CRM User Forum

January 18, 2023

John Kuehn ~ Valerie Eaton

Cornelia Ellis ~ Don Day

Objectives

- Contribution Statements
- Batch Cleanup
- Data Lists
- Questions – Answers

Creating the Annual Contribution Statements

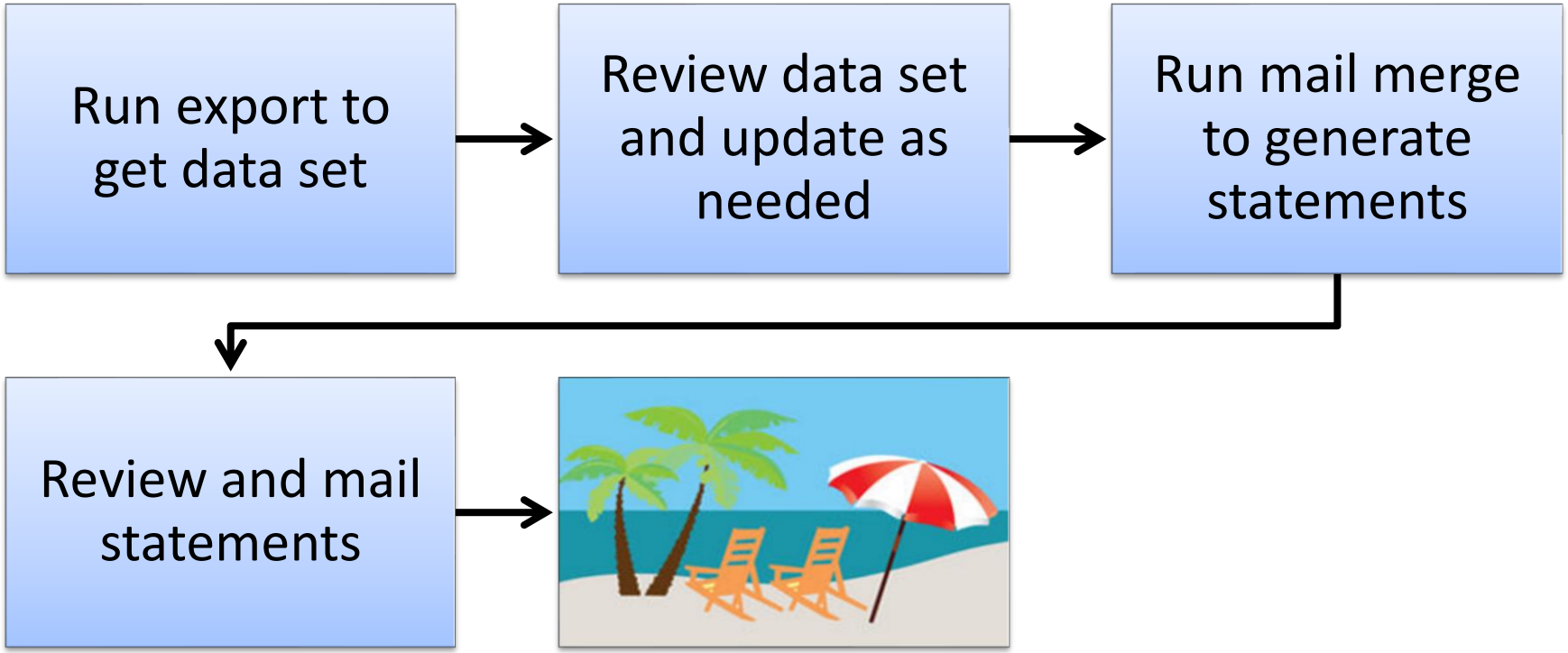
Contribution Statements

- Should be mailed donors by the last day of January.
- Contribution statement template in CRM is ready for use.

IRS Publication 1771, Charitable Contributions–Substantiation and Disclosure Requirements

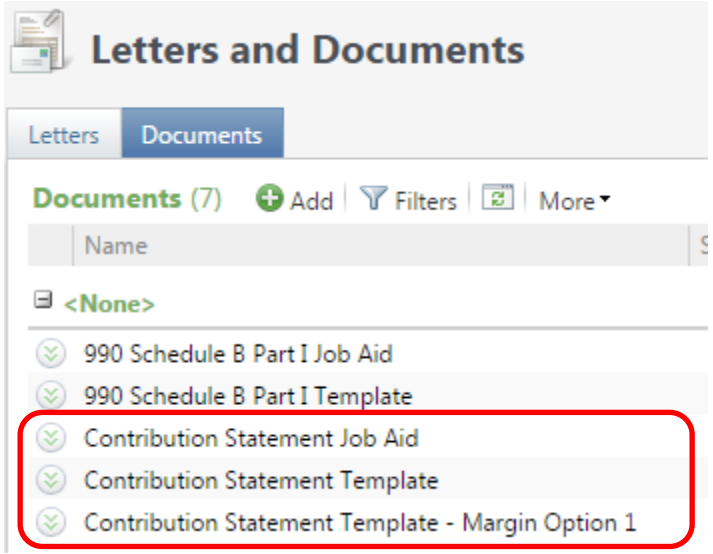
- A donor must have a bank record or written communication from a charity for any monetary contribution before the donor can claim a charitable contribution on his/her federal income tax return
- A donor is responsible for obtaining a written acknowledgment from a charity for any single contribution of $250 or more
- A charitable organization is required to provide a written disclosure to a donor who receives goods or services in exchange for a single payment in excess of $75
- Recipient organizations typically send written acknowledgments to donors no later than January 31 of the year following the donation.

Process Overview



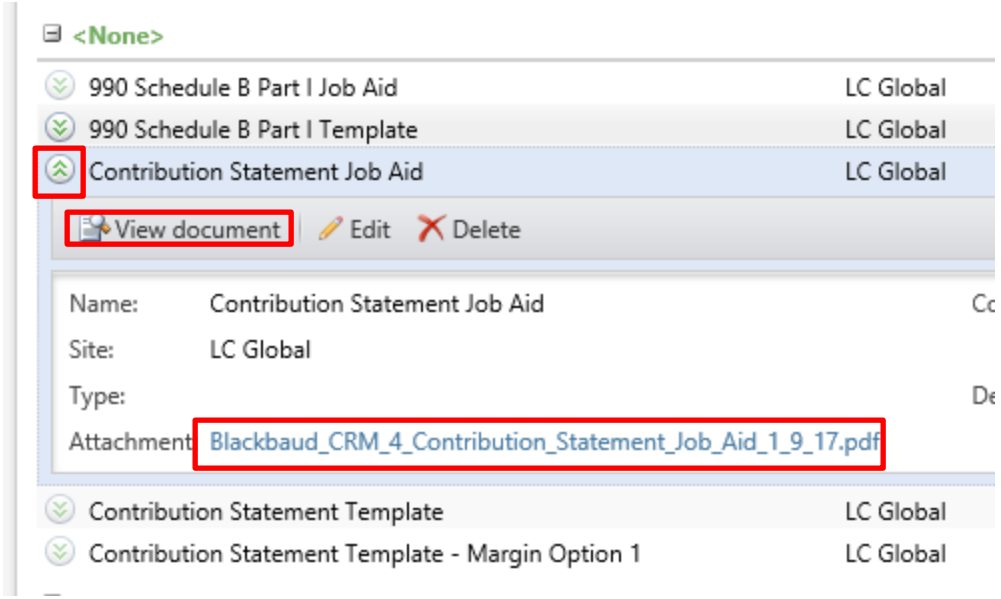
Process Overview

- Marketing and Communications>Packages>Letters and documents>View letters and documents>Documents tab
- **Job Aids** have detailed, step-by-step instructions



