

CRM User Forum

February 15, 2023

John Kuehn ~ Valerie Eaton

Cornelia Ellis ~ Don Day



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Objectives

- Finishing up Year 2022
 - Global write-off process – timing and how-to
 - Write-Off Data List to retrieve write-offs list
 - Reports for the council's 990 & fiscal audit
 - Prior-year payments
 - Beginning of the year GL transactions (PeopleSoft)
- Batch
 - Using Group ID to credit units in FOS appeal



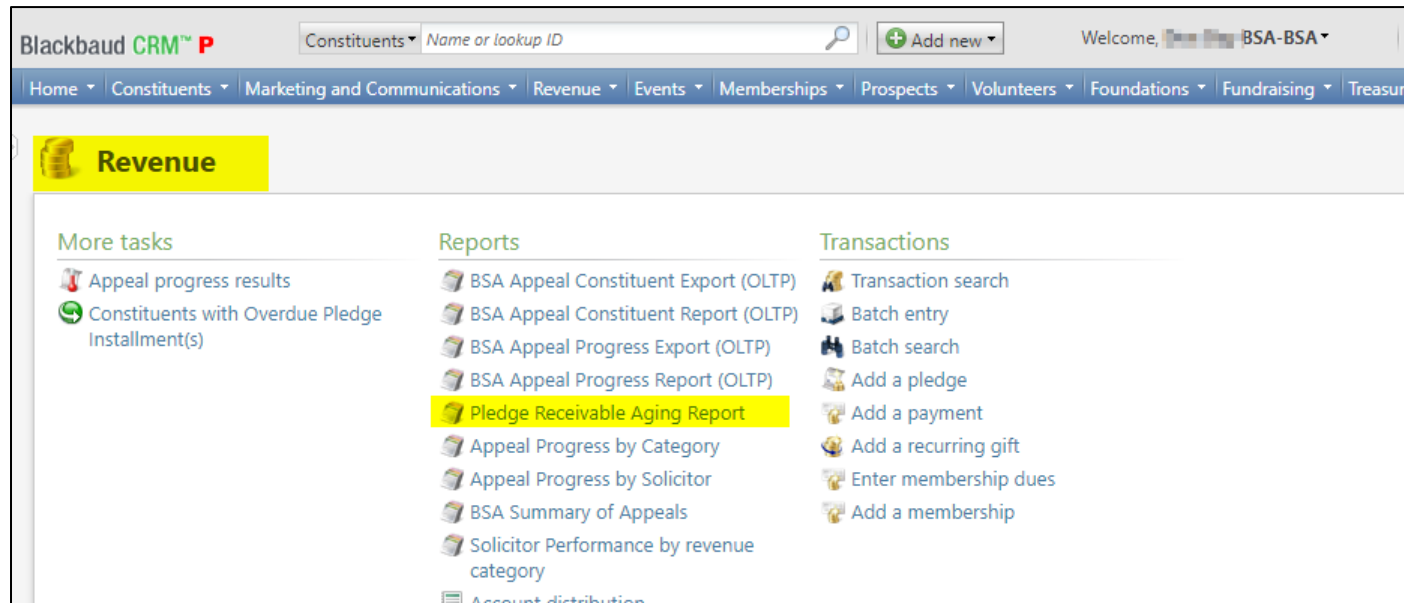
Finishing Up 2022



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Global Write Offs

- Determine collectible value
- Create the Pledges Receivable Aging Report
- Blackbaud CRM ~ Revenue ~



Determine collectible value

Create the Report

1. BSA Organization – your council
2. Report Code – year
3. Appeal – must be run for each open appeal with outstanding donor pledge values
4. Click “View Report”
5. Wait...



