CRM User Forum

September 20, 2023

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Objectives

- Preparing for Year-End
 - Printing the pledge receivable aging report
 - Creating the Unworked Constituent Listing
 - Setting up 2024 Appeal
- Scouting Gives
 - Discontinuing Recurring Gifts
 - Refunding Donations
- PeopleSoft Migration
- CRM Sync
- Questions Answers



Pledge Receivable Aging Report

- Shows the detail and total amount of the council's outstanding pledges.
- The Pledge amount, Pledge balance, Current due and Past due
- Give constituents' information name, phone number, constituent's ID
- Separated by Giving Categories and gives a total.
- Only posted transactions are included in this report.



Pledge Receivable Aging Report

- Click on Revenue at top
- Under Reports click Pledge Receivable Aging Report
- Click in the BSA Organization
- Click Report Code: (Year)
- Click Appeal: (Appeal name)
- Click View Report



Pledge Receivable Aging Report

🍞 Pledge Receivable Agir	ng Report						
BSA Organization F23 2023 Friends of Sc	Council	~	Report Code 2	023	•		
14 4 1 of 7 🕨 🔰	Find Next	4. ©					
Appeal: BSA Structure: Giving Category:	F23 2023 Friends of Sc Community	couting					
	Pledge	Pledge	Pledge	Current		Past Due	
Constituent Name	Date	Amount	Balance	Due	30+	60+	90+
n Charles Childrenn, Marintalalainiaidh Namh Nan Airte an An	31-Jul-23	1,000.00	1,000.00	0.00	0.00	0.00	0.00
Advantation (S. and S.	25-Jan-23	500.00	500.00	0.00	0.00	0.00	0.00
CONTRACTOR CONTRACTOR	31-Jan-23	1,200.00	400.00	0.00	0.00	0.00	0.00
Andre T. Street Co. Collinguation	01-May-23	1,200.00	600.00	0.00	0.00	0.00	0.00
Transfer in the second	01-May-23	250.00	250.00	0.00	0.00	0.00	250.00
And a second	19-Jul-23	300.00	300.00	0.00	0.00	300.00	0.00
All my fay between the contracts.	31-Jul-23	1,500.00	1,500.00	0.00	1,500.00	0.00	0.00
ALC: NO. OF COMPANY.	31-Jul-23	1,000.00	1,000.00	0.00	1,000.00	0.00	0.00
	O						



Unworked Constituent List



"Easy Button" Reports

- Appeal Constituent Report
 - Unworked or worked report
 - Flat list report
 - Export to PDF or Excel
- Appeal Progress Report
 - How are we doing this year compared to prior year
 - Export to PDF or Excel



"Easy Button" Reports

Blackbaud CRM [™] P	Constituents ▼ Name or lookup ID	Add new ▼
Home Constituents Marke	ting and Communications T Revenue	Events Memberships Prospects Foundations Fundraising Analysis
Revenue		
More tasks	Reports	Transactions
Appeal progress results	🏐 BSA Appeal Const	ituent Export (OLTP) 🦧 Transaction search
	🌍 BSA Appeal Const	ituent Report (OLTP) 🛛 🚙 Batch entry
	🇊 BSA Appeal Progre	ess Export (OLTP) 🔥 Batch search
	🚽 🚽 🚽 🖉 🖉 BSA Appeal Progre	ess Report (OLTP) 👘 🐨 Add a payment
	🇊 Pledge Receivable	Aging Report
	🇊 Appeal Progress b	y Category
	🇊 Appeal Progress b	y Solicitor
	③ BSA Summary of A	Appeals
	Solicitor Performan category	nce by revenue
	🗐 Account distributio	n