To Download Document

- Click the Chevron
- Either click “View document” or click the document hyperlink to download.
- DO NOT edit and/or change the site from LC Global to your council.

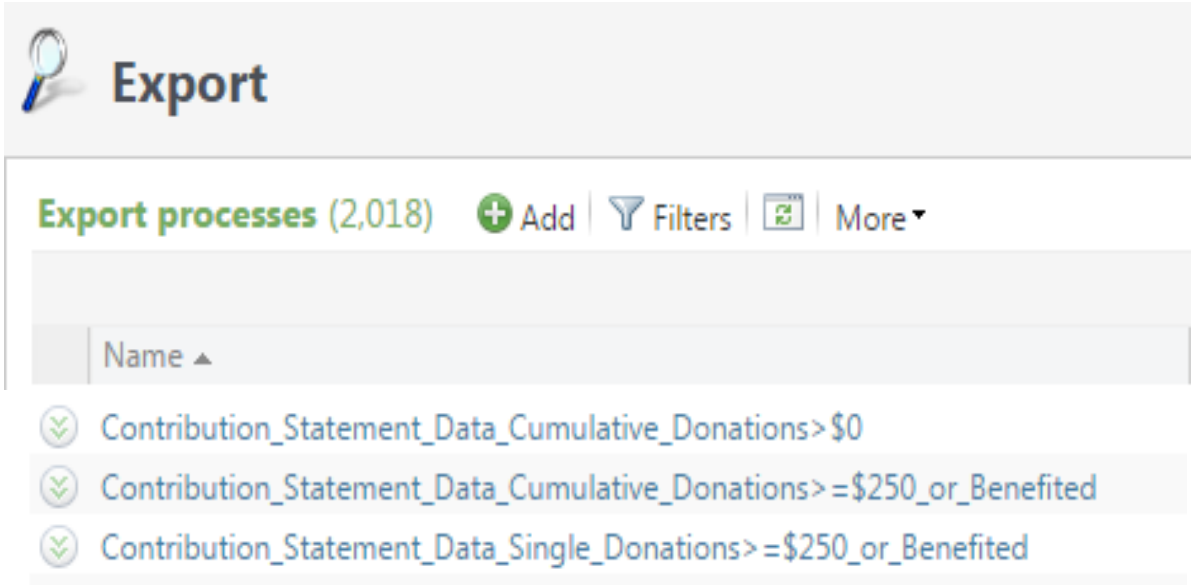


Run Export

- 3 Choices
  - Cumulative contributions > $0
    - All donors get statements
  - Cumulative contributions >= $250 or Benefited
    - Donors that give $250 or more, cumulatively, and any donors that received benefits get statements
  - Single contribution >= $250 or Benefited
    - Donors that give a single gift of $250 or more and any donors that received benefits get statements