Pledge Receivable Aging Report

Blackbaud CRM™ P

Constituents

Welcome, BSA-BSA

Home | Constituents | Marketing and Communications | **Revenue** | Events | Memberships | Prospects | Volunteers | Foundations | Fundraising | Treasury

Pledge Receivable Aging Report

BSA Organization Council 1 Report Code 3

Appeal 2 4



Pledge Aging Receivable Report

- Print report and give to management to review:
 - All open pledges
 - Determine who will still pay
 - Sign and date
- After management review, proceed to Pledge Write-Off process



Pledge Write-off Procedure

- Determine when your council needs to write-off pledges.
- Pledges written off by appeal
- You will use your current Global Pledge Write-off business process
- You will edit the selection in your current business process



Global Pledge Write-off

edge write-off processes (276) + Add

Name	Description
L144	Pledge Write-Off Proc
L144 Abraham Linco...	Just change the select
L003	Pledge Write-Off Proc
L022	Pledge Write-Off Proc
L583	Pledge Write-Off Proc
L382	Pledge Write-Off Proc
Start process	
	Edit Delete As
L618	Pledge Write-Off Proc
L104	Pledge Write Off Proc
L303	Pledge Write-Off Proc
L157	Pledge Write-Off Proc
L468	Pledge Write-Off Proc
L092	Pledge Write-Off Proc
L368	Conversion Pledge W
L220	Pledge Write-Off Proc
L574	Pledge Write-Off Proc
L635	Pledge Write-Off Proc
L695	Global Write-Off
L449	Pledge Write-Off Proc
L006	Pledge Write-Off Proc

Edit pledge write-off process

General

Name: L382

Description: Pledge Write-Off Process

Selection: L382 Global Write Off Query (Ad)

