CRM User Forum

November 16, 2022

John Kuehn

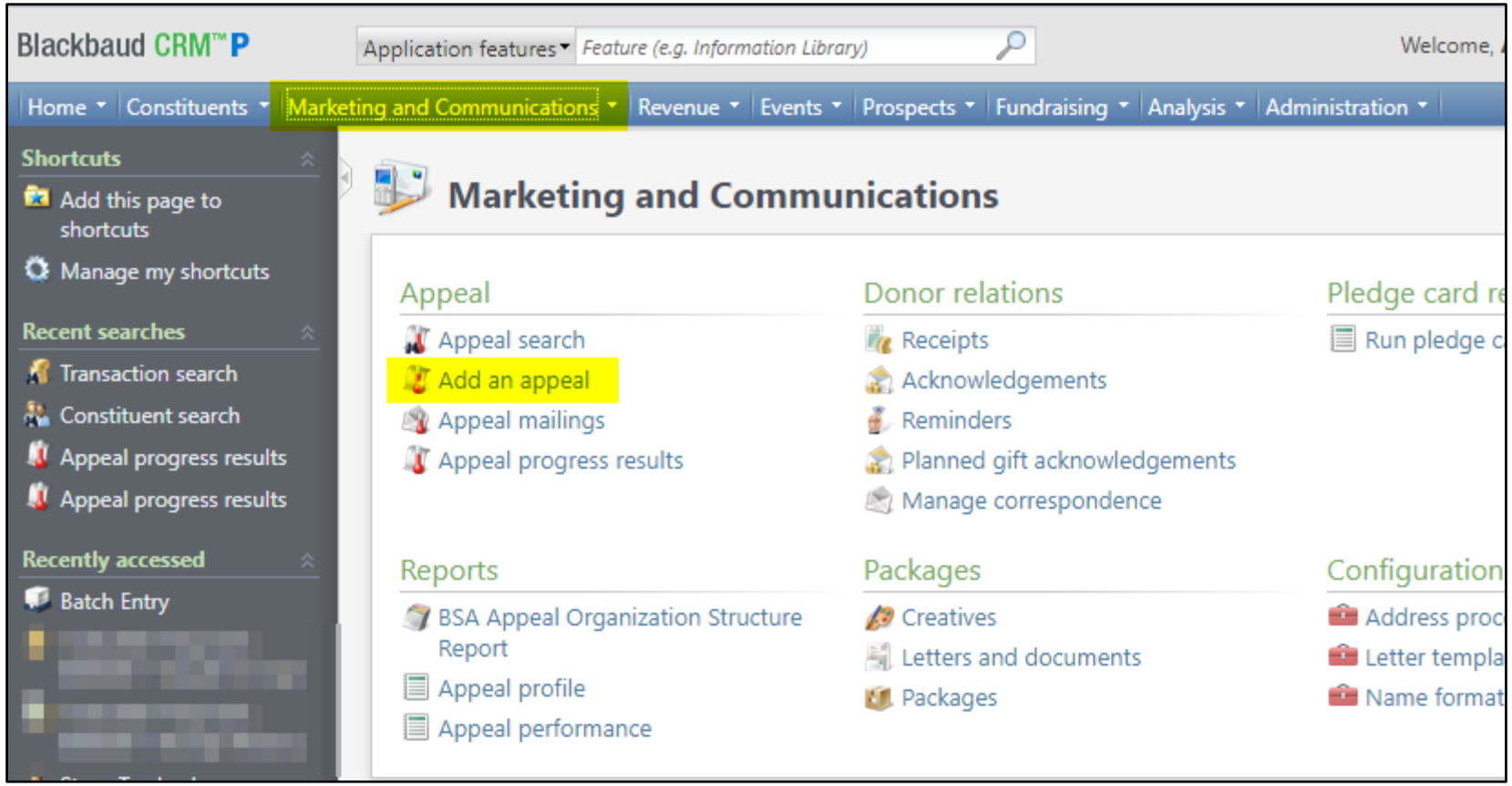
Valerie Eaton

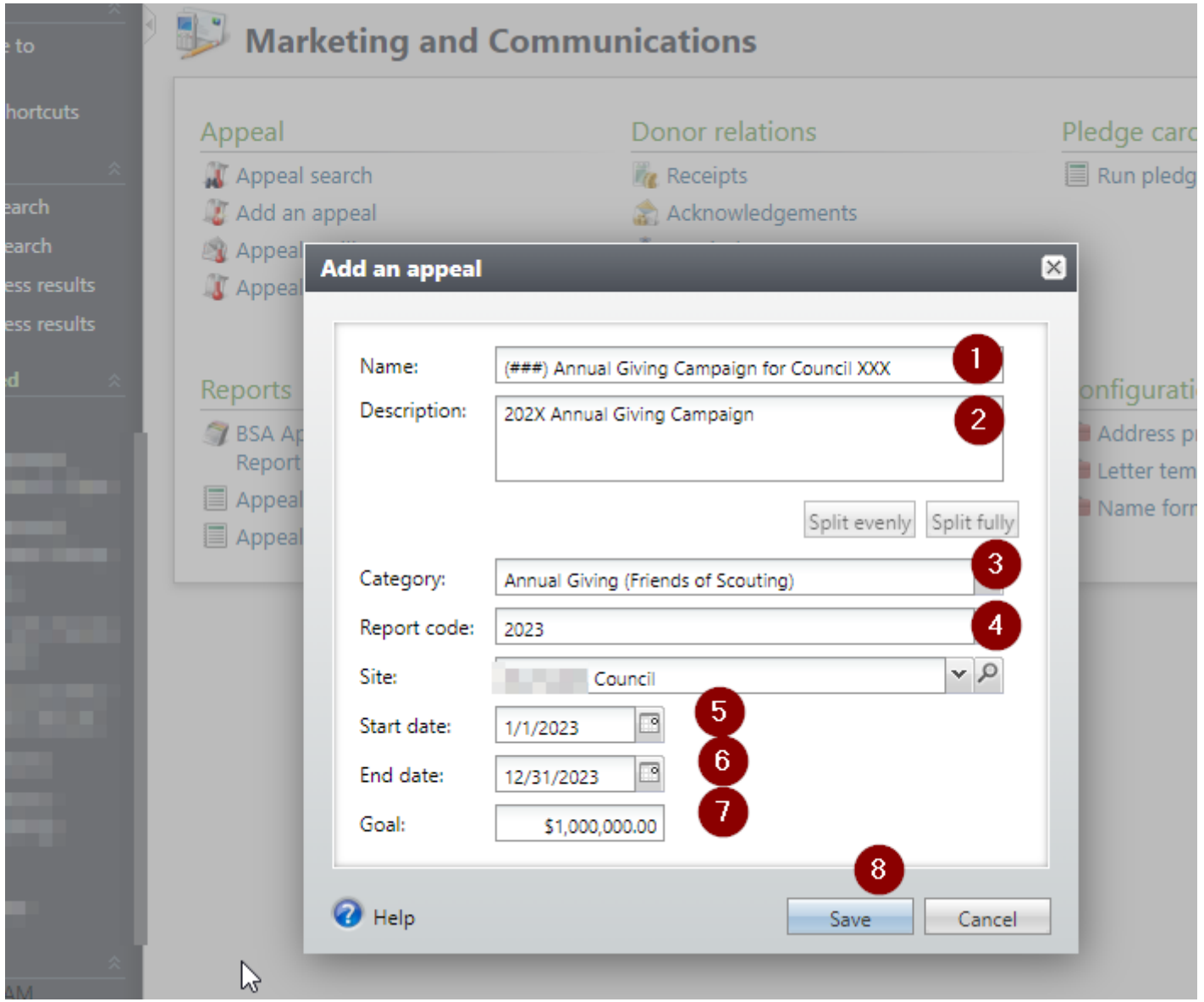
Cornelia Ellis

Objectives

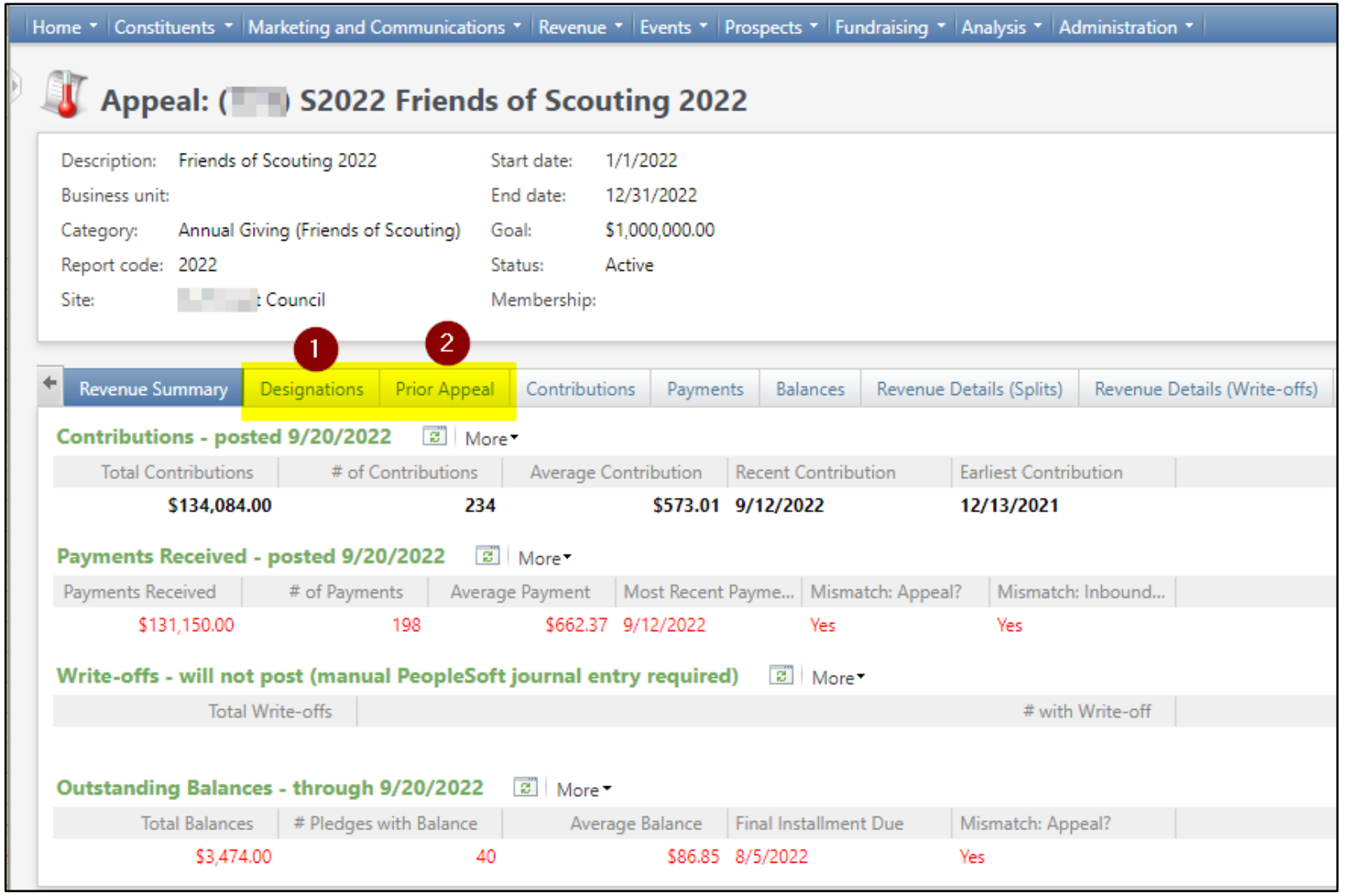
- Review – Creating Appeals
- Review – Creating Future Year (FY) Events
- New – Marking BSAFR Groups & constituents with appeals
- Updating Donor Relation Communications
- Year-end Revenue Checks
  - Mismatched Appeal tabs
  - Future Year (FY) Inbound Channel on Details Splits Tab
  - Future Year (FY) – Inbound Channel
- New Data Lists available in CRM
- Questions – Answers

