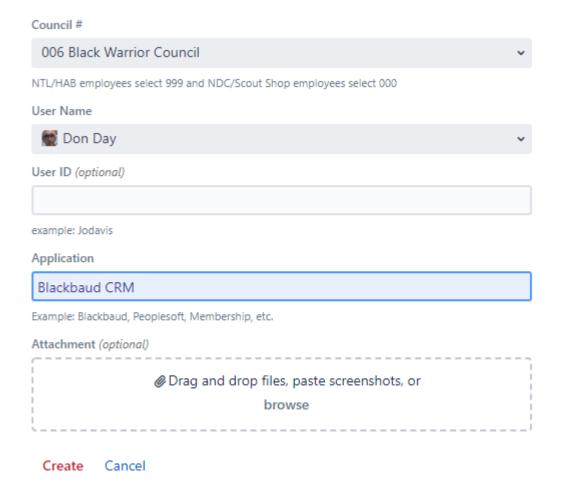
Council #

006 Black Warrior Council

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



User Name – Application - Attachments





Next Forum

July 20, 2022 10:00 am & 2:00 pm CT

Questions & Answers