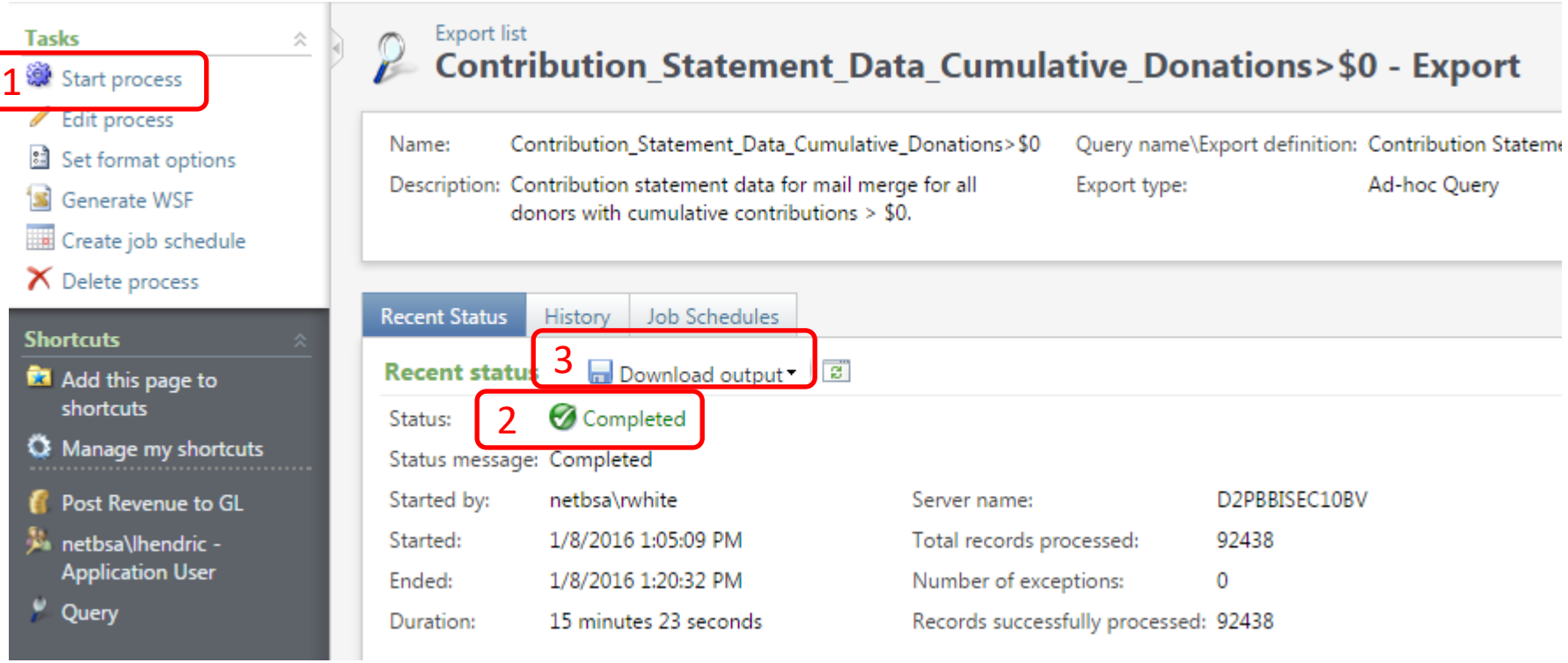
Run Export

- Administration>Tools>Export



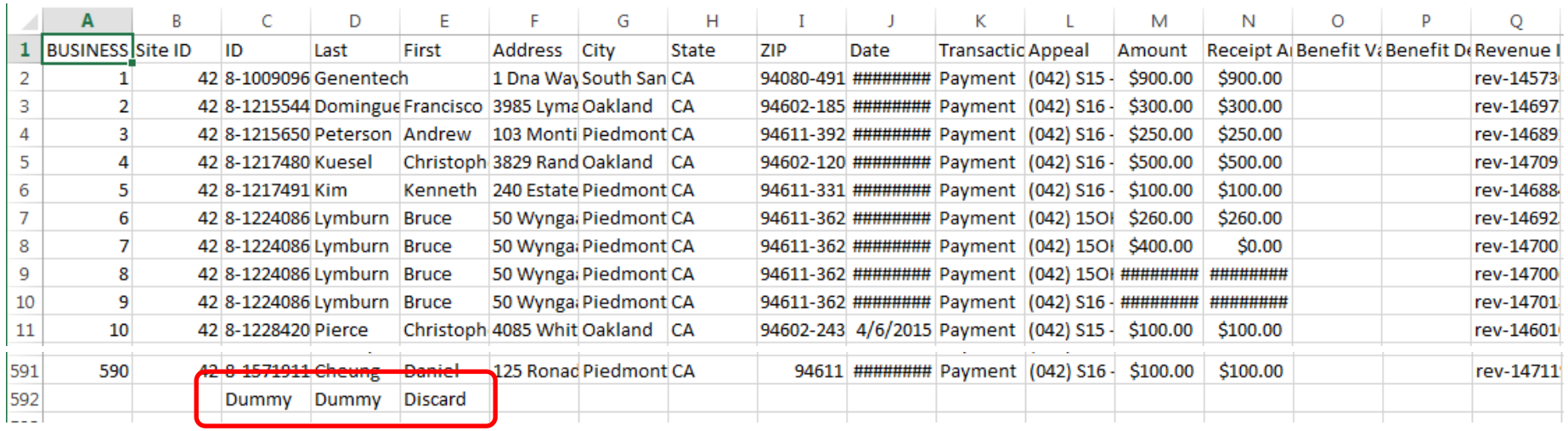
Run Export

- Because you are site secured only your records will be returned when you run this.



Review and Update

- Review your data and make updates as needed
- Add a dummy record at end of the file



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	BUSINESS	Site ID	ID	Last	First	Address	City	State	ZIP	Date	Transactic	Appeal	Amount	Receipt A	Benefit V	Benefit D	Revenue I
2	1	42	8-1009096	Genentech		1 Dna Way	South San	CA	94080-491	########	Payment	(042) S15 -	$900.00	$900.00			rev-14573
3	2	42	8-1215544	Domingue	Francisco	3985 Lyma	Oakland	CA	94602-185	########	Payment	(042) S16 -	$300.00	$300.00			rev-14697
4	3	42	8-1215650	Peterson	Andrew	103 Monti	Piedmont	CA	94611-392	########	Payment	(042) S16 -	$250.00	$250.00			rev-14689
5	4	42	8-1217480	Kuesel	Christoph	3829 Rand	Oakland	CA	94602-120	########	Payment	(042) S16 -	$500.00	$500.00			rev-14709
6	5	42	8-1217491	Kim	Kenneth	240 Estate	Piedmont	CA	94611-331	########	Payment	(042) S16 -	$100.00	$100.00			rev-14688
7	6	42	8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	########	Payment	(042) 15O	$260.00	$260.00			rev-14692
8	7	42	8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	########	Payment	(042) 15O	$400.00	$0.00			rev-14700
9	8	42	8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	########	Payment	(042) 15O	########	########			rev-14700
10	9	42	8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	########	Payment	(042) S16 -	########	########			rev-14701
11	10	42	8-1228420	Pierce	Christoph	4085 Whit	Oakland	CA	94602-243	4/6/2015	Payment	(042) S15 -	$100.00	$100.00			rev-14601
591	590	42	8-1571911	Cheung	Daniel	125 Ronad	Piedmont	CA	94611	########	Payment	(042) S16 -	$100.00	$100.00			rev-14711
592			Dummy	Dummy	Discard												

Review and Update

- Review Columns W and X
  - Possible benefit issue
  - Possible receipt or benefit amount issue
  - These issues depend on how you have been using the system
  - Giving category column is on the sheet to help with benefits in column Y