BSA Appeal Constituent Report

Site:	Council 🗸 🚺	Report Code	2021 💌 🙎	
nnual Appeal(s):	All (144) 2021 Eagle Recognition Event (144) EN21 - 2021 Endowment Campaign (144) R21 - 2021 Gifts-in-Kind	Multi-year Appeal(s)	 Only include multi-year appeal revenue for: 2021 	View re
Include Exclud Include All Include Prior Y	e Breakdown Filter /ear 1 Giving Include Current Year Constitue /ear 2 Giving Include Current Year \$0 Pledge /ear 3 Giving Include Donor Status Stats	nt Appeal/Response (Worked) Info (Worked) Info		



BSA Appeal Constituent Report - Exclude

Site			Report Code:	2021	. 2	
Annual Appeal(s):	All (1) 2021 Eagle Recognition Event (1) EN21 - 2021 Endowment Campaig (1) R21 - 2021 Gifts-in-Kind		Multi-year Appeal(s):	2021		
				Only include multi	ryear appear revenue for:	1000
Include Exclud	e Breakdown Filter			Only include multi	eyear appear revenue for:	View repo
Include Exclud	e Breakdown Filter					View repo
Include Exclude	e Breakdown Filter	ed 0	Exclude Current Year Sol	icitees	Exclude Constituents Marked as Do Not Solid	Uiew repo
Include Exclude Exclude All Exclude Curre	e Breakdown Filter ht Year Donors check this for Unwork ht Year Non-Donors	ed 0	Exclude Current Year Sol Exclude Current Year No	icitees n-Solicitees	 Exclude Constituents Marked as Do Not Solid Exclude Constituents Marked as Deceased 	Uiew repo



BSA Appeal Constituent Report - Breakdown

SA Appeal C	Constituent Report (OLTP)			
Site:	Council 🗸 1	Report Code:	2021 🗸	
Annual Appeal(s):	All (144) 2021 Eagle Recognition Event (144) EN21 - 2021 Endowment Campaig (144) R21 - 2021 Gifts-in-Kind	Multi-year Appeal(s):	 Only include multi-year appeal revenue for: 2021 	View repor
Breakdown by Break Down b Break Down b Break Down b Break Down b	/ All by BSA Structure Anchor to Latest Re by Giving Category Sort by Name (Last/ by Solicitor by Revenue BSAFR Group	venue or Constituent Appeal First) Only		



BSA Appeal Constituent Report – Filter - View

Site:		Report Code:	2021 👻 🙎	
nnual Appeal(s):	All	Multi-year Appeal(s):		
	(144) 2021 Eagle Recognition Event			
	(144) EN21 - 2021 Endowment Campaig 3			
	(144) R21 - 2021 Gifts-in-Kind		•	
	4		Only include multi-year appeal revenue for: 2021	View
nclude Exclud	le Breakdown Filter			_ 6
	As of Date:	Filter on BSA Structure:		
Current Year Mini	mum Giving:	Filter on Giving Category:		
Prior Vear(s) Mini	mum Giving:	Filter on Solicitor:		



BSA Appeal Constituent Report (OLTP)

CY Appeal: S21 - 2021 Friends of Scouting

As of 8/18/2021

PY1 Appeal: S20 - 2020 Friends of Scouting						
PY2 Appeal: S19 - 2019 Friends of Scouting						
PY3 Appeal: S18 - 2018 Friends of Scouting						
Pack 0422 (Individual Langed Linwarked)						
Pack 0422 (Individual, Lapsed, Unworked)						
Community Campaign, [No Solicitor],				101.11		0.10.17
		Contribution	Paid	Write-off	Balance	Sol Credit
	CT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Reality of the second sec	PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	PY2	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00
	PT3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Crew 2727 Individual, Lapsed, Unworked)						
, Family Campaign, C				_		
	1	Contribution	Paid	Write-off	Balance	Sol Credit
	CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	PY2	\$185.00	\$185.00	\$0.00	\$0.00	\$185.00
	PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Fabrication, LLC 9, Organization, Lapsed, Unworked))					
Community Campaign, [No Solicitor],	10 A S	a second)			
	1 1 1	Commonion	raiu	Write-off	Balance	Sol Credit
And the second sec	CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	PY1	\$100.00	\$0.00	\$100.00	\$0.00	\$0.00
	PY2	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00
	PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Deb Deb Unworked)						
Family Campaign, F		1000				
	1	Contribution	Paid	Write-off	Balance	Sol Credit
	CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	PY2	\$50.00	\$50.00	\$0.00	\$0.00	\$50.00
	PY3	\$50.00	\$50.00	\$0.00	\$0.00	\$50.00



