CRM User Forum

July 20, 2022

Cornelia Ellis – John Kuehn

Valerie Eaton – Don Day

Objectives

- Gift entry procedures for donor-advised funds
- Cleaning up batches in CRM – older-dated batches
- New Data Lists available in CRM
  - Household donors
  - Revenue data hygiene
- Move to Azure – update on issues experienced
- Questions – Answers

Donor-Advised Funds – Gift Entry

- Objectives
  - To get individual who has donor advised fund on your donor exports
  - To get contribution statement to go to Donor Advised Fund
    - Management company – Fidelity, Morgan Stanley, AG Edwards Etc.
    - Family Foundation
    - Ensure Recognition credits are correct

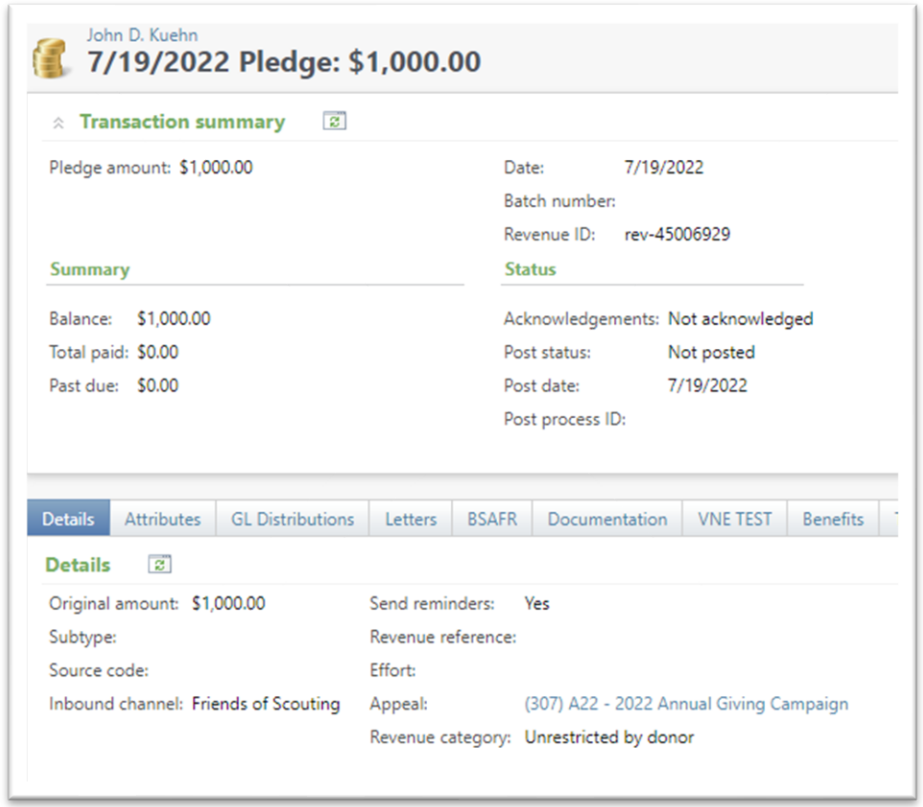
Donor Advised fund scenerios

1. Donor makes a pledge and then pays via donor advised fund or family foundation.
2. No pledge from donor – check arrives from donor advised fund or family foundation.

Scenario #1

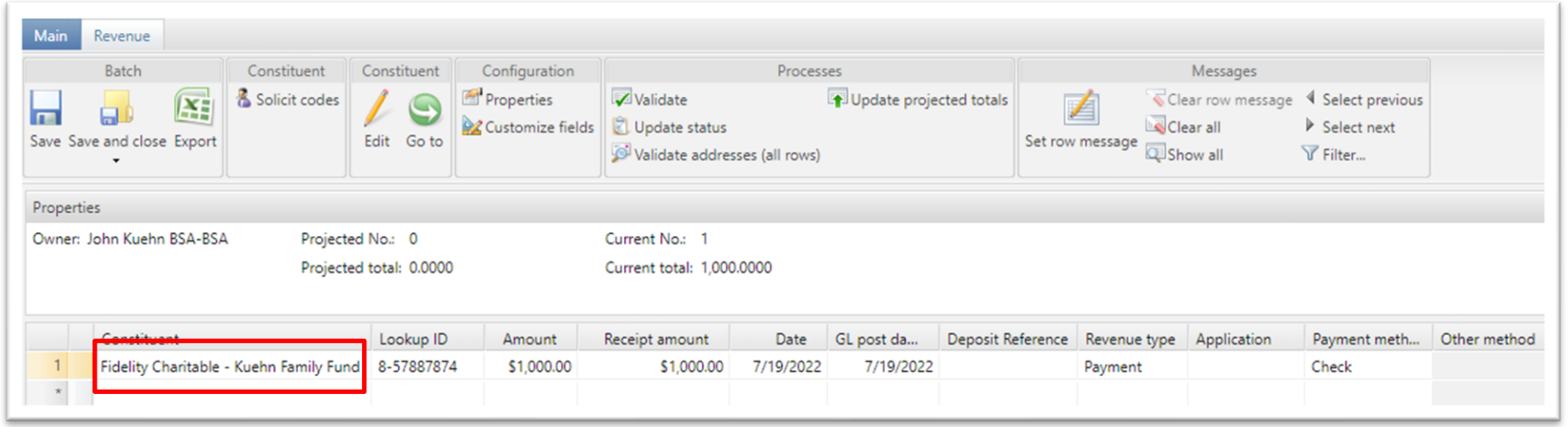
- Apply the donor advised fund change as a payment to the pledge.
- The Advised fund / Family foundation would be a new organization constituent in the system
- Donor shows on your list with a contribution payment does not
- Advised Fund / Family Foundation gets contribution statement at year end because they generate for payments not pledges.
- Donor should get a recognition credit from the payment.

Scenario #1



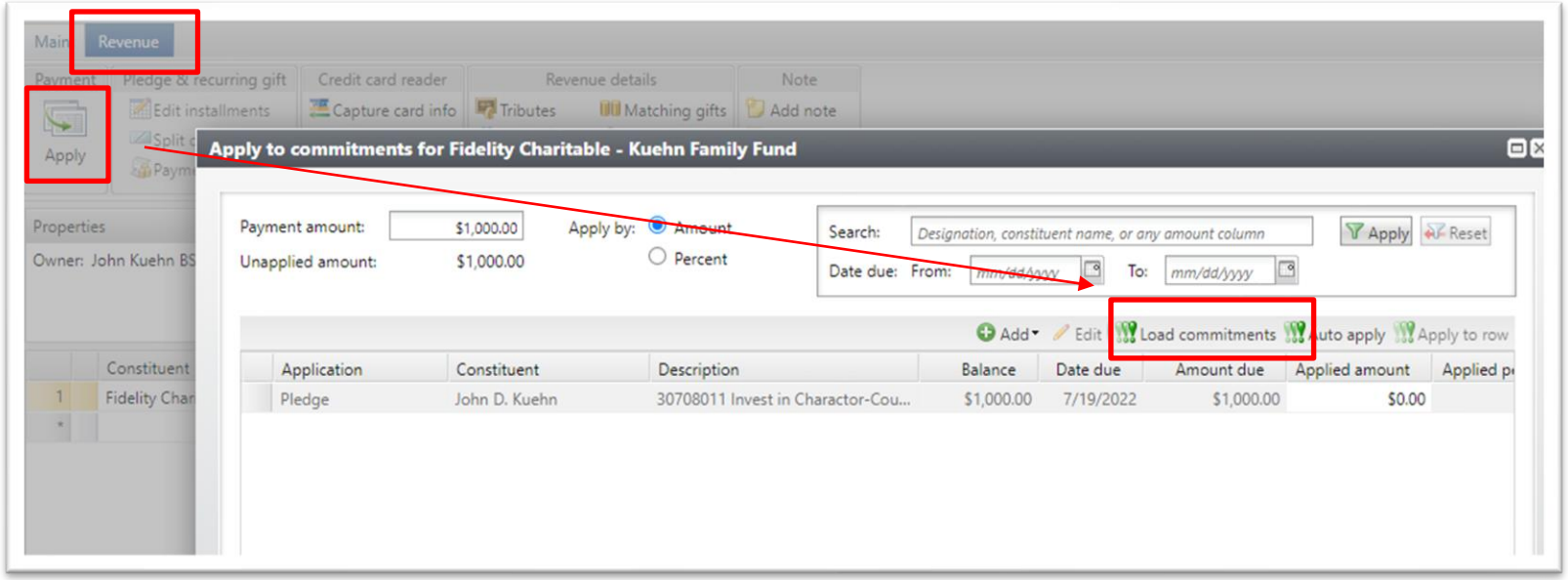
Scenario #1 has a donor that made a pledge at the beginning of the year. We then got a check as payment from a Fidelity Charitable Fund. Donor pledge is on the left. Organization constituent was then created from the check received with the company address.