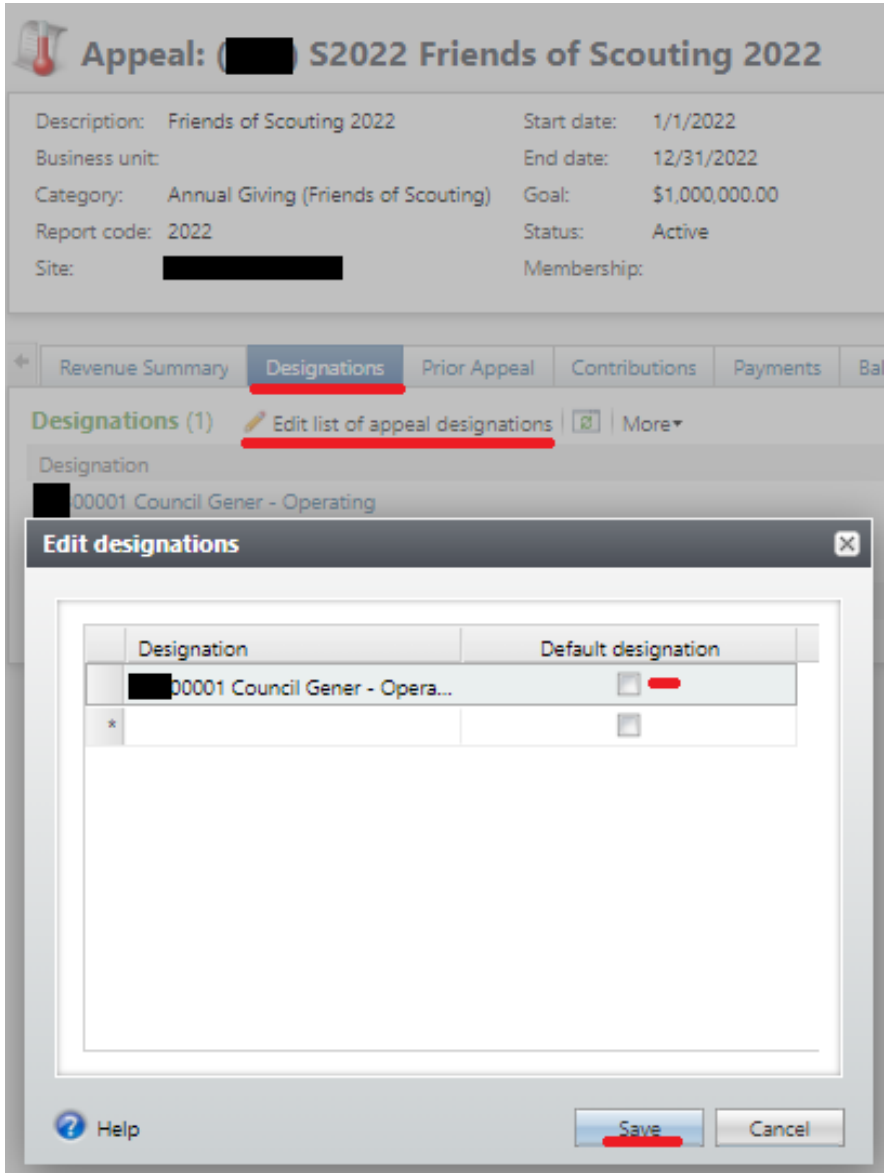
Creating an appeal

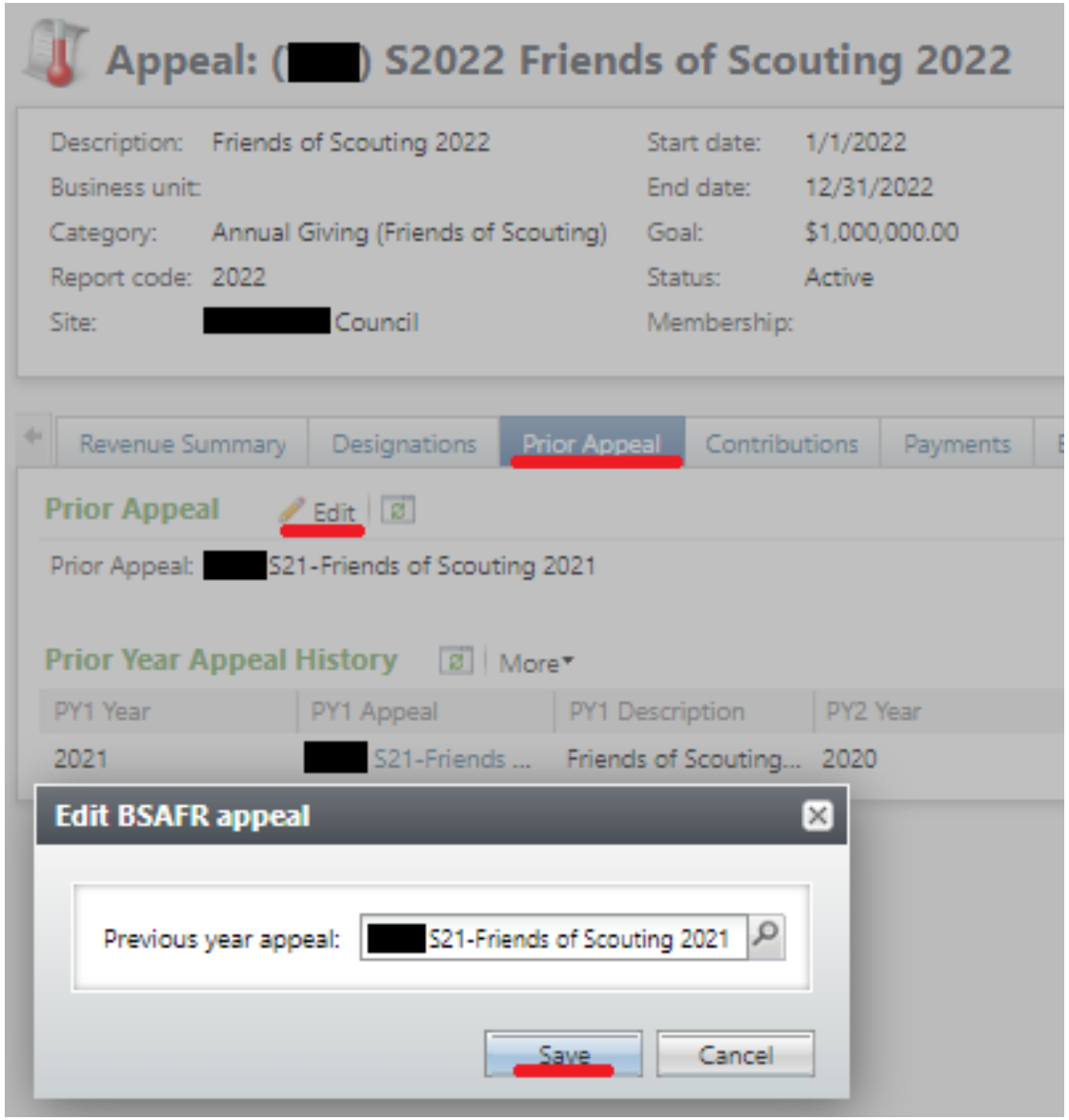

Blackbaud CRM™ P
Application features
Feature (e.g. Information Library)
Welcome,
Home
Constituents
Marketing and Communications
Revenue
Events
Prospects
Fundraising
Analysis
Administration
Shortcuts
Add this page to shortcuts
Manage my shortcuts
Recent searches
Transaction search
Constituent search
Appeal progress results
Appeal progress results
Recently accessed
Batch Entry
Marketing and Communications
Appeal
Appeal search
Add an appeal
Appeal mailings
Appeal progress results
Donor relations
Receipts
Acknowledgements
Reminders
Planned gift acknowledgements
Manage correspondence
Pledge card re
Run pledge c
Reports
BSA Appeal Organization Structure Report
Appeal profile
Appeal performance
Packages
Creatives
Letters and documents
Packages
Configuration
Address proc
Letter templa
Name format



Prepared. For Life.™


Home
Constituents
Marketing and Communications
Revenue
Events
Prospects
Fundraising
Analysis
Administration
Appeal: ( ) S2022 Friends of Scouting 2022
Description: Friends of Scouting 2022
Business unit:
Category: Annual Giving (Friends of Scouting)
Report code: 2022
Site: Council
Start date: 1/1/2022
End date: 12/31/2022
Goal: $1,000,000.00
Status: Active
Membership:
1
2
Revenue Summary
Designations
Prior Appeal
Contributions
Payments
Balances
Revenue Details (Splits)
Revenue Details (Write-offs)
Contributions - posted 9/20/2022
More
Total Contributions
# of Contributions
Average Contribution
Recent Contribution
Earliest Contribution
$134,084.00
234
$573.01
9/12/2022
12/13/2021
Payments Received - posted 9/20/2022
More
Payments Received
# of Payments
Average Payment
Most Recent Payme...
Mismatch: Appeal?
Mismatch: Inbound...
$131,150.00
198
$662.37
9/12/2022
Yes
Yes
Write-offs - will not post (manual PeopleSoft journal entry required)
More
Total Write-offs
with Write-off
Outstanding Balances - through 9/20/2022
More
Total Balances
Pledges with Balance
Average Balance
Final Installment Due
Mismatch: Appeal?
$3,474.00
40
$86.85
8/5/2022
Yes


Appeal: [redacted] S2022 Friends of Scouting 2022
Description: Friends of Scouting 2022
Business unit:
Category: Annual Giving (Friends of Scouting)
Report code: 2022
Site: [redacted]
Start date: 1/1/2022
End date: 12/31/2022
Goal: $1,000,000.00
Status: Active
Membership:
Revenue Summary
Designations
Prior Appeal
Contributions
Payments
Designations (1)
Edit list of appeal designations
More
Designation
[redacted]00001 Council Gener - Operating
Edit designations
Designation
Default designation
[redacted]00001 Council Gener - Opera...
Help
Save
Cancel

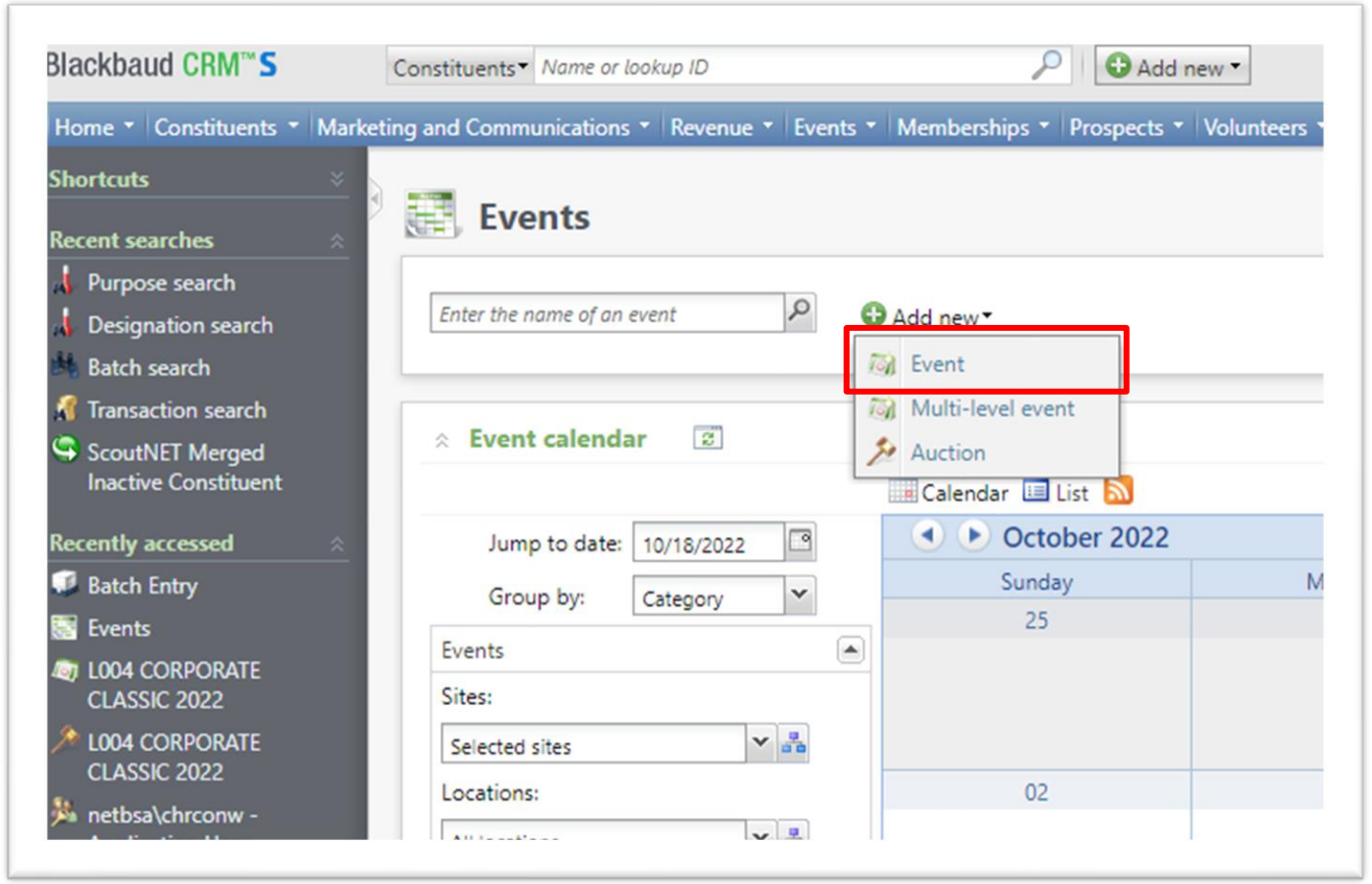

Appeal: ([redacted]) S2022 Friends of Scouting 2022
Description: Friends of Scouting 2022
Business unit:
Category: Annual Giving (Friends of Scouting)
Report code: 2022
Site: [redacted] Council
Start date: 1/1/2022
End date: 12/31/2022
Goal: $1,000,000.00
Status: Active
Membership:
Revenue Summary
Designations
Prior Appeal
Contributions
Payments
Prior Appeal
Edit
Prior Appeal: [redacted]S21-Friends of Scouting 2021
Prior Year Appeal History
More
PY1 Year
PY1 Appeal
PY1 Description
PY2 Year
2021
[redacted] S21-Friends ...
Friends of Scouting...
2020
Edit BSAFR appeal
Previous year appeal: [redacted]S21-Friends of Scouting 2021
Save
Cancel

Creating Future Year Events

Events – Creating for Future Year (FY)

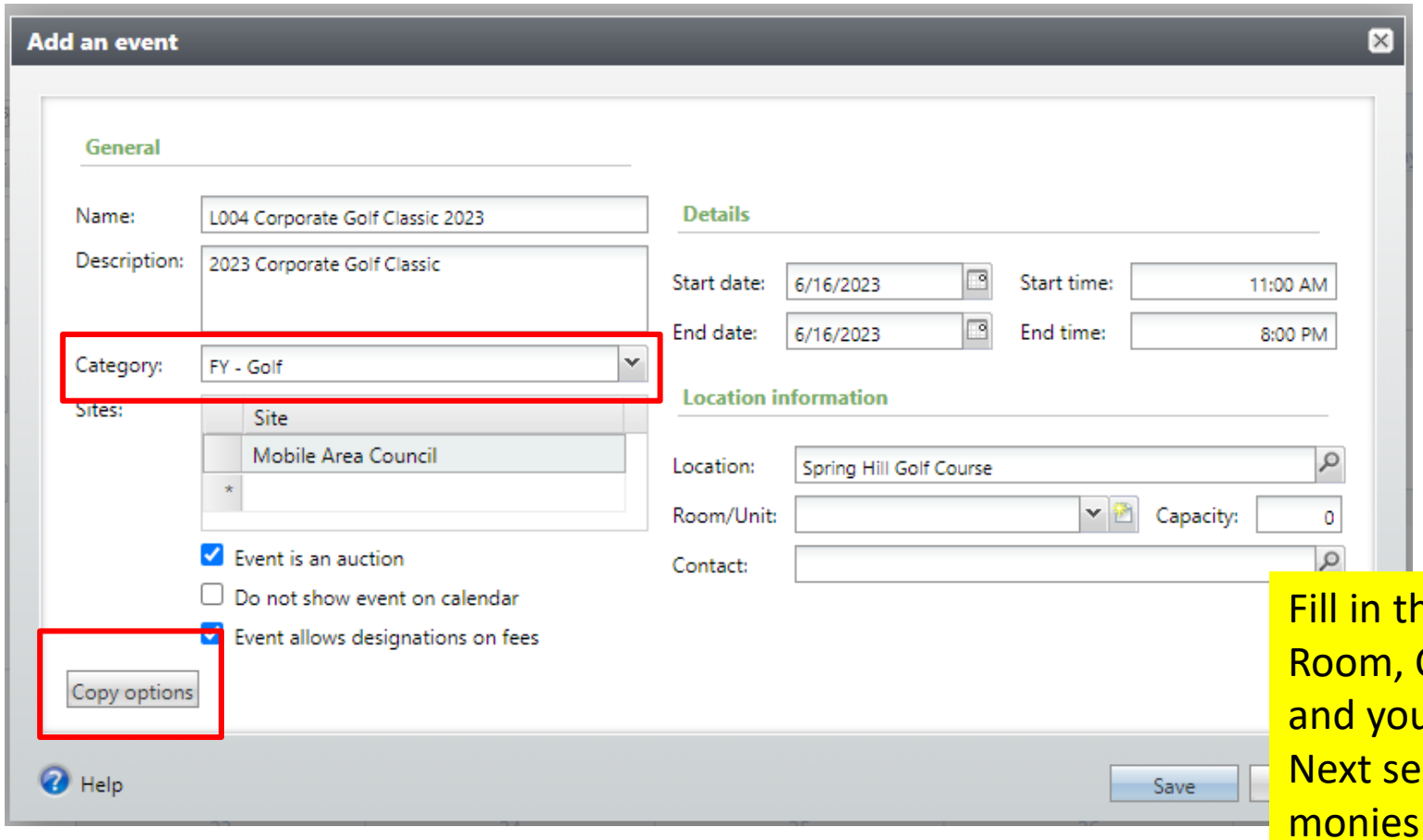
- Create event for 2023
- Remember to set Event Category to FY Category
- Do this if attaching 2023 event payments received in 2023 to registrations for next year.
- Jan 2 after all 2023 event registrations payments have been processed in with a post date of 2022, update event category to current year

