CRM User Forum

August 17, 2022

Cornelia Ellis – John Kuehn

Valerie Eaton – Don Day

Objectives

- Optimizing batch data entry
- Understanding the “Pledges Receivable Aging” report
- Creating the “Summary of Appeals” report
- New Data Lists available in CRM
  - Organization Donor List
  - Household donors
  - Revenue data hygiene
  - Appeal data list updates
- Move to Azure – update on issues experienced
- Questions – Answers

Optimizing Batch entry process

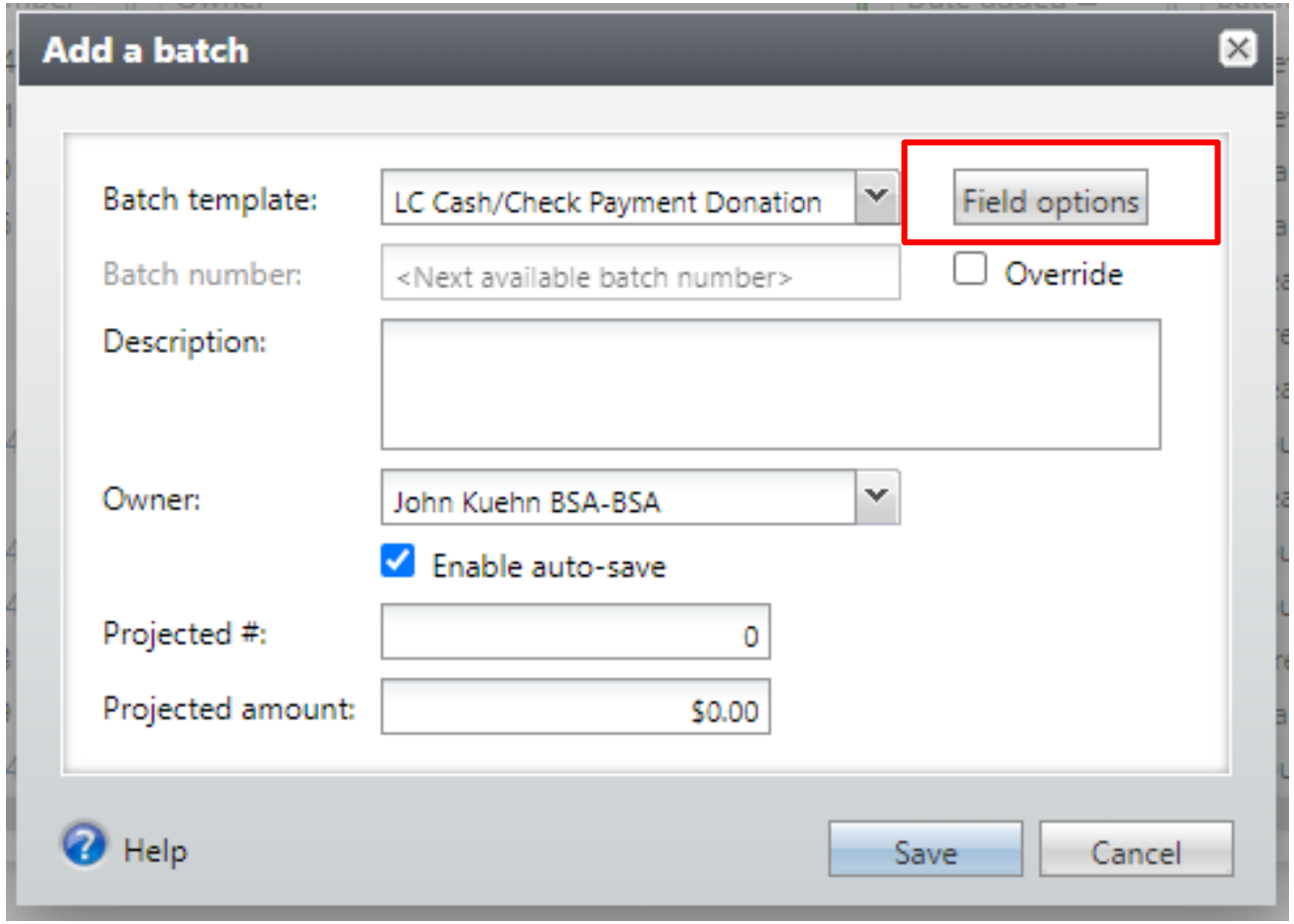
Batch Data Entry Tricks

- Customize your batch before putting data into it
- * or % when typing in appeal with short name
- Lead typing in drop down fields such as BSA structure, Giving Category and Inbound Channel

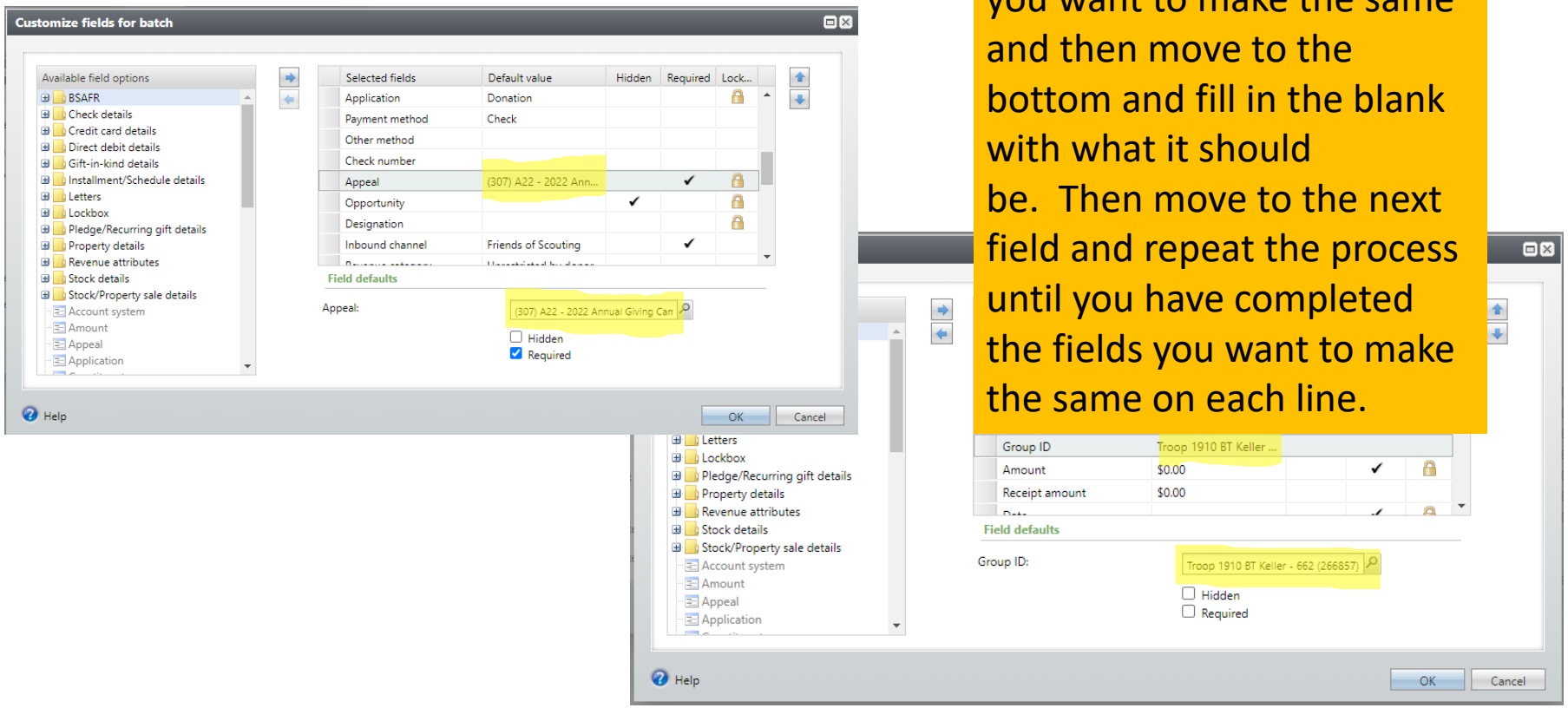
Customize your batch

- Use this process if you have many lines in the batch with the same information
- On each line, the donor and the amount will be the only difference
- Customize information will repeat on each line
  - Create a batch
  - Before saving click "fields options"
  - Define what each field will be then save

Create a batch and click the Field Options box



Sample Fields Customized



To customize click the field you want to make the same and then move to the bottom and fill in the blank with what it should be. Then move to the next field and repeat the process until you have completed the fields you want to make the same on each line.

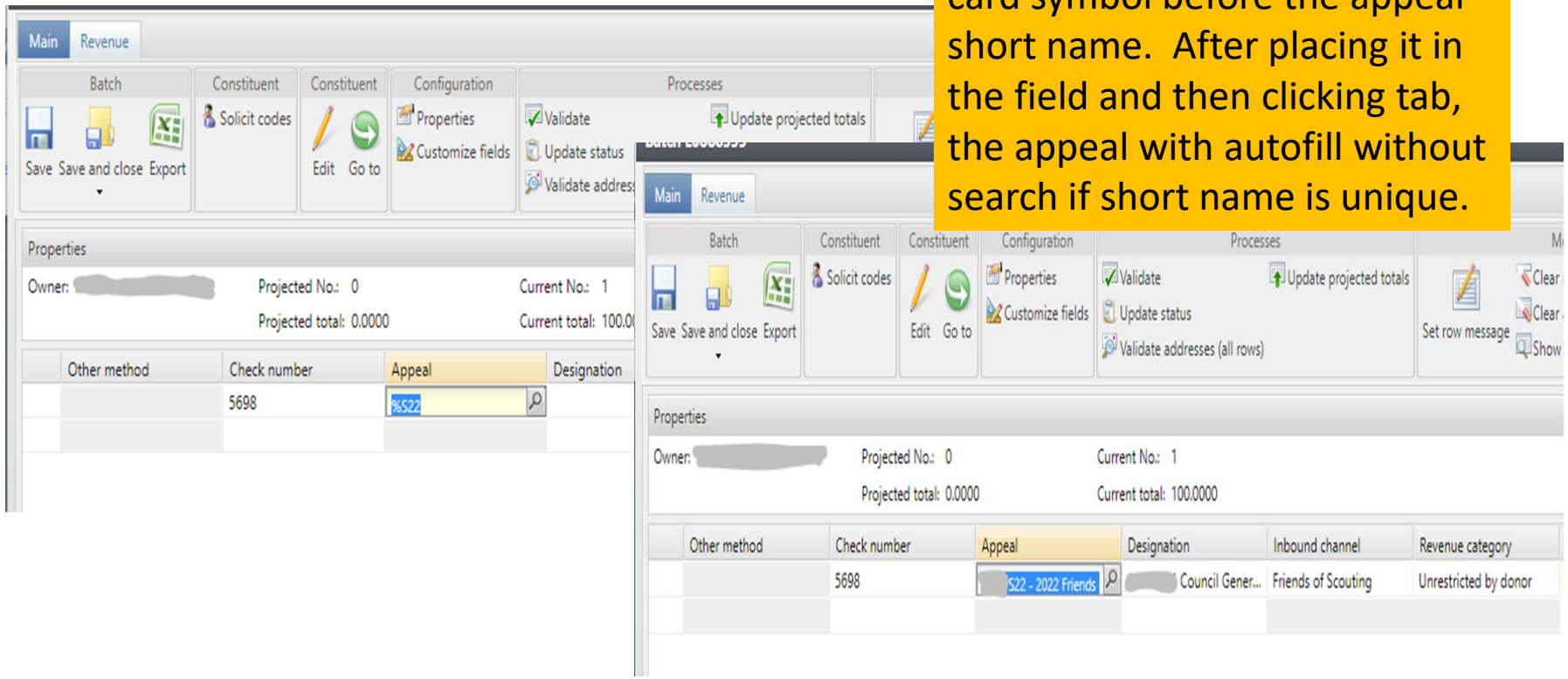
Fields highlighted are customized.

	Constituent	Lookup ID	Group ID	Amount	Receipt...	Date	GL post date	Deposit Reference	Revenue type
1			Troop 1910 BT Keller - 662 (266857)	$0.00	$0.00	8/17/2022	8/17/2022	Deposit 8.16 FR	Payment
*									

Appeal	Designation	Inbound channel	Revenue category	Giving Category	BSA Structure
(307) A22 - 2022 Annual Giving Campaign	30708011 Invest in Charactor-Counci -...	Friends of Scouting	Unrestricted by donor	Family	Mustang

* or % with appeal short name verses appeal search

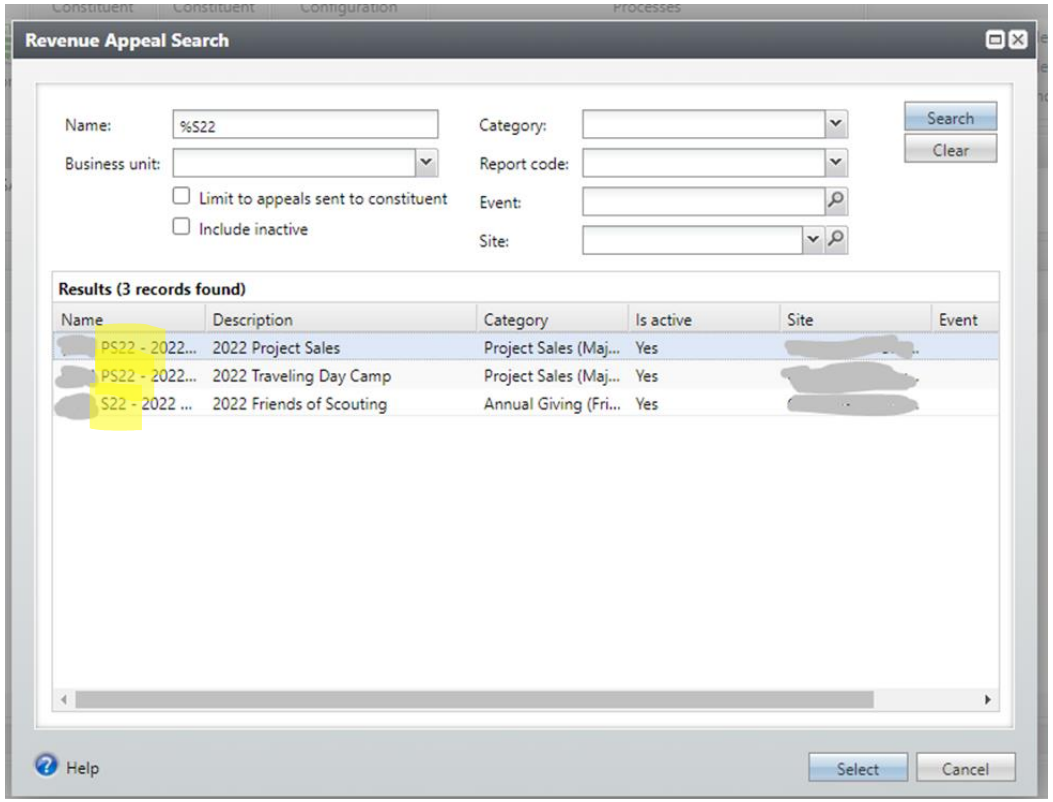
These slides demonstrate a wild card symbol before the appeal short name. After placing it in the field and then clicking tab, the appeal with autofill without search if short name is unique.