Creating 2024 Appeal

- Create all FY appeals at the same time
- Mirror the Appeal name from this year when creating 2024 appeals
- Marketing & Communications \ Add an Appeal
- Remember to use FY inbound channels with monies applied to 2024 appeals with 2023 postdates.



Add an Appeal

Name:	(092) A24 - 2024 Peach of an A	thlete		
Description:	2024 Peach of an Athlete			
		Split evenly	Split	fully
Category:	Special Events			~
Report code:	2024			*
Site:	Atlanta Area Council		~	9
Start date:	1/1/2024			
End date:	12/31/2024			
Goal:	\$0.00			

Name	Description
(092) A23 - 2023 Peach of an Athlete	2023 Peach of an Athlete
(092) M23 - 2023 Metro Classic Golf	2023 Metro Classic Golf
(092) OOD23 - Operating Other Direct	Operating Other Direct
(092) R23 - 2023 Eagle Scout Recognition	2023 Eagle Scout Recognition
(092) S23 - 2023 Friends of Scouting	2023 Friends of Scouting
(092) Y23 - 2023 Whitney M Young	2023 Whitney M Young

- 1. Add Name
- 2. Add Description
- 3. Add Category
- 4. Add Report Code (Appeal Year)
- 5. Site will default to your site
- 6. Add Start date Logic
- 7. End date is last day of next year

Add an Appeal

- Add Prior Appeal and Designation
- On the Designations tab set a default





Adding a FY Event

- Create all repeat events at the same time
- Follow naming conventions from 2023 to 2024
- Use the copy feature when creating
- Update appeals and registration option
- Submit your Event Revenue mapping sheet.
- Events \ Add New



- 1. Mirror naming and description from previous year
- 2. Add dates and location
- 3. Copy items from last year
- 4. Pick correct category

Prepared.

- 1. If processing monies in 2023, pick FY Category
- 2. If not processing monies in 2023 pick non-FY Category
- 5. Update options and dates with correct information when known

	~
Auction	
Cultivation/Recognition (no revenue)	
Distinguished Citizens Dinner	
Friends of Scouting (no registration revenue)	
Golf	
Special Fundraising Event	
Sporting Clays	
FY - Auction	
FY - Distinguished Citizens Dinner	
FY - Golf	
FY - Special Fundraising Event	
FY - Sporting Clays	

Add an Event

General								
Name:	L004 Corporate Go	lf Classic 2024		Details				
Description:	Corporate Golf Clas	ssic 2024		Start date:	7/1/2024	Start time:	hh:ı	nm AM
Category:			v	End date:	7/1/2024	End time:	hh:ı	nm AM
Sites:	Site			Location i	nformation			
	Mobile Area	Council		Location:	The Athelstan Club			۶
				Room/Unit:		▼ 🖻	Capacity:	150
	Event is an auc	tion		Contact:				2
Copy option	Event allows de Copy from e	esignations on fees				⊠		
🕡 Help	Copy from:	L004 Corporate Golf Clas	sic 2023 P Copy ex Copy in	rpenses vitations v	Copy registration options Copy invitees		Save	Cance
		Copy lodging option Copy designations	IS Copy to	b occurrences	Conviteam members			

Scouting Gives Recurring Gifts

- Donor creates the recurrence
- Recurrence comes to CRM in one batch
- Recurrence payments comes to CRM in a second batch
- Payments continue until Credit Card goes bad
- Donor can't end recurrence Council Employee terminates



Payment Platform Access

- Log into MyBSA
- Click Scouting Gives Log-in link insert username and password
- Click Payment Platform link insert username and password
 - Payment Platform access not granted automatically
 - Member Care ticket must be created to have this access added to you



Scouting Gives Login





- 1. Login link in the Fundraising Gadget on MyBSA
- 2. Use your MyBSA credentials to sign in.
- 3. Must have APTGBasicAdmin role in CRM to log on.