Scenario #1



Picture to the right is the payment being added to our new constituent. This is a LC Pledge Payment cash/ check batch.

The picture to the lefts shows how to find the pledge of the individual to add the payment to. Click the batch revenue tab, click apply, click load commitment and search for the donor with the pledge and click add to bring it in to apply the payment to.



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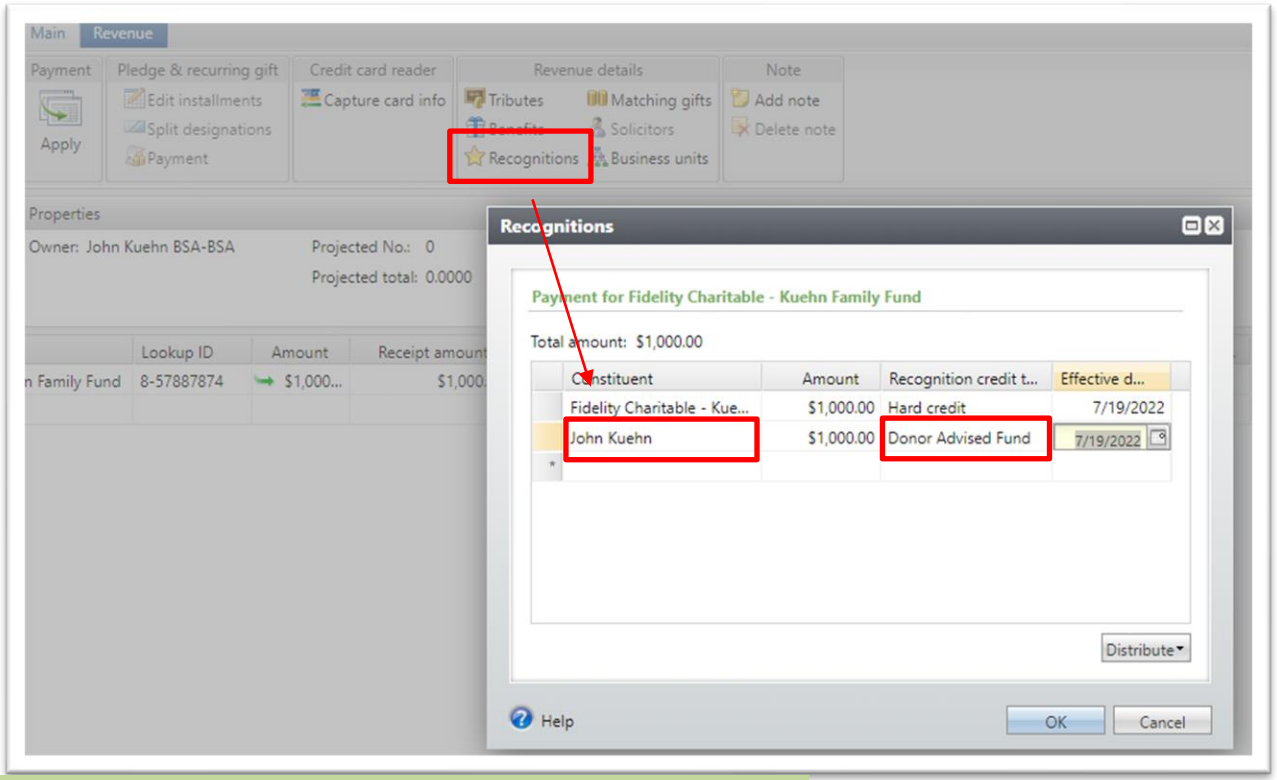


Scenario #1

Next click the Recognitions button on the Revenue tab.
This will open the Recognitions credit window. The organization will have a hard credit for the cash. You want to search for the donor with the pledge on the next line and add a Recognition Credit of Donor Advised Fund or Family Foundation.

Pledge and Payment on Donor Record

Date	Amount	Balance	Transaction	Application	Reve...	Detail	Category	Campaigns	Payment method	Constituent	Sites
7/19/2022	$1,000.00	$0.00	Pledge	Donation	Gift	30708011 Invest in Charactor-Counci - ...	Unrestricted by donor		None	John D. Kuehn	Heart of America Co...
7/19/2022	$1,000.00		Payment	Pledge	Gift	30708011 Invest in Charactor-Counci - ...	Unrestricted by donor		Check	Fidelity Charitable ...	Heart of America Co...

Recognition Credits on Donor Record

Recognition date	Recogni...	Recognition type	Transaction	Application	Revenue type	Detail	Category	Campaigns	Revenue date	Revenue a...	Donor
7/19/2022	$1,000.00	Donor Advised Fund	Payment	Pledge	Gift	30708011 Invest in Chara...	Unrestricted...		7/19/2022	$1,000.00	Fidelity Charitable - Kuehn Family Fund
7/19/2022	$1,000.00	Hard credit	Pledge	Donation	Gift	30708011 Invest in Chara...	Unrestricted...		7/19/2022	$1,000.00	John D. Kuehn

Scenario #2

- Add pledge on the donor record.
- Create Organization record for the donor advised fund or family foundation.
- Use the donor advised fund check to pay of the donor pledge
- Give the donor the correct recognition credit

Cleaning up batches in CRM – older-dated batches

Batch Clean-up in CRM

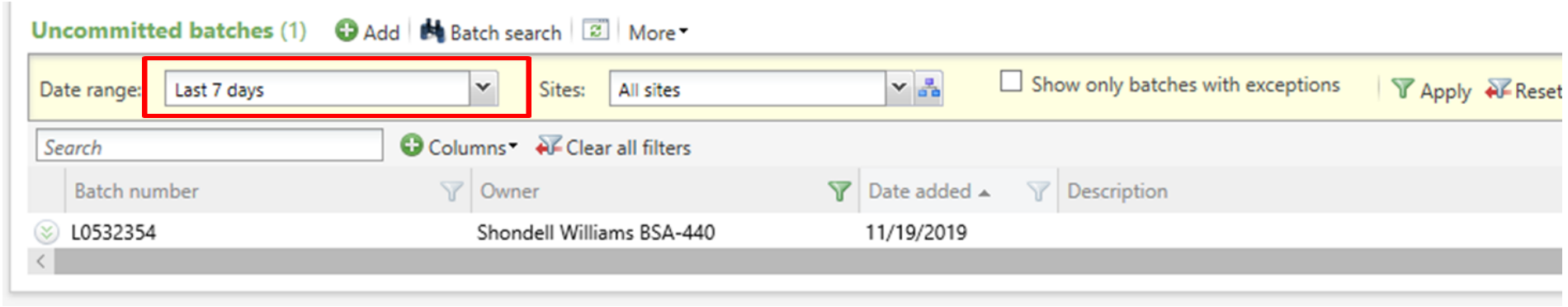
- This will be done in the Uncommitted Batch Tab.
- Uncommitted batches accumulate if you have your filters active
- Need to clear your date filters to see if you have hidden batches
- Leave site filter to all sites
- If you find uncommitted batches, edit the batch
  - If batch contains information, confirm if it has or has not been committed in another batch
  - If batch not needed, delete the batch
  - If batch is empty, use or delete the batch.
- Your goal should be to not have open batches.