Review and Update

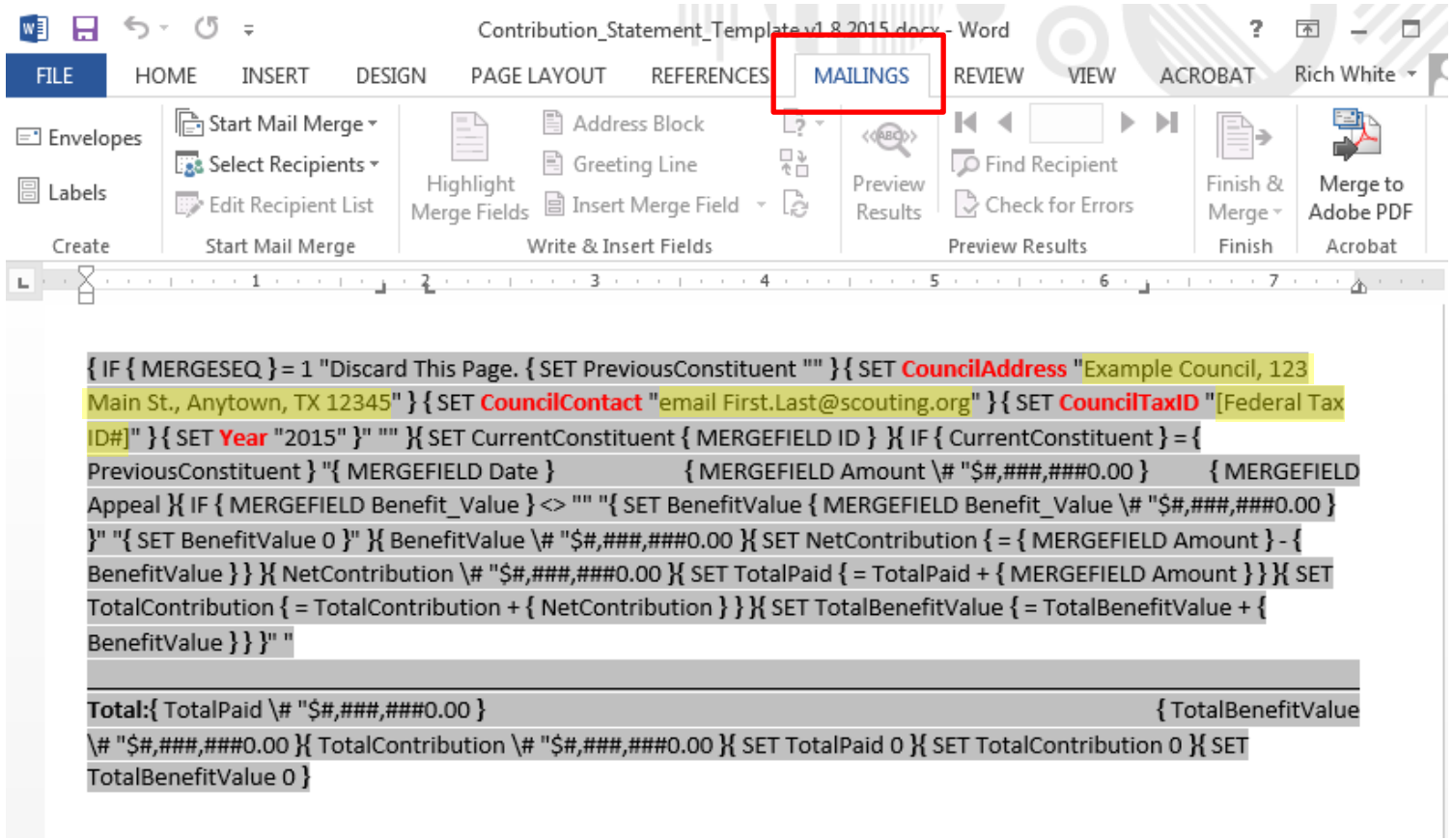
(089) S17	$250.00	$250.00			PAS-13989	61788	FALSE	FALSE	Sebring
(089) S17	$250.00	$250.00			PAS-13975	60848	FALSE	FALSE	Family
(089) S17	$250.00	$250.00			PAS-13969	60470	FALSE	FALSE	Community - DCA
(089) A17	########	$0.00			rev-41589	491027	TRUE	TRUE	Mexico Trip
(089) A17	$120.00	$0.00			rev-41598	497003	TRUE	TRUE	Kendra Scott Necklace a
(089) A17	$500.00	$0.00			rev-41598	497682	TRUE	TRUE	Golf Clubs and Bag
(089) A17	$100.00	$100.00			rev-41598	498645	FALSE	FALSE	Sponsor
(089) A17	$40.00	$0.00			rev-41599	499007	TRUE	TRUE	Play and Music Lesson
(089) S17	$250.00	$250.00			PAS-13985	61326	FALSE	FALSE	Community - DCA
(089) S17	########	########			PAS-13985	61364	FALSE	FALSE	Citrus County

89) S1	$50.00	$50.00			rev-41706	585076	FALSE	FALSE	Community - DCA
89) X1	$500.00	$500.00			rev-34061	431701	FALSE	FALSE	1/2 PAGE AD
89) X1	$1,300.00	$980.00	$320.00	Table Sponsor	rev-34061	431585	FALSE	FALSE	Table Sponsors
89) S1	$500.00	$500.00			rev-41640	533302	FALSE	FALSE	Family
89) S1	$500.00	$500.00			PAS-13959	59990	FALSE	FALSE	Board Division

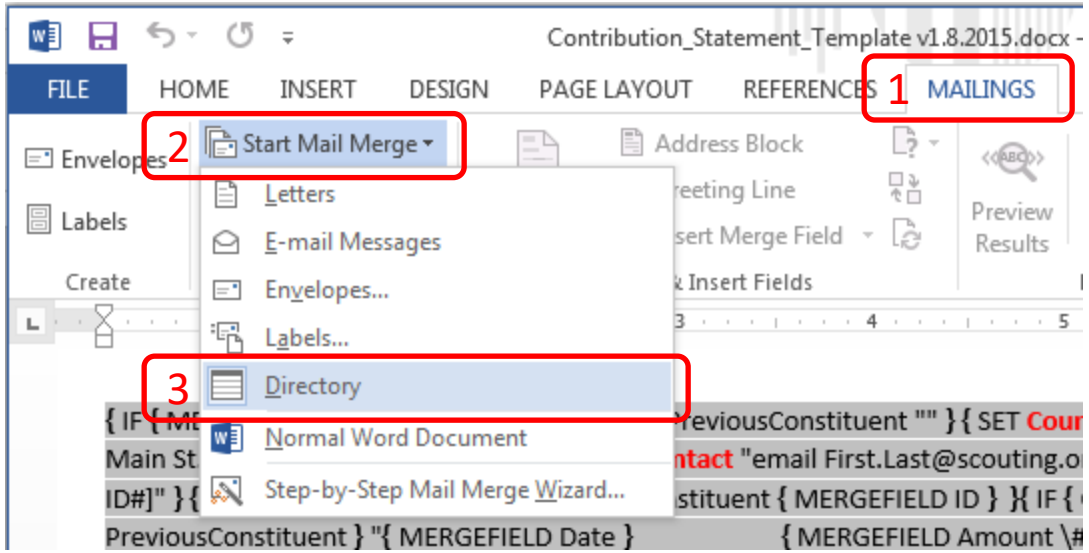
Run Mail Merge

- Download mail merge template
- Edit merge field values for your council
- Start a Directory mail merge
- Select the contribution statement data file
- Finish the merge

