CRM User Forum

November 15, 2023

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Objectives

- CRM Batches
    - Reviewing uncommitted batches
    - Working through LC Import Pledge and Recurring payment batches
- Preparing for Year-End
    - Printing the pledge receivable aging report
    - Setting up 2024 Appeal
    - Billing and Acknowledgement Updates
    - Creating 2024 Events
    - Recording Future contribution
    - Year End Revenue Check
    - Updating Recurring gifts
- Questions – Answers

Uncommitted Batches

- Uncommitted batches should be reviewed
- If batch has revenue that needs to be committed – Commit
- If batch has revenue that has been committed – Delete
- If batch is empty – use the batch or delete the batch
- Currently we have 640 uncommitted batches.
- 180 of these batches have added dates before 11/1/23

Check for Uncommitted batches

- Navigate to Revenue \ Batch Entry
- Click on the Uncommitted Batch Tab
- Change the Date Range filter to "blank"
- Ensure the Site filter is set to "All Sites"
- Click "Apply" to engage your new filters
- Recommendation: Keep your filters set like this on the Uncommitted Batch Tab.

- Before Filter Change

- After Filter Change – 27 uncommitted batch show

LC Import of Pledge and Recurring Payments

LC Import Batches

- Batches are system Generated
- Payment batches for stored Recurring Gifts or Pledges with installment schedules paid by credit card
- They should be dealt with ASAP
- Failure to resolve these batches causes your council to lose cash

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LC Import Batches

- Review the batch
- Add postdate and inbound channel
- Save and close your batch and remember batch number
- Run the batch through your credit card processor.
- If transactions are authorized by BBMS – Review the batch and then commit.

LC Import Batches

- If transactions do not authorize
  - System removes them from batch – view exception report and fix
  - System creates retry batch – review batch rejection message
- If insufficient funds – Wait a few days and try to run the retry batch through Credit Card Processor
- Call donor for Credit Card information. Update Pledge and recurring gift marker – system will generate new batch with updated CC info. Do not update the CC info in batch.

LC Import Batches

- If payment method is fixed, the system will want to catch up missed installments. Get donor permission or reschedule pledge or recurring gift.
- If you can't get new credit card information
  o Update pledge to send a bill and remove the payment method
  o Update recurring gift and make it inactive

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Credit Card Processing Results

1. If Authorized – Review batch and commit
2. If Rejected
   o Permanent Rejection will be removed from the batch so other authorized transactions can be committed.
   o Review results report or exception file to determine course of action.
   o Provisional Rejections are removed from original batch and placed in a retry batch
   o System will bring installments rejected into another batch each time Generate Payments process runs.

BBMS Rejection Codes:
https://kb.blackbaud.com/knowledgebase/articles/Article/61752

Results Report

Credit Card Processing

Credit Card Processing Results Report

Batch processed:	L1041107	Retry batch created:	None	Process date:	11/14/2023
Payments processed:	9	Authorized transactions:	3	Authorized revenue total:	$175.00
		Provisional rejections:	0	Provisionally rejected revenue total:	$0.00
		Permanent rejections:	6	Permanently rejected revenue total:	$205.00

Number of times these transactions have been attempted: Not applicable   Maximum number of allowed attempts: 2

Transaction Number	Commitment Lookup ID	Constituent Name	Last 4 Digits	Transaction Amount	Authorization/Rejection Code	Transaction Outcome
1	rev-452		61	$75.00	214103	Processed batch (batch L1041107)
2	rev-453		89	$30.00	Invalid credit card number.	Removed for export
3	rev-437		35	$10.00	Invalid account number.	Removed for export
4	rev-436		57	$16.67	014813	Processed batch (batch L1041107)
5	rev-452		80	$15.00	Please call the number on the back of your card. Your bank requested that we do not honor this card.	Removed for export
6	rev-436		57	$83.33	015409	Processed batch (batch L1041107)
7	rev-440		42	$25.00	Please call the number on the back of your card. Your bank requested that we do not honor this card.	Removed for export
8	rev-453		59	$25.00	Please call the number on the back of your card. Your bank requested that we do not honor this card.	Removed for export
9	rev-441		27	$100.00	Please call the number on the back of your card. Your bank requested that we do not honor this card.	Removed for export

1. Transactions with authorization codes left in original batch
2. Other transactions are permanent rejects and where removed from the batch.
3. Generate payment routine will create new batch with rejected transactions when it runs again.

Pledge Receivable Aging Report

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.