Statistics of Uncommitted Batches

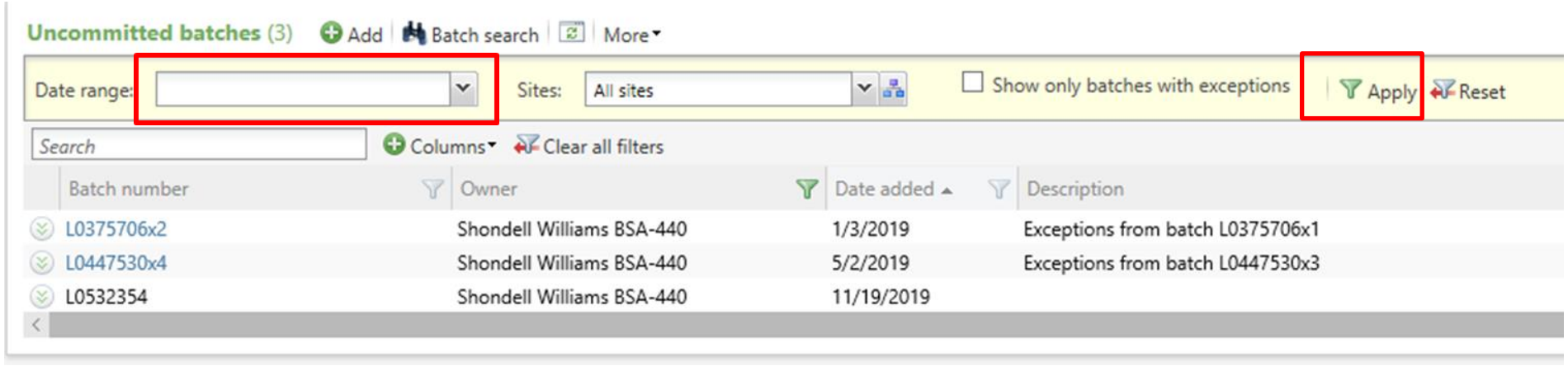
- 202 of 514 are Scouting give Batches
- 110 of 514 are LC Import of Pledge or Recurring Payments
- 202 of 514 have a created date before 7/1/22

Clear Batch Filters

Sample with filter engaged



Sample with no filter engaged



Points to remember

- Process LC Import of pledge or recurring payments as they generate.
- Scouting Gives Batches
  - Process Recurring Gift Commitment batch before Recurring Gift payment batch
  - Process Event Registration batch before payment batch for event registrations
  - Recurrence or Registration needs to be committed first before you can attach the payment.

Blackbaud CRM is moving - Update

Blackbaud CRM is moving

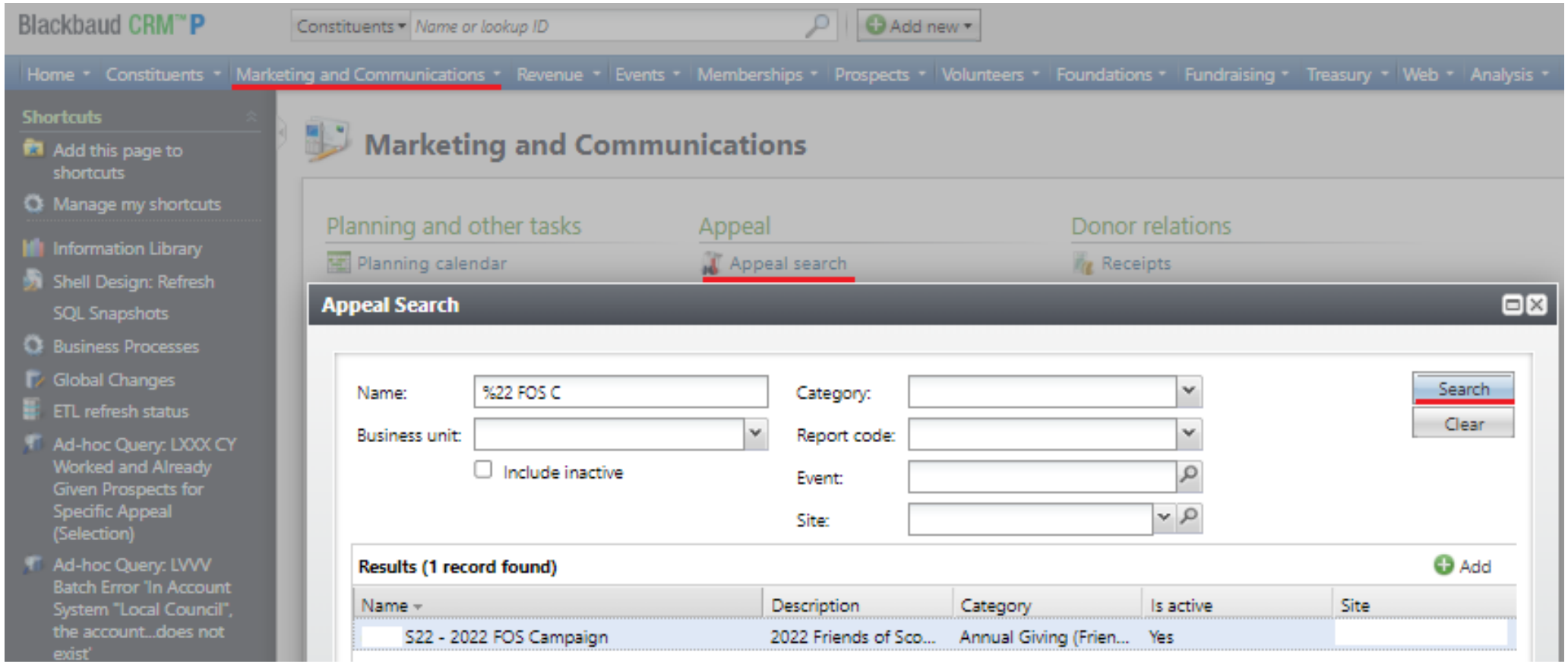
- Expect very few changes in CRM
- Moving to a new hosting site to save $$
- Expect no change in speed or service
- Items which you may need to review:
  - A new URL for signing into CRM will be provided
  - Links to “O-Data” feeds will change and will need to be refreshed
  - CRM will be shut down over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