If appeal short name not unique it will return choices

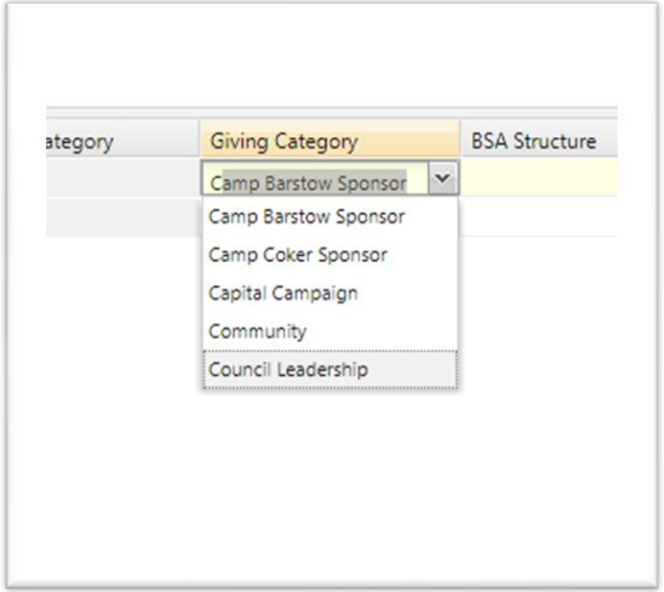
Note that three of the appeal in this council use "S22" in the short name. Two use the same short name.

Recommendation: is that you make all short name unique.



Lead type with the letter the word begins with.

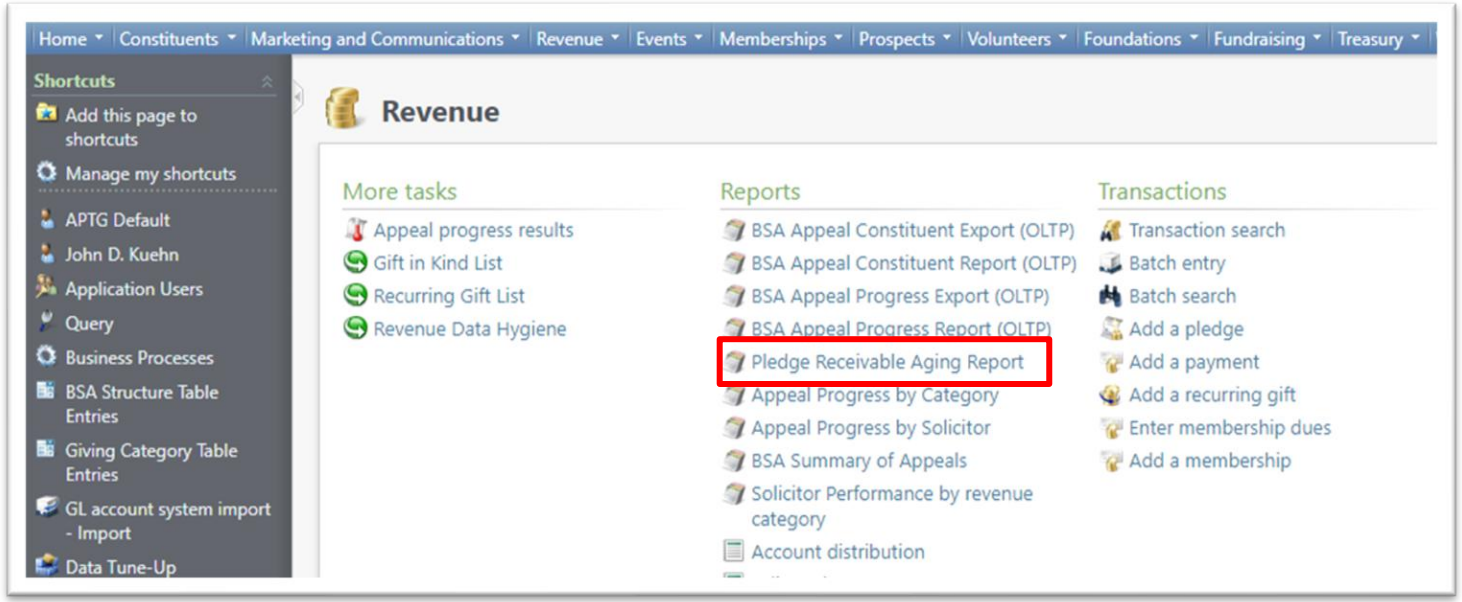
- In this example the user typed a "C" and all the possible entries that begin with "C" show up for a quick pick.
- You can also type the full word.



Pledges Receivable Aging Report

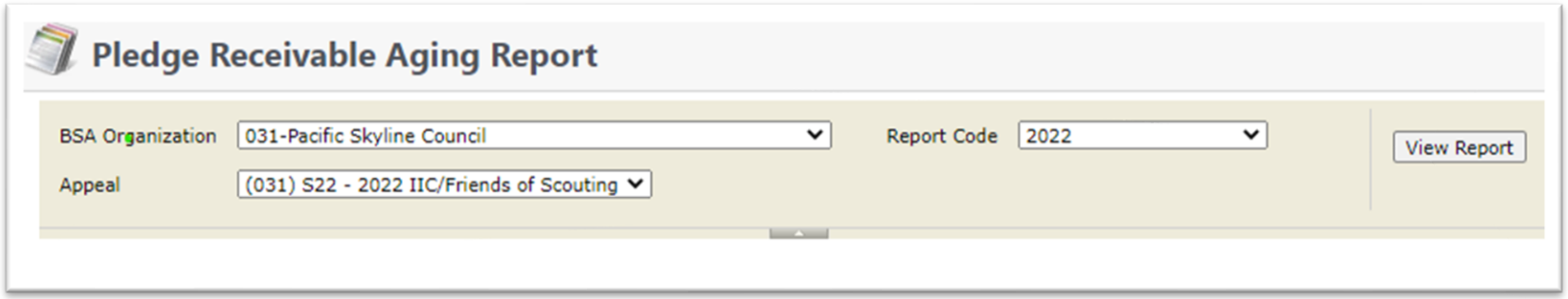
Pledge Receivable Aging Report

- Found under Revenue/Reports/Pledge Receivable Aging Report



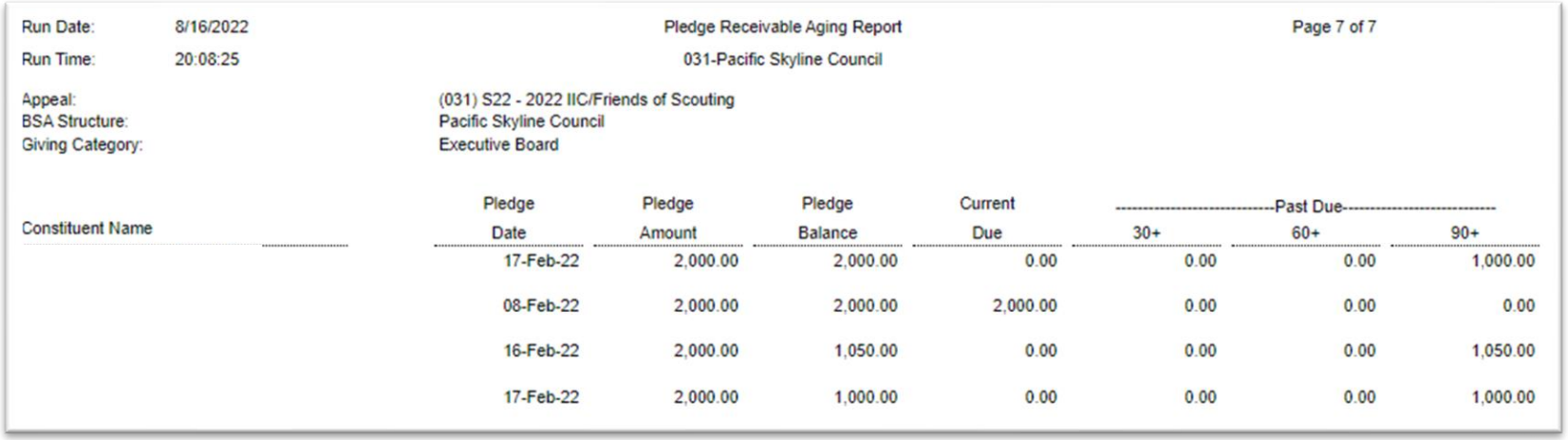
How to Run

- Select your council
- Select the Report Code (Appeal Year)
- Select which appeal you would like the report for
- Click View Report



Report Contains

- Report splits by Structure & Giving Category
- List donors who are past due
- Contains data from the previous days data entry



Run Date: 8/16/2022 | Pledge Receivable Aging Report | Page 7 of 7

Run Time: 20:08:25 | 031-Pacific Skyline Council

Appeal: (031) S22 - 2022 IIC/Friends of Scouting
BSA Structure: Pacific Skyline Council
Giving Category: Executive Board

Constituent Name	Pledge Date	Pledge Amount	Pledge Balance	Current Due	Past Due 30+	Past Due 60+	Past Due 90+
	17-Feb-22	2,000.00	2,000.00	0.00	0.00	0.00	1,000.00
	08-Feb-22	2,000.00	2,000.00	2,000.00	0.00	0.00	0.00
	16-Feb-22	2,000.00	1,050.00	0.00	0.00	0.00	1,050.00
	17-Feb-22	2,000.00	1,000.00	0.00	0.00	0.00	1,000.00

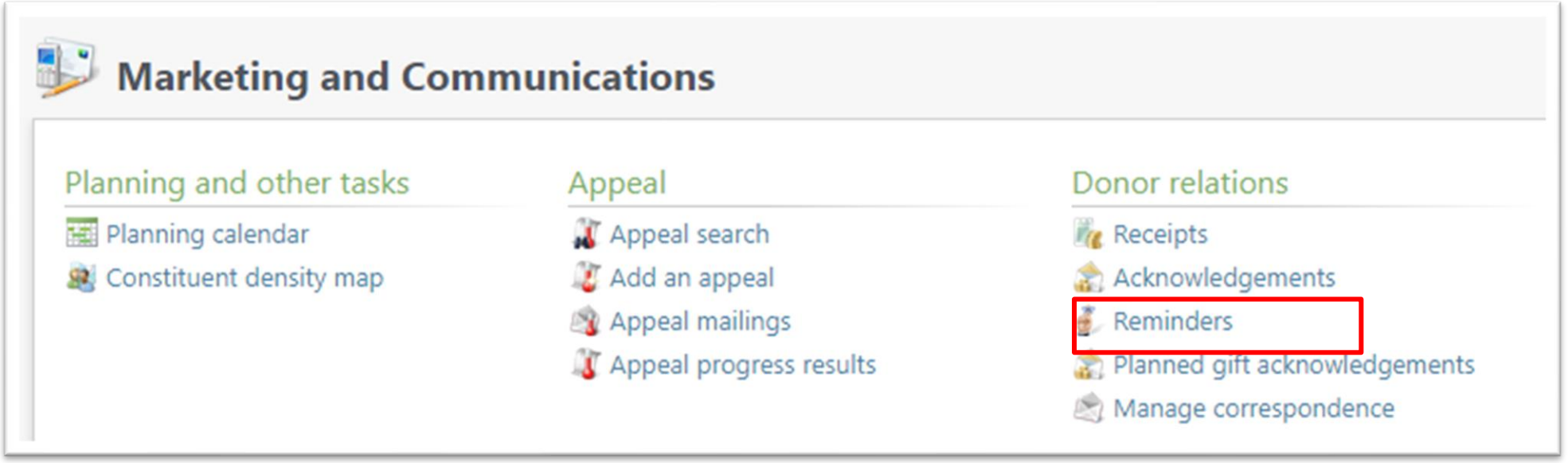
Running Reminder

Reminders

- Where to find your reminder routines
- Determine your business process cycle (Month is currently August)
- How to run them
- Cash is King – Unpaid pledges do not pay the bills