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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

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Pledge Receivable Aging Report

Creating a New Appeal

Creating 2024 Appeal

- Create all FY appeals at the same time
- Mirror the Appeal name from this year when creating 2024 appeals
- (XXX) (Council number in title)
- Marketing & Communications > Add an Appeal
- Remember to use FY inbound channels with monies applied to 2024 appeals with 2023 postdates.

Add an Appeal

Add an appeal

Name: (092) A24 - 2024 Peach of an Athlete

Description: 2024 Peach of an Athlete

Split evenly | Split fully

Category: Special Events

Report code: 2024

Site: Atlanta Area Council

Start date: 1/1/2024

End date: 12/31/2024

Goal: $0.00

Help | Save | Cancel

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
- Prior Appeal will sync to reports overnight

Updating Constituent Reminders and Thank Yous
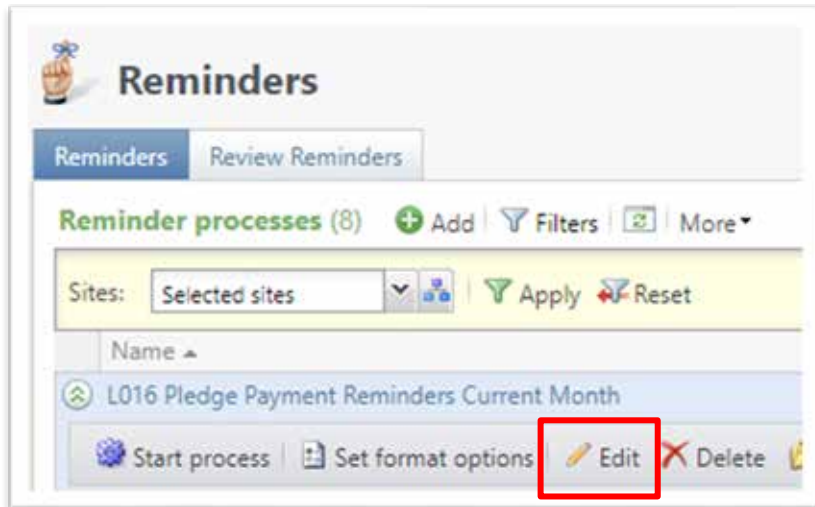
Update Billing Reminders & Acknowledgements

- Drop Chevron

- Click Edit

- Find Selection and click the pencil next to it

- Edit the Selection if needed
  - Add 2024 Appeal report Code
  - Add name of new appeal

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Reminders

Reminders

Reminders | Review Reminders
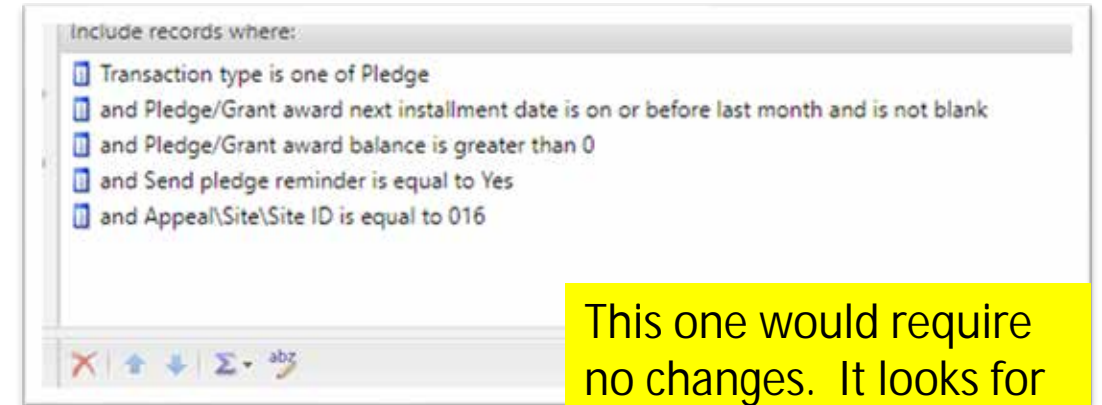
Reminder processes (8) ⊕ Add ▽ Filters ⟳ More▾