New Data Lists Available in CRM

Household Donors
Revenue Data Hygiene

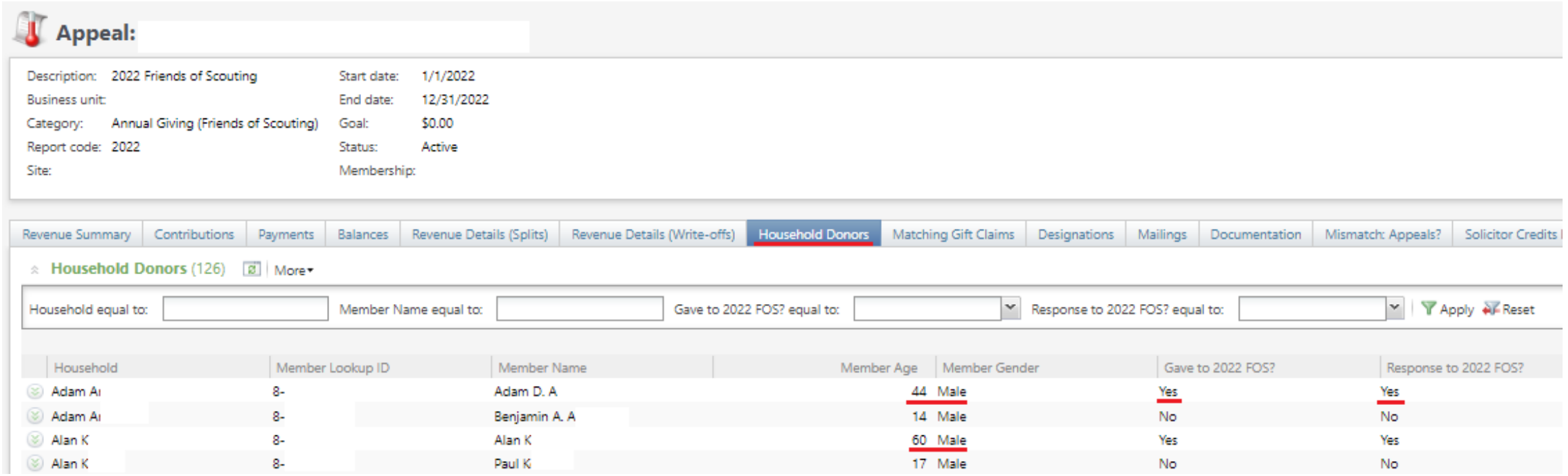
Household Donors

Marketing and Communicatons>Appeal Search, select Appeal>Household Donors



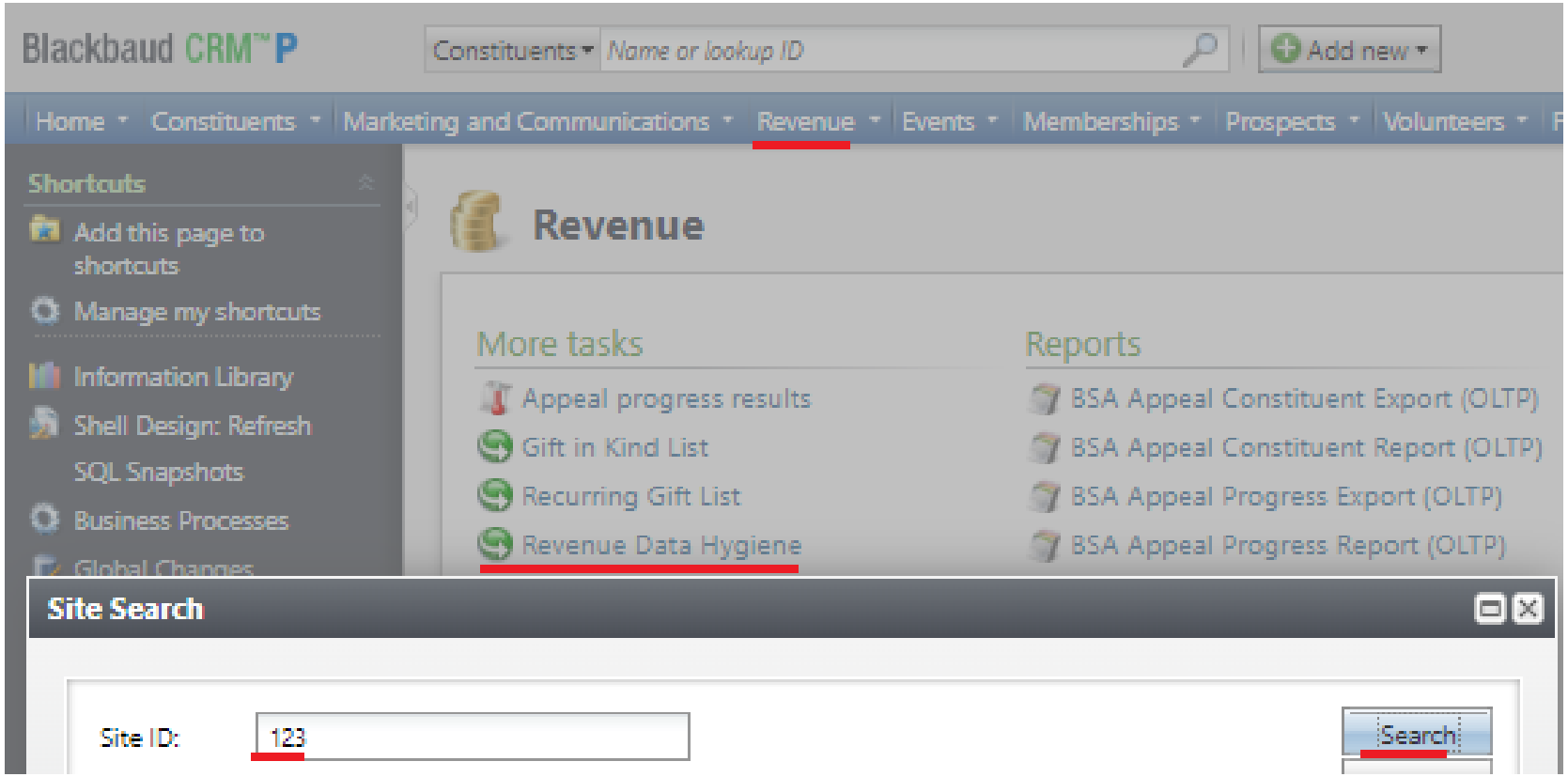
Household Donors