Post status: Do not post

Post date: mm/dd/yyyy

Site: Allegheny Highlands Council

Write-off reason

Reason code: UNC - Uncollectable

Details: 2017 Write Off

Output

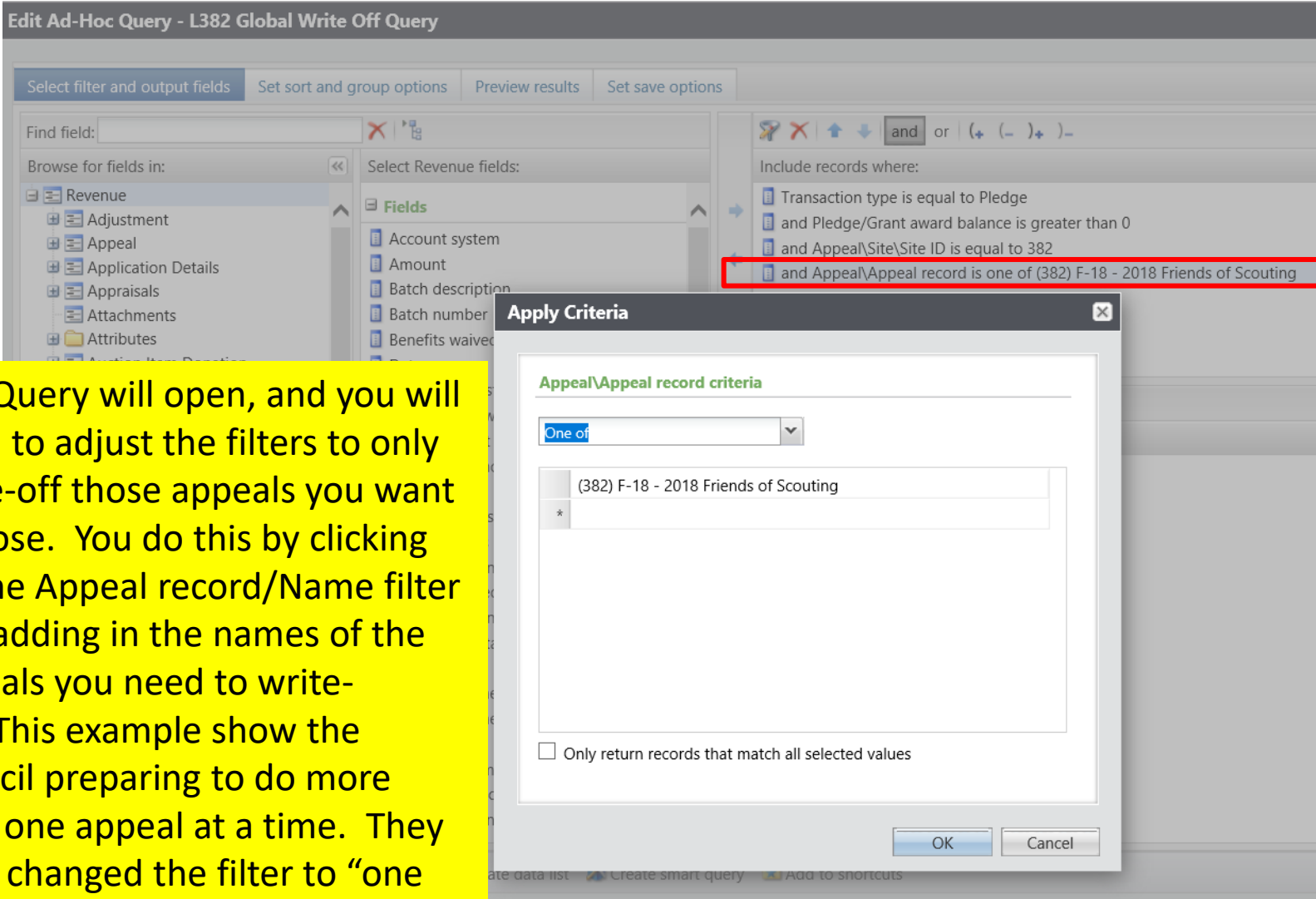
☐ Create output selection

☐ Overwrite existing selection

Selection name:

Help Save Cancel

Go to the Global Pledge Write-off processes and edit your routine. No need to create a new routine. When the edit window opens click the pencil to edit the query attached as the selection.



The Query will open, and you will need to adjust the filters to only write-off those appeals you want to close. You do this by clicking on the Appeal record/Name filter and adding in the names of the appeals you need to write-off. This example show the council preparing to do more than one appeal at a time. They have changed the filter to “one of” and then can now list multiple appeals.



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Edit Ad-Hoc Query - L382 Global Write Off Query

[Select filter and output fields](#)[Set sort and group options](#)[Preview results](#)[Set save options](#)

Results (78 records found)

Appeal\Name	Pledge/Grant award balance
(382) F-18 - 2018 Friends of Scout...	\$250.00
(382) F-18 - 2018 Friends of Scout...	\$600.00
(382) F-18 - 2018 Friends of Scout...	\$500.00
(382) F-18 - 2018 Friends of Scout...	\$40.00
(382) F-18 - 2018 Friends of Scout...	\$30.00
(382) F-18 - 2018 Friends of Scout...	\$20.00
(382) F-18 - 2018 Friends of Scout...	\$1,200.00
(382) F-18 - 2018 Friends of Scout...	\$1,000.00
(382) F-18 - 2018 Friends of Scout...	\$95.00
(382) F-18 - 2018 Friends of Scout...	\$30.00
(382) F-18 - 2018 Friends of Scout...	\$60.00
(382) F-18 - 2018 Friends of Scout...	\$100.00
(382) F-18 - 2018 Friends of Scout...	\$720.00
(382) F-18 - 2018 Friends of Scout...	\$45.45
(382) F-18 - 2018 Friends of Scout...	\$75.00
(382) F-18 - 2018 Friends of Scout...	\$20.00

Always preview your query before saving it and running your routine to make sure only your appeals are showing and that only the appeals you want to write-off are listed.