Create New Event



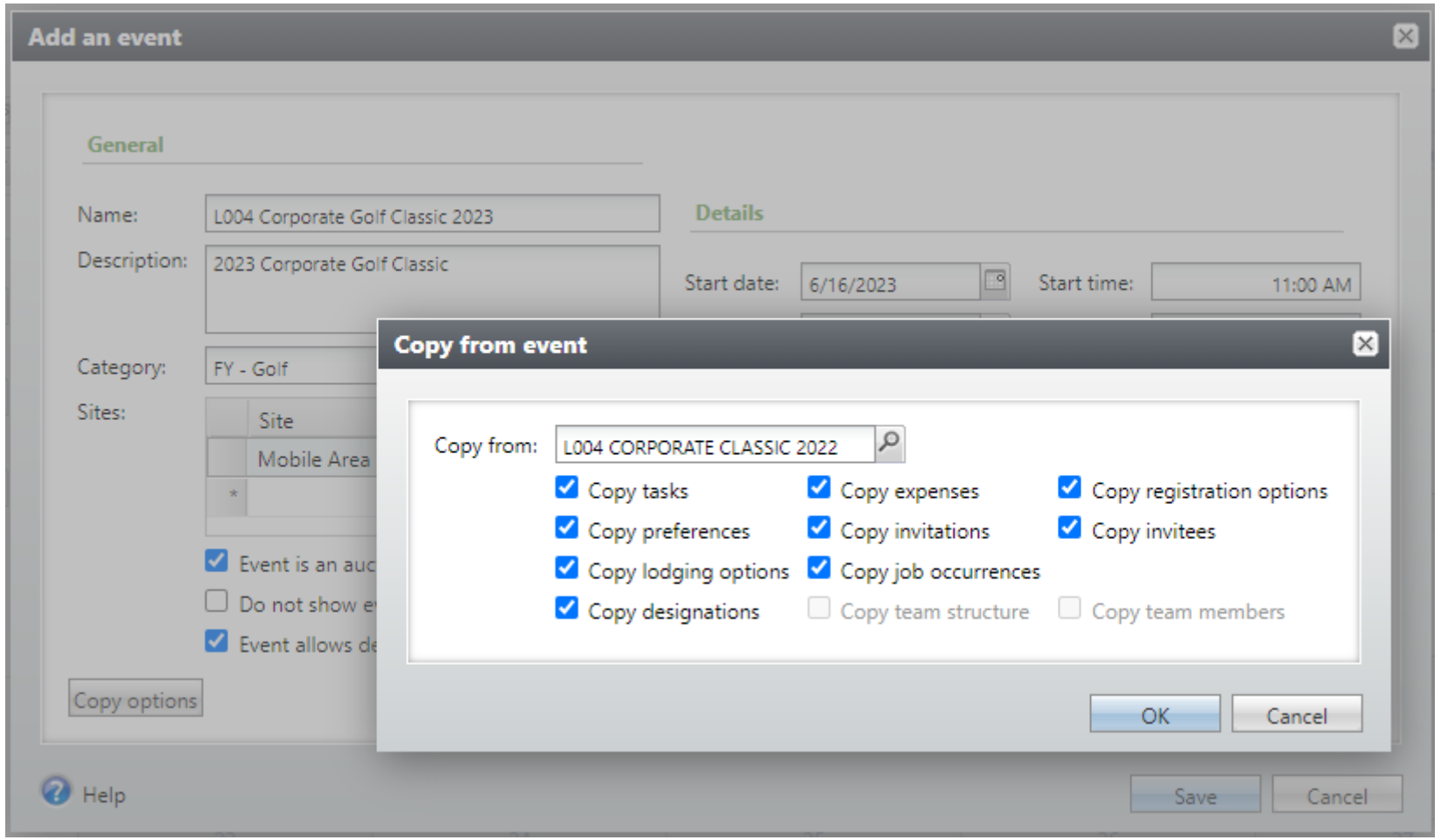
Proceed to the Events functional area and click Add New and select Event.

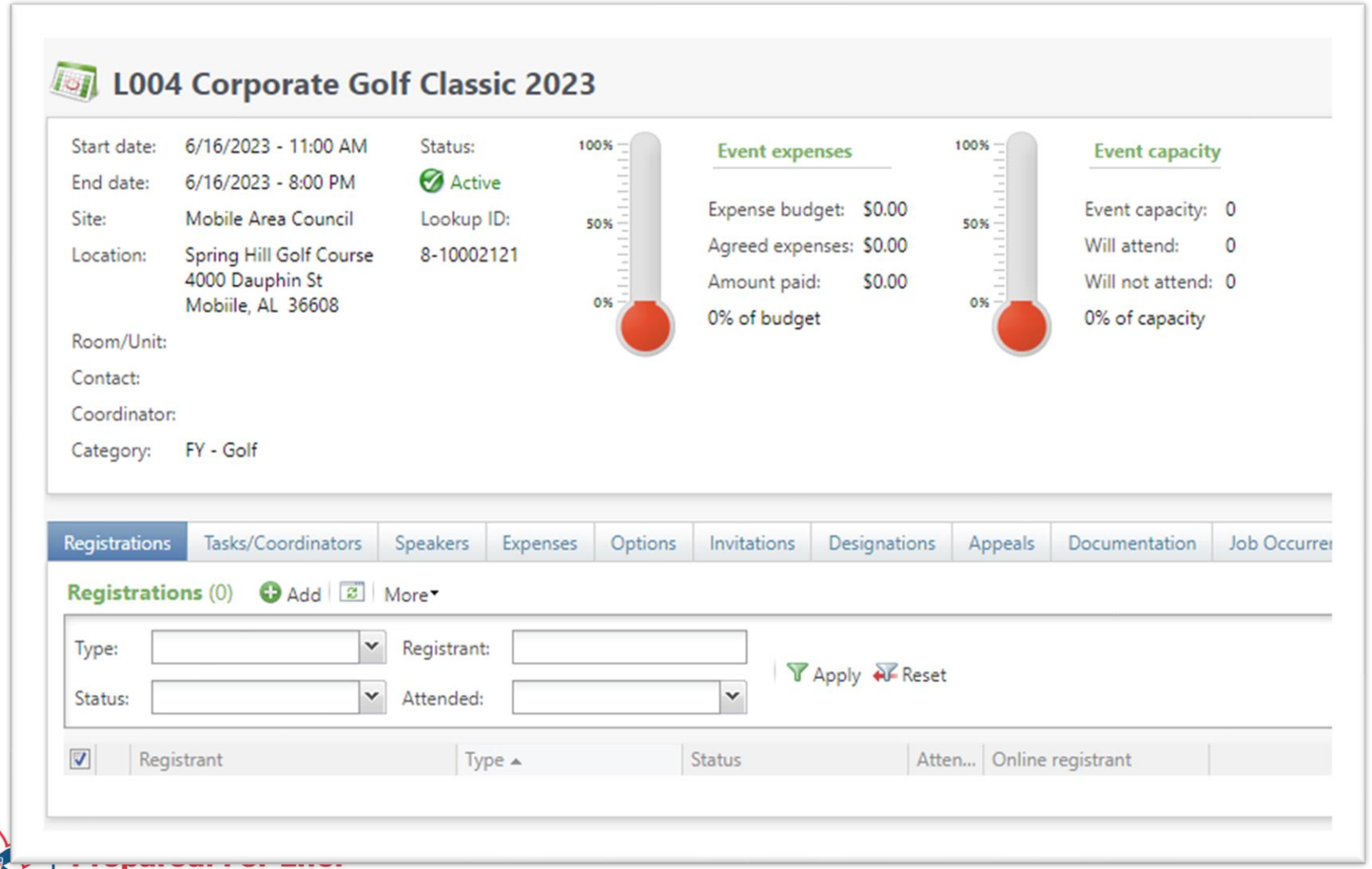
Create new – Copy Option



Fill in the Name, Description, Dates, Times, Location, Room, Contact and check the boxes if it's an auction and you are planning to run payment through it. Next select the proper FY Category. This ensure monies attached to the event in 2022 will be reclassed for 2023. Use Copy options if there is a prior event

Copy options from prior event the update





Add your 2023 appeal to the appeal tab. Add your designations to the designation tab. Designations will copy from last event. Submit your event mapping worksheet to have the event mapped so you can process monies during batch entry.

If you copied options update the options to 2023 information.

Marking Constituents with FOS Appeal

Marking Constituents with 2023 Appeal

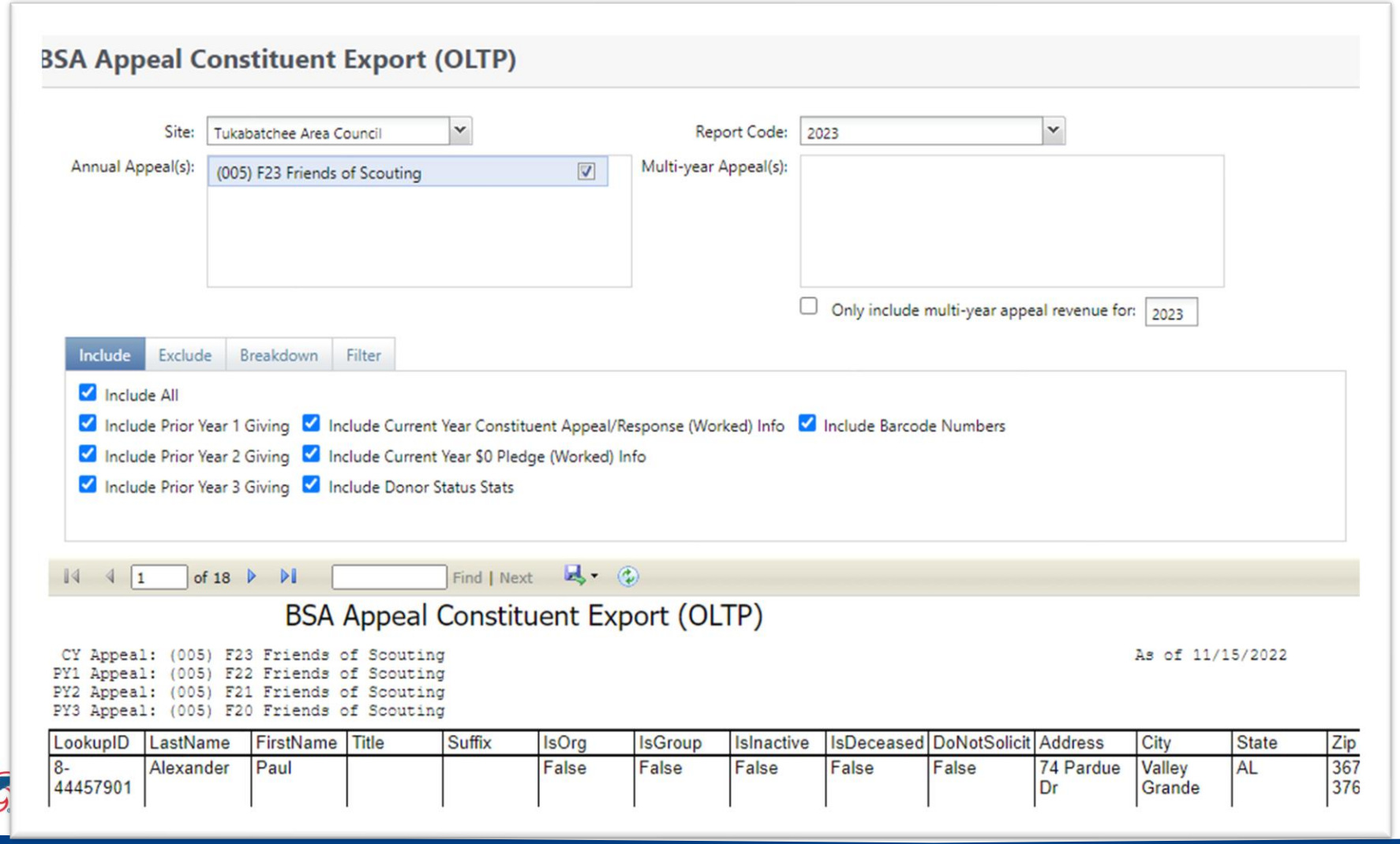
- Used to get a complete list of unworked constituents
- List feeds to your BSA Appeal Constituent Export / Report (OLTP)
- If you don't do this your list is only comprised of those that have been attached to your appeal in the past three years
- Accomplished by using the Pledge Card Generator
- You will need your BSAFR Structure to accomplish this

Step to Follow

- Create your 2023 appeal. (Connect Prior Year Appeals)
- Wait overnight then run your BSA Appeal Constituent Export

  Download to excel – This will give you those that have been connected to your prior appeals for the last three years.
- Next run the pledge card generator marking all groups with the 2023 Appeal
  - Use your top group and all subordinate groups to achieve this.
  - The process will need to then run overnight to add all to your OTLP report

Run Constituent Export – Record count is 936



BSA Appeal Constituent Export (OLTP)

Site: Tukabatchee Area Council

Report Code: 2023

Annual Appeal(s): (005) F23 Friends of Scouting

Multi-year Appeal(s):

Only include multi-year appeal revenue for: 2023

Include | Exclude | Breakdown | Filter

Include All

Include Prior Year 1 Giving | Include Current Year Constituent Appeal/Response (Worked) Info | Include Barcode Numbers

Include Prior Year 2 Giving | Include Current Year $0 Pledge (Worked) Info

Include Prior Year 3 Giving | Include Donor Status Stats

1 of 18 Find | Next

BSA Appeal Constituent Export (OLTP)

CY Appeal: (005) F23 Friends of Scouting
PY1 Appeal: (005) F22 Friends of Scouting
PY2 Appeal: (005) F21 Friends of Scouting
PY3 Appeal: (005) F20 Friends of Scouting

As of 11/15/2022

LookupID	LastName	FirstName	Title	Suffix	IsOrg	IsGroup	IsInactive	IsDeceased	DoNotSolicit	Address	City	State	Zip
8-44457901	Alexander	Paul			False	False	False	False	False	74 Pardue Dr	Valley Grande	AL	367376

After the system refreshes overnight your 2023 appeal will show in the report drop down. I included all historical records attached to the prior appeals and broke it down by structure and giving category. Then I viewed the report. I then downloaded to get a record count which came to 936 records that are attached to the last three prior appeals.