Marketing and Communicatons>Appeal Search, select Appeal>Household Donors



Revenue Data Hygiene

Revenue>Revenue Data Hygiene, search for Council Site



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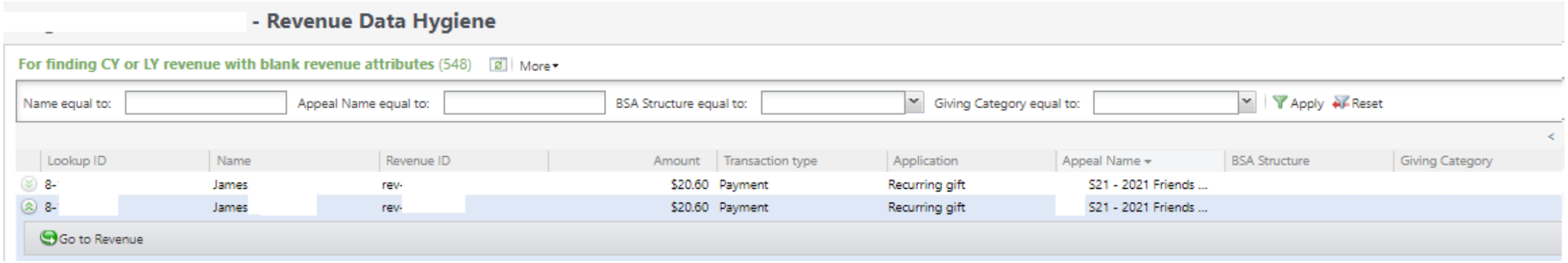
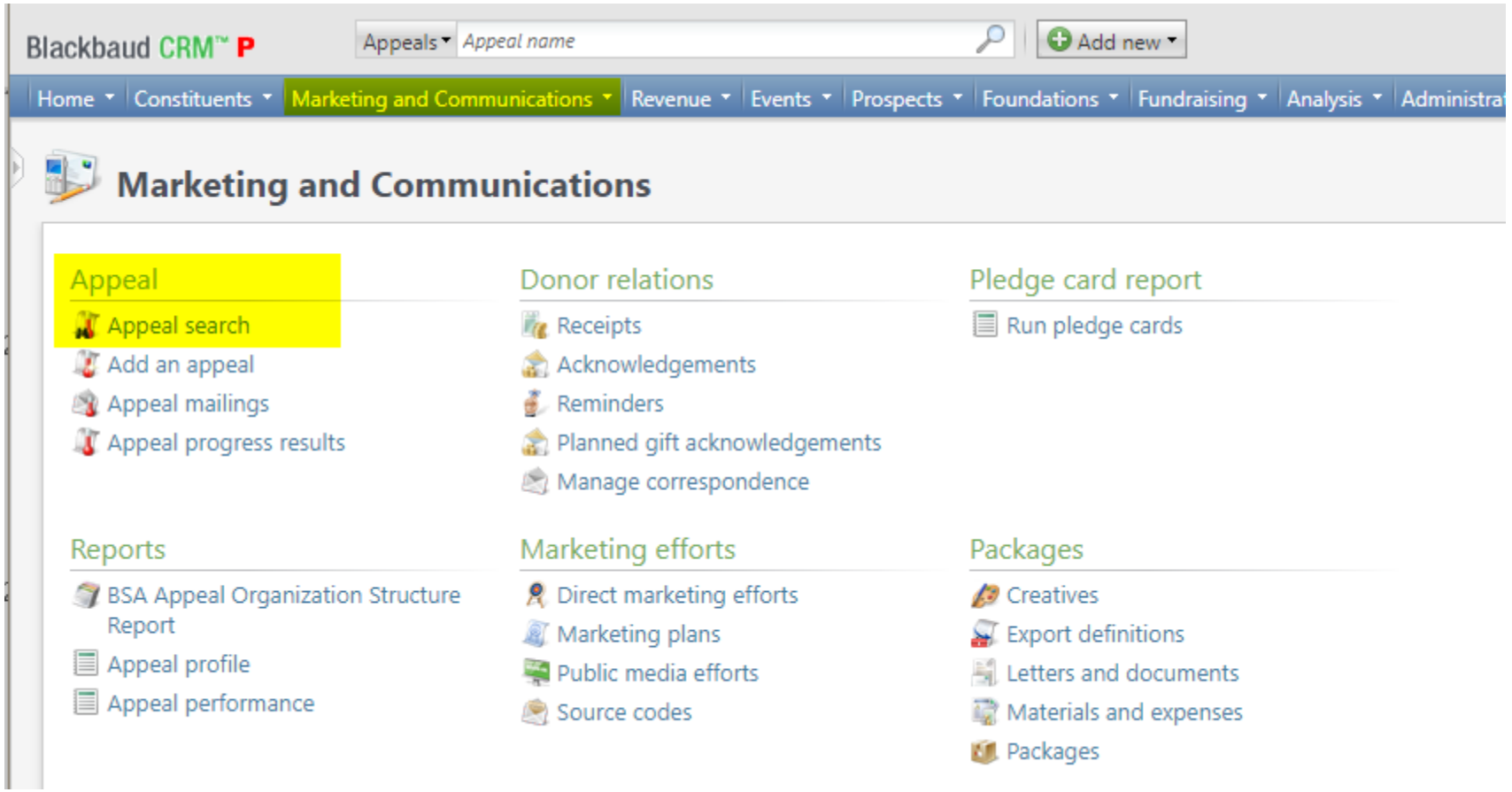
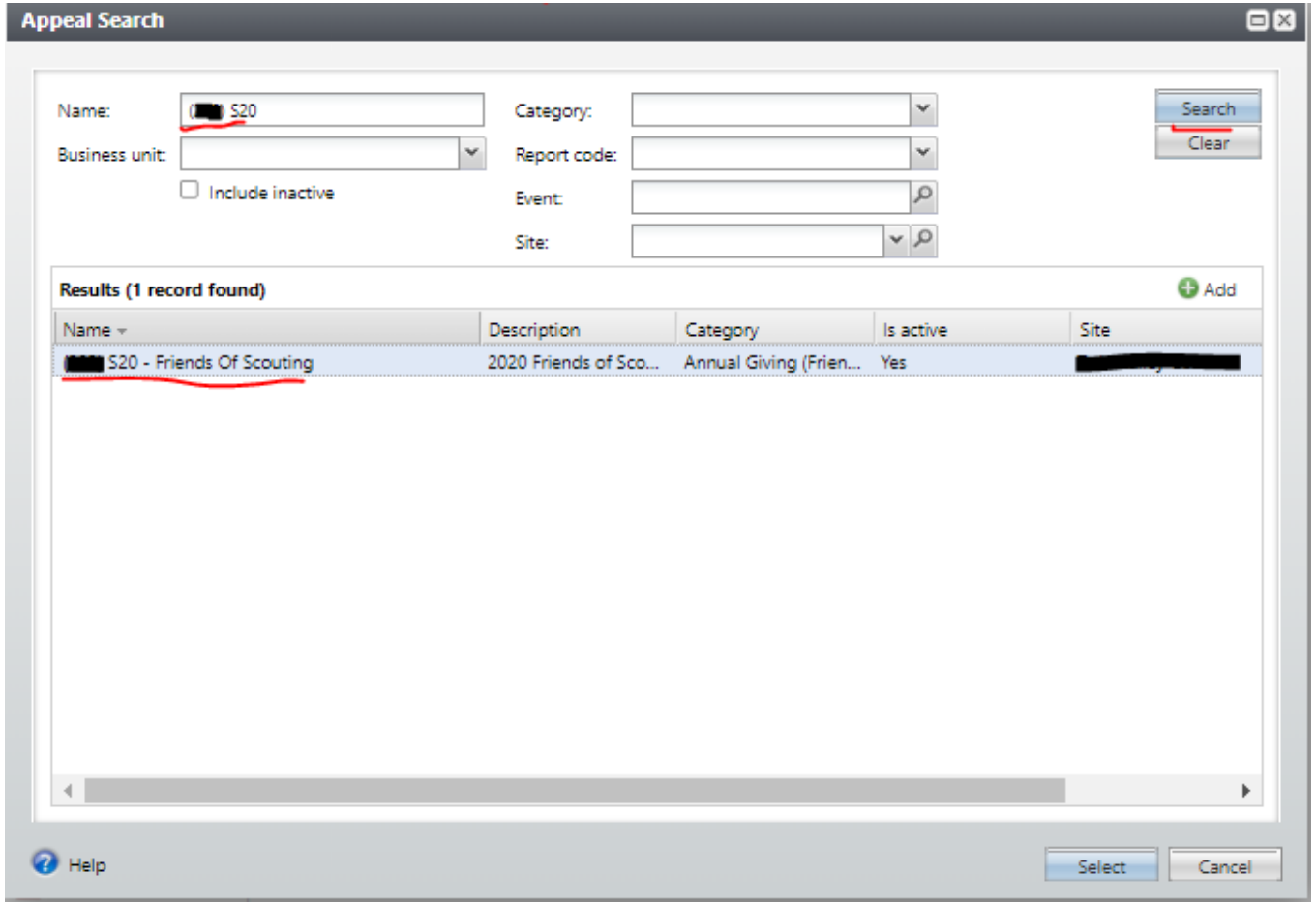