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If you need to exclude specific constituents from the write-off process, you can add the line Constituent\Lookup ID to the Include records where window, then change the operator from 'Equal to' to 'Not one of', then list as many Lookup IDs as necessary. If you want to exclude specific pledges, you can do the same with the field 'Revenue ID is not one of'

The screenshot displays a software interface with two main sections. The top section, titled 'Include records where:', contains a list of search criteria. The bottom section, titled 'Results fields to display:', contains a list of fields to be shown in the results.

Include records where:

- Appeal\Site\Site ID is equal to 027
- and Appeal\Appeal record is one of (027) F19 - 2019 Friends of Scouting, (027) F20 - 2020 Friends of Scouting, (027) FG21 - 2021 Fresno Golf Tournament, (027) F21 - 2021 Friends of Scouting
- and Transaction type is equal to Pledge
- and Pledge/Grant award balance is greater than 0
- and Constituent\Lookup ID is not one of 8-12345678, 8-87654321 or is blank

Results fields to display:








- Appeal\Name
- Pledge/Grant award balance
- Constituent\Name
- Constituent\Lookup ID




If you need a list of what was written off after the process, go to Revenue/More Tasks/ Write-Offs Data list. Search for your site and then filter by the date the you ran your write-offs. It will provide a list of those written-off on or after the date that you used the write-off process.

Revenue







More tasks

-  Appeal progress results
-  Daily Revenue Transactions List
-  Gift in Kind List
-  Open Pledge List
-  Recurring Gift List
-  Revenue Data Hygiene
-  Write-Offs Data List

List for Write-offs

Write-Offs for your council. This list includes write-offs on or after 1/1/2018. (65)  More

Appeal equal to: Constituent Name equal to: Date Added on or after:   Apply  Reset

	Council #	Appeal	Constituent ID	Constituent Na...	Pledge Date	Pledge ID	Pledge Amount	Write-Off Am...
	006	(006) F-21 2021 Friends of Scouting	8-322	ird	3/19/2021	rev-4	\$500.00	\$500.0
	006	(006) F-21 2021 Friends of Scouting	8-322	ard	2/12/2021	rev-4	\$400.00	\$400.0
	006	(006) F-21 2021 Friends of Scouting	8-322		2/19/2021	rev-4	\$250.00	\$250.0
	006	(006) F-21 2021 Friends of Scouting	8-322		7/19/2021	rev-4	\$100.00	\$100.0
	006	(006) F-21 2021 Friends of Scouting	8-322		12/30/2020	rev-4	\$2,000.00	\$2,000.0
	006	(006) F-21 2021 Friends of Scouting	8-322	st	3/8/2021	rev-4	\$100.00	\$100.0



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IRS 990 Schedule B



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IRS 990 Schedule B

- Creation process like contribution statements
- Download and review data via export
- Merge Excel data to Word template provided
- User guide is under Administration with the CRM User Guides on MyBSA or in CRM in Marketing Communication under Letters and Documents.



Location of CRM Tools

Marketing and Communications | Revenue | Events | Memberships

Letters and Documents

Letters | Documents

Documents (5) + Add | Filters | More

Type: [] Sites: Selected sites

Name
<None>
990 Schedule B Part I Job Aid
990 Schedule B Part I Template
Contribution Statement Job Aid
Contribution Statement Template
Contribution Statement Template - Margin Option 1

Exports | **Administration**

Exports (4) + Add | Filters | More

Sites: Selected sites | Apply | Reset

Search | Columns | Save list

Name
990 Schedule B Part 1 Data
Contribution Statement Data Cumulative >= \$250 or Benefited
Contribution Statement Data Cumulative Donations > \$0
Contribution Statement Data Single >= \$250 or Benefited



Remember:

- 990 Schedule B are based on contributions (pledges/straight donations/etc.) a person has given during the year. Pledge Payments do not count towards this, so if a donor is missing from the results, they may not have made any new contributions during the year. We use an accrual basis instead of a cash basis, which means that if a donor pledged \$5,000 but only paid \$4,000, they will show up as a \$5,000 donor.
- Don't worry if businesses on your 990s show as 'individuals' in the spreadsheet. Column D of the 990 Schedule B Part 1 form shows the type of contribution, not the type of constituent. The 3 choices are Person, Payroll and Noncash. The mail merge assumes "Person" for all contribution types.