Dashboard • Appeals Events Text Giving \$ Peer 2 Peer alt. Reports A ransactio Logs

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Manage







This is your Scouting Give landing page. To access recurrences and refunds one needs to click the work **MANAGE** next to Payment Platform. This will open another sign in window for your use.

💄 Event Capacity 0



Payment Platform

Login Window



Scheduled Payment	ts						
Q Search by Na	me, Product Name,	Merchant ID and Recurring ID					
			۵	Download	🖒 Refresh	🗇 Show: Filter Op	ptions
	Name	Product Name	Merchant ID	Recurring ID	Description		Amoun
÷	ermini		13166365	2364	WPY*BSAHe	artofVirginiaCouncil	\$1236.0
\odot	el Raymon	d	13166365	2366	WPY*BSAHe	artofVirginiaCouncil	\$5.15
\oplus	etty		13166365	3580	WPY*BSAHe	artofVirginiaCouncil	\$1236.0
۲	a Anderso	n	13166365	3702	WPY*BSAHe	artofVirginiaCouncil	\$25.75
۲	Hall Hall		13166365	3827	WPY*BSAHe	artofVirginiaCouncil	\$300.0
Ð	ming		13166365	3833	WPY*BSAHe	artofVirginiaCouncil	\$309.00
Ð	Murphy		13166365	3936	WPY*BSAHe	artofVirginiaCouncil	\$103.00
\odot	Porter		13166365	5271	WPY*BSAHe	artofVirginiaCouncil	\$10.30
Ð	y Leonard	I	13166365	5394	WPY*BSAHe	artofVirginiaCouncil	\$25.75
\oplus	er Payne	Scouting Gives Online Donations	13166365	5396	WPY*BSAHe	artofVirginiaCouncil	\$10.30
	Scheduled Payment Q Search by Na Q Search by Na Image: Search by Na Image: Search by Na	Scheduled Payments Q Search by Name, Product Name, Name Permini	Scheduled Payments Q Search by Name, Product Name, Merchant ID and Recurring ID Name Product Name Image: Search by Name Image: Se	Scheduled Payments Q: Search by Name, Product Name, Merchant ID and Recurring ID Name Product Name Image: Search by Name, Product Name, Merchant ID and Recurring ID Name Product Name Image: Search by Name, Product Name Image: Search by Name, Merchant ID Image: Search by Name, Product Name Image: Search by Name, Merchant ID Image: Search by Name, Product Name Image: Search by Name, Merchant ID Image: Search by Name, Product Name Image: Search by Name, Search by Name, Merchant ID Image: Search by Name, Product Name Image: Search by Name, Search	Scheduled Payments Rame, Product Name, Merchant ID and Recurring ID Image: Scheduled Payment, Merchant ID Image: Scheduled Payment Image: Scheduled Payment Image: Schedule Payment	Scheduled Payments Scheduled Payments © Search by Name, Product Name, Merchant ID and Recurring ID Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Name Product Name Merchant ID Ownload Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) Image: Comparison of the Product Name (Comparison of the Product Name) <td>Scheduled Payments © Search by Name, Product Name, Merchant ID and Recurring ID Devine Devine</td>	Scheduled Payments © Search by Name, Product Name, Merchant ID and Recurring ID Devine Devine



