CRM User Forum

December 18, 2024

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Cornelia Ellis
John Kuehn

Objectives

- 2024 Preparing for Year-End
  - Review Uncommitted Batches
  - Recording Future contribution
  - Year End Revenue Check
  - Printing the pledge receivable aging report
- 2025 Activities
  - Setting up 2025 Appeal & Creating 2024 Events
  - Billing and Acknowledgement Updates
  - Updating Recurring gifts
  - Contribution Statements
- Scouting America branding
- Questions - Answers

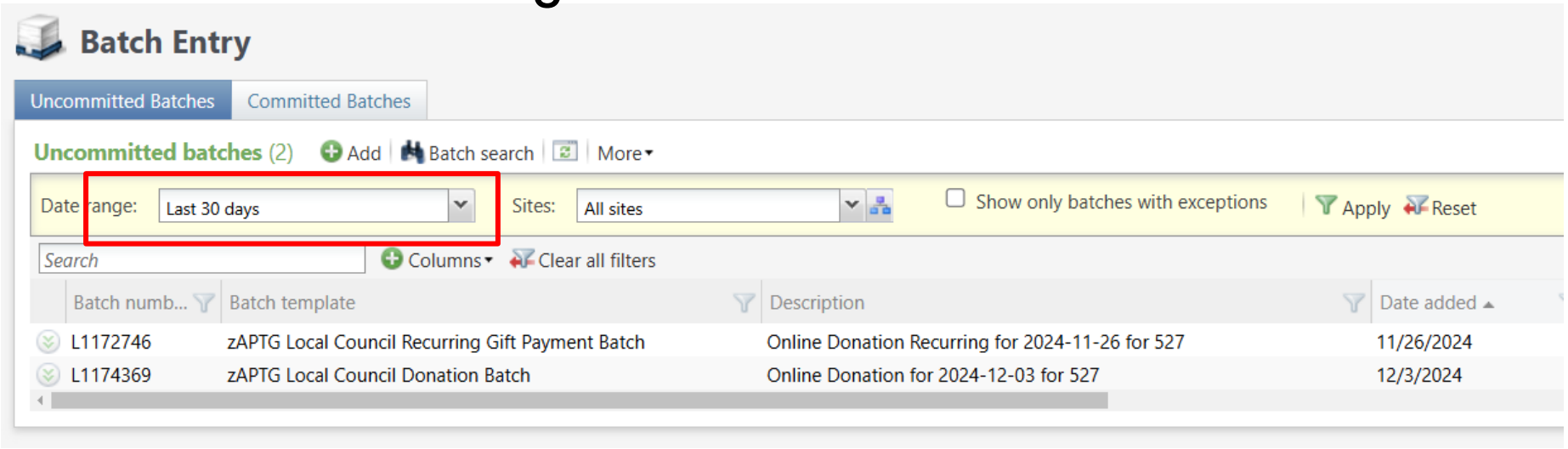
Uncommitted Batches

- 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 758 uncommitted batches.
- 259 of these batches have added dates before 12/1/24