Prior Year Pledge Payment



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Prior Year Pledge Payment

- Why do them?
- How do they feed to the GL?
- How do I make PY payment show as current year contributions?
- Did you write-off all pledges in PeopleSoft at year end?



Reasons to use this function

Accuracy of Donor Record

If you use a payment as a new donation in 2023, you may fail to ask the donor for their 2023 gift.

Follow the intentions of your donors

Eventually the donor will be able to see their records, and this can help reduce unnecessary question from the donor.



Prior Year Payment Process

- You should use this feature until the end of March.
- This keeps donor records intact
- Prior year payments relieve pledges you hold open and have moved from GL account 1301 to 1321
- Prior year payments build current year contributions with GL account 4002 through monthly journal entry if you have written off all pledges in the PeopleSoft.



Account Flow for a PY Payment

Account	Debit	Credit	Debit	Credit
Beginning		200		0
1321		-20		-20
1001	20			
1321 Balance		180		-20
1321			20	
4002				20
1321 Balance				0

Account	Description	Debit amount	Credit amount
Pledge	Edit		
→ L147-1-1321-000-00	L147-1-FOSP-PAPL-L14700001-UNR. PAYMENT-on-Pledge-Receiveable(PY): Council General		\$30.00
→ L147-1-1001-000-00	L147-1-FOSP-CASH-L14700001-UNR. PAYMENT-Cash etc: Council General	\$30.00	



PeopleSoft Transactions



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Accounts

- 1321 is your Contributions Receivable Prior year account. This is populated with pledges you expect to be paid late after you close your books(GJ from 1301). If you write-off all pledges this will have a zero balance.
- 4002 is your Contributions-FOS-Prior Year account. Dollars are move to here if there is negative balance in 1321 as you reconcile monthly during current year.



Need to be done PeopleSoft

Beginning of the year in PeopleSoft, these GL transactions required:

- Journal entry to move balances to new accounts
- Run a Posted detail in PS and Pledge Receivable report in CRM

Contribution - Pledges

- 1301 (CR) to 1321 (DR) (move from current year to prior)
- 1331 (CR) to 1301 (DR) (move from future to current)
- Allowance
- 1371 (DR) to 1381 (CR) (move current to prior)
- 1391 (DR) to 1371 (CR) (move future to current)