Tracking Your Appeal Progress

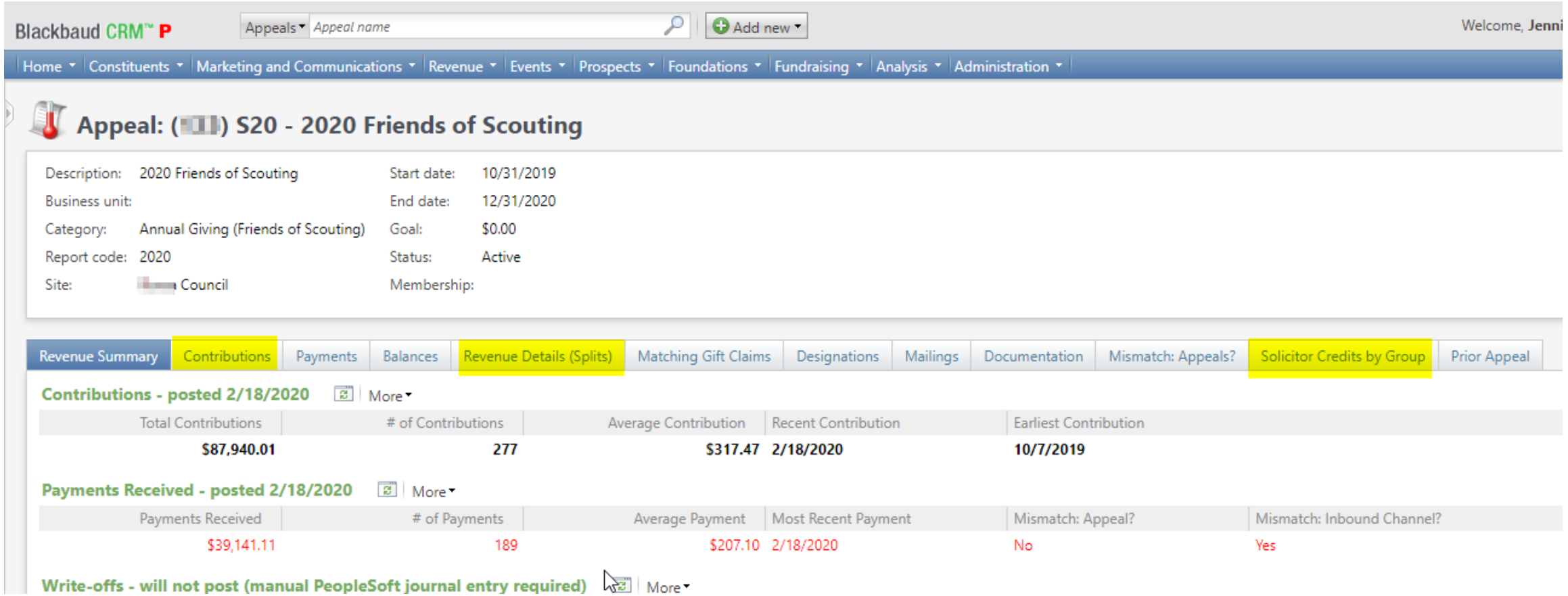
Navigating to the Appeal Record



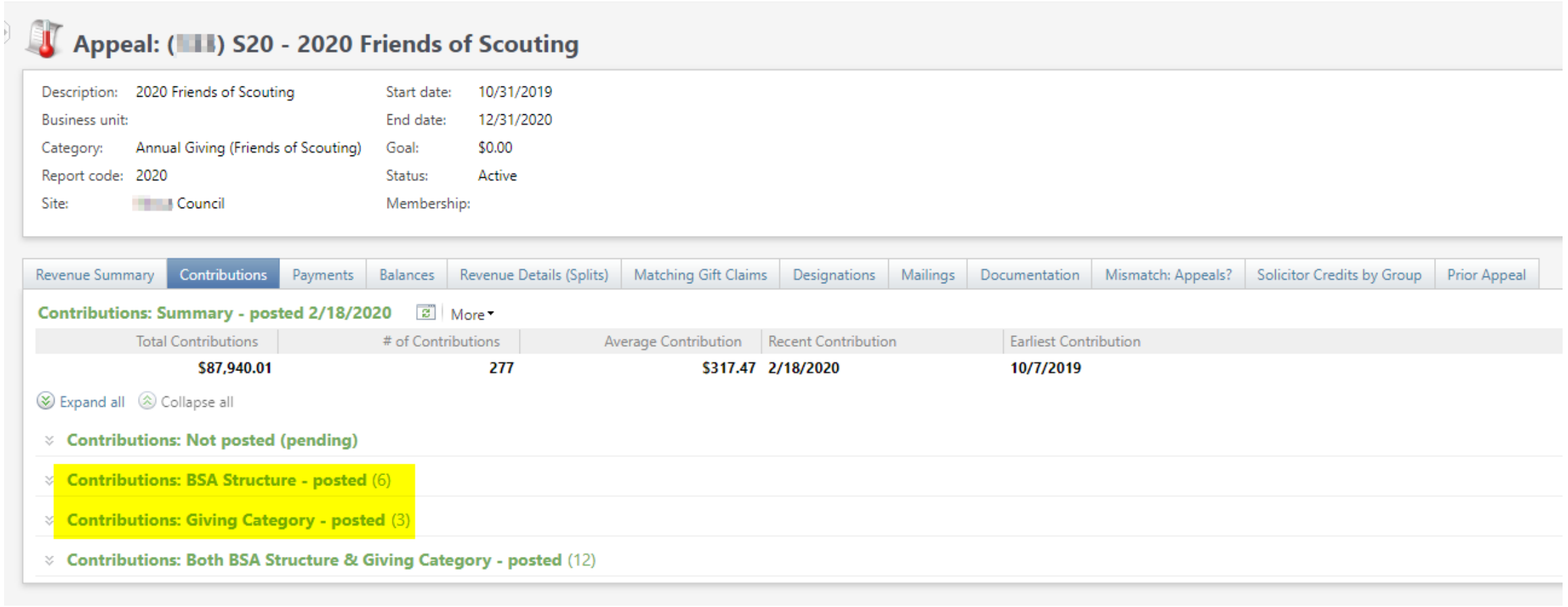
Appeal Search



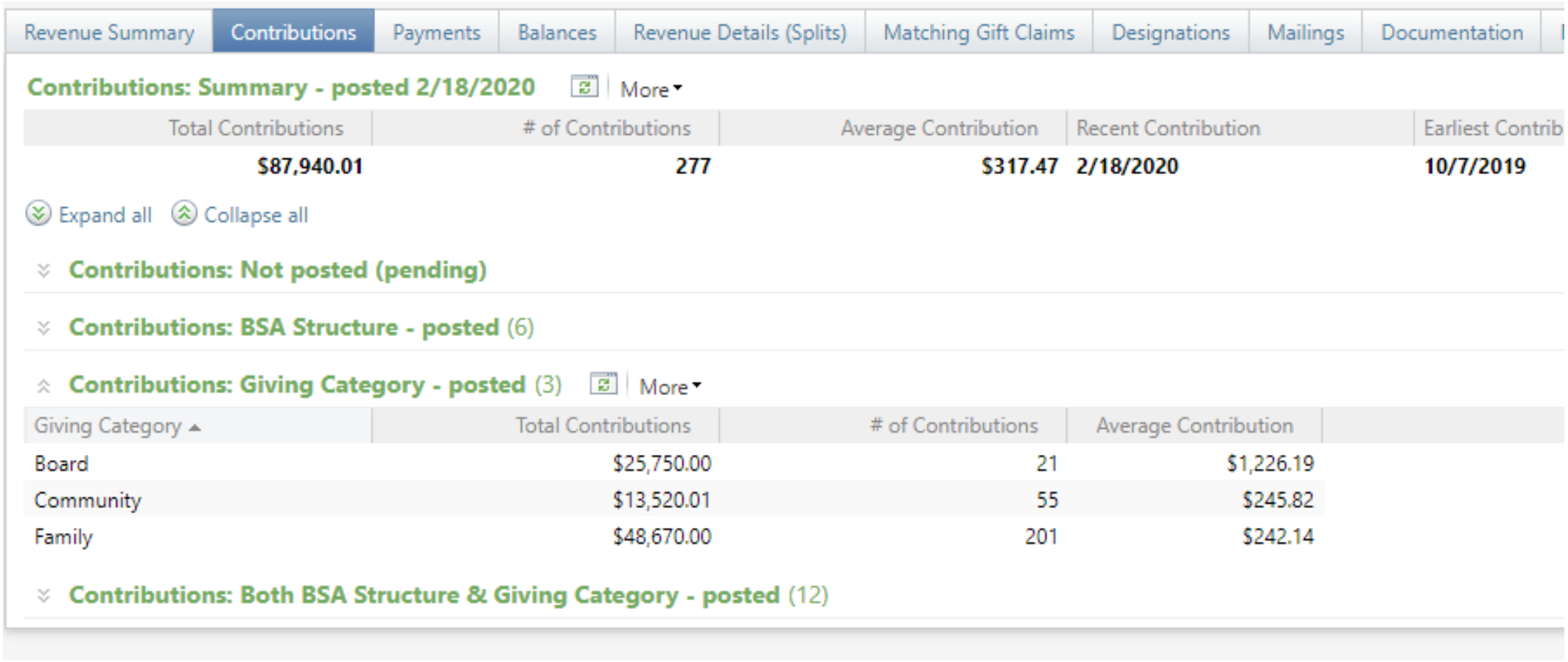
Multiple tabs available



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)