Find your BSAFR Group Query and find top Level Group

Information library

Ad-hoc Query: L005 BSAFR Groups

Name:	L005 BSAFR Groups	Owner:	Denise Miller BSA-005	OData:	Get OData link
Type:	Constituent	Source view:	Constituents		
Category:		Description:	List of all BSAFR groups. Change the Site ID criteria to match your council.		
Site:	Tukabatchee Area Council	Others can modify:	Yes		

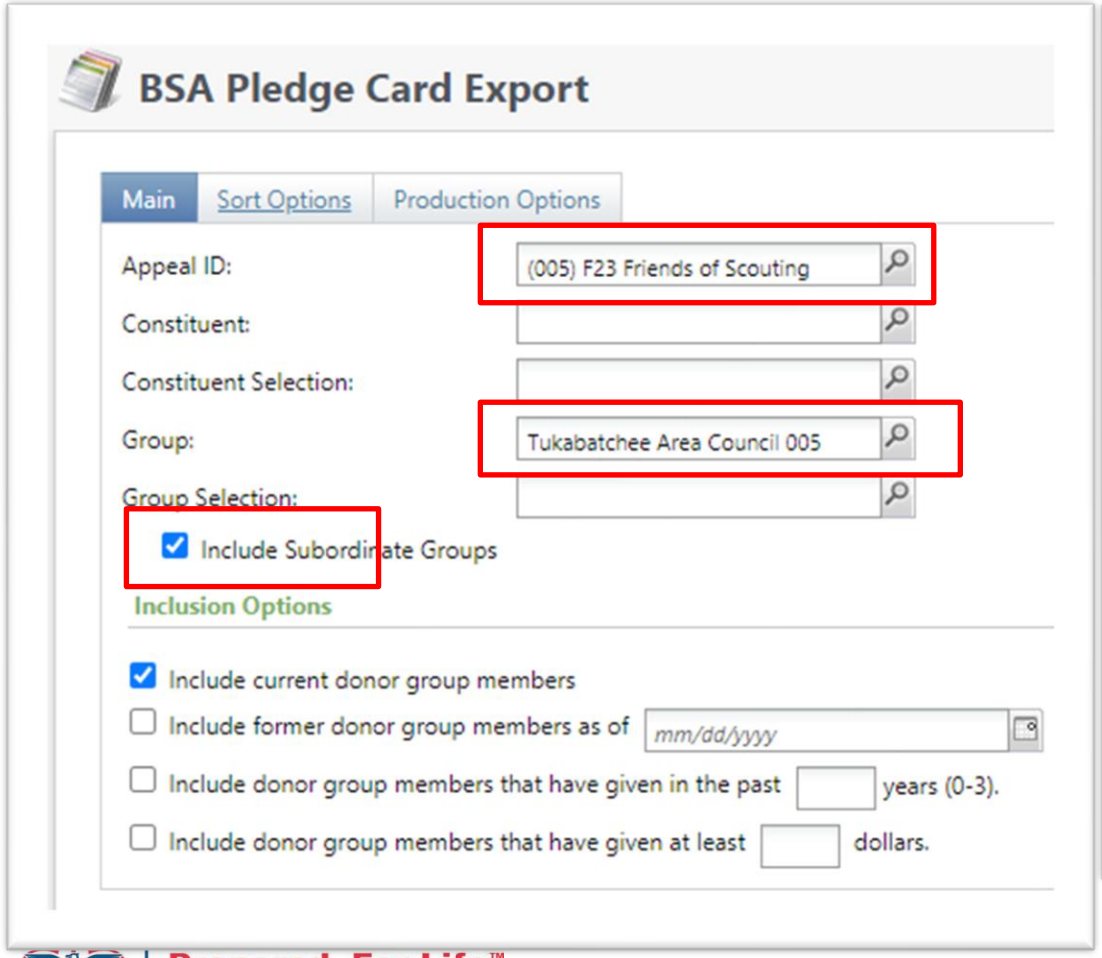
Results (187 records found)

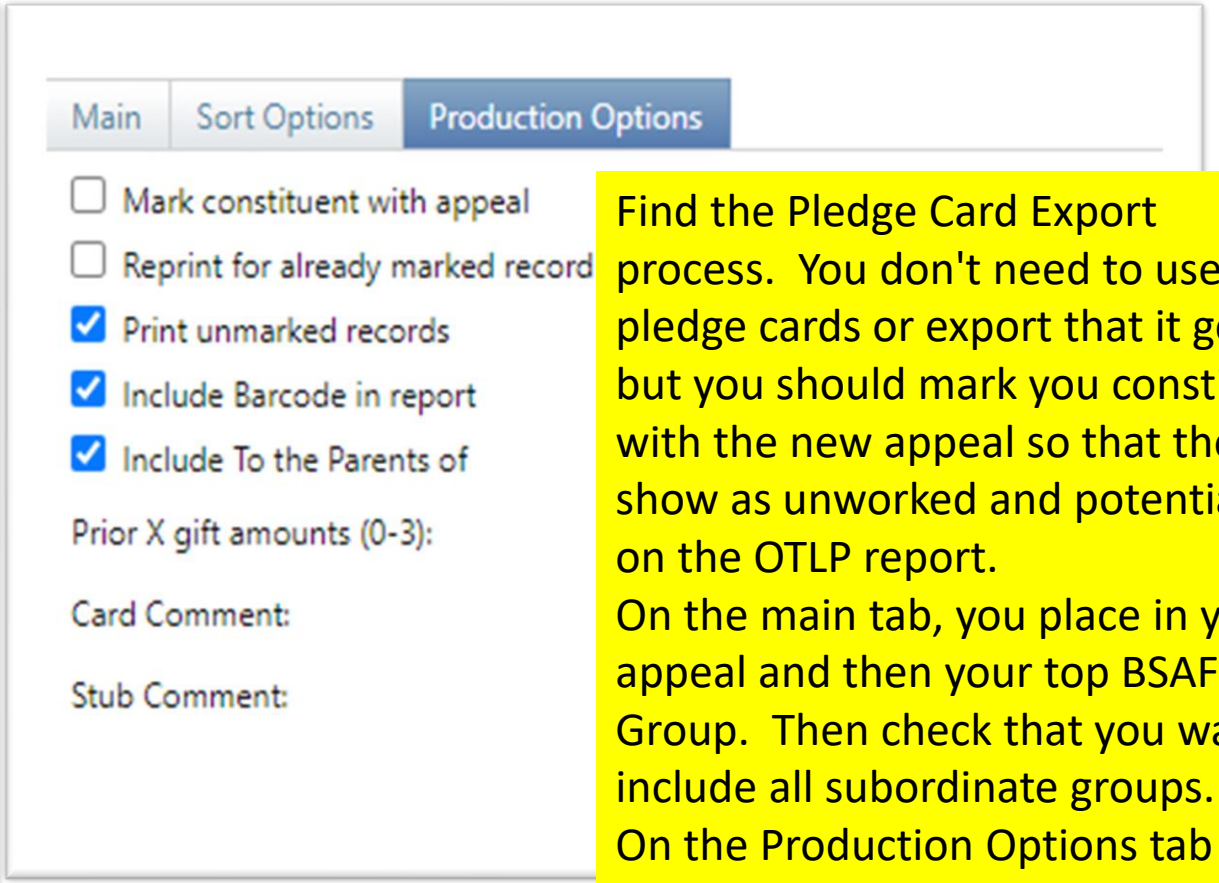
Page 1 of 4

Site	Lookup ID	Name	BSAFR\Solicit f...	BSAFR\BSA str...	BSAFR\Giving c...	BSAFR\BSAFR s...
005	8-57187634	Eagle Dinner	Yes	Tukabatchee Ar...	Council	
005	8-57866787	Scouting Clays	Yes	Tukabatchee Ar...	Council	
005	8-40728301	Tukabatchee Area Council 005	No	Tukabatchee Ar...	Council	
005	8-41791529	Crane 02	Yes	Crane	Community	
005	8-55192946	Crane District Community Chair	Yes	Crane	Community	
005	8-56704509	Crane Bob Myers	Yes	Crane	Community	Bob Myers
005	8-56736455	Crane community Alfred Morelock	Yes	Crane	Community	Alfred D. Morel...
005	8-46006633	Crane Community Allen Bearden	Yes	Crane	Community	Allen Bearden
005	8-46006637	Crane Community Carrie & Tom Glover	Yes	Crane	Community	Carrie & Tom G...
005	8-56755745	Crane Community Dalton Williamson	Yes	Crane	Community	Dalton Williams...

To add all members of your BSAFR groups to your 2023 FOS appeal you need to use the Pledge Card generator. You first need to review your BSAFR group query in your information library and figure out which group is your top group so you can mark all members from the top group through its subordinate groups. For this council the 3rd group on the list is the top group. The first two groups are event related groups.

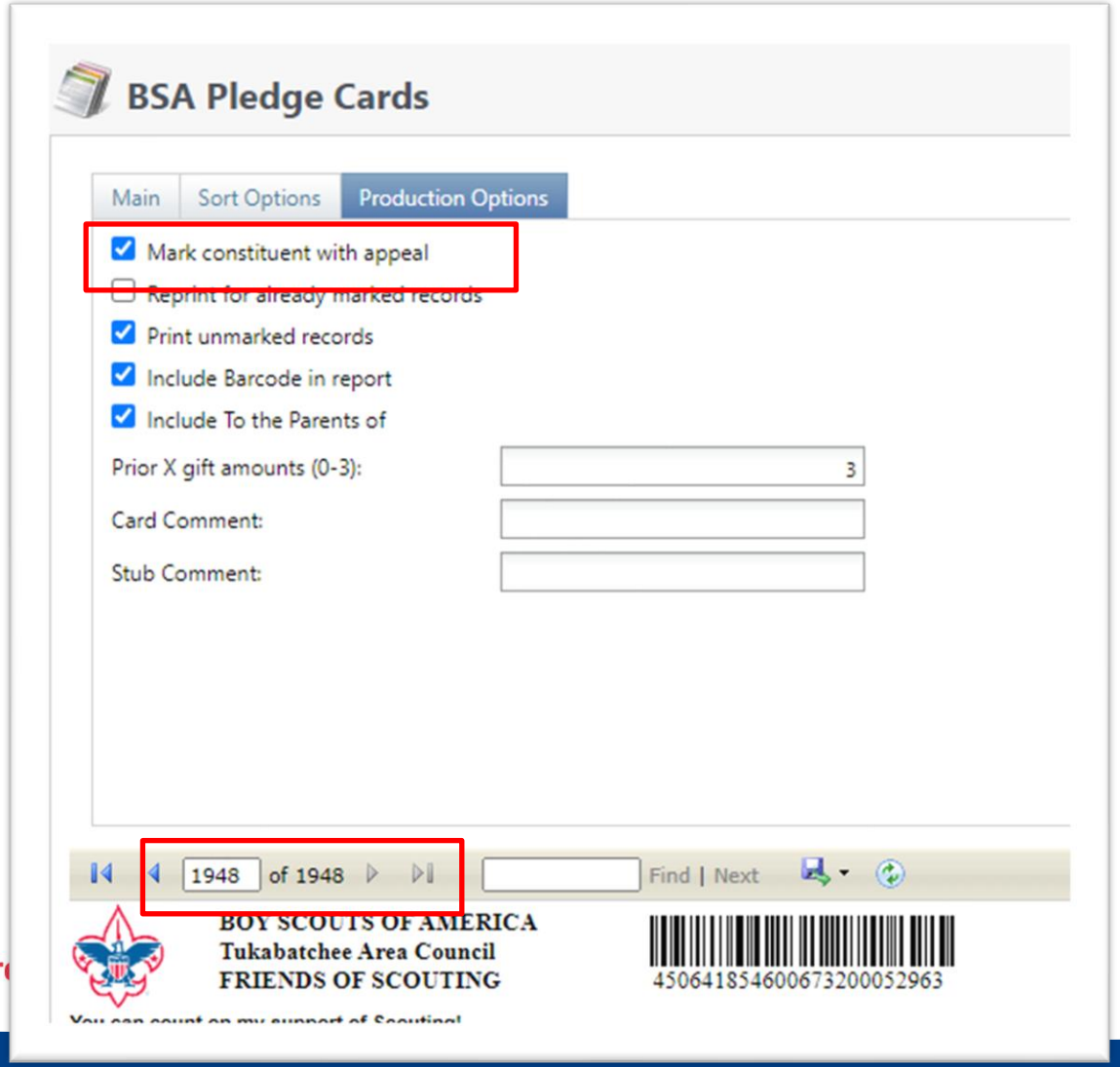
Mark Group Members with Appeal Analysis/More Tasks/ Pledge Card Export



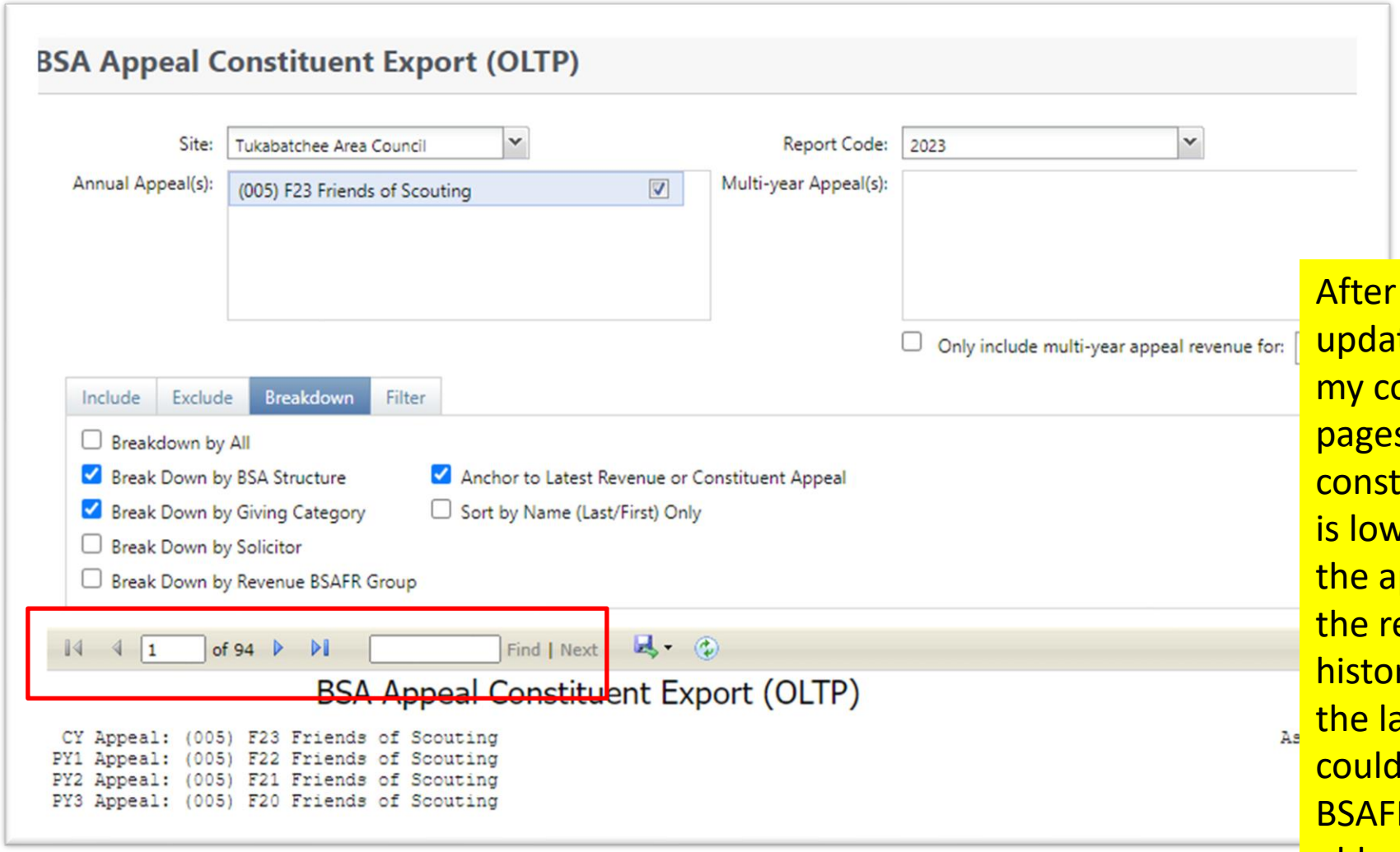


Find the Pledge Card Export process. You don't need to use the pledge cards or export that it generates but you should mark you constituents with the new appeal so that they will show as unworked and potential donors on the OTLP report.
On the main tab, you place in your 2023 appeal and then your top BSAFR Group. Then check that you want to include all subordinate groups.
On the Production Options tab click the three boxes checked and view the results to get a count.