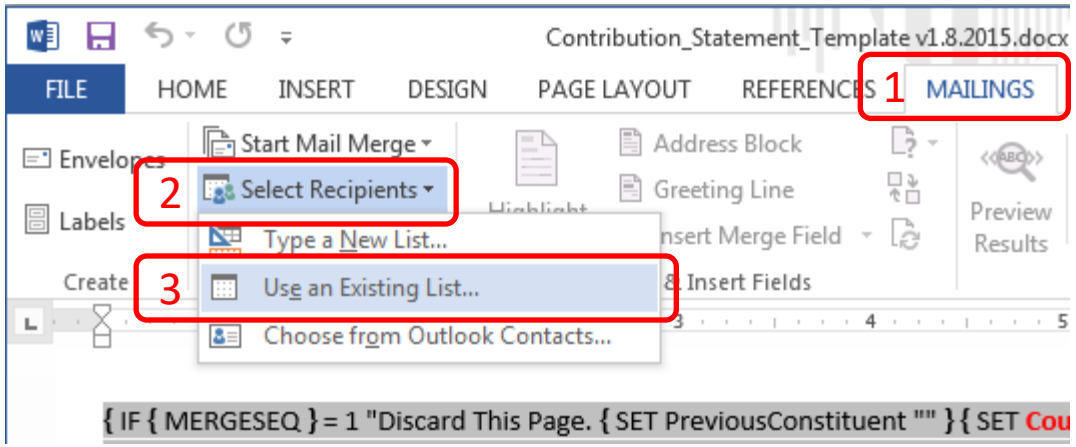
Run Mail Merge



Run Mail Merge

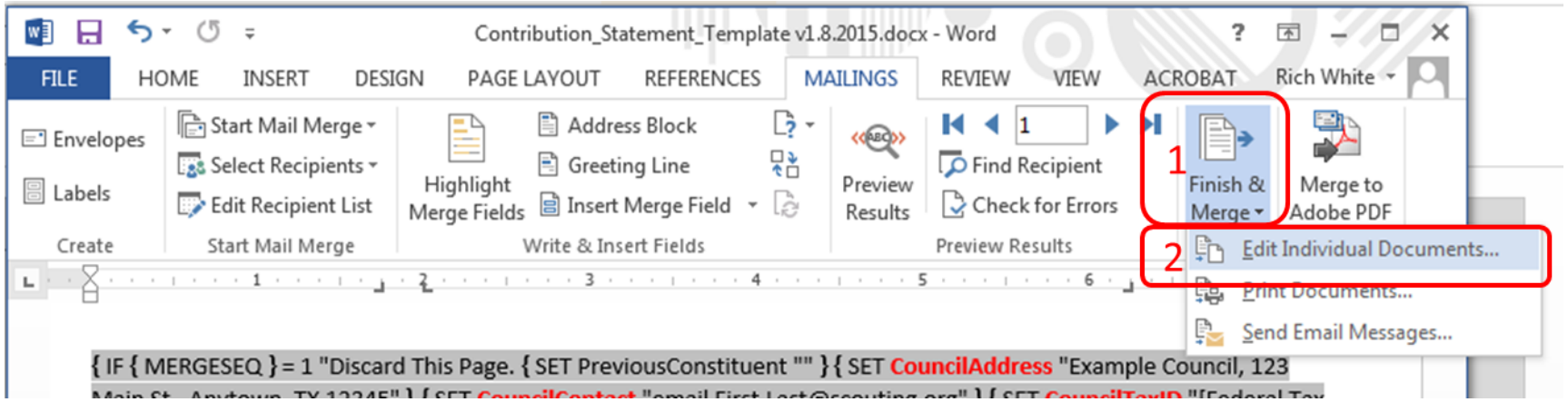


Run Mail Merge

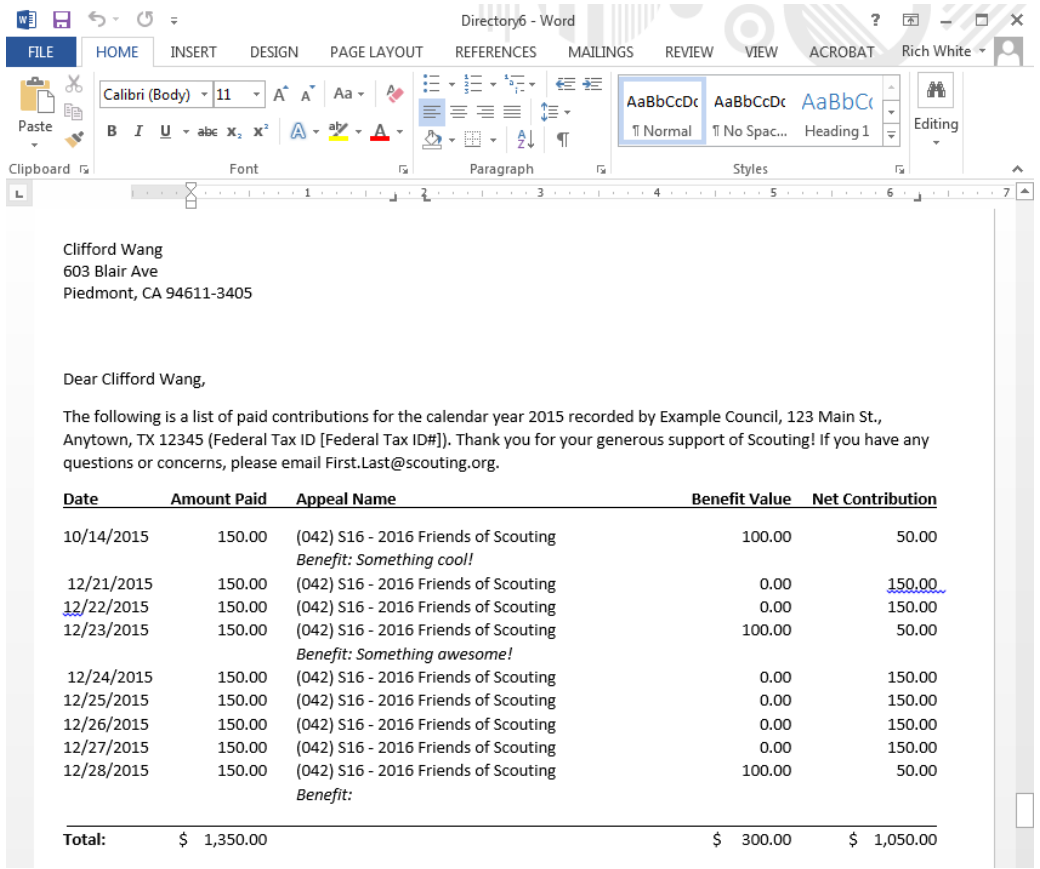


- Navigate to your downloaded data file and select it

Run Mail Merge



Run Mail Merge



Clifford Wang
603 Blair Ave
Piedmont, CA 94611-3405

Dear Clifford Wang,

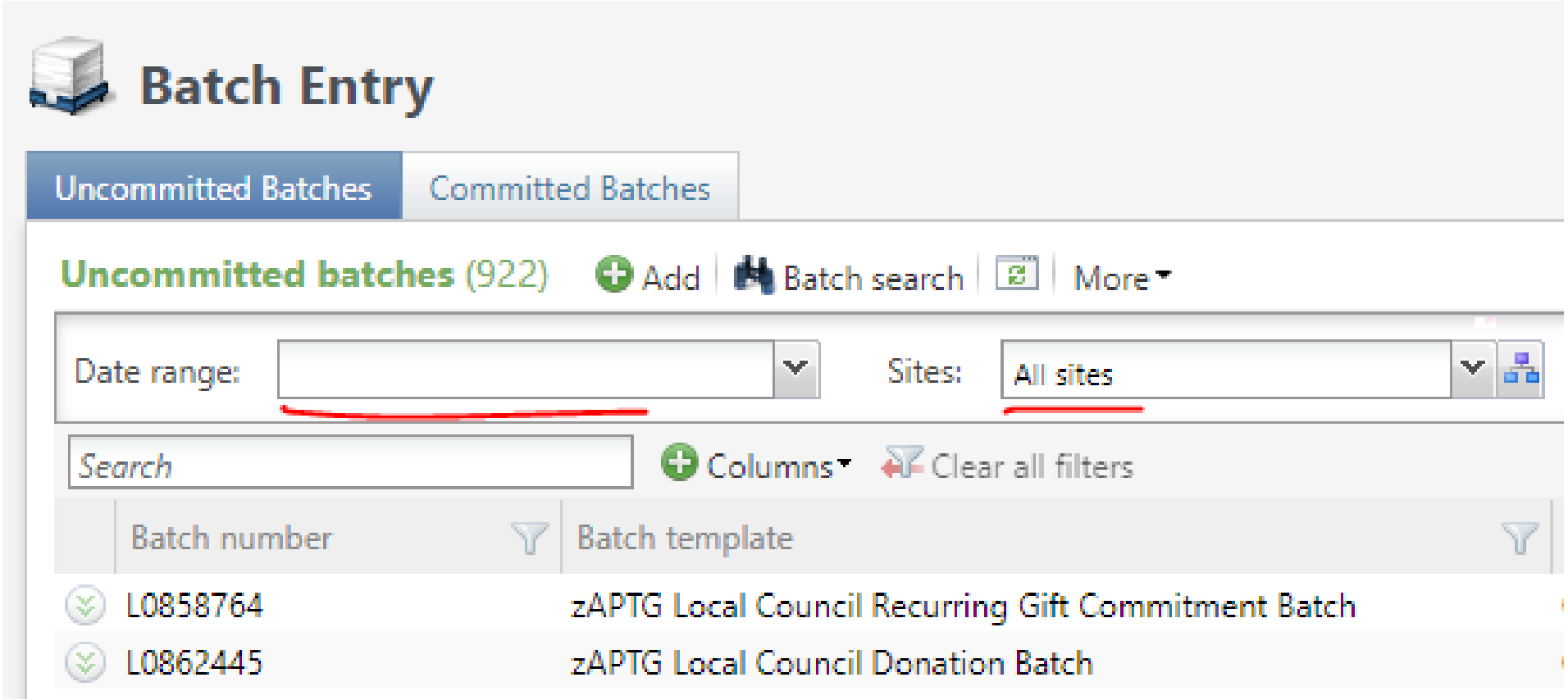
The following is a list of paid contributions for the calendar year 2015 recorded by Example Council, 123 Main St., Anytown, TX 12345 (Federal Tax ID [Federal Tax ID#]). Thank you for your generous support of Scouting! If you have any questions or concerns, please email First.Last@scouting.org.

Date	Amount Paid	Appeal Name	Benefit Value	Net Contribution
10/14/2015	150.00	(042) S16 - 2016 Friends of Scouting	100.00	50.00
		Benefit: Something cool!		
12/21/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/22/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/23/2015	150.00	(042) S16 - 2016 Friends of Scouting	100.00	50.00
		Benefit: Something awesome!		
12/24/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/25/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/26/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/27/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/28/2015	150.00	(042) S16 - 2016 Friends of Scouting	100.00	50.00
		Benefit:		
Total:	$ 1,350.00		$ 300.00	$ 1,050.00

Review and Mail

- Print, fold, stuff and mail per your council's usual procedure
- Discard the first and last pages from the merge file