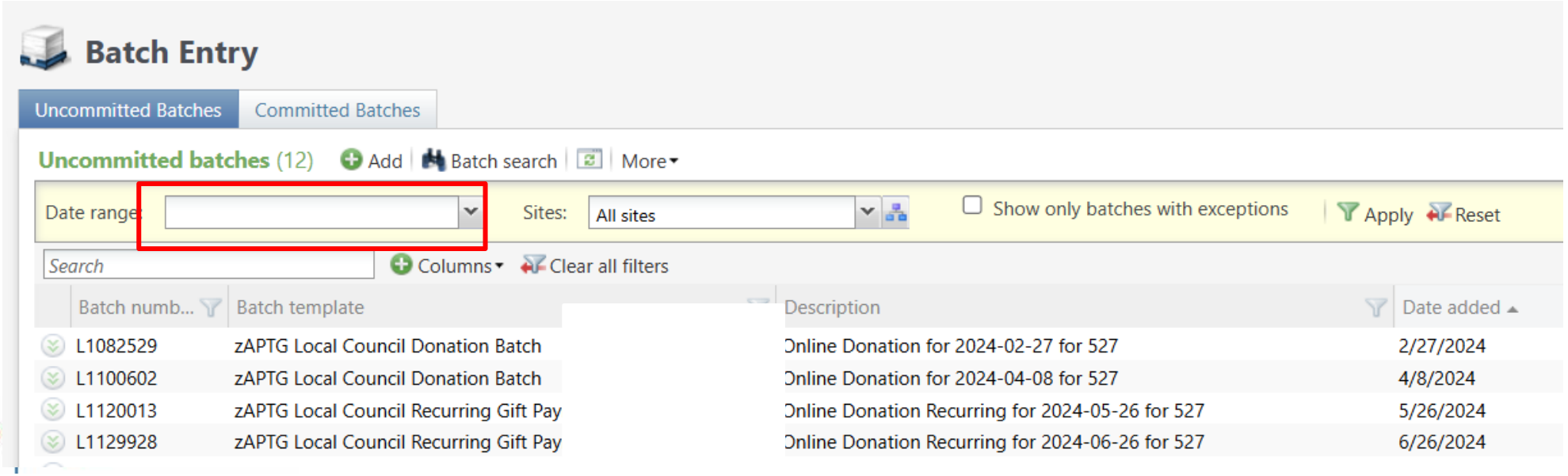
Check for Uncommitted batches

- 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 – 12 uncommitted batch show

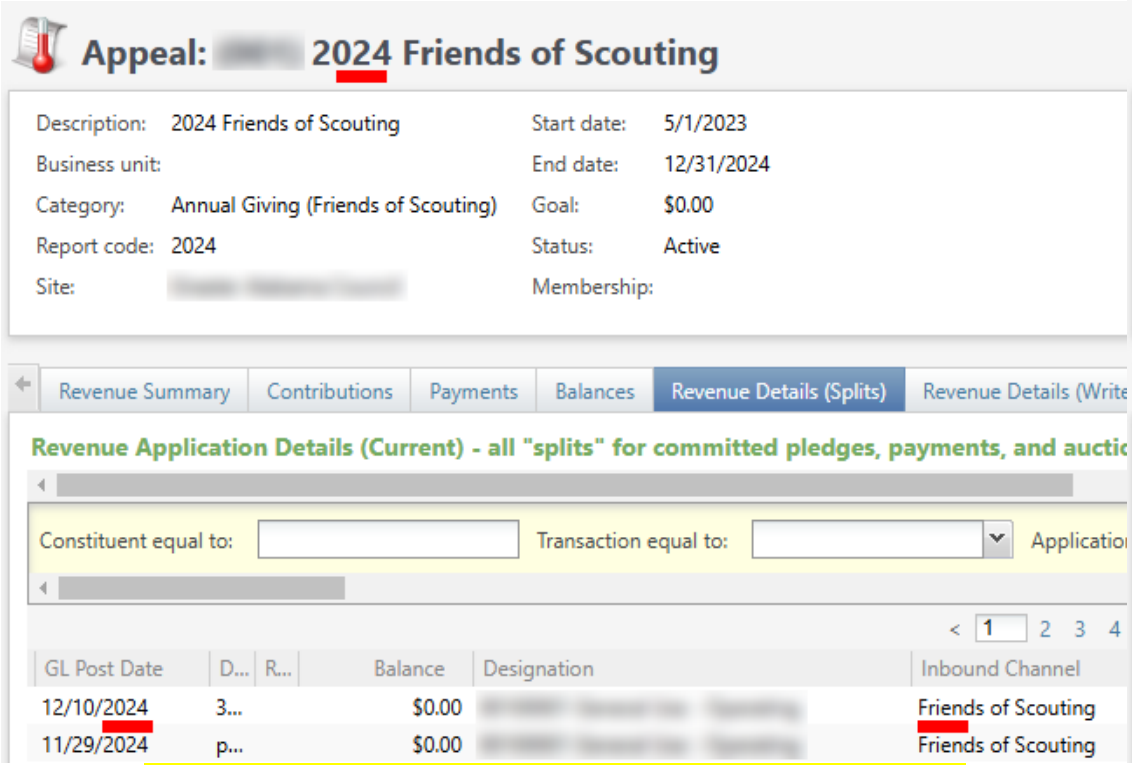


Year End Revenue Check

- 2024 Postdates to 2024 Appeals = CY Inbound Channel
- 2024 Postdates to 2025 Appeals = FY Inbound Channel
- 2025 Postdates to 2024 Appeals = PY Inbound Channel
- 2025 Postdates to 2025 Appeals = CY Inbound Channel