Final View Results is done with Mark Constituent Checked



I ran the report instead of the export and it gave me 1948 pages of pledge cards. I multiplied this by 3 and I got 5,952 group members that will be marked by the appeal. These should all show on my appeal constituent export once marked. Remember current donor already show.
To mark the constituents, check the Mark Constituent With Appeal Box and click view result.



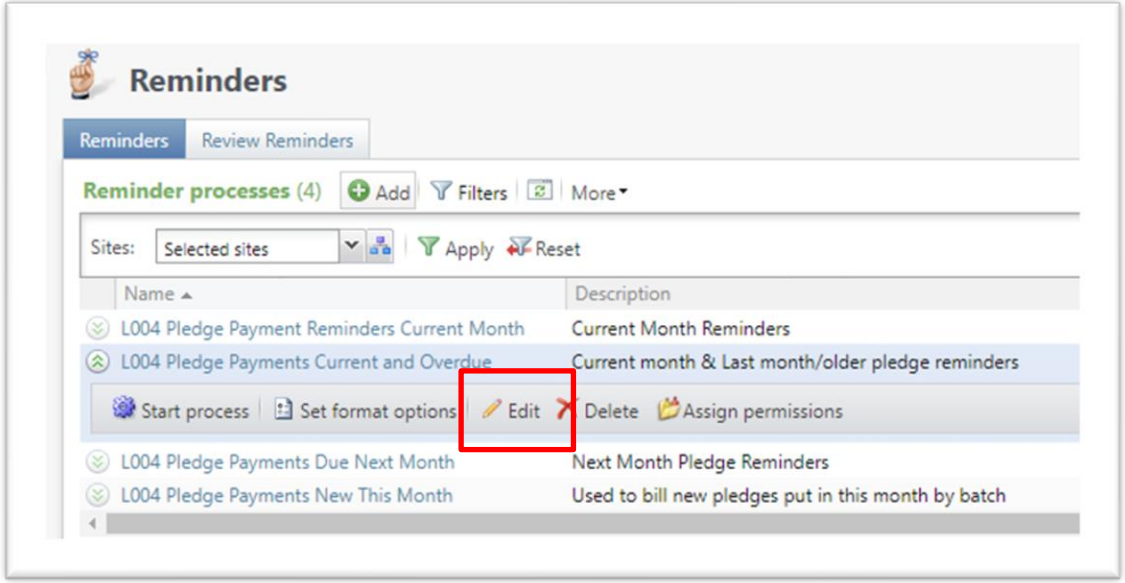
After the system ran overnight to update reporting tables I then ran my constituent export. I now have 95 pages which equates to 5,147 constituents in my appeal report. This is lower than the number marked by the appeal but 936 where already on the report because they had giving history. The list contains my donors for the last three years and others that I could ask because they are part of my BSAFR groups, the history may be older than three years.

Updating Donor Communications for 2023

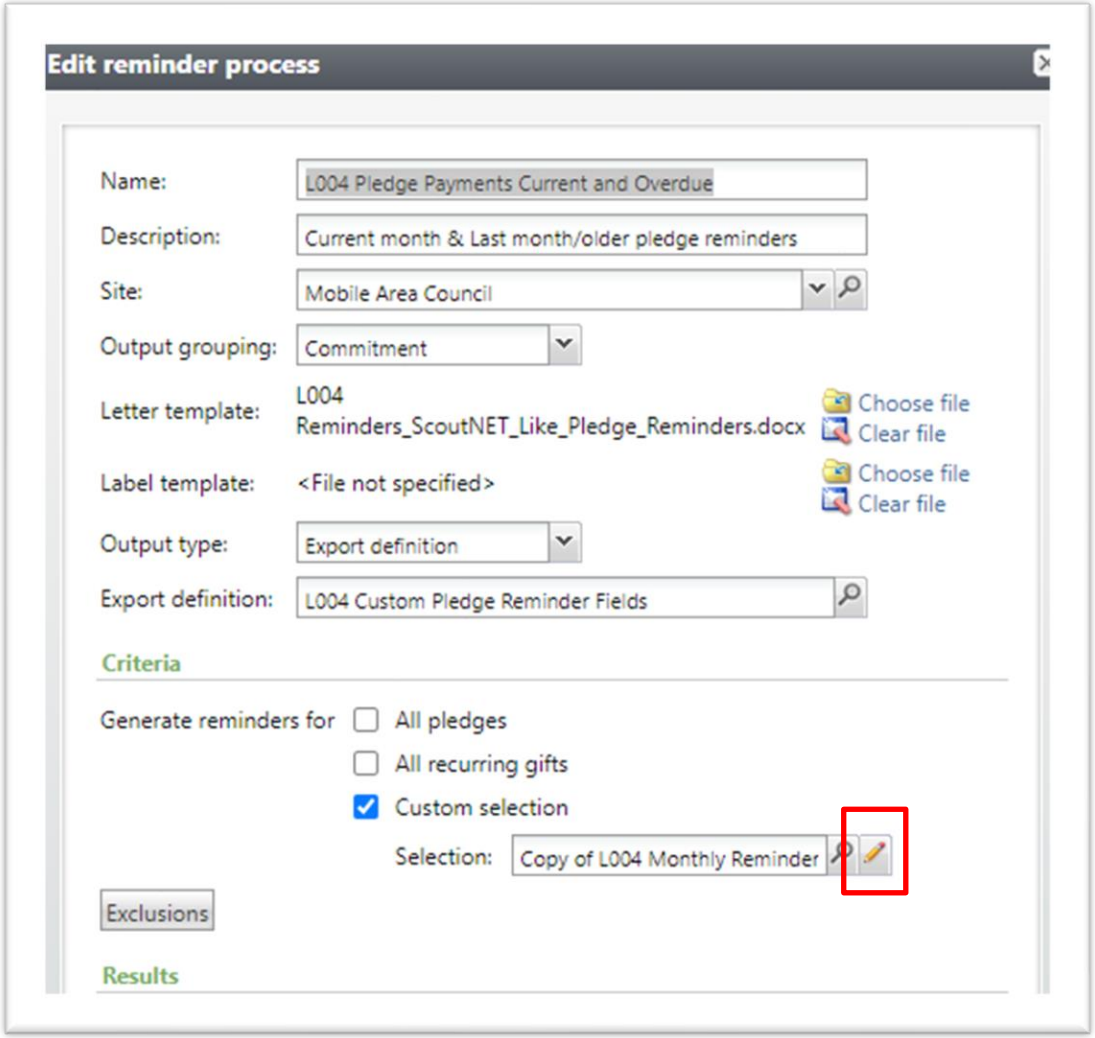
Updating Reminders and Acknowledgements

- New appeals mean new revenue
- Selections that creates donor communication needs to be updated
- Add new appeals
- Add report code 2023

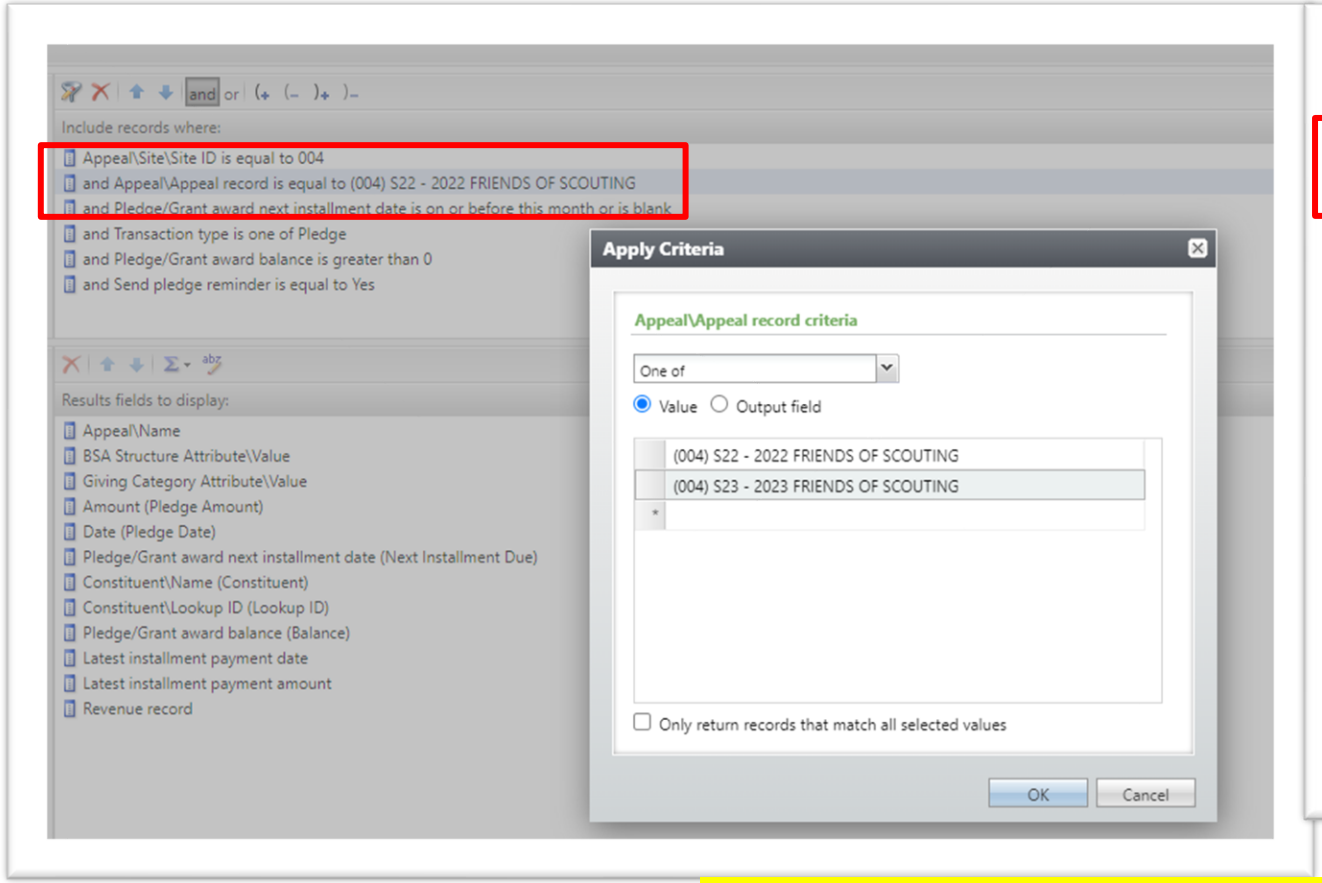
Finding your Reminder Selections

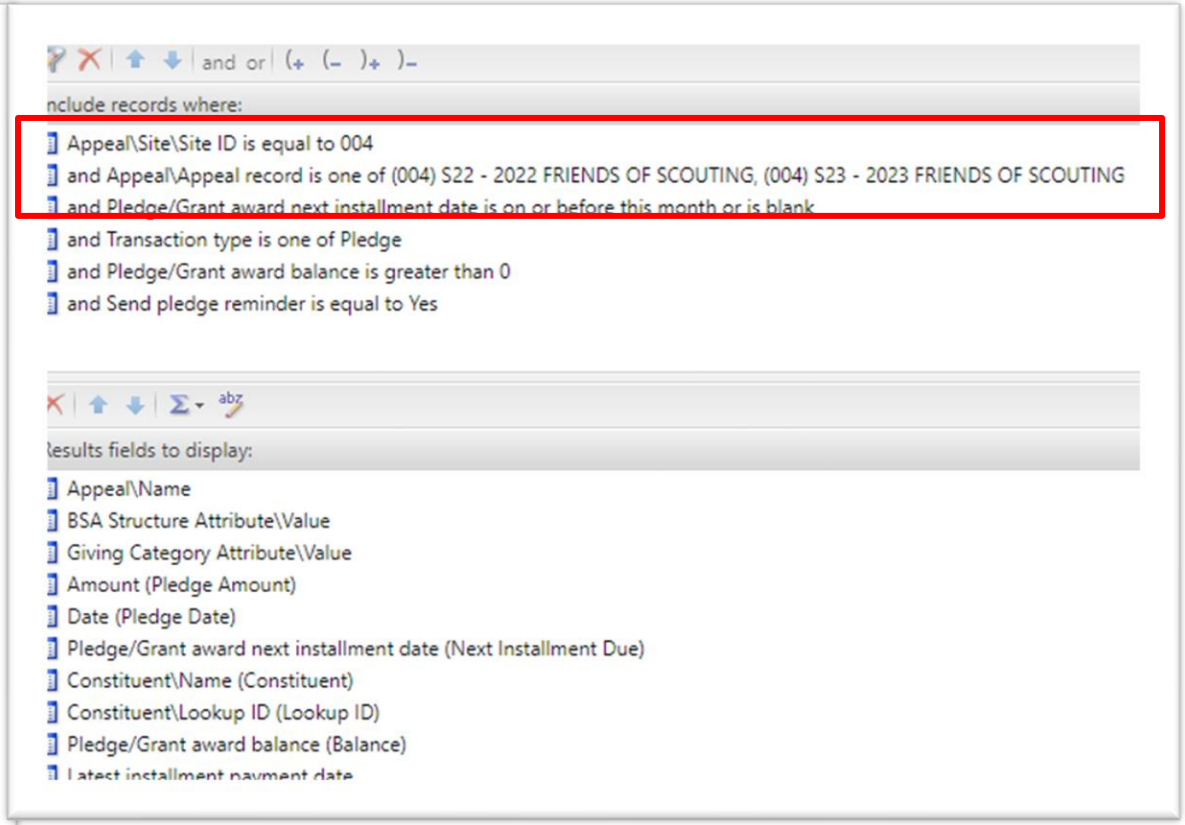


Reminders are found under Marketing & Communications / Donor Relations. You will need to edit each reminder process and update the selection for the next year.