Batch Cleanup



Data Lists in CRM

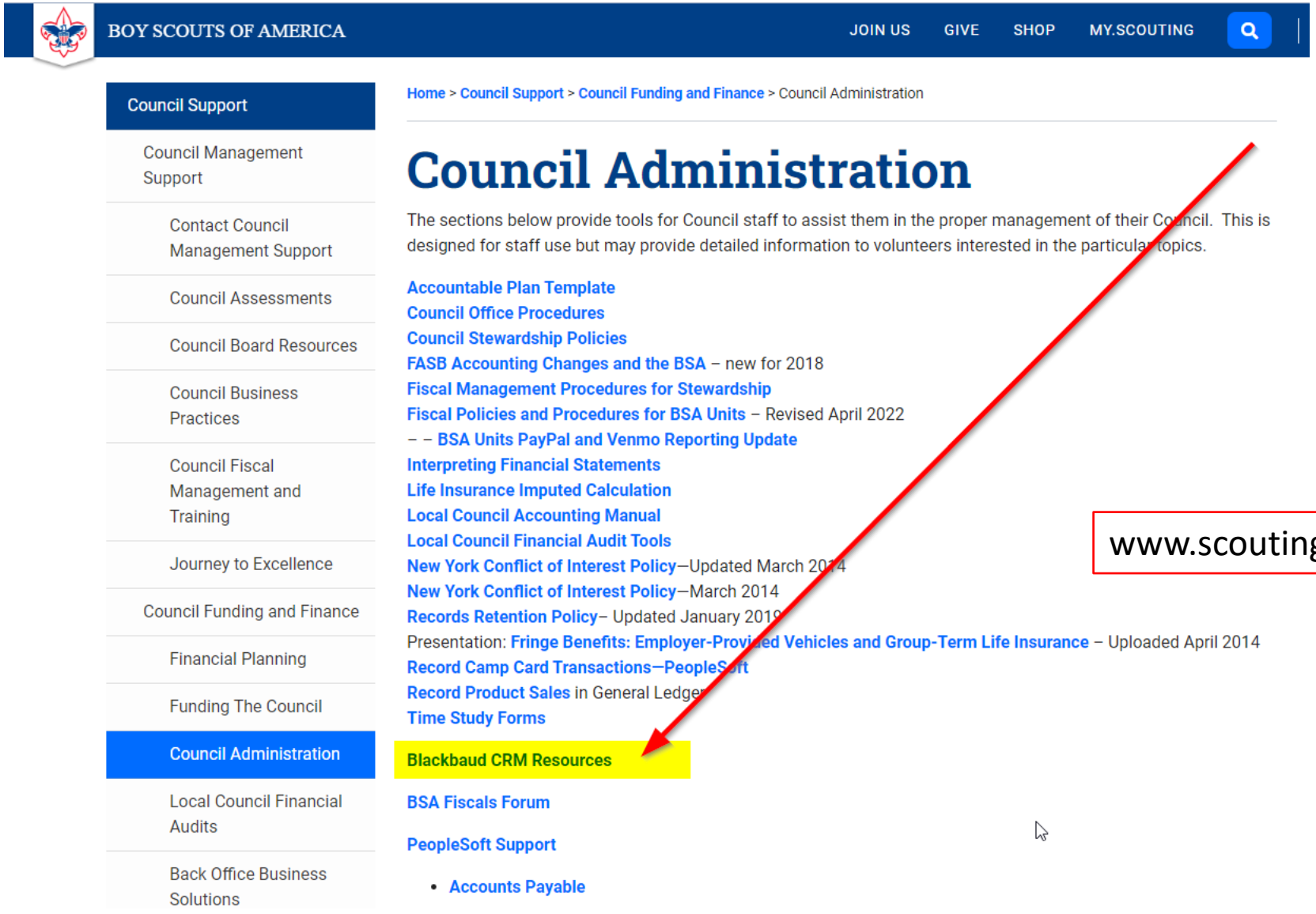
Where to find Data Lists

Constituents Tab

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

Revenue Tab

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



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

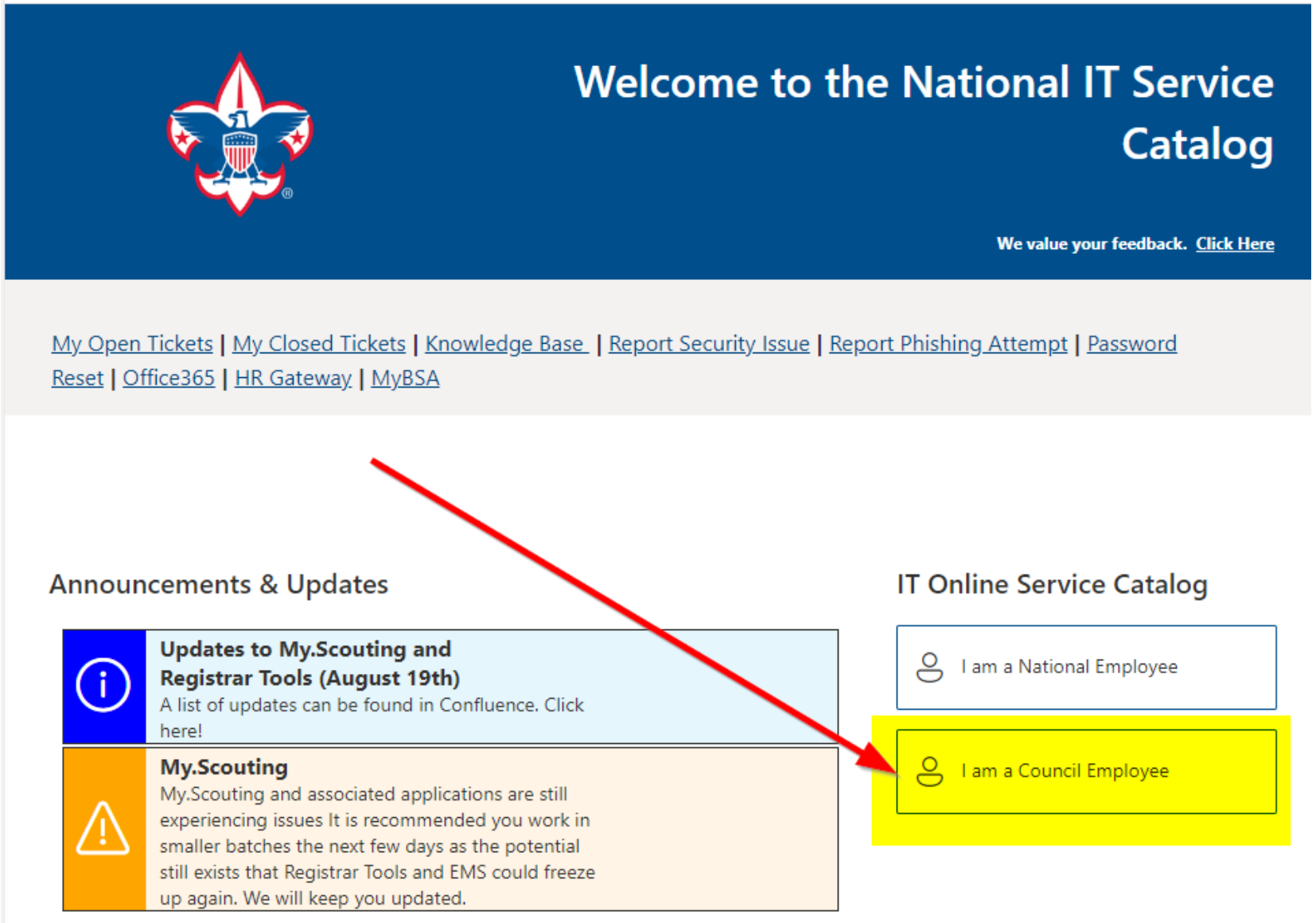
January 2022 User Forum – **Slide Deck** – **recording**
February 2022 User Forum – **Slide Deck** – **recording**
March 2022 User Forum – **Slide Deck** – **recording**
April 2022 User Forum – **Slide Deck** – **recording**
– Creating Constituent Interactions * Using the Constituent Interaction Data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