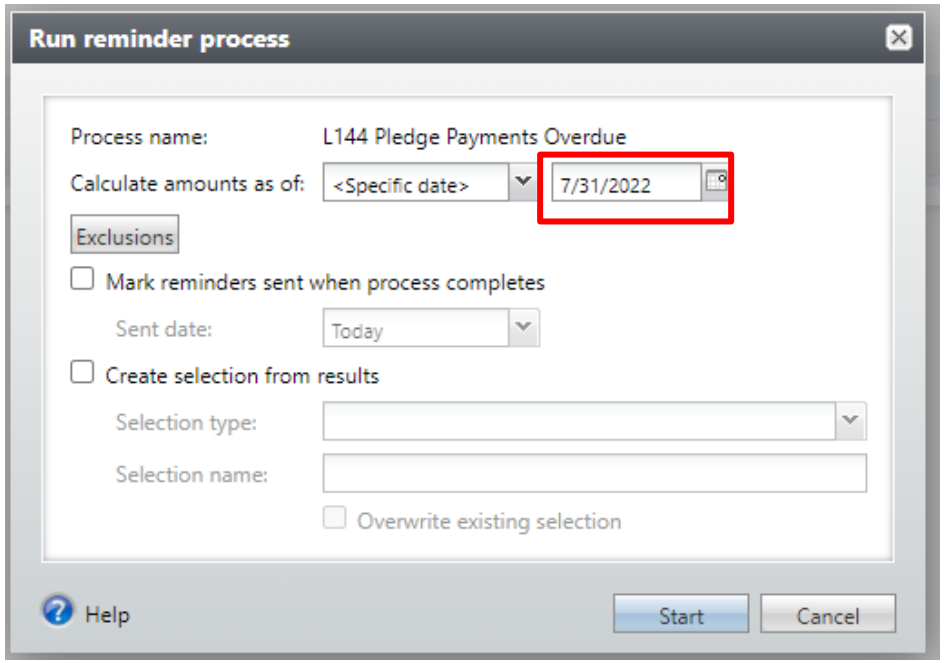
Reminder Routines Locations

- Marketing and Communications / Donor Relations / Reminders



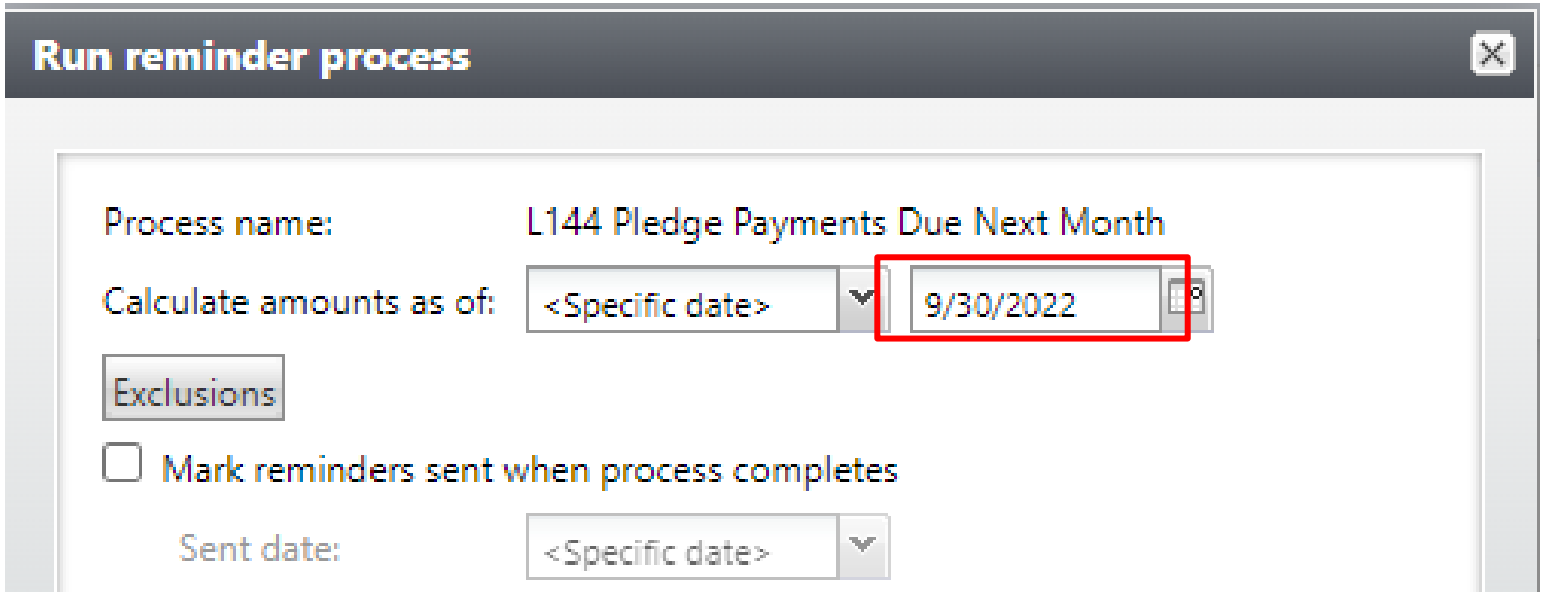
Determine your business Cycle

- Will you run bills at the end of the month or beginning of the month?
- Pledge Payments Overdue should be run every month
  - When you start the process place the last day of the last month in the calculate amounts as of box.
  - Process looks for Pledges with open installment last month or older.



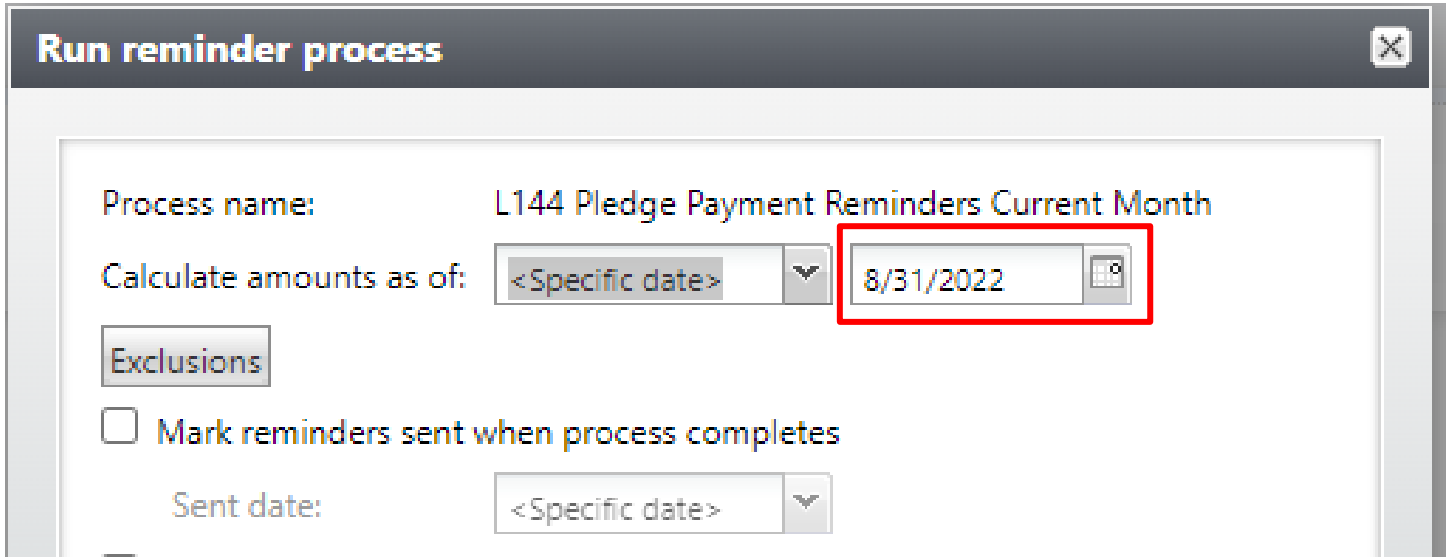
Bills at end of the month = Next month

- Click the start button and place the last day of next month in the Calculate amount as of Box.
- Process look for open installments next months.
- The installment could have any day of week on them



Bills at the beginning of the Month = Current

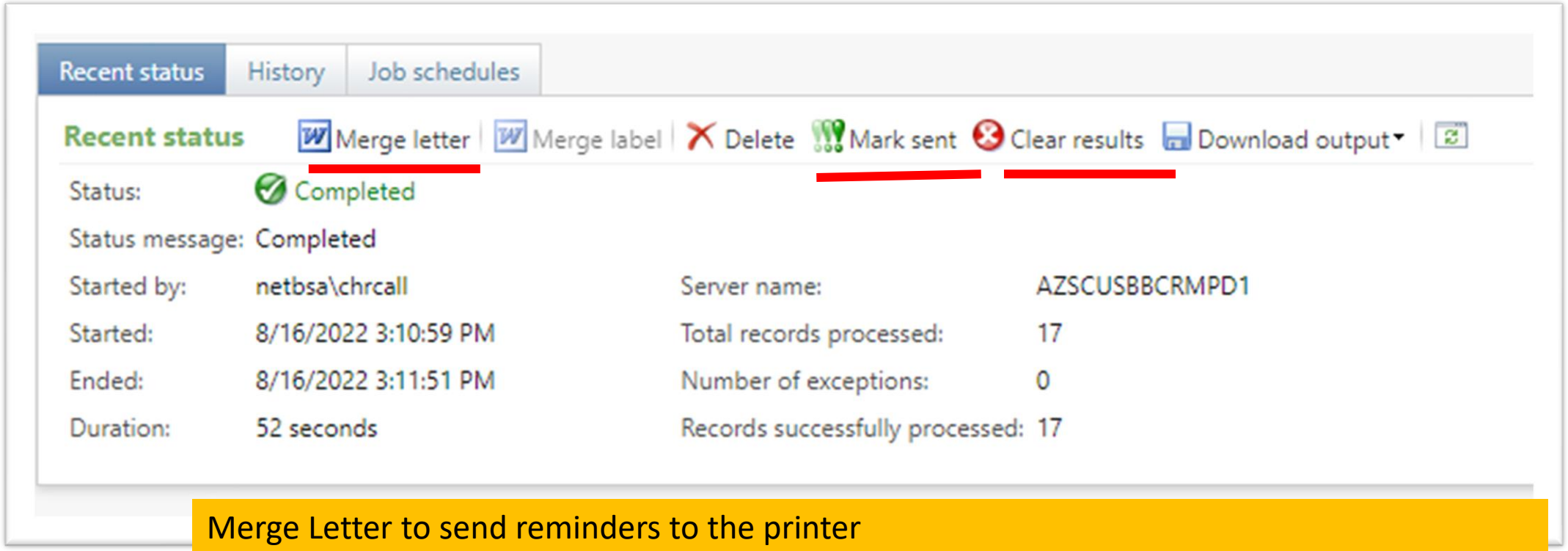
- You would run these during the first few days of the new month
- Calculate values as of the last day of the month
- Each installment is on a different day of the month



Process to mail reminder

- Once you click start it will take you to your reminder home page.
- You will click the merge letter button to generate a word document of reminders.
- If they look fine – print & mail - "Mark sent"
- If there is an issue, "Clear results" - fix template or data in CRM then click start again.
- If wrong data is coming into the reminder adjust selection with correct appeal years.