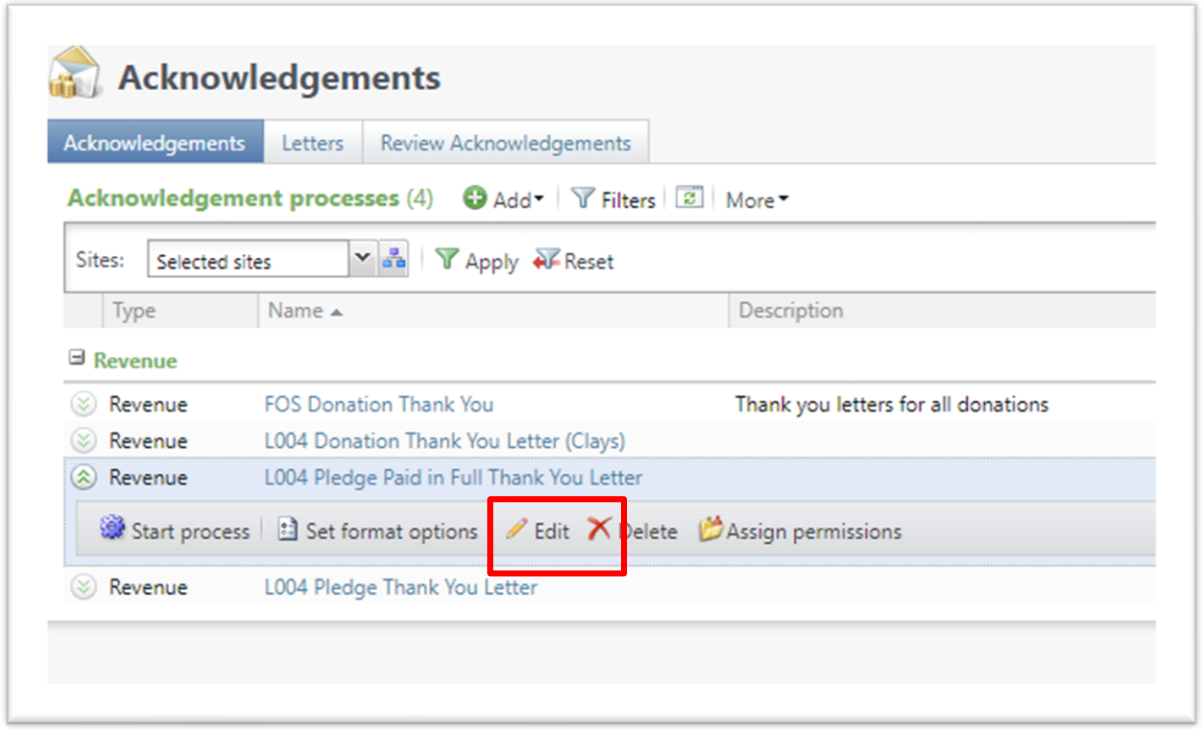
Updating your Appeal selections

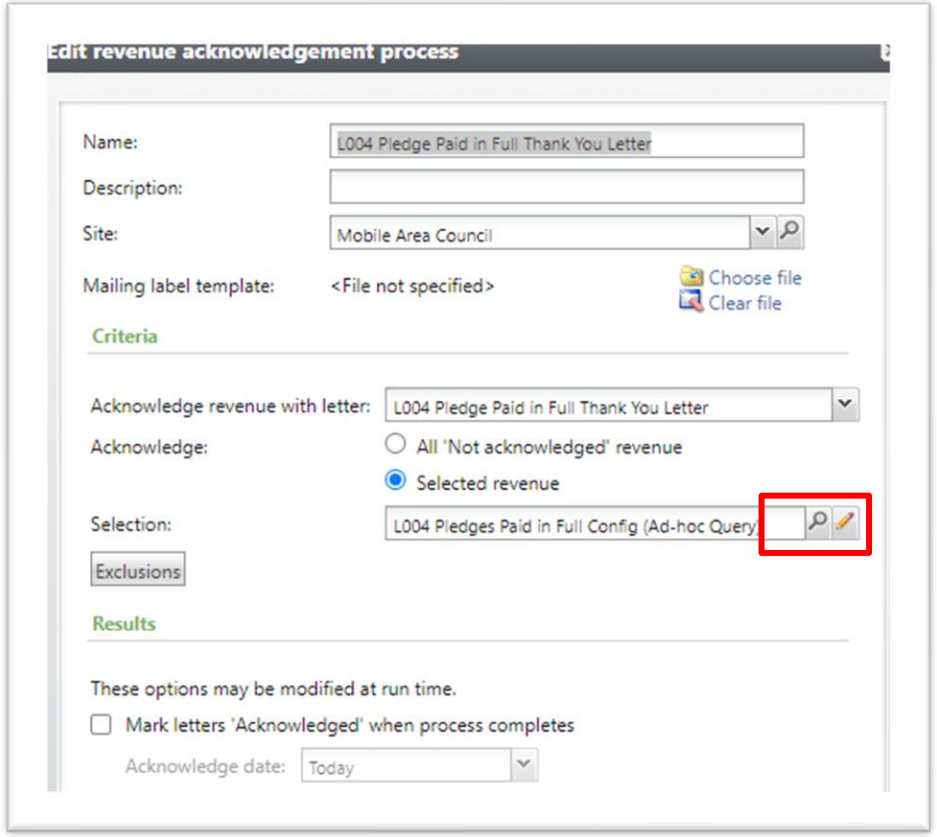




We still need to remind current appeal but also need to start reminding those that pledge for 2023. Double click your appeal record box and add the 2023 appeal and save. You may need to change it to "One Of" to add multiple appeals.

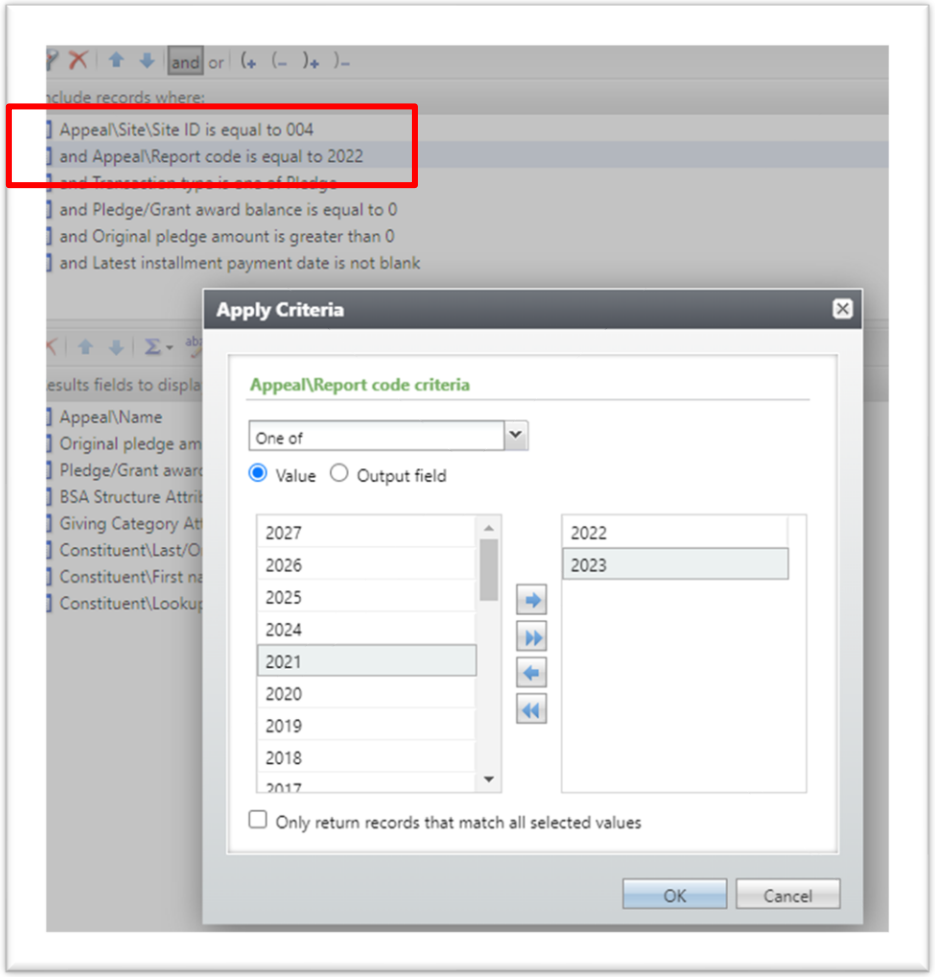
Finding your Acknowledgement Selections



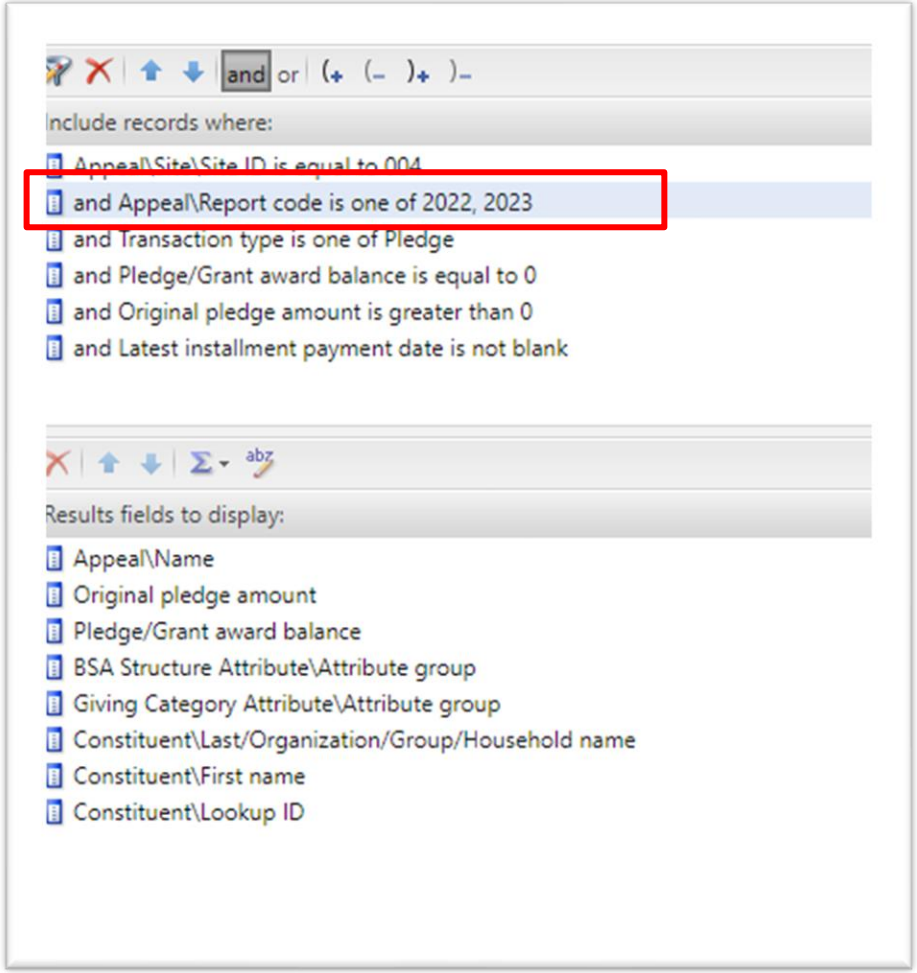


Acknowledgements are found under Marketing & Communications / Donor Relations. You will need to edit each acknowledgement process and update the selection for the next year.

Updating Report Codes

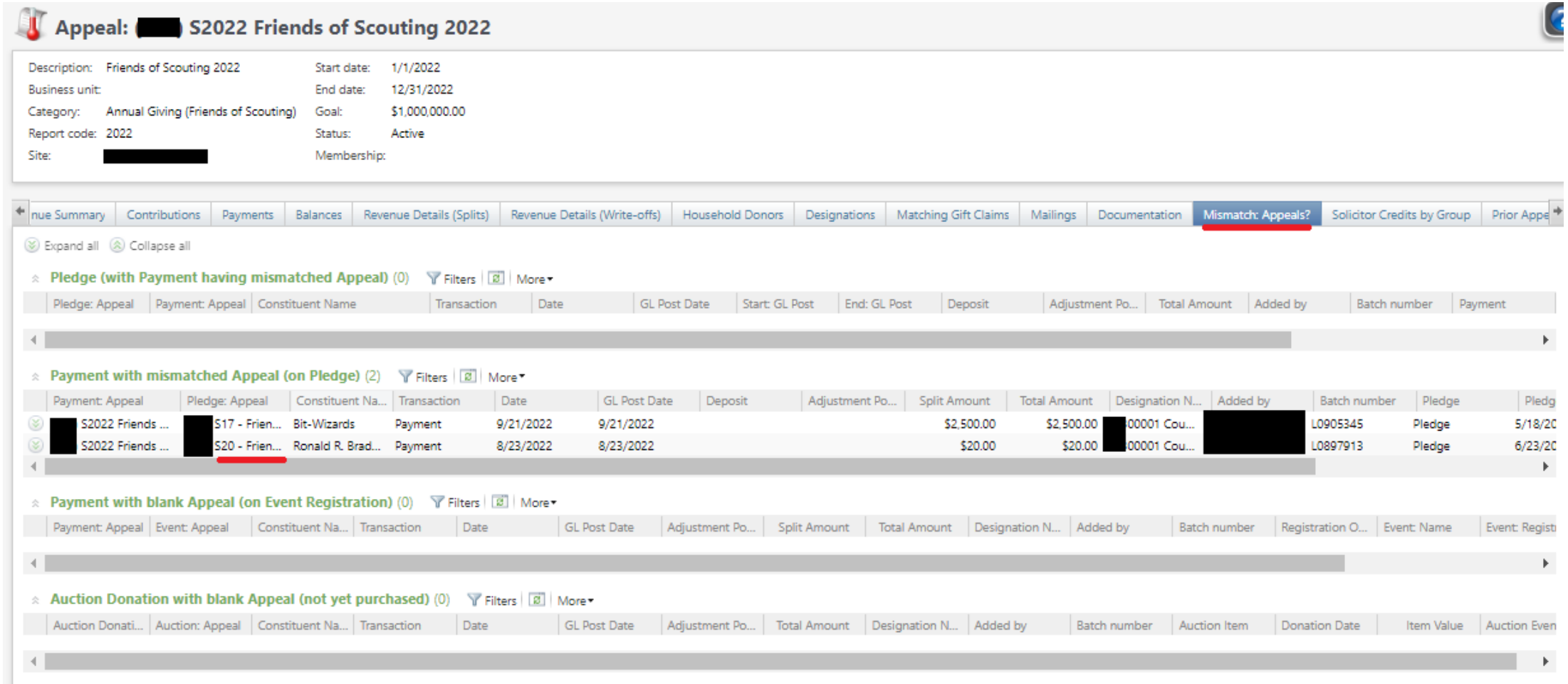


We still need to thank current appeals with report code of 2022 but you also need to start reminding those that pledge for 2023. Double click your Report Code line add the 2023 Report Code and save. You may need to change it to "One Of" to add multiple Report Codes.