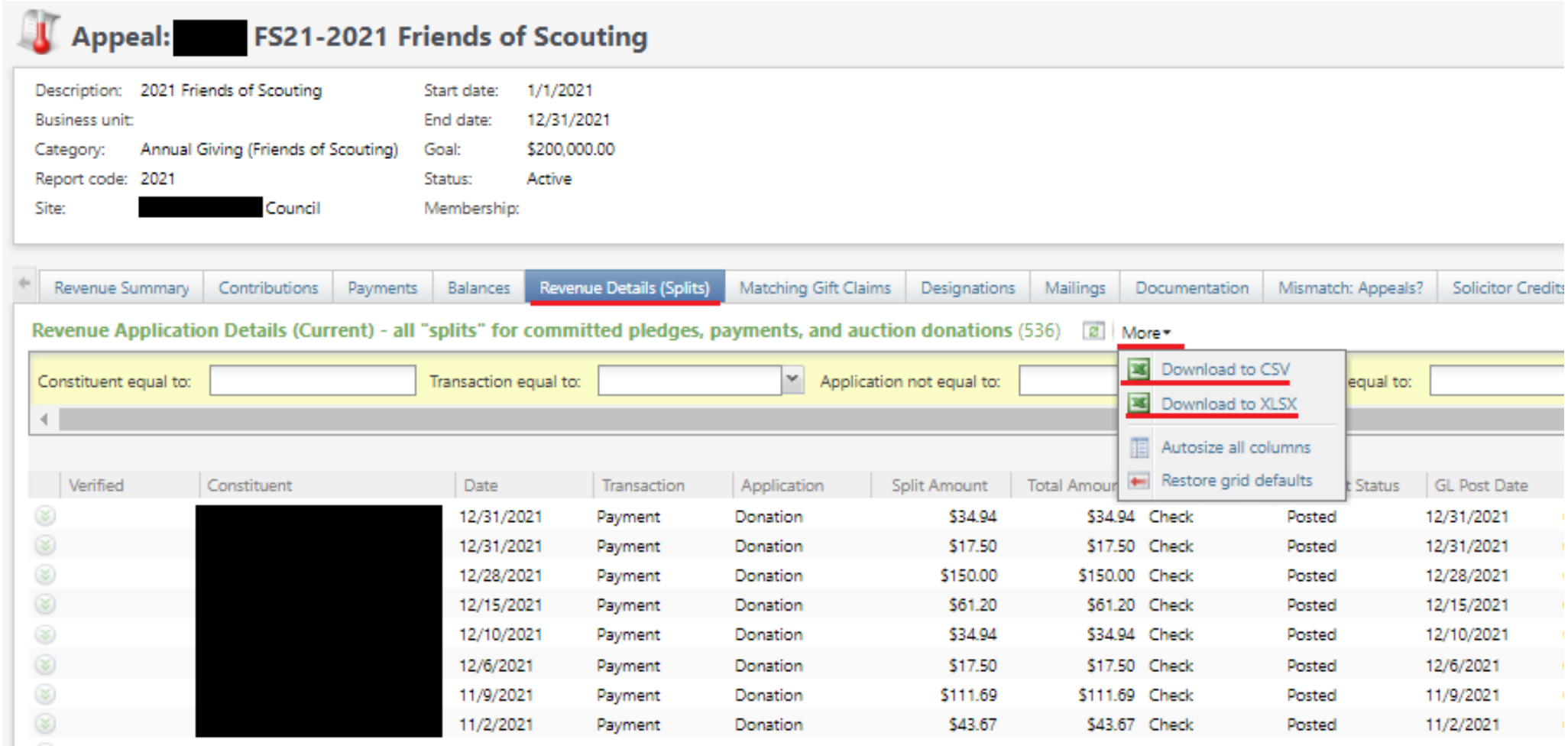
Solicitor Credits

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

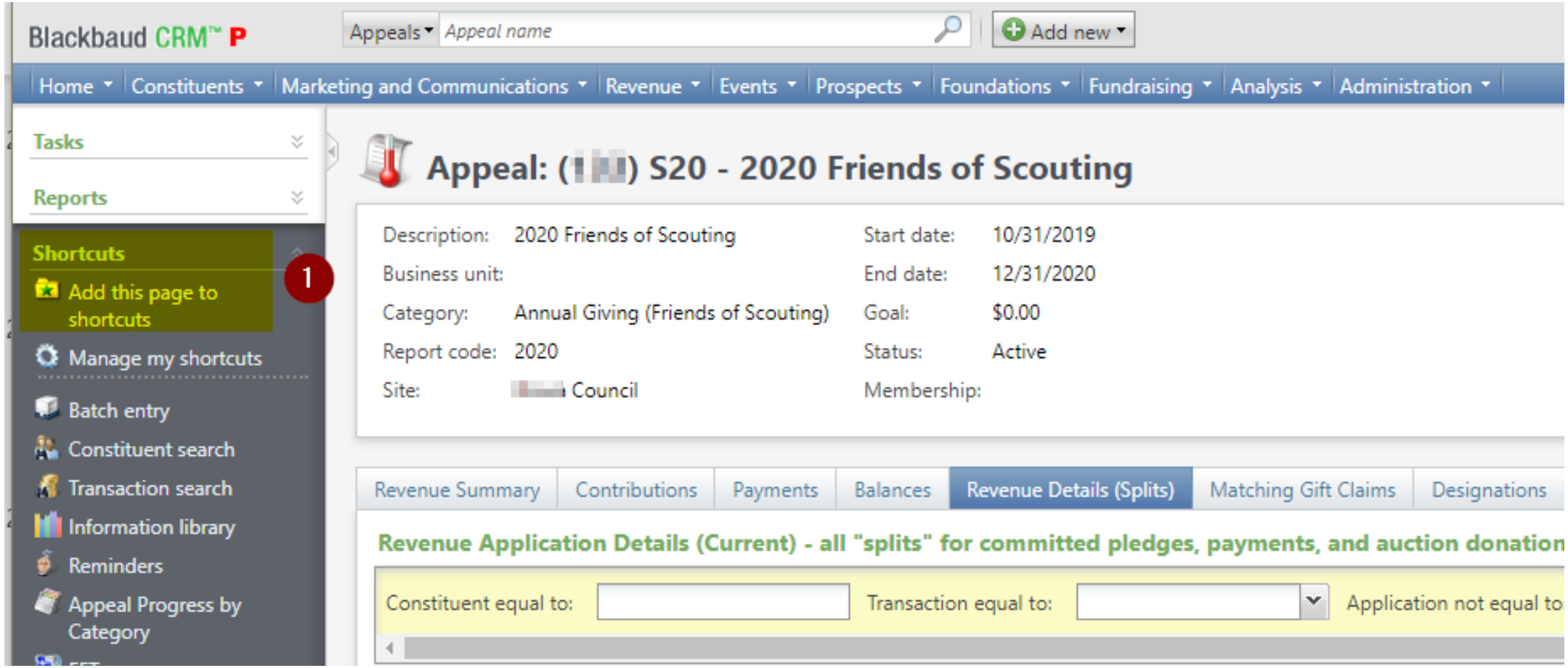
Appeal Solicitor Credits by Solicitor Group ...note: solicitor's row is bold when fundraising goal is achieved (44) More

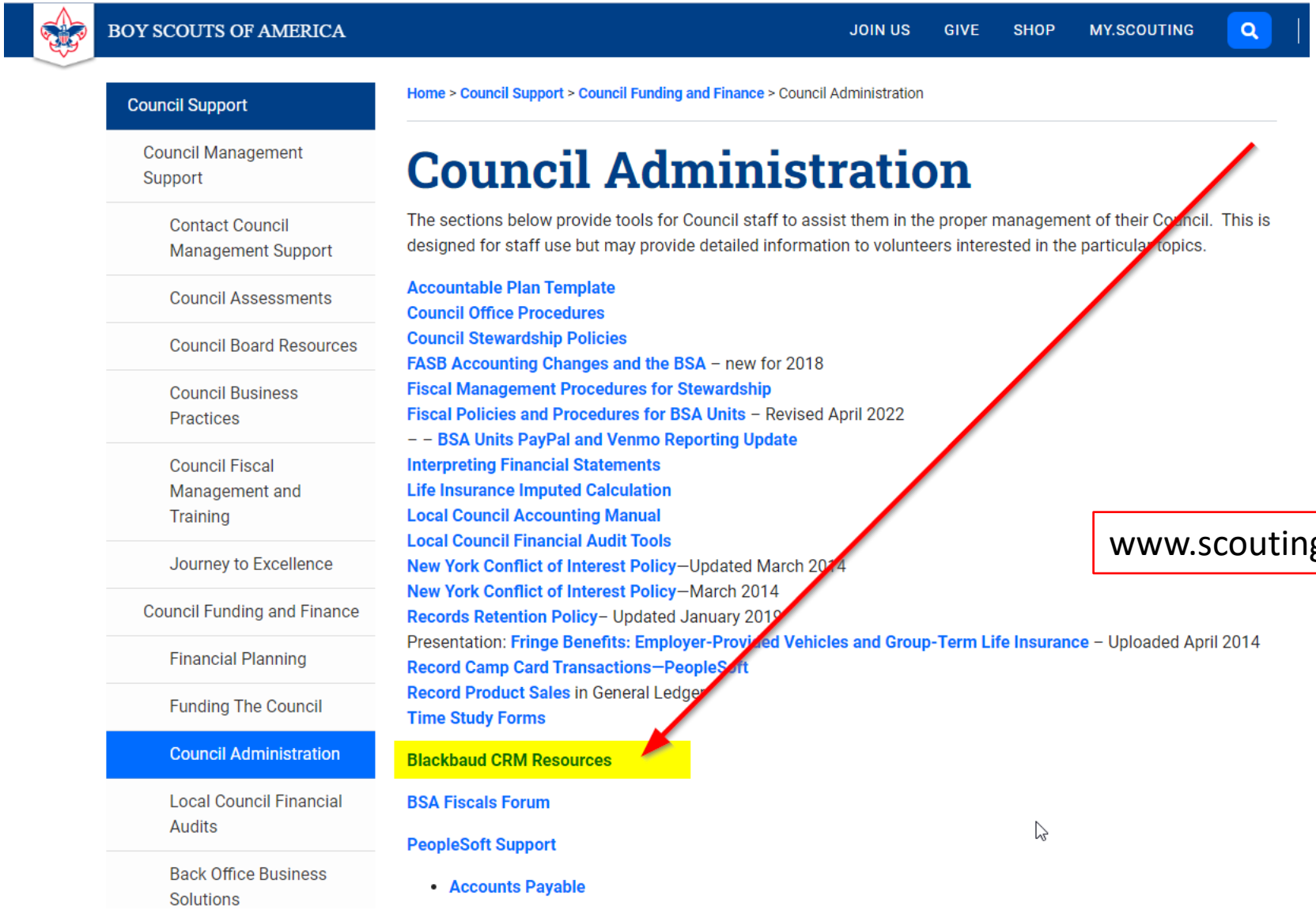
BSA Structure	Giving Category	Inactive?	Group Name	Group Public Name	Solicitor Cre...
Hoover					
Hoover	Family	No	Pack 3151 BP Wilton - 133 (163962)	Pack 3151	$25.00
Hoover	Family	No	Pack 3153 FP Durant - 133 (163963)	Pack 3153	$195.00
Hoover	Family	No	Troop 0127 BT Muscatine - 133 (164...	Troop 0127	$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





www.scouting.org/financeimpact

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Council Support
Council Management Support
Contact Council Management Support
Council Assessments
Council Board Resources
Council Business Practices
Council Fiscal Management and Training
Journey to Excellence
Council Funding and Finance