Ending Recurrence

Q wall							
	lbrid Z			Download	🖒 Refresh	হ্ন Show: Filter Option	WPY*BSAGu New recurring scheduled for WPY*BSAGulf
Na	ame 🗢 🗢 Product Name 🗢	Merchant ID	Recurring ID	Description	Amount	Frequency	Tue, 19 Sep 2023
1	Walbr	1823602172	3998	WPY*BSAGreenMo	untainCouncil \$15.45	3 & 4 monthly	Payment Scheduled or
1. S 2. S 3. F 4. D 5. C 6. S 7. A 8. C	Start on Scheduled Payn Search for donor Find the Frequency Colu Double click the frequen Click End Recurring Payn Select date you want it t Add comments Click End Recurring Payn	nents mn icy nent o end nent.	End Recurrin Select End Da Add Commen Donor reque	ng Payment te 2023/09/19 ts 6 - 8 ested termination.		10 / page	End Date: 3 0 Sat Sep 30 2023 (•) Scheduled Tue Oct 31 2023 (•) Scheduled Thu Nov 30 2023 (•) Scheduled Sun Dec 31 2023 (•) Scheduled M Sun Dec 31 2023 (•) Scheduled Sun Dec 31 2023 (•) Scheduled (•) Scheduled (•) Scheduled (•) Scheduled (•) Scheduled (•) Scheduled (•) Scheduled (•) Scheduled (•) Schedule

Scouting Gives Refunds

 Scheduled Wepay Payments Wepay Reconciliation 	Council Nar 1 Wepay Paymen	me or Number t History 2	Council Name	e or Number			_	2. Se 3. Sl re 4. Fi	earch for ide to th fund lin ll in refu	r donc ne righ k nd bo	it to fir	nd click
Orbital Payments Eailed Resurring Reurports	Q portor						🕈 Downloa	d	🖒 Refresh	ę	Show: Filter C	Options
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Orbital Reconciliation	13166365	5764	602	Heart of Virginia (Council W/PV*RSAHe	artofVirginiaCouncil robert por	teriii@amail.com	80/6250	807	monthly	🗸 released	Refund
Orbital Reports	13166365	5764	602	Refund						monthly	🕑 released	<u>Refund</u>
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Other Topics

- PeopleSoft Migration
- CRM Sync





Council Support

Home > Council Support > Council Funding and Finance > Council Administration

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

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 20 New York Conflict of Interest Policy-March 2014 Records Retention Policy- Updated January 2012 Presentation: Fringe Benefits: Employer-Prov ived Vehicles and Group-Term Life Insurance – Uploaded April 2014 Record Camp Card Transactions—PeopleS Record Product Sales in General Ledge **Time Study Forms**

Blackbaud CRM Resources

BSA Fiscals Forum

PeopleSoft Support

Accounts Payable

www.scouting.org/financeimpact

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BOY SCOUTS OF AMERICA

JOIN US GIVE SHOP MY.SCOUTING



Council Support

Council Management Support

CRM Resources

CRM (Blackbaud) User Forum Presentations

Contact Council Management Support

Council Assessments

Council Business

Practices

Training

Council Fiscal

Management and

Council Board Resources

Report Cookbook (for OLTP) BSA Appeal Progress & Appeal Constituent Reports

Home > Council Support > Council Funding and Finance > Council Administration > CRM Resources

2022

2021

CRM Process Videos

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

Journey to Excellence

Council Funding and Finance



Member Care Self-Service

<u>http://membercare.scouting.org</u>

• Creating an incident directly in JIRA







Service Categories





Service Categories



Prepared. For Life.[™]

General Assistance

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

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

Tickets opened using the general assistance option go into the general queue



Summary – Description – Council

Summary

DI II				
Blackbaud	nood	DOW	an an a	cotocory
DIackDauu -	neeu	new	uiviilu	category
			2	

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

Council



Create Cancel



Next Forum

October 18, 2023 10:00 am & 2:00 pm CT



Questions & Answers