2021

Member Care Self-Service

- http://membercare.scouting.org

- Creating an incident directly in JIRA


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

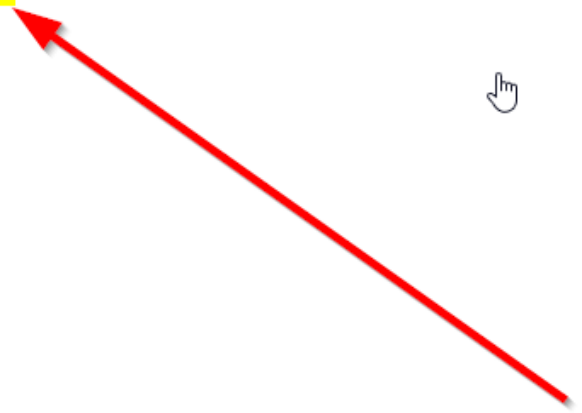
General Assistance

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

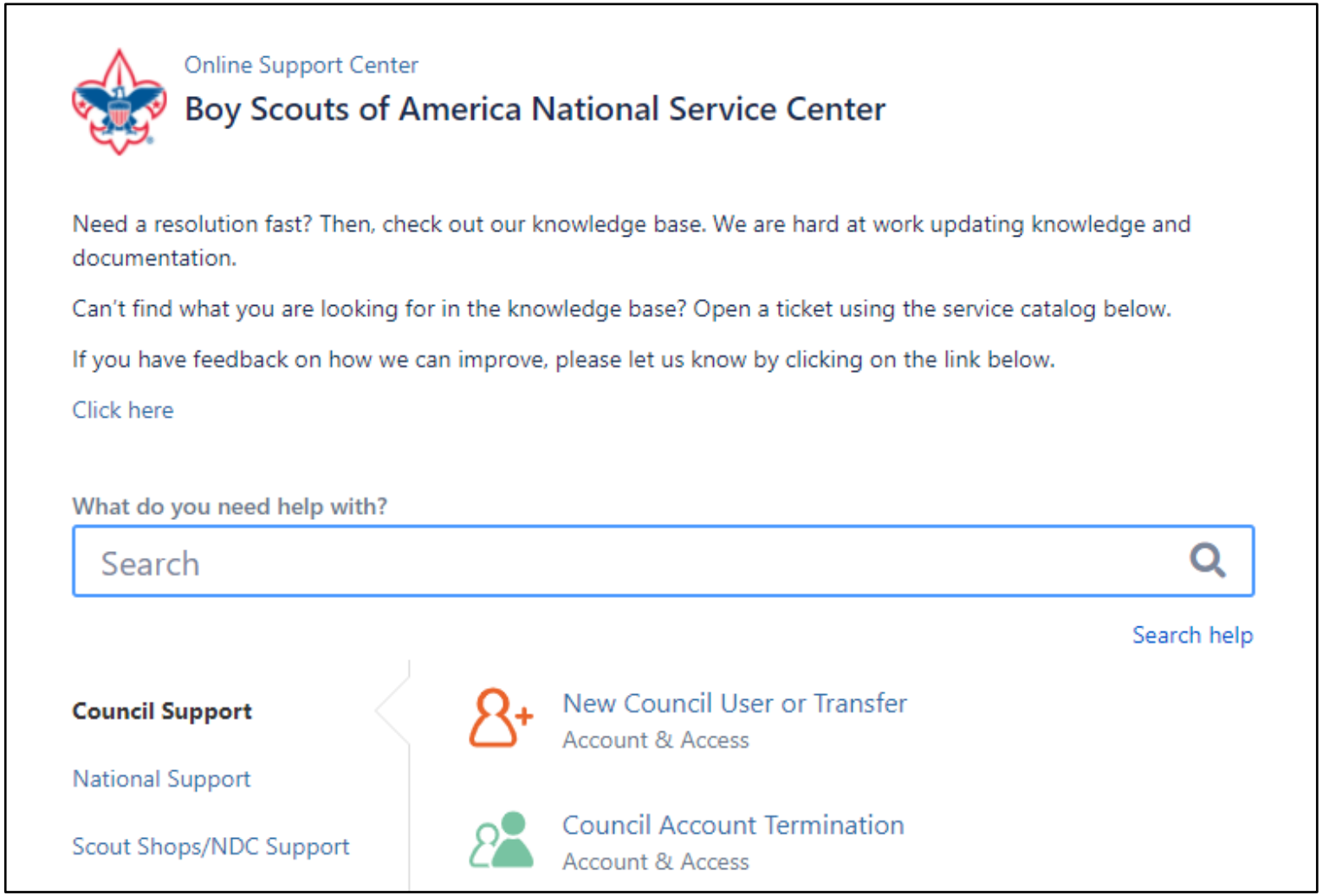
When possible, open a ticket by selecting the service from the Service Catalog Request link. Doing so will ensure all the necessary information is collected and quickly routed.

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.

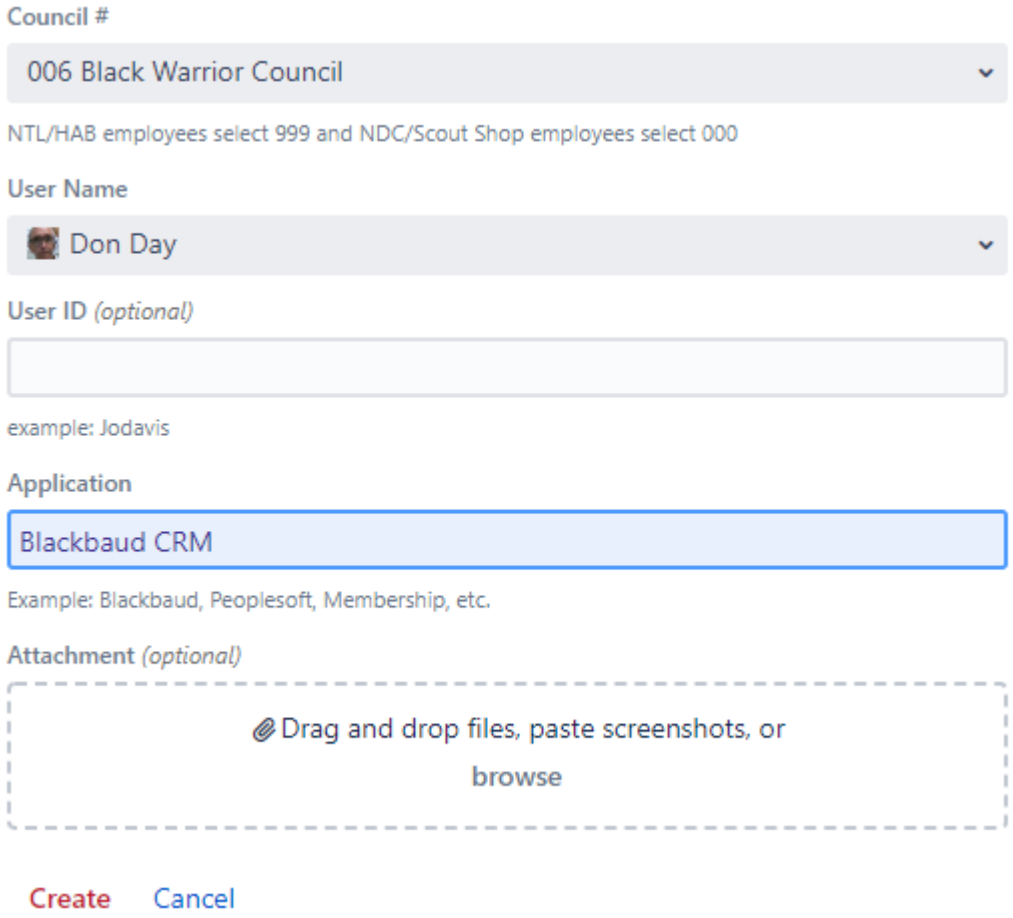
Please provide me a list of giving categories

Council #

006 Black Warrior Council

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

User Name – Application - Attachments



Next Forum

February 15, 2023
10:00 am & 2:00 pm CT

Questions & Answers