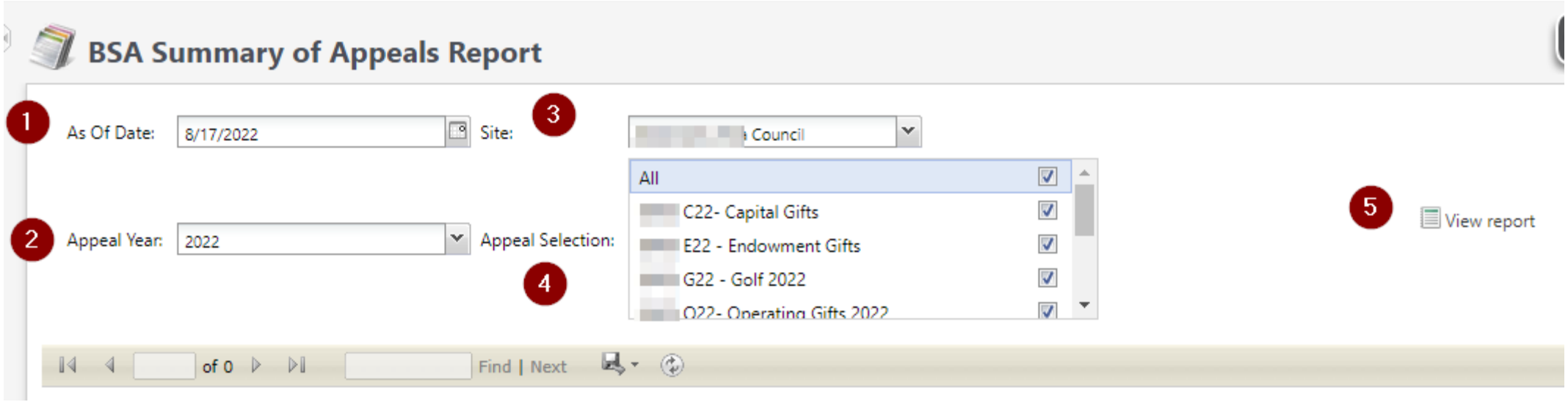
Reminder Home Page Results



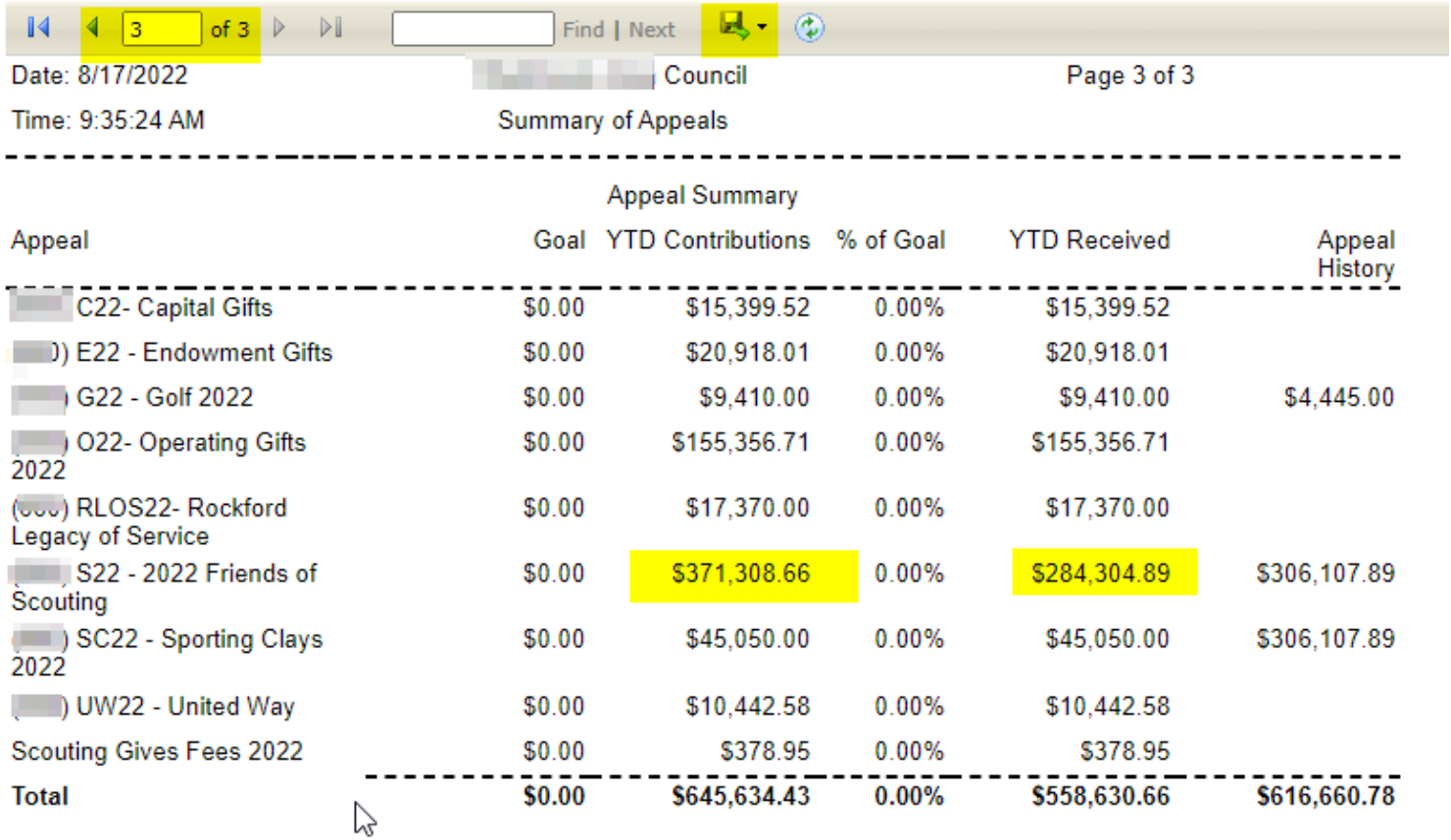
Merge Letter to send reminders to the printer
Mark Sent after sending reminders to the printer
If reminders do not look right and you need to make changes, Clear Results and start over.

Summary of Appeals Report

BSA Summary of Appeals



Report Example



3 of 3 Find | Next

Date: 8/17/2022 [redacted] Council Page 3 of 3

Time: 9:35:24 AM Summary of Appeals

Appeal Summary

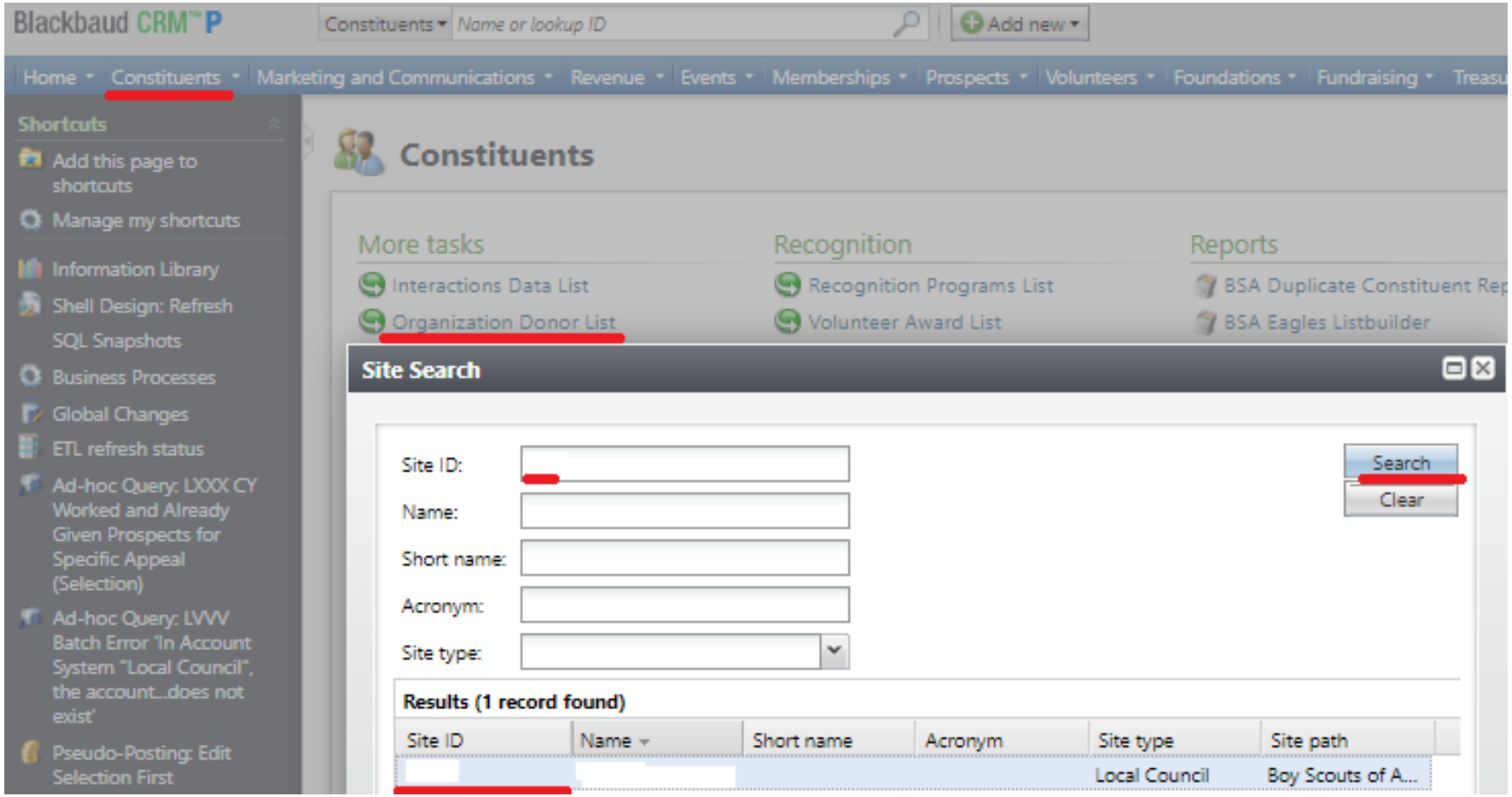
Appeal	Goal	YTD Contributions	% of Goal	YTD Received	Appeal History
[redacted] C22- Capital Gifts	$0.00	$15,399.52	0.00%	$15,399.52	
[redacted] E22 - Endowment Gifts	$0.00	$20,918.01	0.00%	$20,918.01	
[redacted] G22 - Golf 2022	$0.00	$9,410.00	0.00%	$9,410.00	$4,445.00
[redacted] O22- Operating Gifts 2022	$0.00	$155,356.71	0.00%	$155,356.71	
[redacted] RLOS22- Rockford Legacy of Service	$0.00	$17,370.00	0.00%	$17,370.00	
[redacted] S22 - 2022 Friends of Scouting	$0.00	$371,308.66	0.00%	$284,304.89	$306,107.89
[redacted] SC22 - Sporting Clays 2022	$0.00	$45,050.00	0.00%	$45,050.00	$306,107.89
[redacted] UW22 - United Way	$0.00	$10,442.58	0.00%	$10,442.58	
Scouting Gives Fees 2022	$0.00	$378.95	0.00%	$378.95	
Total	**$0.00**	**$645,634.43**	**0.00%**	**$558,630.66**	**$616,660.78**

New Data Lists Available in CRM

Organization Donor List
Household Donors
Revenue Data Hygiene
Appeal Data List Updates

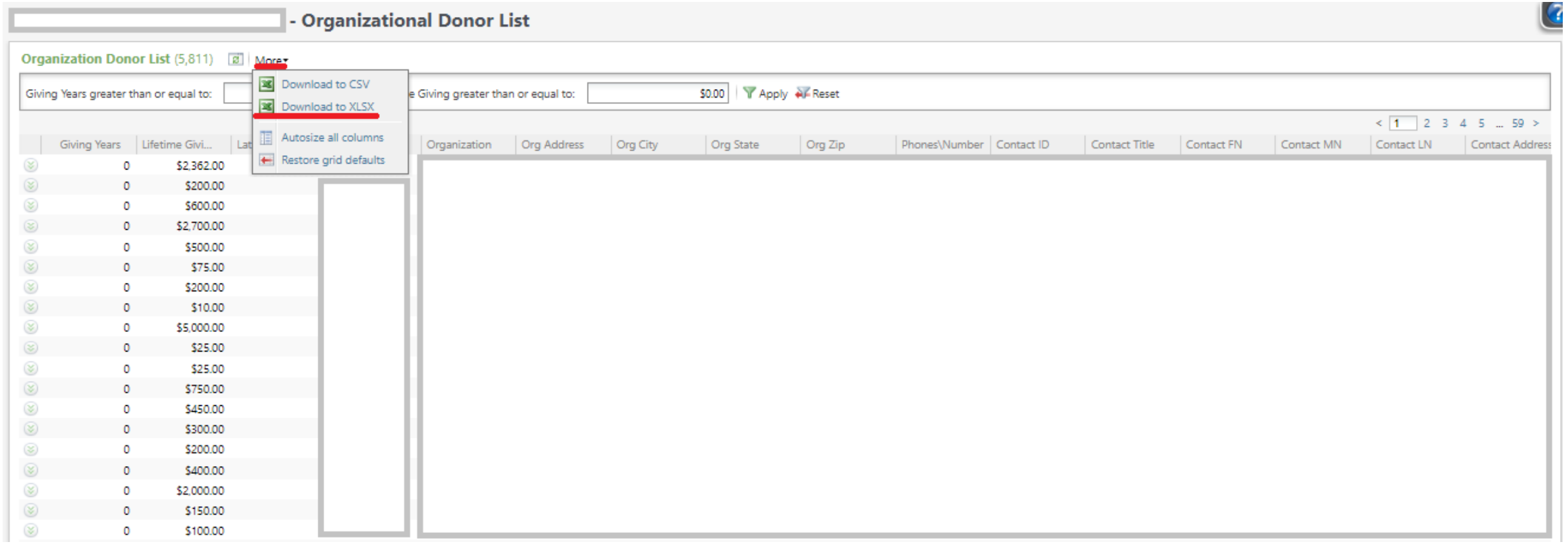
Organization Donor List

Constituents>Organization Donor List



Organization Donor List

Constituents>Organization Donor List



Organization Donor List

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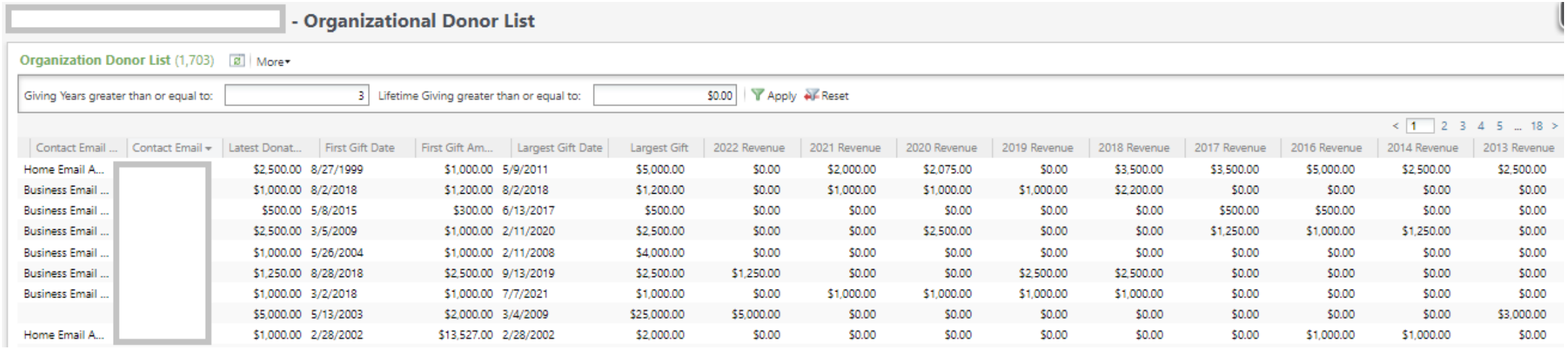