Batches



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Using Group ID in batch

- Why?
 - Improves solicitor reporting
 - Units
 - Groups



Revenue Batch

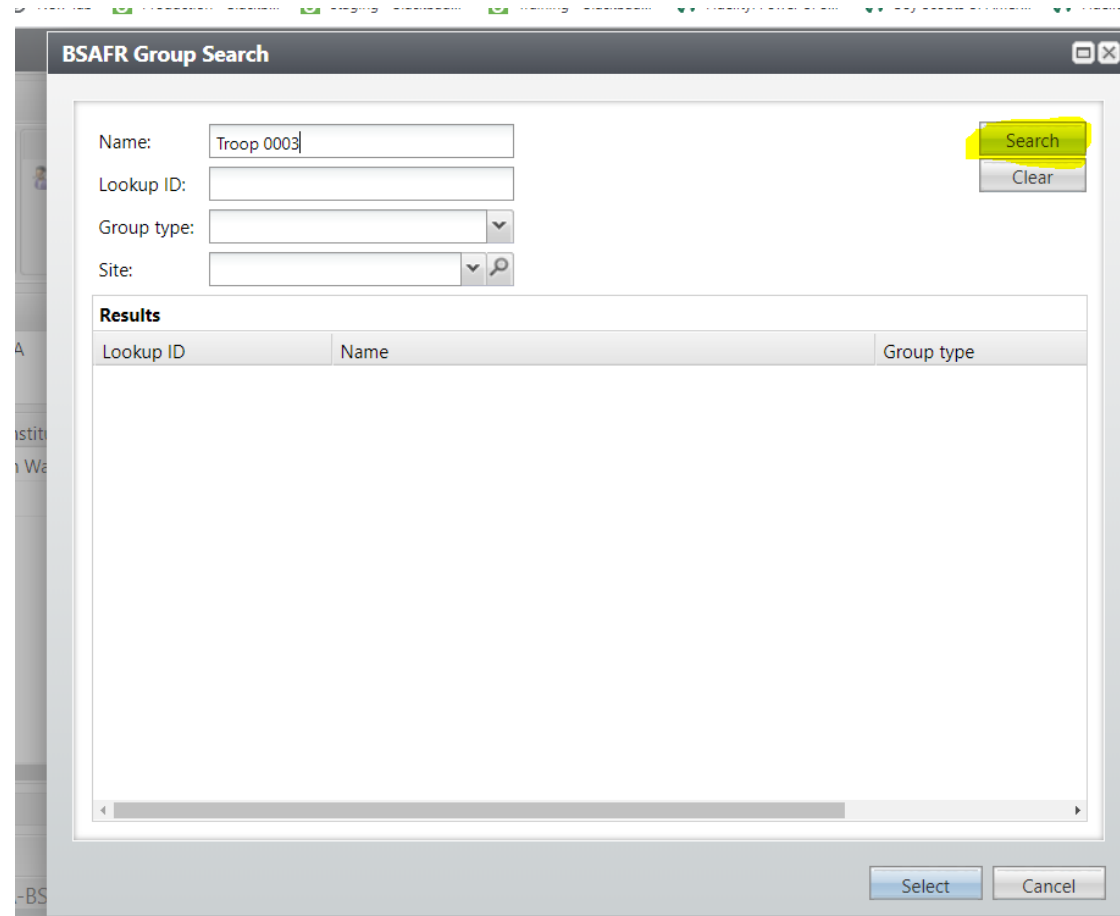
When entering a Unit to a Revenue batch select the Constituent then in the Group ID enter the information of the Unit. (Troop 0003, etc)

The screenshot shows the 'Revenue Batch' window with a 'Main' tab. The interface includes a toolbar with 'Batch' (Save, Save and close, Export), 'Constituent' (Solicit codes, Edit, Go to), 'Configuration' (Properties, Customize fields), and 'Processes' (Validate, Update status, Validate addresses (all rows), Update projected totals, Set row message). Below the toolbar is a 'Properties' section with fields for Owner, Projected No., Current No., Projected total, and Current total. The main area contains a table with the following columns: Barcode, Constituent, Lookup ID, Group ID, Amount, and Receipt a... The first row of the table has a yellow background and the Group ID field is highlighted in yellow. The bottom of the window shows a 'Constituent Window' and a page indicator 'Page 1 of 1'.

	Barcode	Constituent	Lookup ID	Group ID	Amount	Receipt a...
1					\$0.00	\$0.00



Search for the BSAFR Group



A screenshot of a software dialog box titled "BSAFR Group Search". The dialog box has a title bar with standard window controls. Inside, there are four input fields: "Name:" with the text "Troop 0003", "Lookup ID:", "Group type:" with a dropdown arrow, and "Site:" with a dropdown arrow and a magnifying glass icon. To the right of these fields are two buttons: "Search" (highlighted in yellow) and "Clear". Below the input fields is a section titled "Results" containing a table with three columns: "Lookup ID", "Name", and "Group type". The table is currently empty. At the bottom of the dialog box are two buttons: "Select" and "Cancel".