Sites: | Selected sites ▾ | 🔍 | ▽ Apply ⇄ Reset

Name ▲

⊙ L016 Pledge Payment Reminders Current Month
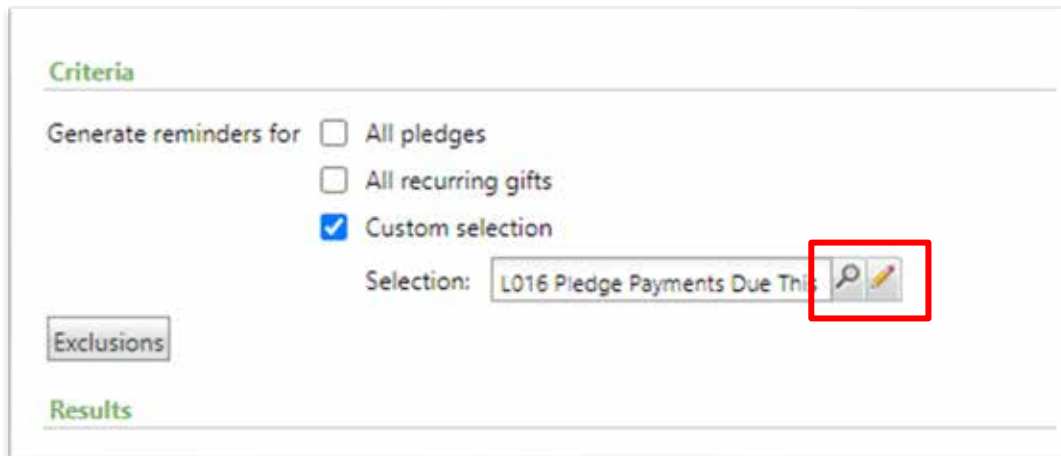
⚙ Start process | 🖹 Set format options | ✏ Edit | ✖ Delete

Include records where:

▯ Transaction type is one of Pledge
▯ and Pledge/Grant award next installment date is on or before last month and is not blank
▯ and Pledge/Grant award balance is greater than 0
▯ and Send pledge reminder is equal to Yes
▯ and Appeal\Site\Site ID is equal to 016

✖ | ⬆ ⬇ | Σ▾ abz

This one would require no changes. It looks for all overdue pledges.
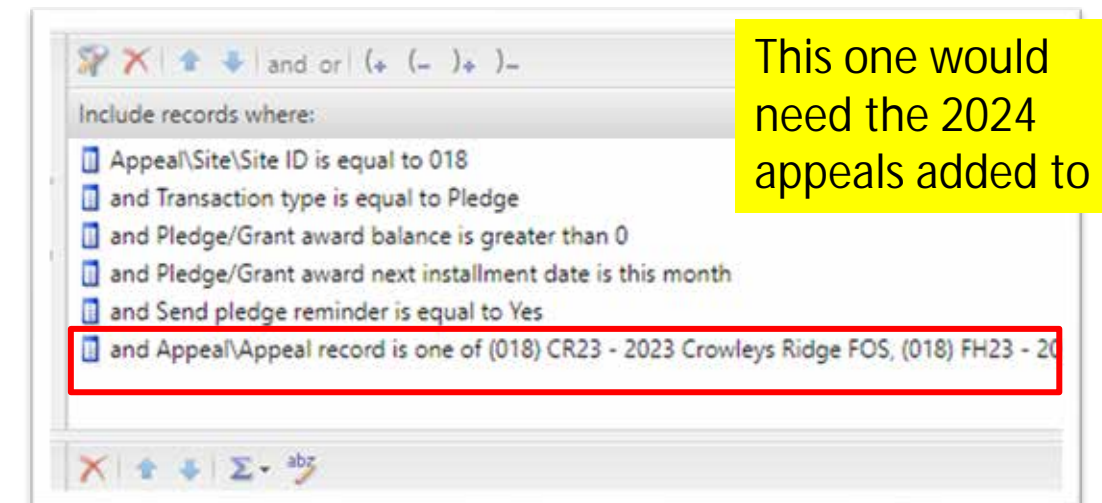
Criteria

Generate reminders for ☐ All pledges
☐ All recurring gifts
☑ Custom selection

Selection: | L016 Pledge Payments Due This | 🔍 ✏

Exclusions

Results

⚙ ✖ | ⬆ ⬇ | and or | (+ (–)+)–
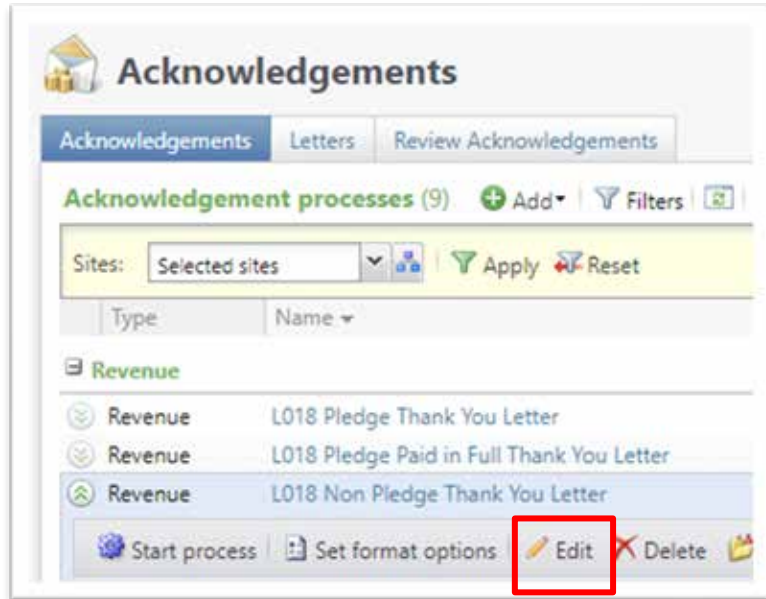
Include records where:

▯ Appeal\Site\Site ID is equal to 018
▯ and Transaction type is equal to Pledge
▯ and Pledge/Grant award balance is greater than 0
▯ and Pledge/Grant award next installment date is this month
▯ and Send pledge reminder is equal to Yes
▯ and Appeal\Appeal record is one of (018) CR23 - 2023 Crowleys Ridge FOS, (018) FH23 - 20

✖ | ⬆ ⬇ | Σ▾ abz

This one would need the 2024 appeals added to it.

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Acknowledgements

Acknowledgements

Acknowledgements | Letters | Review Acknowledgements

Acknowledgement processes (9) ⊕ Add ▾ ▽ Filters ▣
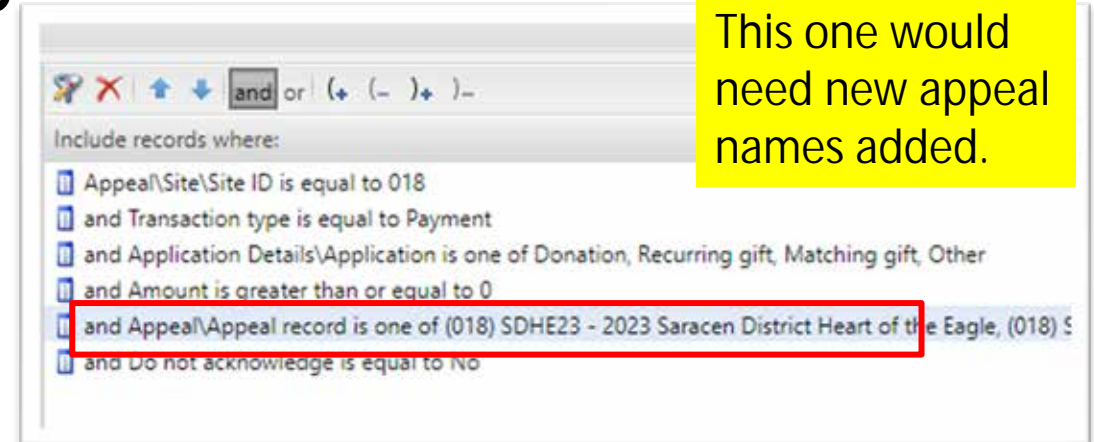
Sites: Selected sites ⯆ ⬝ ▽ Apply ⬝ Reset

Type	Name ▾
⊟ Revenue	
⊗ Revenue	L018 Pledge Thank You Letter
⊗ Revenue	L018 Pledge Paid in Full Thank You Letter
⊗ Revenue	L018 Non Pledge Thank You Letter

🛠 Start process | 🗒 Set format options | ✏ Edit | ✕ Delete | 📂

Edit revenue acknowledgement process ✕

Name: L018 Non Pledge Thank You Letter

Description:

Site: Quapaw Area Council ⯆ 🔎

Mailing label template: <File not specified> 📁 Choose file 🔎 Clear file
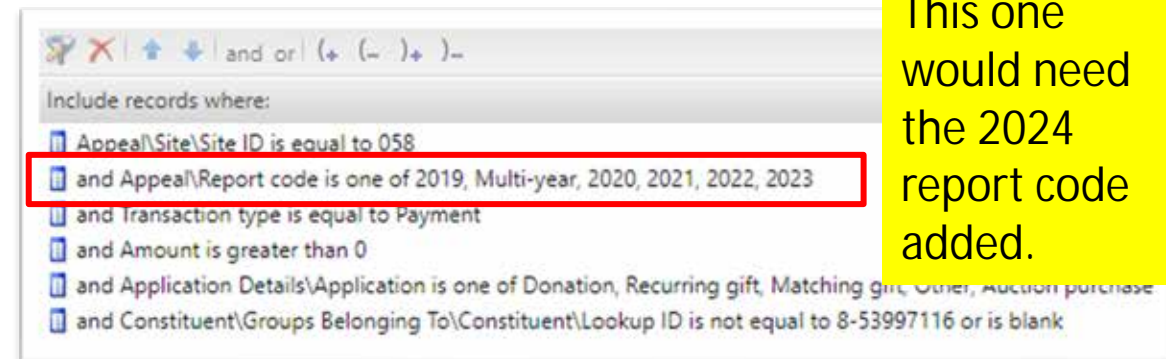
Criteria