- Organizational Donor List

Organization Donor List (1,703) | More

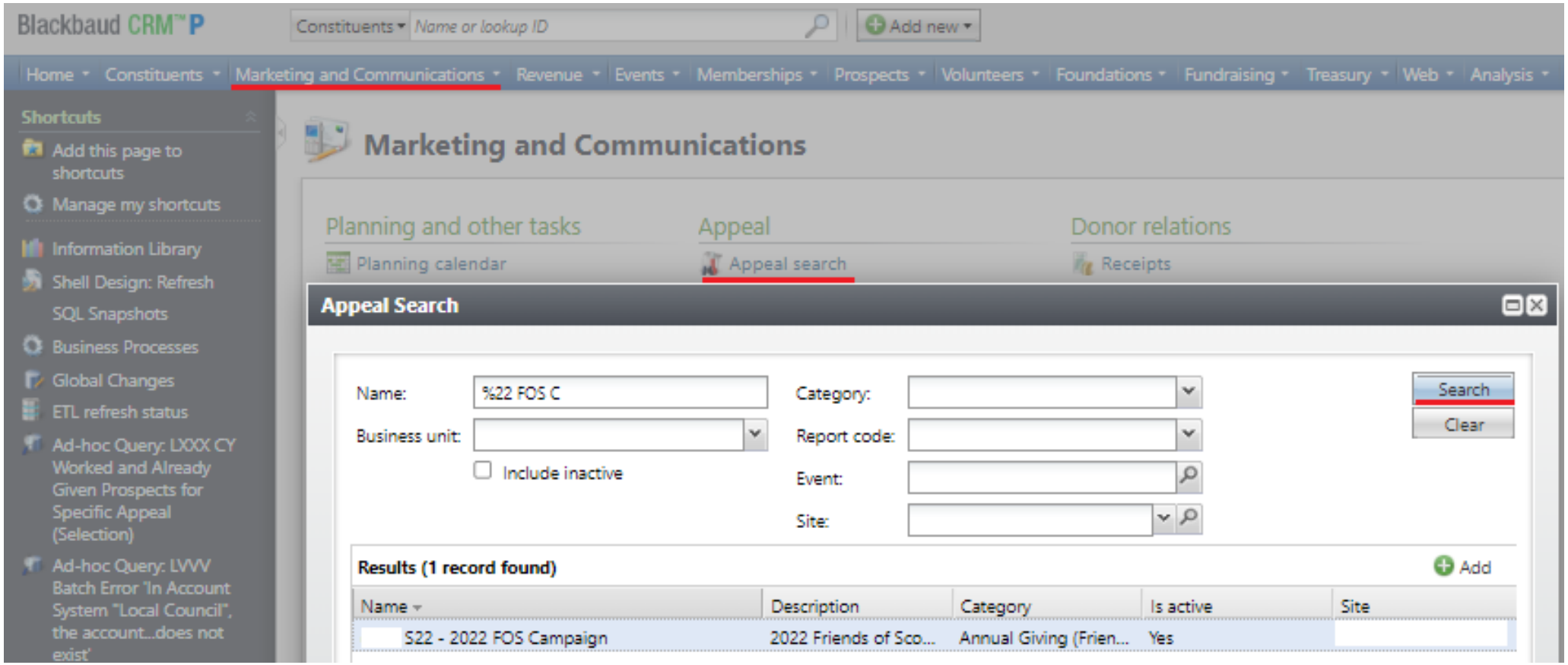
Giving Years greater than or equal to: 3 | Lifetime Giving greater than or equal to: $0.00 | Apply | Reset

< 1 2 3 4 5 ... 18 >

Contact Email ...	Contact Email	Latest Donat...	First Gift Date	First Gift Am...	Largest Gift Date	Largest Gift	2022 Revenue	2021 Revenue	2020 Revenue	2019 Revenue	2018 Revenue	2017 Revenue	2016 Revenue	2014 Revenue	2013 Revenue
Home Email A...		$2,500.00	8/27/1999	$1,000.00	5/9/2011	$5,000.00	$0.00	$2,000.00	$2,075.00	$0.00	$3,500.00	$3,500.00	$5,000.00	$2,500.00	$2,500.00
Business Email ...		$1,000.00	8/2/2018	$1,200.00	8/2/2018	$1,200.00	$0.00	$1,000.00	$1,000.00	$1,000.00	$2,200.00	$0.00	$0.00	$0.00	$0.00
Business Email ...		$500.00	5/8/2015	$300.00	6/13/2017	$500.00	$0.00	$0.00	$0.00	$0.00	$0.00	$500.00	$500.00	$0.00	$0.00
Business Email ...		$2,500.00	3/5/2009	$1,000.00	2/11/2020	$2,500.00	$0.00	$0.00	$2,500.00	$0.00	$0.00	$1,250.00	$1,000.00	$1,250.00	$0.00
Business Email ...		$1,000.00	5/26/2004	$1,000.00	2/11/2008	$4,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Business Email ...		$1,250.00	8/28/2018	$2,500.00	9/13/2019	$2,500.00	$1,250.00	$0.00	$0.00	$2,500.00	$2,500.00	$0.00	$0.00	$0.00	$0.00
Business Email ...		$1,000.00	3/2/2018	$1,000.00	7/7/2021	$1,000.00	$0.00	$1,000.00	$1,000.00	$1,000.00	$1,000.00	$0.00	$0.00	$0.00	$0.00
		$5,000.00	5/13/2003	$2,000.00	3/4/2009	$25,000.00	$5,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$3,000.00
Home Email A...		$1,000.00	2/28/2002	$13,527.00	2/28/2002	$2,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,000.00	$1,000.00	$0.00