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

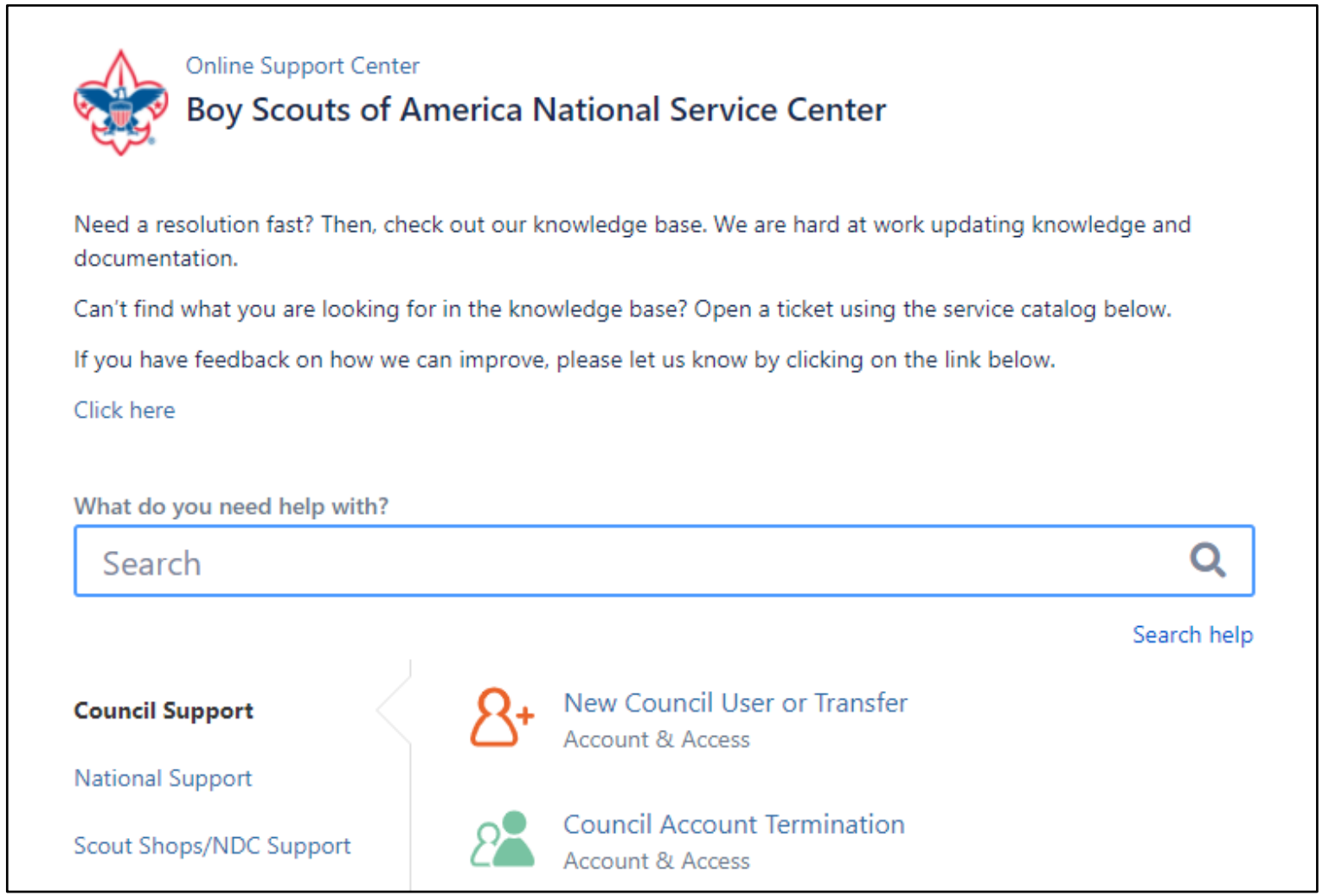
2021

Member Care Self-Service

- http://membercare.scouting.org

- Creating an incident directly in JIRA

http://membercare.scouting.org



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.

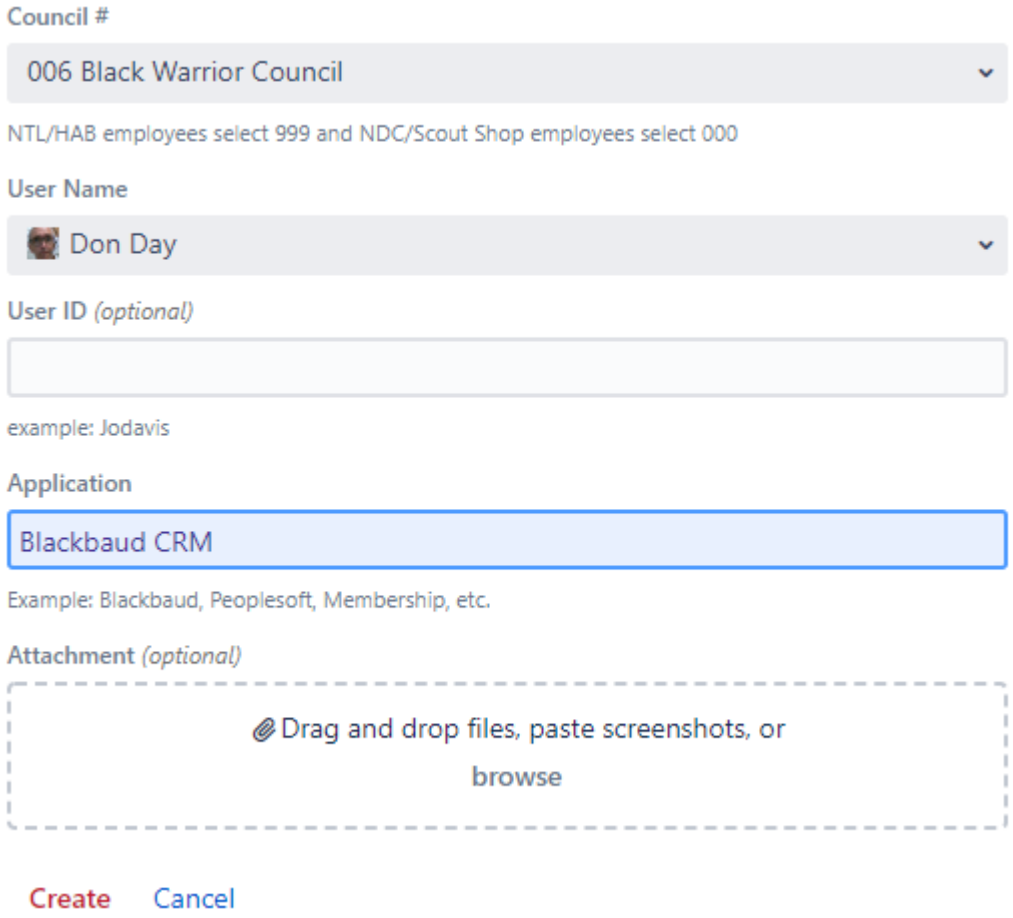
Please provide me a list of giving categories

Council #

006 Black Warrior Council

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

User Name – Application - Attachments



Next Forum

August 17, 2022
10:00 am & 2:00 pm CT

Questions & Answers