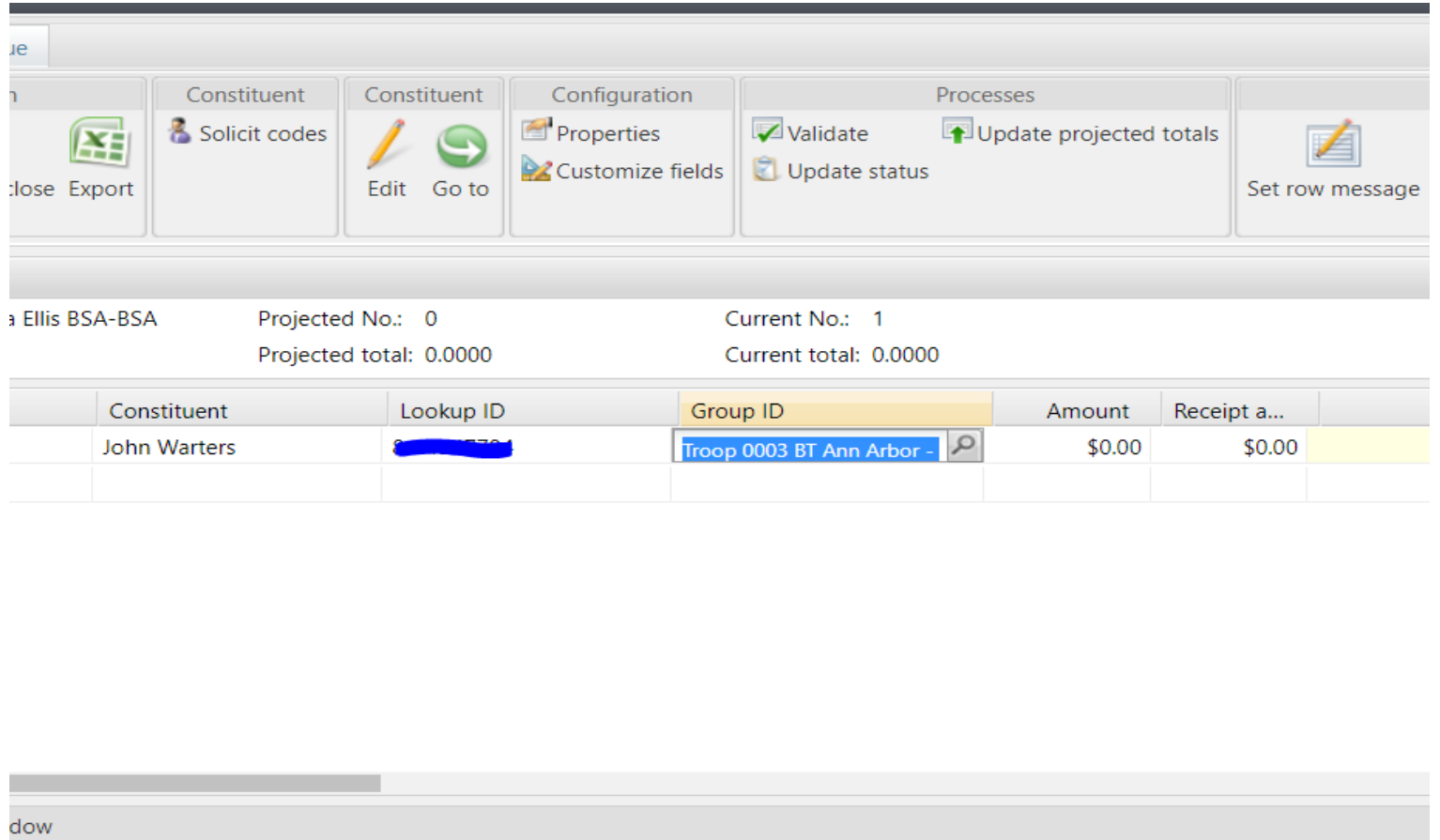
Lookup ID	Name	Group type
-----------	------	------------



Populate in the BSAFR Group

The Group ID will populate with the Unit information. This will attach to the pledge or payment and will show on the Unit and Constituent's profile.