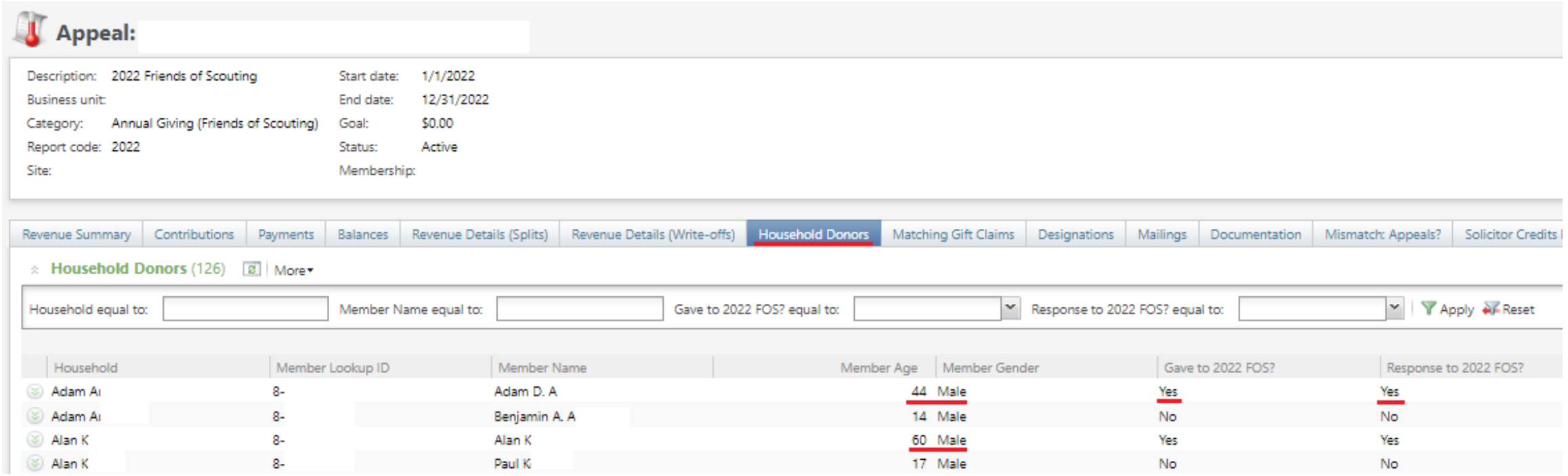
Household Donors

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



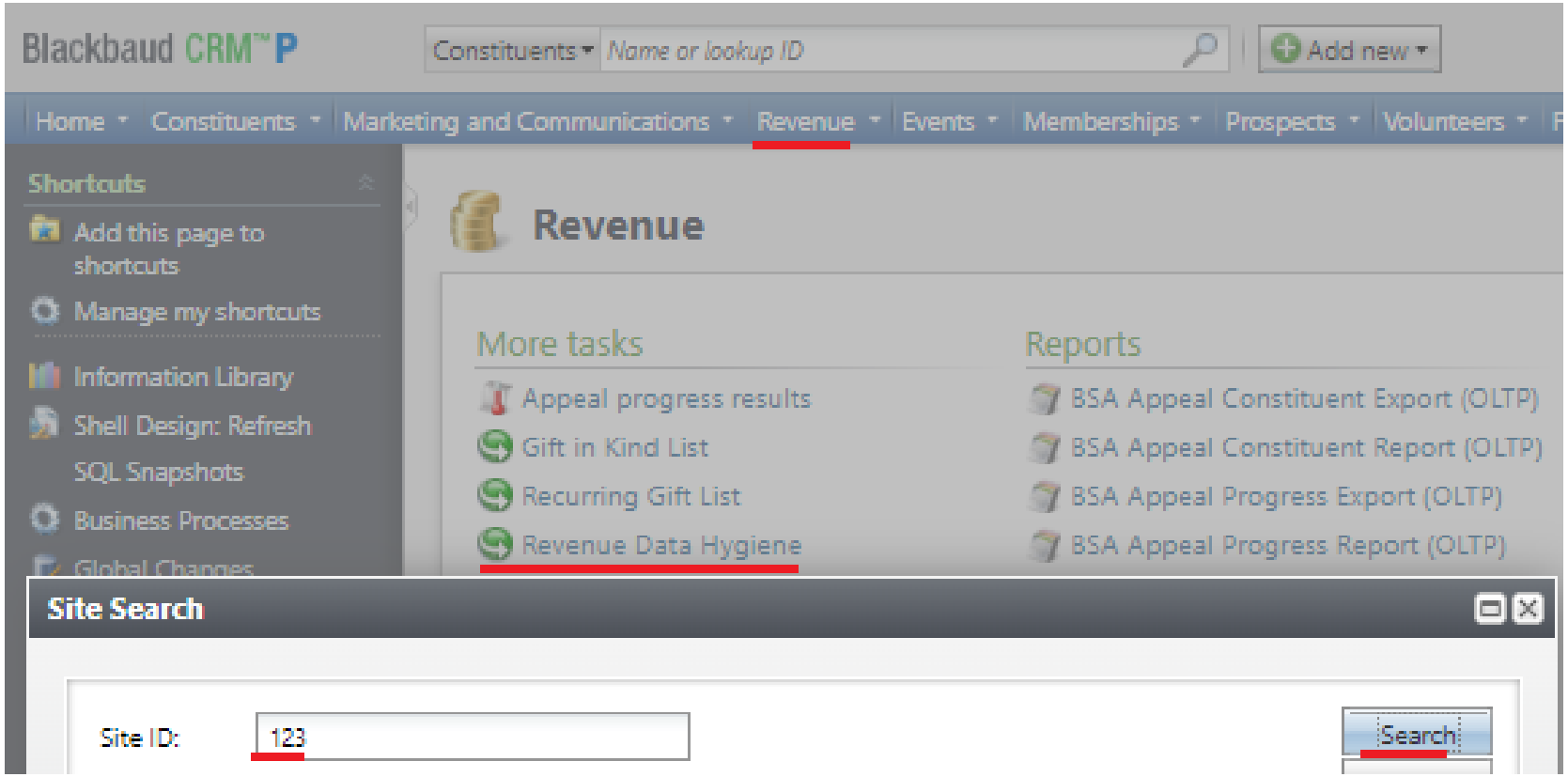
Household Donors

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



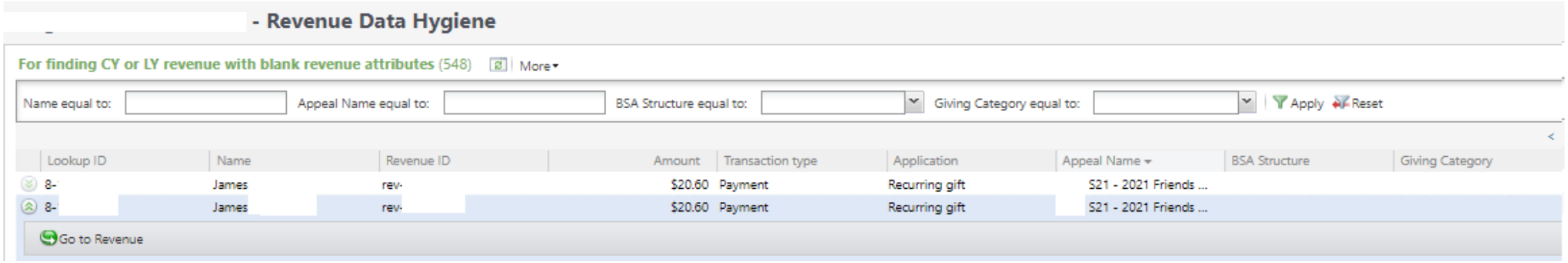
Revenue Data Hygiene

Revenue>Revenue Data Hygiene, search for Council Site



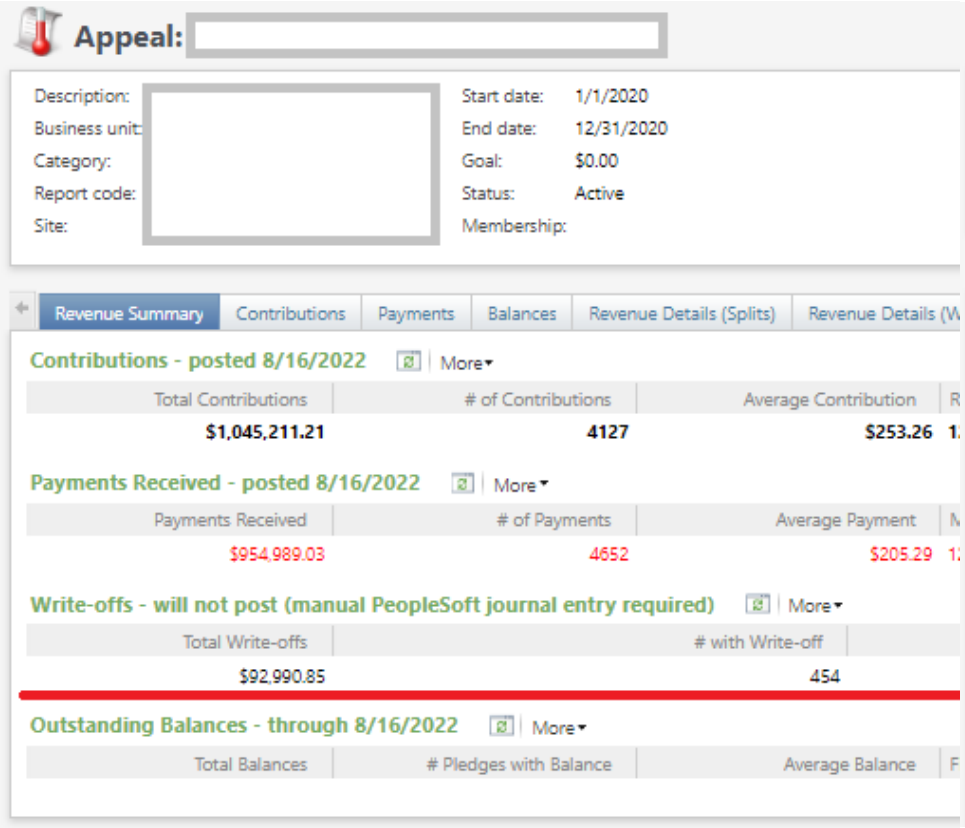
Revenue Data Hygiene

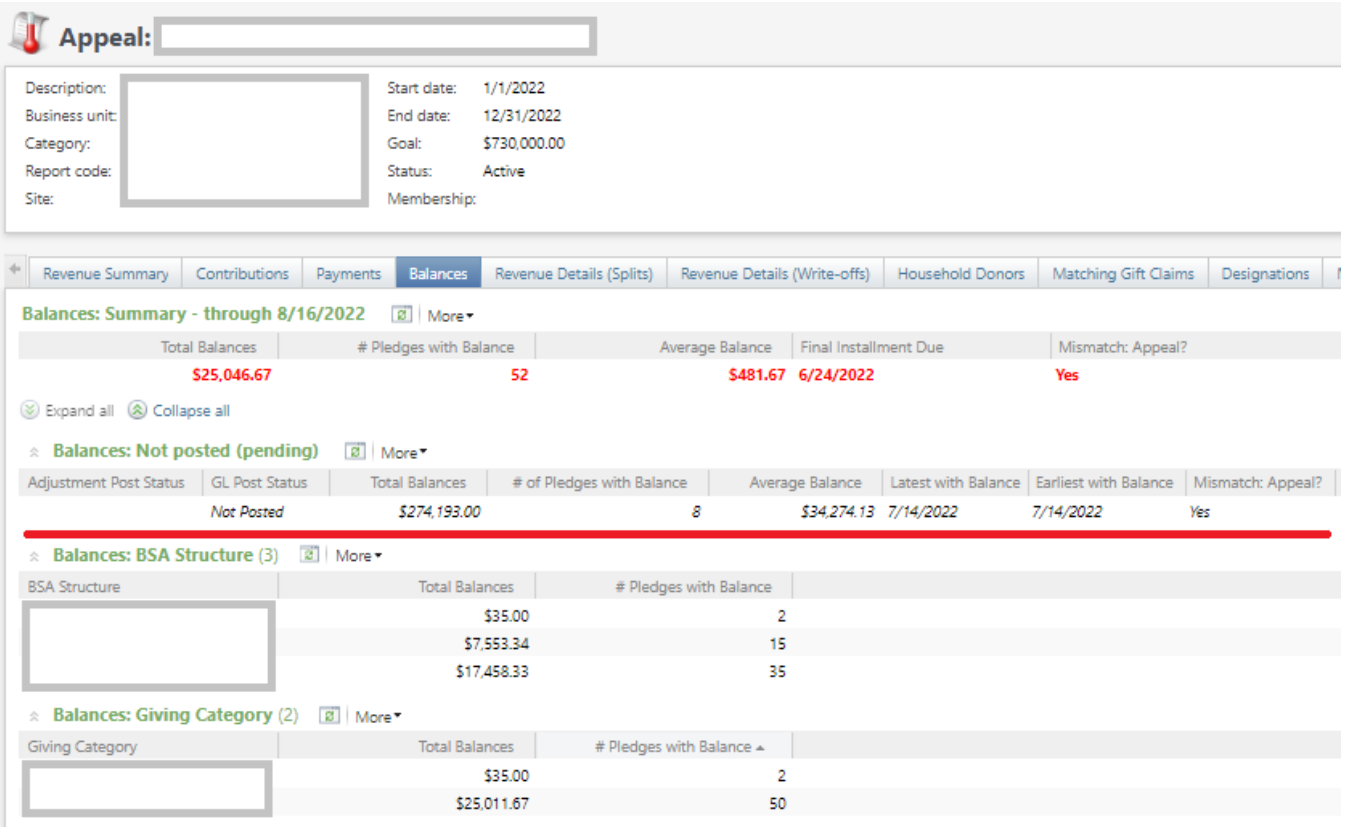
Revenue>Revenue Data Hygiene, search for Council Site



Appeal Data List Updates

Appeal Record>Revenue Summary and Appeal Record>Balances





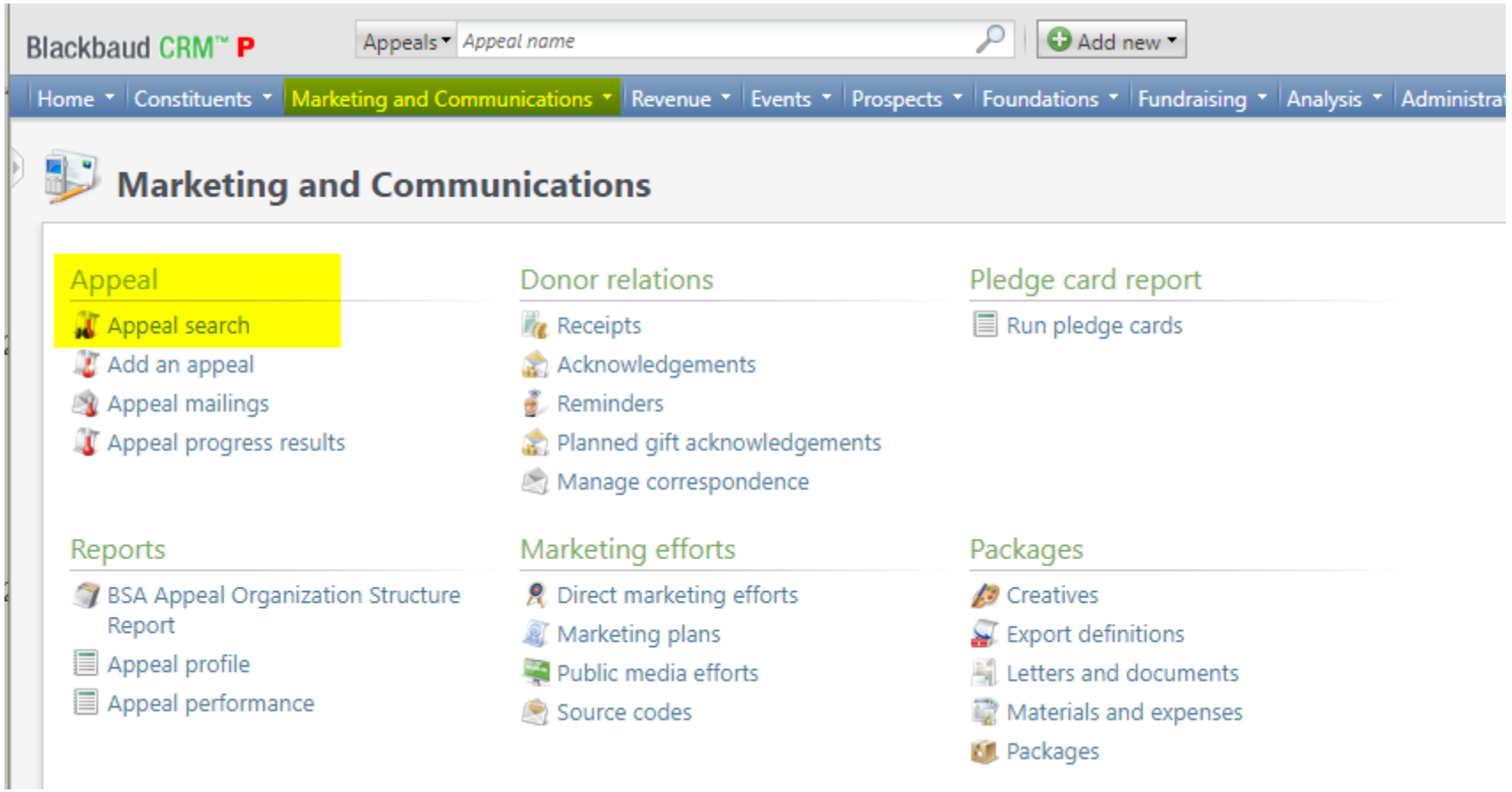
Blackbaud CRM is moving - Update

Blackbaud CRM is moving

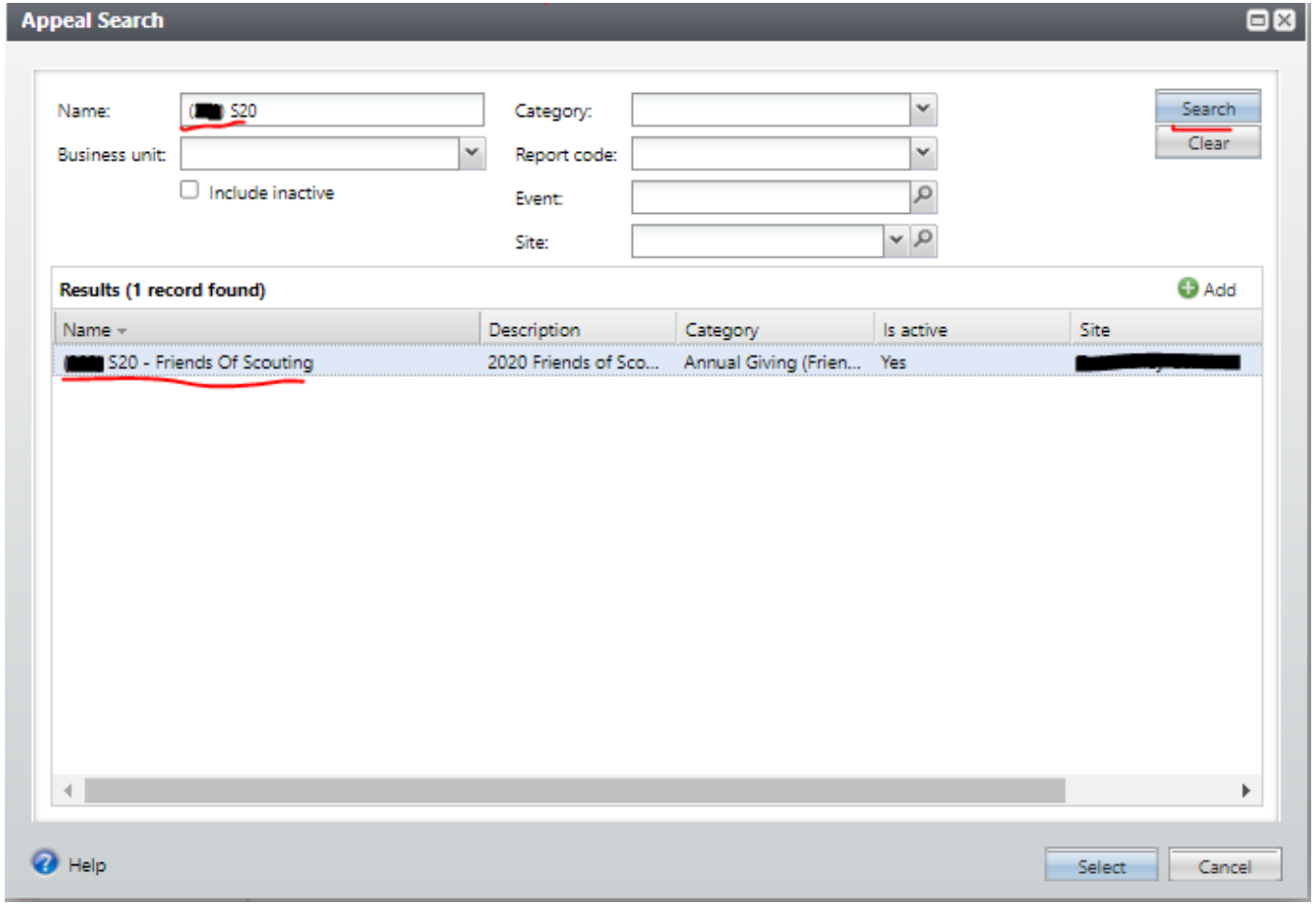
- Expect very few changes in CRM
- Moving to a new hosting site to save $$
- Expect no change in speed or service
- Items which you may need to review:
  - A new URL for signing into CRM will be provided
  - Links to “O-Data” feeds will change and will need to be refreshed
  - CRM will be shut down over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