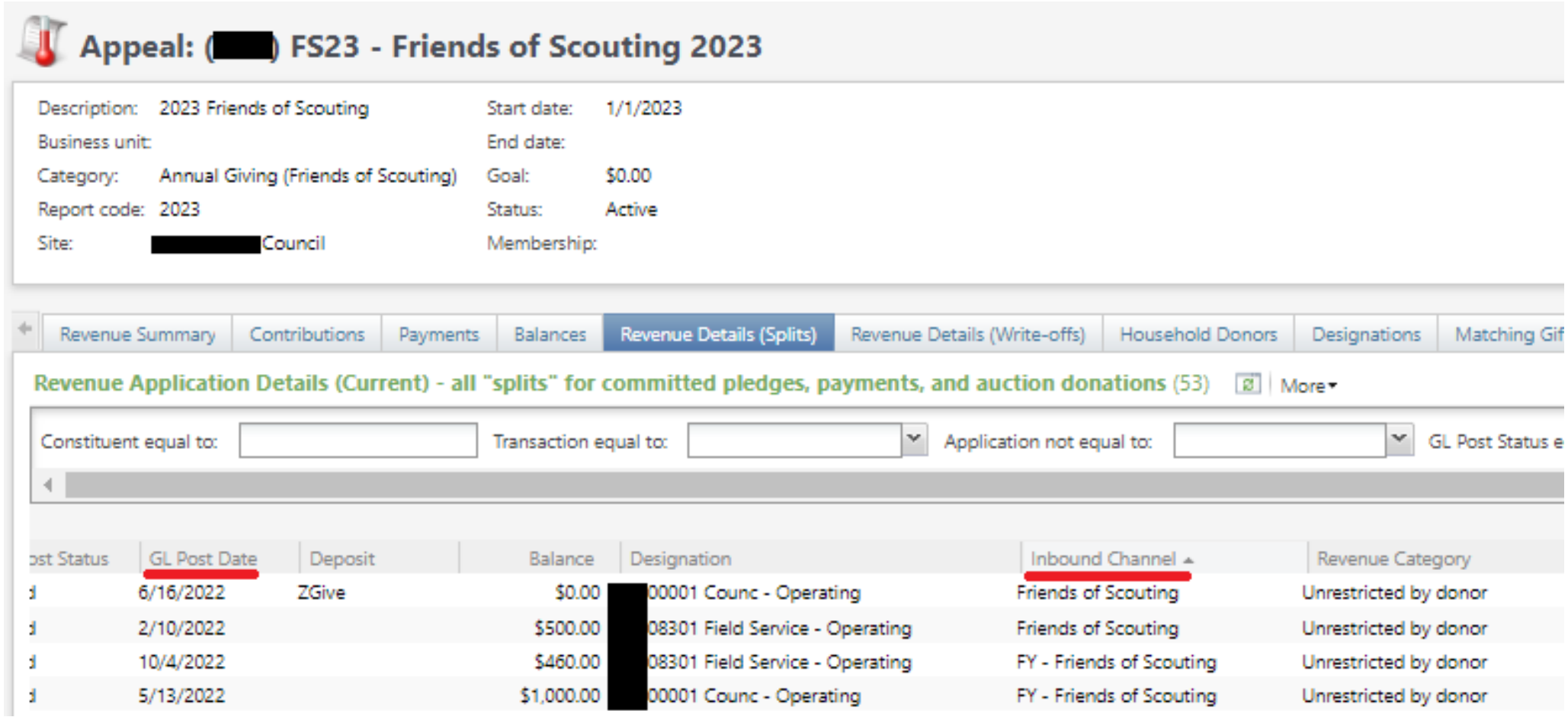
Year-End Revenue Checks

Mismatched Appeal tabs



Year-End Revenue Checks

Future Year (FY) Inbound Channel on Details Splits Tab



Appeal: ([redacted]) FS23 - Friends of Scouting 2023

Description:	2023 Friends of Scouting	Start date:	1/1/2023
Business unit:		End date:	
Category:	Annual Giving (Friends of Scouting)	Goal:	$0.00
Report code:	2023	Status:	Active
Site:	[redacted]Council	Membership:	

Revenue Summary | Contributions | Payments | Balances | **Revenue Details (Splits)** | Revenue Details (Write-offs) | Household Donors | Designations | Matching Gif

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (53) More

Constituent equal to: | Transaction equal to: | Application not equal to: | GL Post Status e

ost Status	GL Post Date	Deposit	Balance	Designation	Inbound Channel	Revenue Category
d	6/16/2022	ZGive	$0.00	[redacted]00001 Counc - Operating	Friends of Scouting	Unrestricted by donor
d	2/10/2022		$500.00	[redacted]08301 Field Service - Operating	Friends of Scouting	Unrestricted by donor
d	10/4/2022		$460.00	[redacted]08301 Field Service - Operating	FY - Friends of Scouting	Unrestricted by donor
d	5/13/2022		$1,000.00	[redacted]00001 Counc - Operating	FY - Friends of Scouting	Unrestricted by donor

Future Year – Inbound Channel

- FY – Inbound channel is used to place dollars raised into the reclass account in PeopleSoft.
- This is used when we are raising monies to be used next year.
- Normally used during the last quarter of current year with 2023 appeals with revenue having 2022 postdates.
- If you fail to do this, next year's monies will show as current year contributions thus overstating your council financial.
- Stop using FY – Inbound Channel once you have completed 2022 entries into your 2023 appeal using 2022 postdates.

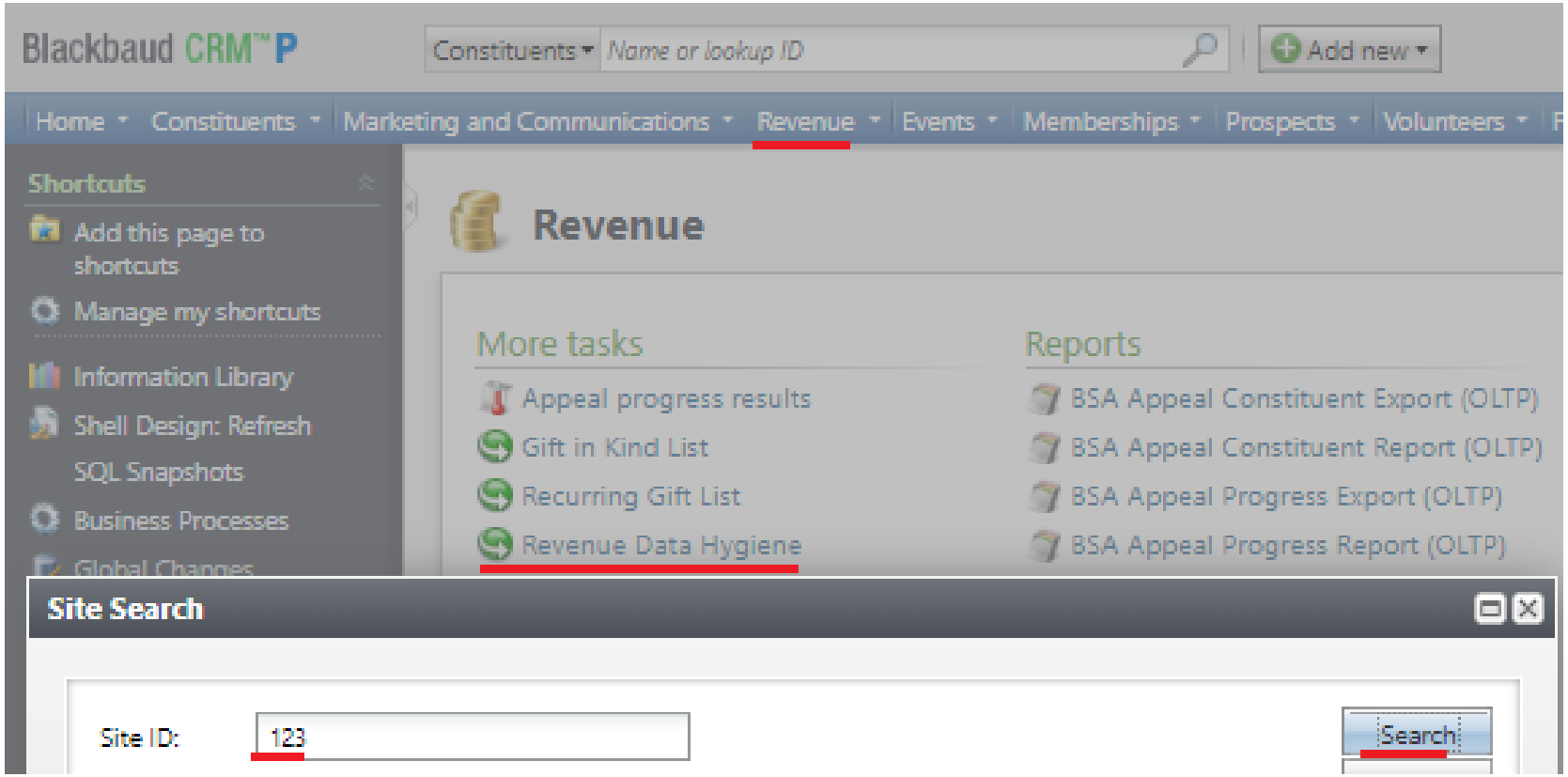
Data Lists in CRM

New Data Lists Available in CRM

Revenue Data Hygiene

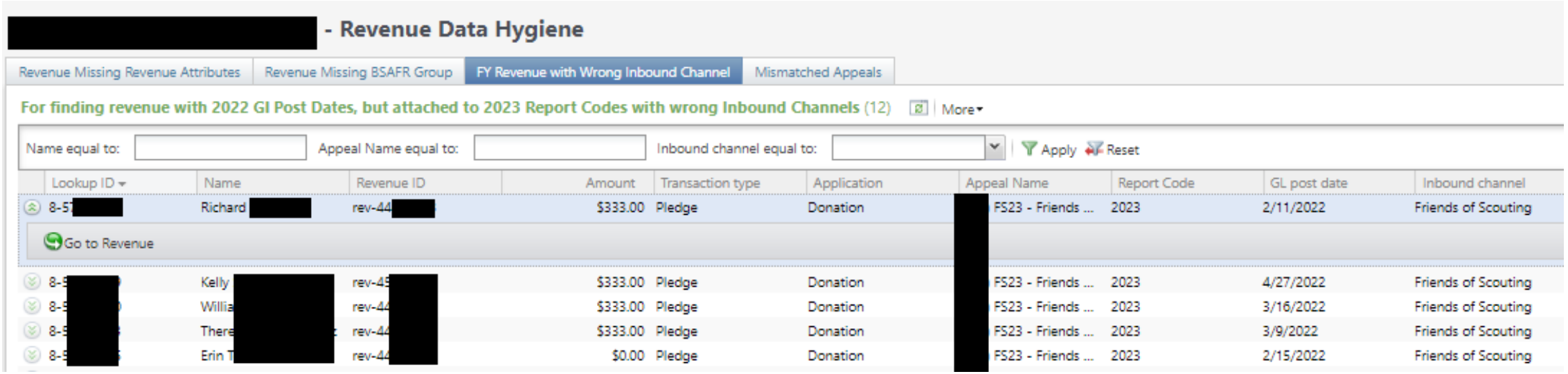
Revenue Data Hygiene

Revenue>Revenue Data Hygiene, search for Council Site



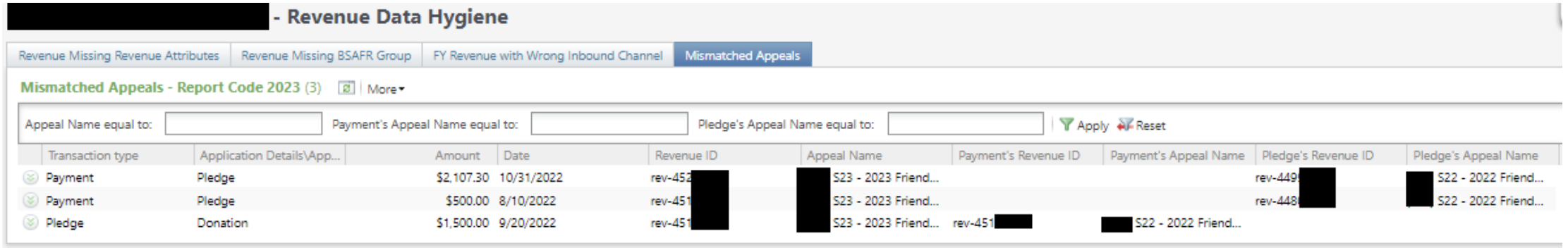
Revenue Data Hygiene

FY Revenue with Wrong Inbound Channel



Revenue Data Hygiene

Mismatched Appeals



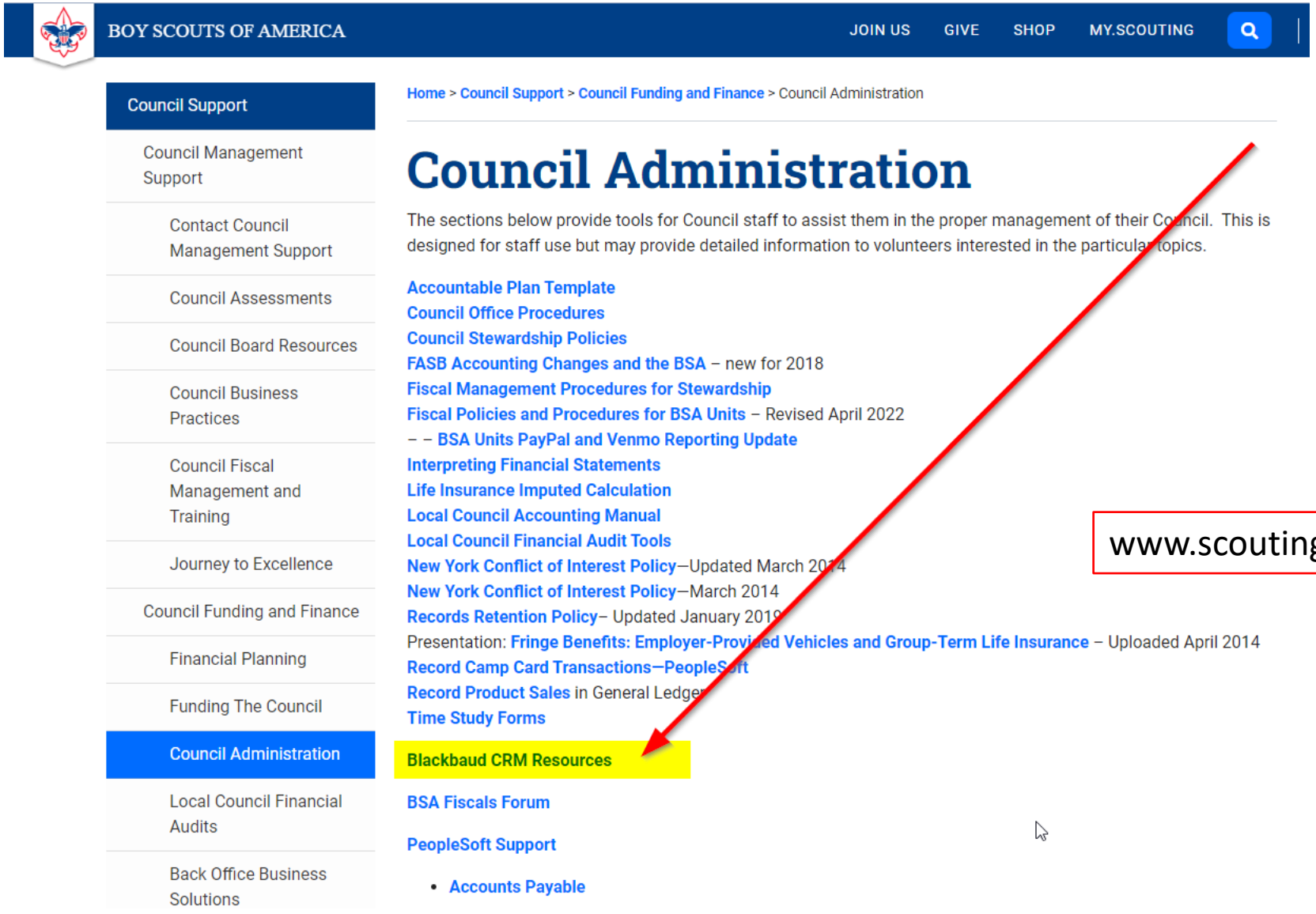
Where to find Data Lists

Constituents Tab

- Interactions List
- Organization Donor List
- Employer-Employee Relationships
- BSA Eagles Listbuilder