The Giving Category and BSA Structure columns will also fill in from the group.



The screenshot displays the BSAFR Group management interface. At the top, there are tabs for 'Constituent', 'Configuration', and 'Processes'. The 'Constituent' tab is active, showing 'Solicit codes', 'Edit', and 'Go to' options. The 'Configuration' tab shows 'Properties' and 'Customize fields'. The 'Processes' tab shows 'Validate', 'Update projected totals', and 'Update status'. Below the tabs, there is a summary section for 'Ellis BSA-BSA' with 'Projected No.: 0', 'Projected total: 0.0000', 'Current No.: 1', and 'Current total: 0.0000'. The main table has columns for 'Constituent', 'Lookup ID', 'Group ID', 'Amount', and 'Receipt a...'. The first row shows 'John Warters' as the constituent, a redacted 'Lookup ID', and 'Troop 0003 BT Ann Arbor' as the 'Group ID'. The 'Amount' and 'Receipt a...' columns are both \$0.00. The 'Group ID' column has a search icon next to it.

Constituent	Lookup ID	Group ID	Amount	Receipt a...
John Warters	[REDACTED]	Troop 0003 BT Ann Arbor	\$0.00	\$0.00



Data Lists in CRM



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Where to find Data Lists

Constituents Tab

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

Revenue Tab

- Appeal progress results
- Daily Revenue Transactions List
- Gift in Kind List
- Recurring Gift list
- Revenue Data Hygiene
- Write-Offs List





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](#)[Financial Planning](#)[Funding The Council](#)[Council Administration](#)[Local Council Financial Audits](#)[Back Office Business Solutions](#)[Home](#) > [Council Support](#) > [Council Funding and Finance](#) > [Council Administration](#)

Council Administration

The sections below provide tools for Council staff to assist them in the proper management of their Council. This is designed for staff use but may provide detailed information to volunteers interested in the particular topics.

[Accountable Plan Template](#)[Council Office Procedures](#)[Council Stewardship Policies](#)[FASB Accounting Changes and the BSA](#) – new for 2018[Fiscal Management Procedures for Stewardship](#)[Fiscal Policies and Procedures for BSA Units](#) – Revised April 2022[– BSA Units PayPal and Venmo Reporting Update](#)[Interpreting Financial Statements](#)[Life Insurance Imputed Calculation](#)[Local Council Accounting Manual](#)[Local Council Financial Audit Tools](#)[New York Conflict of Interest Policy](#)—Updated March 2014[New York Conflict of Interest Policy](#)—March 2014[Records Retention Policy](#)— Updated January 2019[Presentation: Fringe Benefits: Employer-Provided Vehicles and Group-Term Life Insurance](#) – Uploaded April 2014[Record Camp Card Transactions—PeopleSoft](#)[Record Product Sales](#) in General Ledger[Time Study Forms](#)[Blackbaud CRM Resources](#)[BSA Fiscals Forum](#)[PeopleSoft Support](#)

- [Accounts Payable](#)

www.scouting.org/financeimpact



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

[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





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



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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](#)



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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



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<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 help](#)

Council Support

National Support

Scout Shops/NDC Support



New Council User or Transfer
Account & Access



Council Account Termination
Account & Access



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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



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User Name – Application - Attachments

Council #

006 Black Warrior Council

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

User Name

 Don Day

User ID *(optional)*


example: Jodavis

Application

Blackbaud CRM

Example: Blackbaud, Peoplesoft, Membership, etc.

Attachment *(optional)*

 Drag and drop files, paste screenshots, or
browse

Create Cancel



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Next Forum

March 15, 2023

10:00 am & 2:00 pm CT



Questions & Answers



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