Tracking Your Appeal Progress

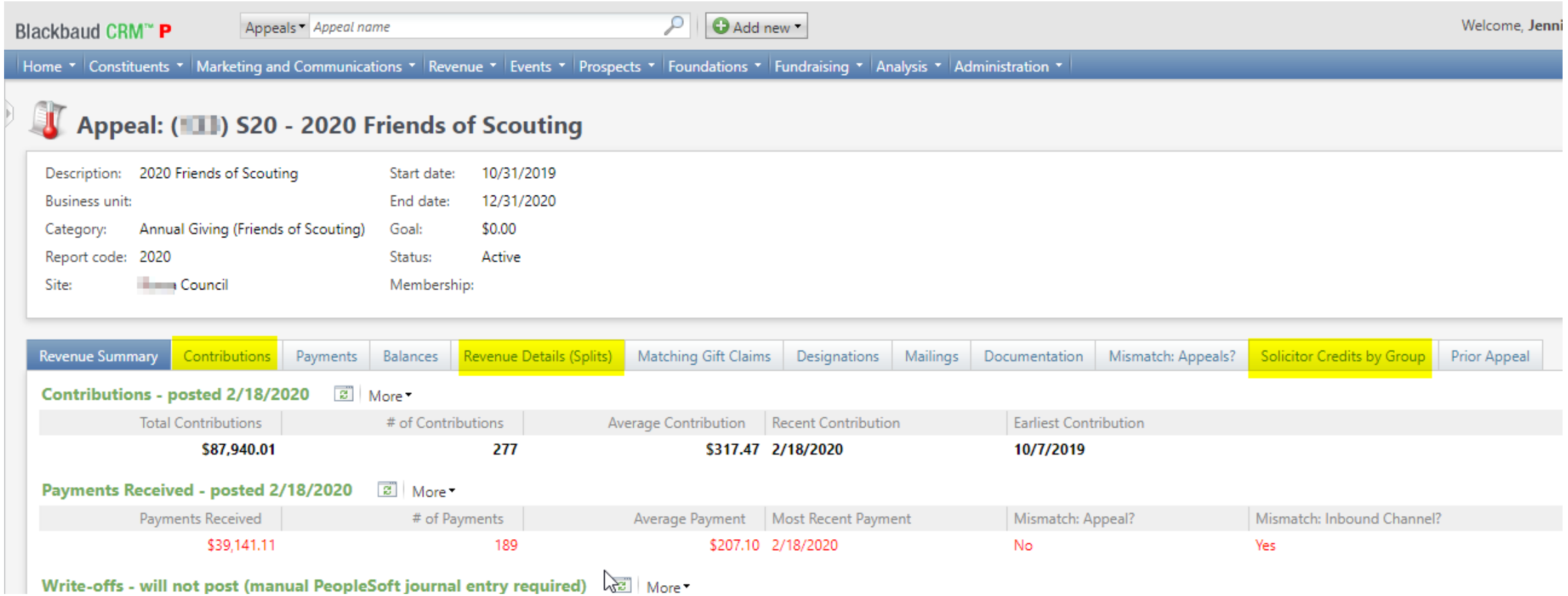
Navigating to the Appeal Record



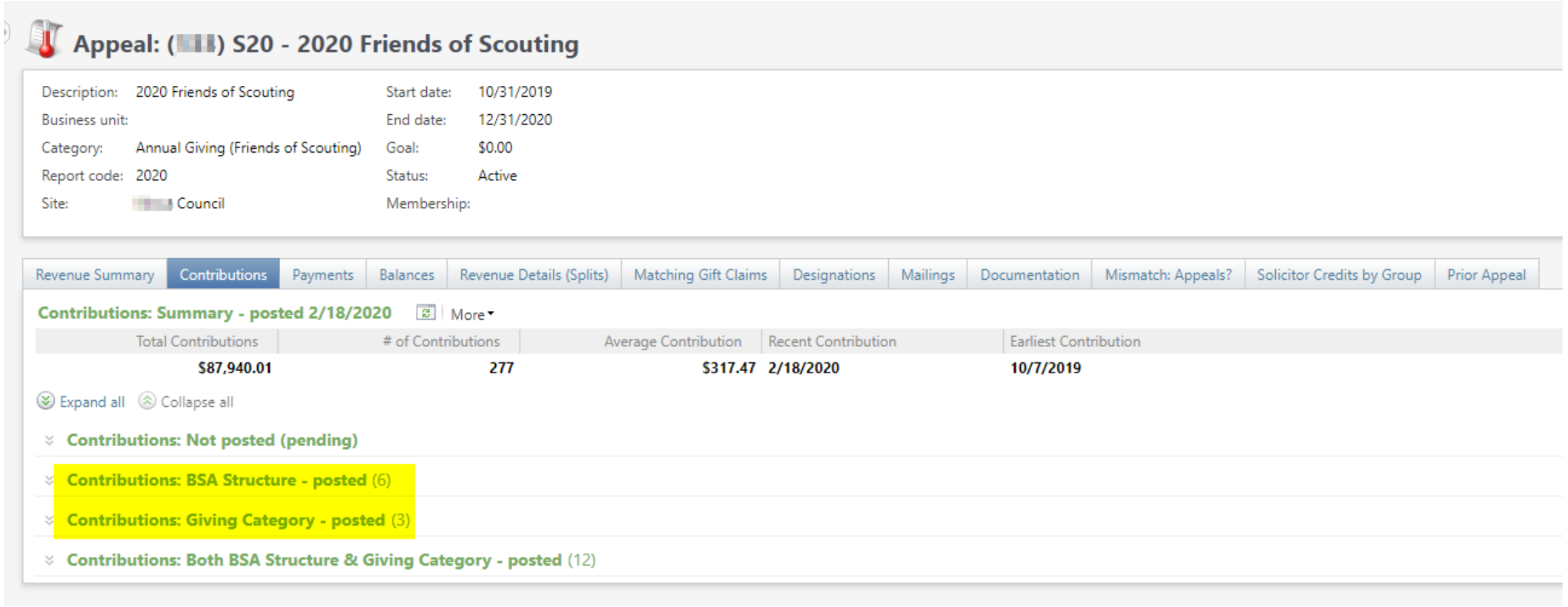
Appeal Search



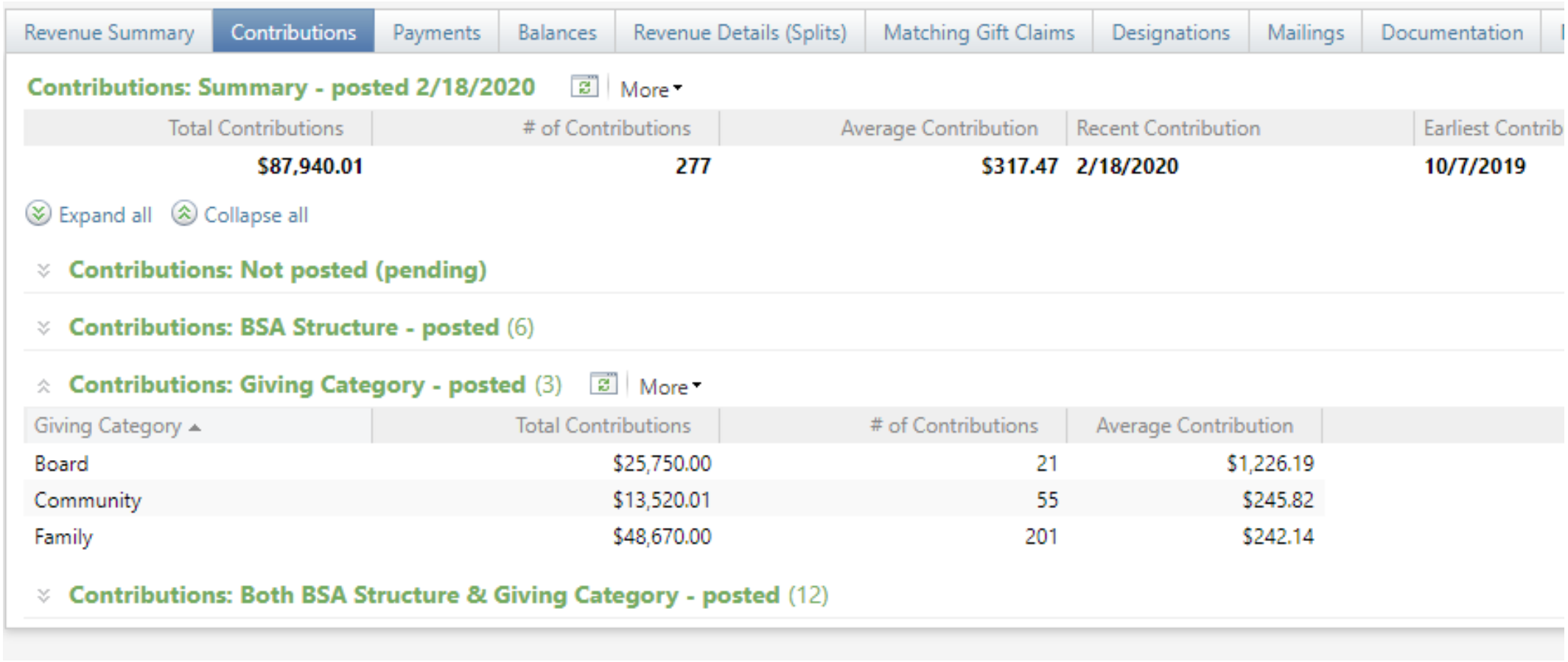
Multiple tabs available



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)