Acknowledge revenue with letter: L018 Non Pledge Thank You Letter ⯆

Acknowledge: ○ All 'Not acknowledged' revenue
  ● Selected revenue

Selection: L018 No Pledge Payment Thank You (Ad-hoc Query) 🔎 ✏

Exclusions

🛠 ✕ | ⬆ ⬇ and or (₊ (₋)₊)₋

Include records where:

- Appeal\Site\Site ID is equal to 018
- and Transaction type is equal to Payment
- and Application Details\Application is one of Donation, Recurring gift, Matching gift, Other
- and Amount is greater than or equal to 0
- **and Appeal\Appeal record is one of (018) SDHE23 - 2023 Saracen District Heart of the Eagle, (018) S**
- and Do not acknowledge is equal to No

> **This one would need new appeal names added.**

🛠 ✕ | ⬆ ⬇ and or (₊ (₋)₊)₋

Include records where:

- Appeal\Site\Site ID is equal to 058
- **and Appeal\Report code is one of 2019, Multi-year, 2020, 2021, 2022, 2023**
- and Transaction type is equal to Payment
- and Amount is greater than 0
- and Application Details\Application is one of Donation, Recurring gift, Matching gift, Other, Auction purchase
- and Constituent\Groups Belonging To\Constituent\Lookup ID is not equal to 8-53997116 or is blank

> **This one would need the 2024 report code added.**

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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

Add an Event

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

Year End Revenue Check

- 2023 Appeals
  - FY-Inbound Channel with 2022 Postdate
  - CY-Inbound Channel with 2023 Postdate
  - PY-Inbound Channel with 2024 Postdate
- 2024 Appeals
  - FY-Inbound Channel with2023 Postdate

Use your Revenue Details (Splits) tab to check your data on the Appeal

Revenue Details Splits Tab

2023 appeal. Post Dates of 2023 with Current Year inbound channel as we approach year-end

2024 Appeal. Postdates of 2023 with Future Year inbound channel.

Mismatched Appeals

Review each 2023 appeal and visit the Mismatch: Appeals tab. If data populates, review and fix in an update batch. This example shows 3 2023 pledges that have payments attached. The payments have a 2022 appeal on them. This throws your reports off. Dropping the chevron allows you to see the Revenue ID's need for your update batch.

Revenue Data Hygiene

We have a set of data lists to help councils more quickly locate potential issues with their revenue.

Under Revenue>Revenue Data Hygiene, search for your council, then select it to load the data lists.

Revenue Data Hygiene

The Mismatched Inbound Channels tab will find any revenue with report code 2023 in Fund 1 where revenue with a 2022 post date has a CY Inbound Channel or 2023 post date has a PY or FY Inbound Channel.

The Mismatched Appeals tab will find any 2023 report code revenue where the appeal of the pledge doesn't match the payment

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Revenue Data Hygiene

The Revenue Not Posting tab will show revenue with a GL Post Status of Not Posted, Date Added this or last calendar year, where the Date Added is before yesterday.

In this example, the revenue was added near the beginning/middle of 2023, with GL Post Dates towards the end of 2023. This may have been an error by the user entering the revenue, and the revenue will not post until those dates are past or corrected.

Recurring Gifts

- Review Recurring Gifts Data List under Revenue
- Revenue \ More Tasks \ Recurring Gift List
- Update Appeal on Recurring gift to next year's appeal
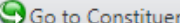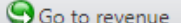- Do this on January 1

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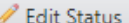
Maintaining Recurring Gifts

This council will need to click **Go to Revenue** and then edit the recurrence and change it to the 2024 Appeal. If the recurrence needs to be adjusted from active to terminated or lapsed, you can do this by clicking **Edit Status**.

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

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Member Care Self-Service

- http://membercare.scouting.org

- Creating an incident directly in JIRA

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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

Welcome to the National Online Support Center Service Catalog.

- Accounts & Passwords

- BSA Applications (Operations)

- BSA Applications (Program)

- Email, Communication & Collaboration

- Network Services

- Security Services

- Hardware & Software

- General Assistance

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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Summary – Description – Council

User Name – Application - Attachments

Next Forum

December 20, 2023
10:00 am & 2:00 pm CT

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Questions & Answers