Revenue Tab

- Appeal progress results
- Gift in Kind List
- Recurring Gift list
- Revenue Data Hygiene



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

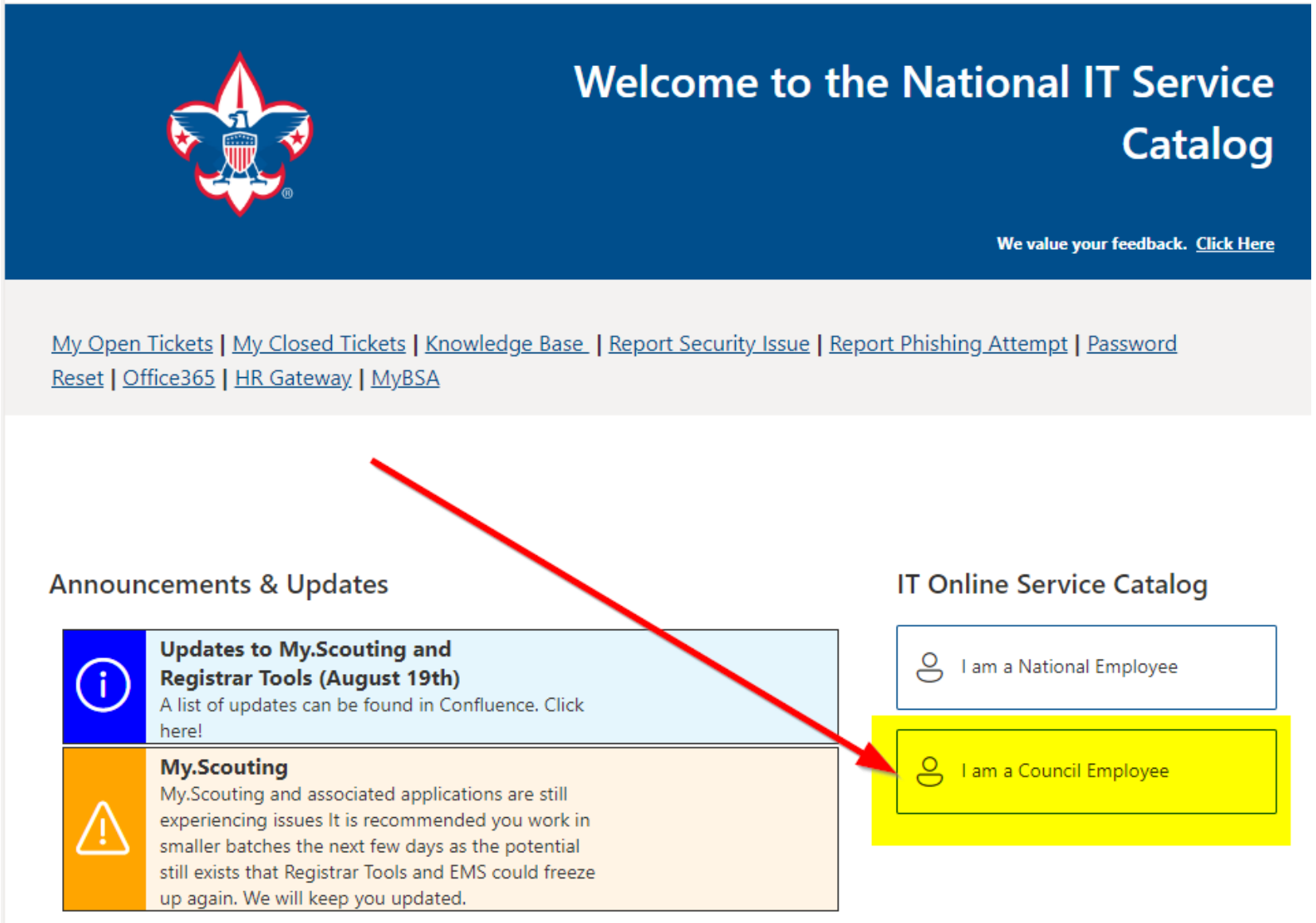
January 2022 User Forum – **Slide Deck** – **recording**
February 2022 User Forum – **Slide Deck** – **recording**
March 2022 User Forum – **Slide Deck** – **recording**
April 2022 User Forum – **Slide Deck** – **recording**
– Creating Constituent Interactions * Using the Constituent Interaction Data List * Using Development Workspace * Scouting Gives Setup

2021

Member Care Self-Service

- http://membercare.scouting.org

- Creating an incident directly in JIRA


Welcome to the National IT Service Catalog
We value your feedback. Click Here
My Open Tickets | My Closed Tickets | Knowledge Base | Report Security Issue | Report Phishing Attempt | Password Reset | Office365 | HR Gateway | MyBSA
Announcements & Updates
Updates to My.Scouting and Registrar Tools (August 19th)
A list of updates can be found in Confluence. Click here!
My.Scouting
My.Scouting and associated applications are still experiencing issues It is recommended you work in smaller batches the next few days as the potential still exists that Registrar Tools and EMS could freeze up again. We will keep you updated.
IT Online Service Catalog
I am a National Employee
I am a Council Employee

Service Categories

- Accounts & Passwords
- BSA Applications (Operations)
- BSA Applications (Program)
- Email, Communication & Collaboration
- Network Services
- Security Services
- Hardware & Software
- General Assistance

Welcome to the National Online Support Center Service Catalog.

This service catalog is a detailed list of services provided by the Information Services Group.

Each service will have the following information:

- A brief description
- How to request support
- Links to additional knowledge or training
- Highlighted Frequently Asked Questions

To go directly to the knowledge base, click here.

If there is something we can do to make this service catalog better, please let us know; click here.

All Council Services

Service Categories

- Accounts & Passwords
- BSA Applications (Operations)
- BSA Applications (Program)
- Email, Communication & Collaboration
- Network Services
- Security Services
- Hardware & Software
- General Assistance

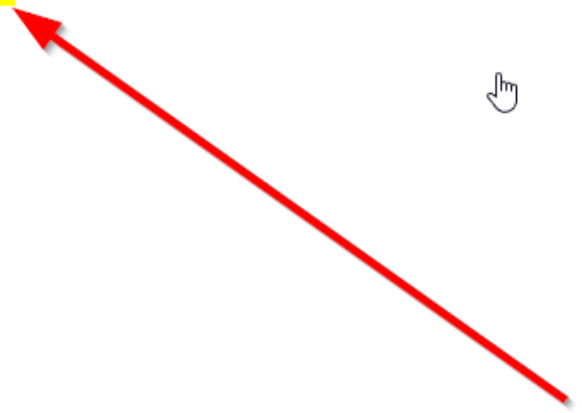
General Assistance

The General Assistance option should be used when the issue or question isn't Catalog.

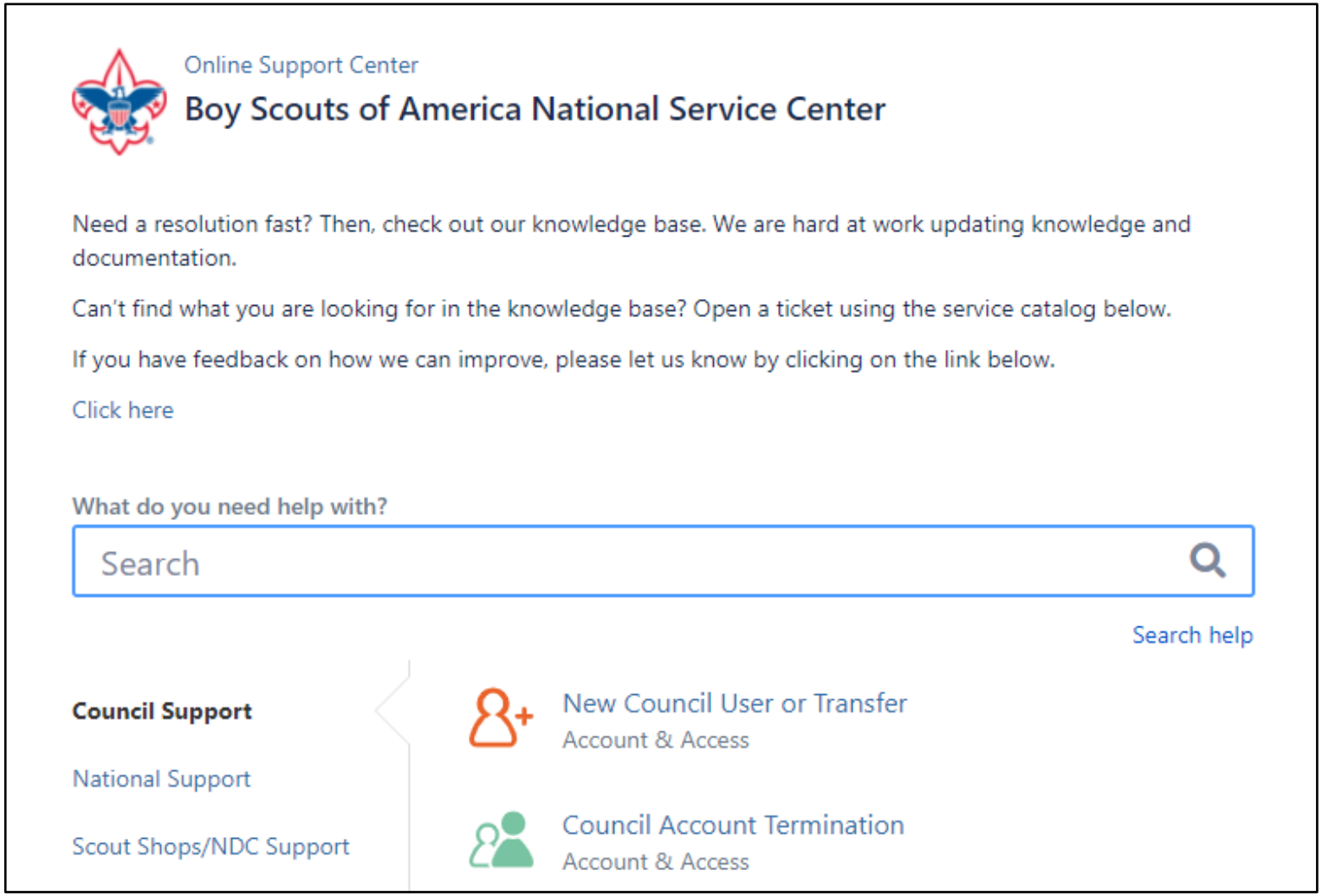
When possible, open a ticket by selecting the service from the Service Catalog Request link. Doing so will ensure all the necessary information is collected and quickly routed.

Tickets opened using the general assistance option go into the general queue the order received.

Open A Request



http://membercare.scouting.org



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.

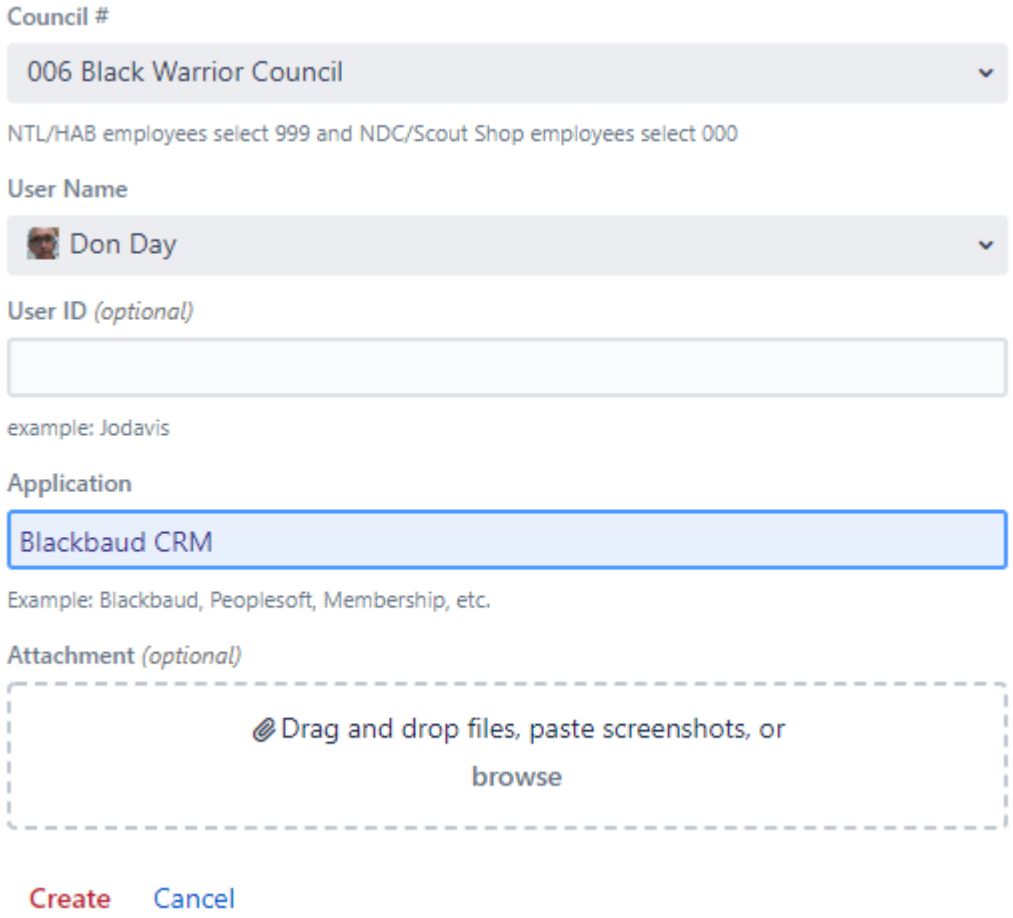
Please provide me a list of giving categories

Council #

006 Black Warrior Council

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

User Name – Application - Attachments



Next Forum

November 16, 2022
10:00 am & 2:00 pm CT

Questions & Answers