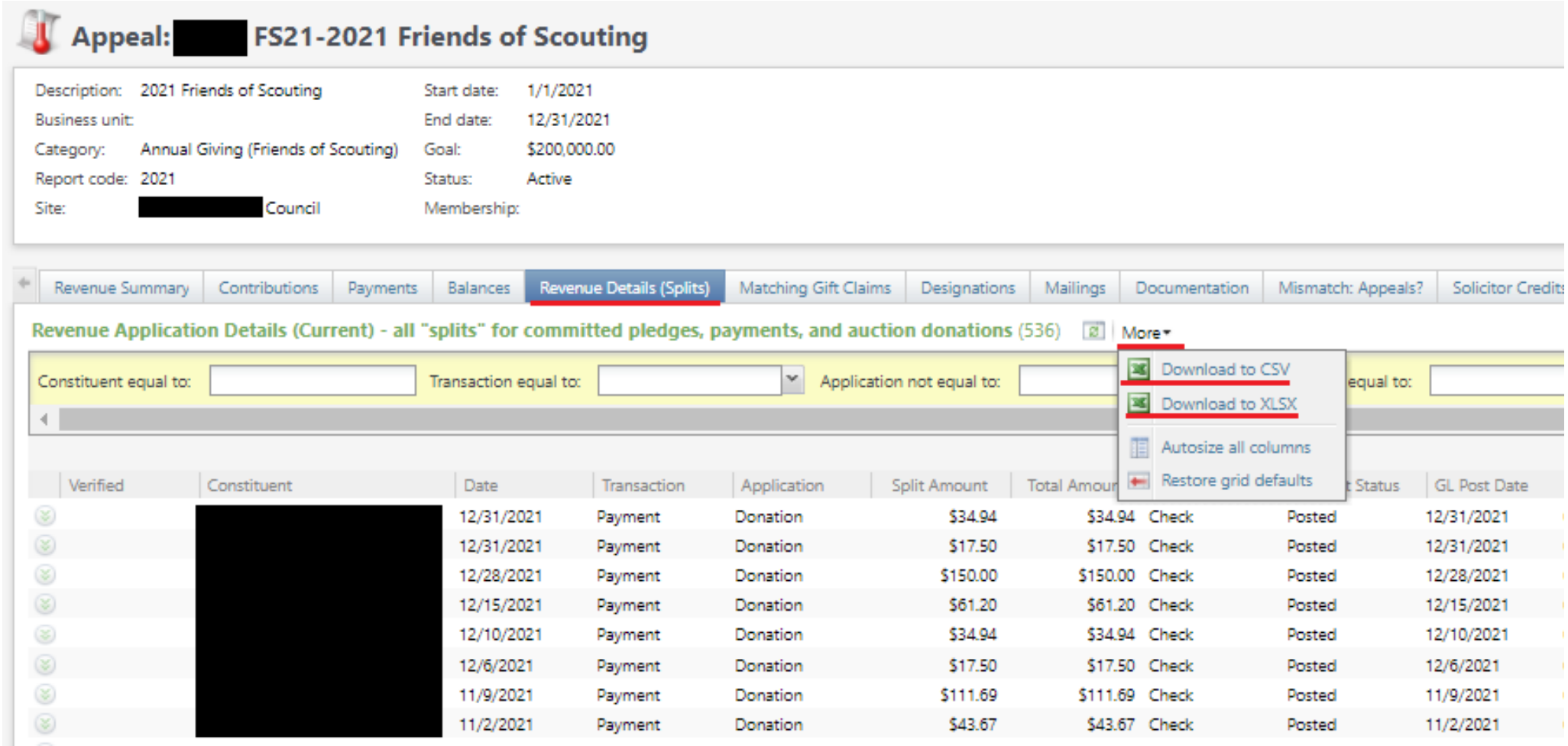
Solicitor Credits

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

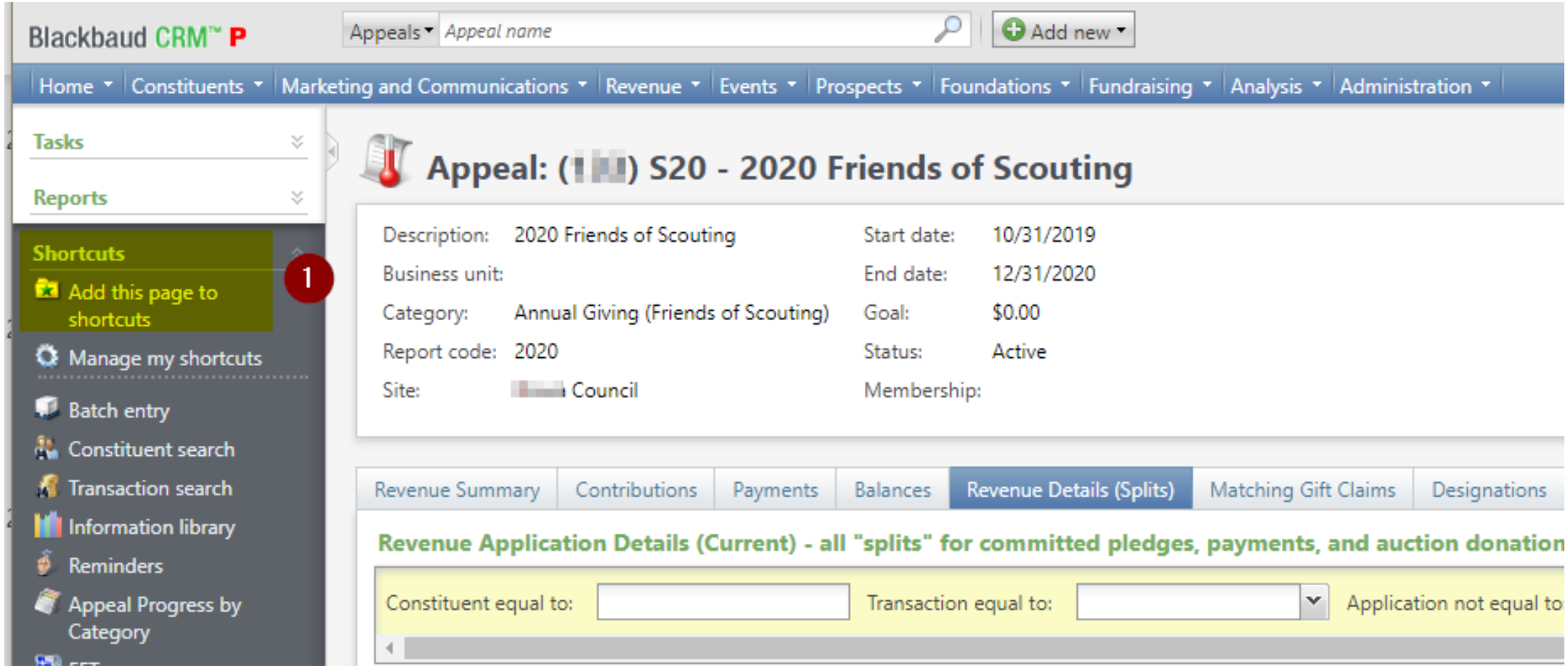
Appeal Solicitor Credits by Solicitor Group ...note: solicitor's row is bold when fundraising goal is achieved (44) More

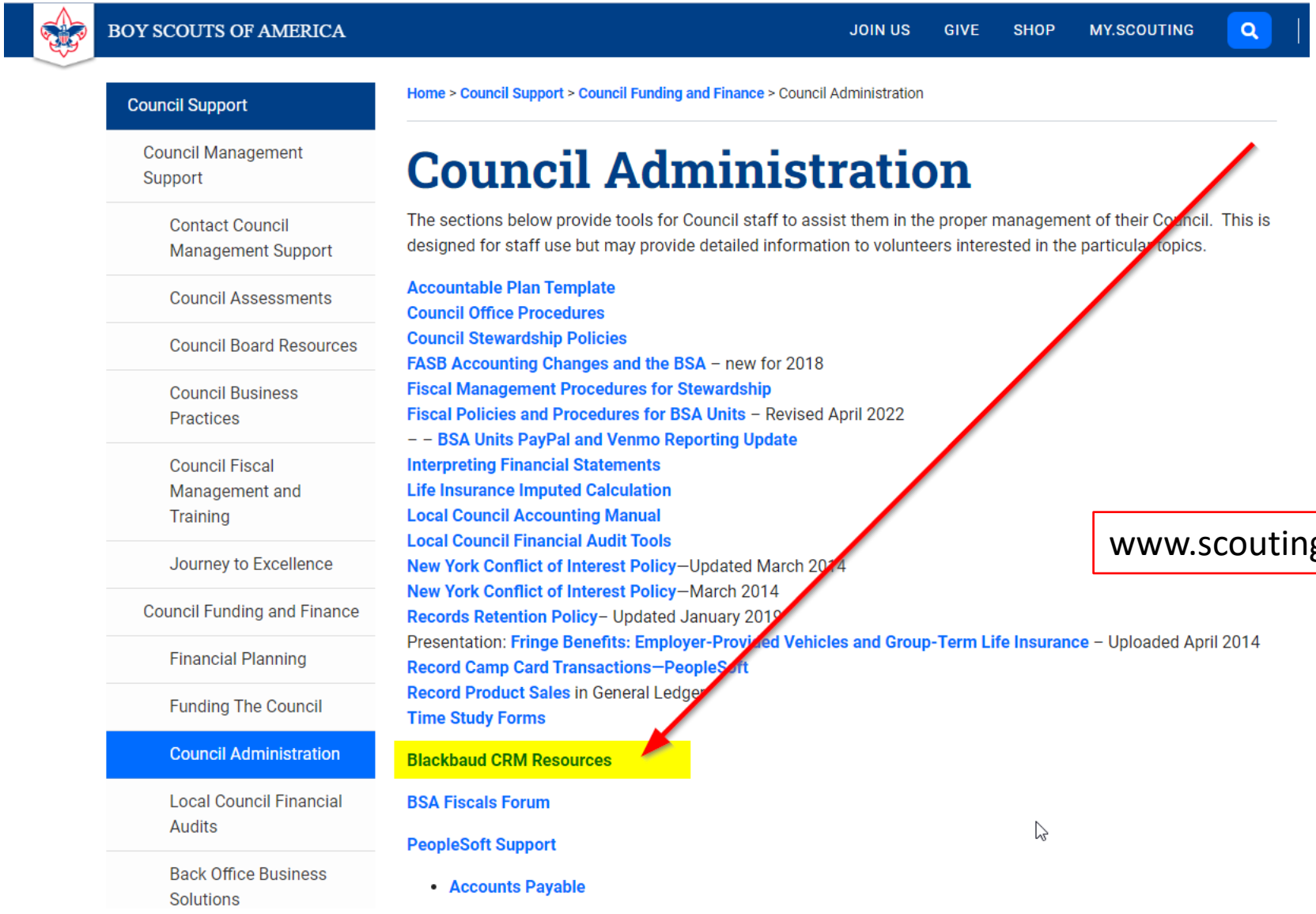
BSA Structure	Giving Category	Inactive?	Group Name	Group Public Name	Solicitor Cre...
Hoover					
Hoover	Family	No	Pack 3151 BP Wilton - 133 (163962)	Pack 3151	$25.00
Hoover	Family	No	Pack 3153 FP Durant - 133 (163963)	Pack 3153	$195.00
Hoover	Family	No	Troop 0127 BT Muscatine - 133 (164...	Troop 0127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

Prepared. For Life.™

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

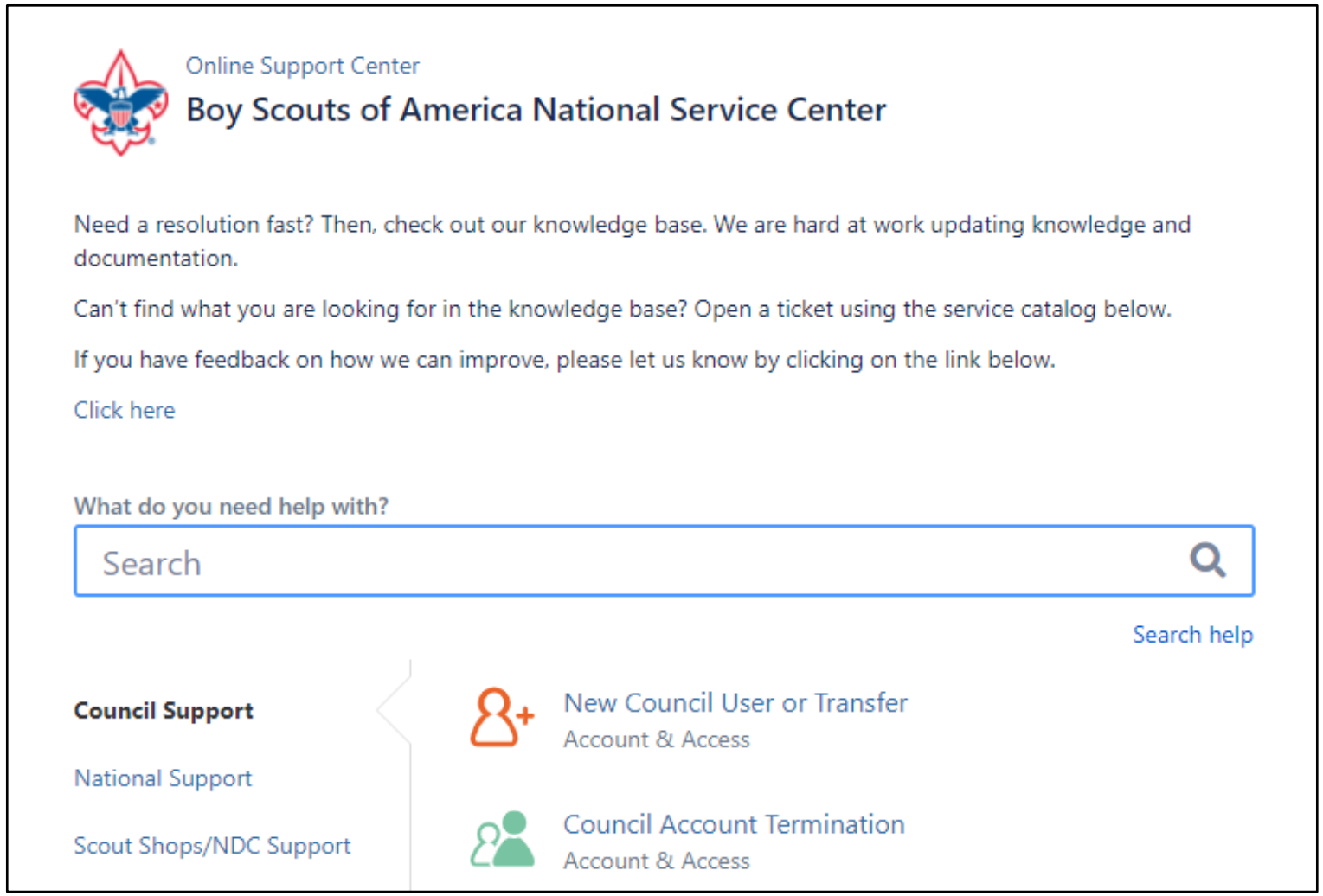
2021

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.

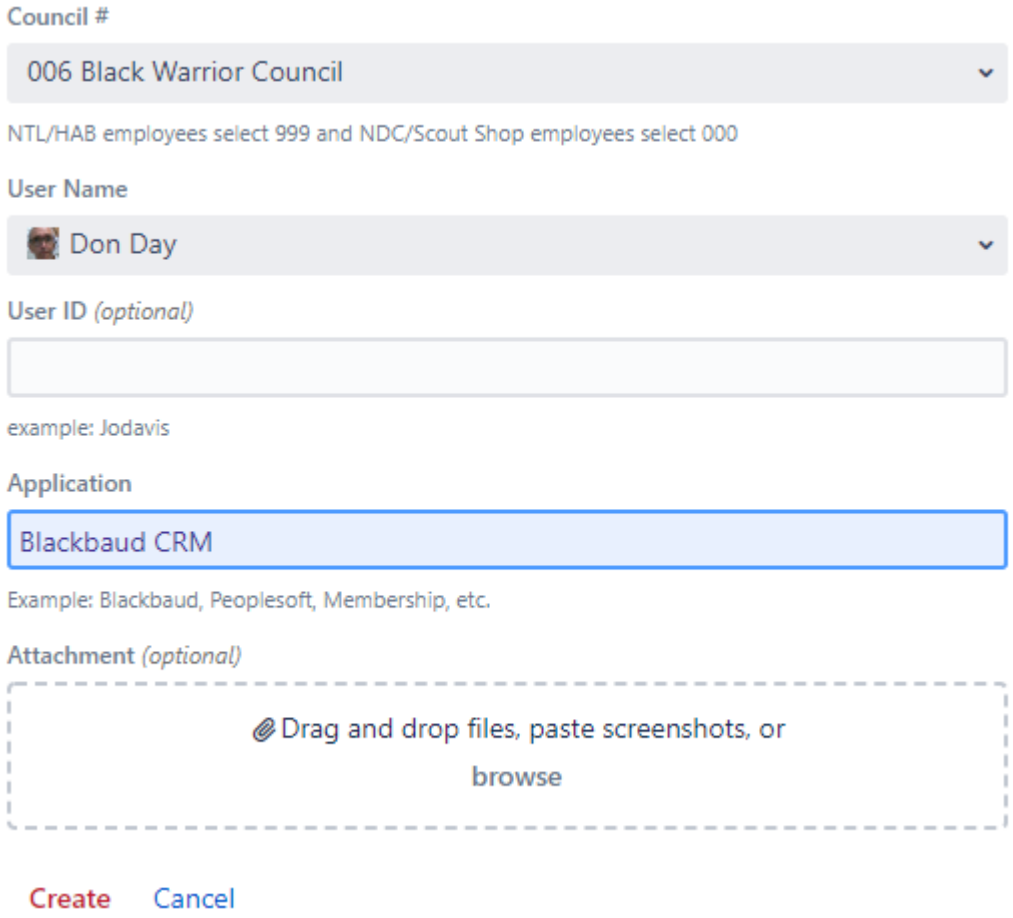
Please provide me a list of giving categories

Council #

006 Black Warrior Council

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

User Name – Application - Attachments



Next Forum

September 21, 2022
10:00 am & 2:00 pm CT

Questions & Answers