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

Revenue Details Splits Tab



Appeal: [redacted] 2024 Friends of Scouting

Description:	2024 Friends of Scouting	Start date:	5/1/2023
Business unit:		End date:	12/31/2024
Category:	Annual Giving (Friends of Scouting)	Goal:	$0.00
Report code:	2024	Status:	Active
Site:	[redacted]	Membership:	

Revenue Summary | Contributions | Payments | Balances | Revenue Details (Splits) | Revenue Details (Write

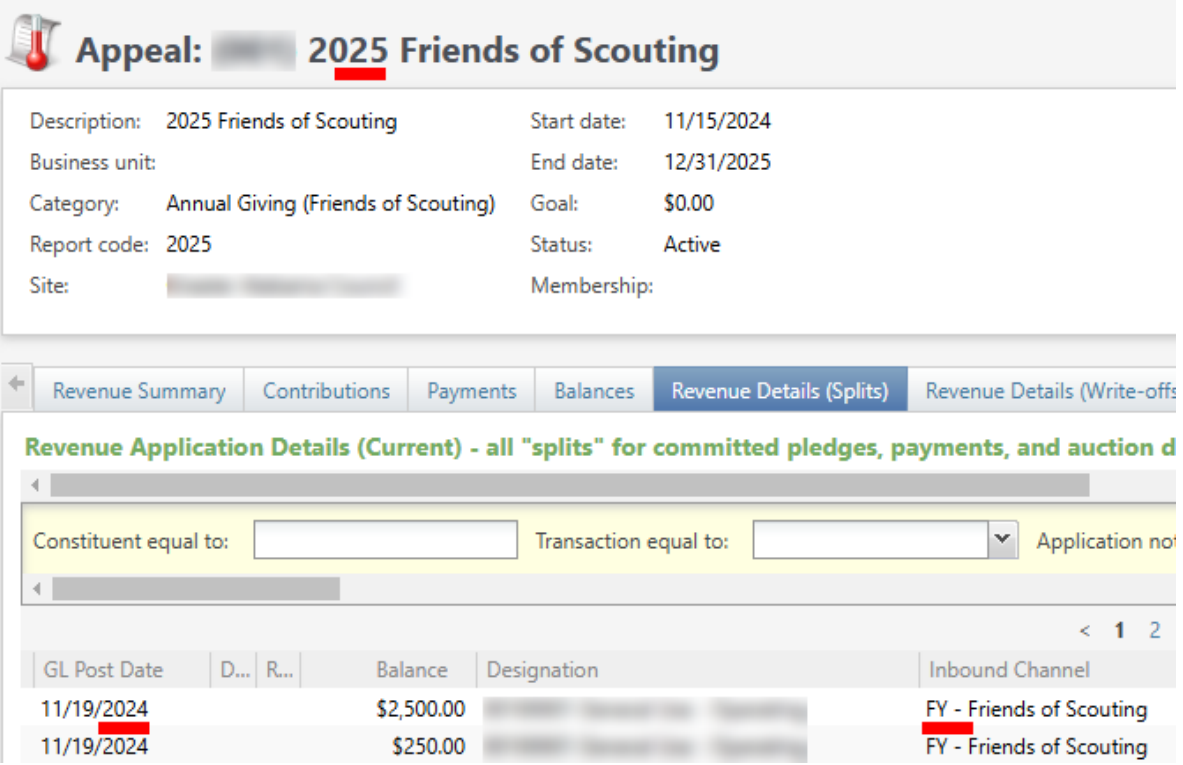
Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auctic

Constituent equal to: | Transaction equal to: | Applicatio

< 1 2 3 4

GL Post Date	D...	R...	Balance	Designation	Inbound Channel
12/10/2024	3...		$0.00	[redacted]	Friends of Scouting
11/29/2024	p...		$0.00	[redacted]	Friends of Scouting

2024 appeal. Post Dates of 2024 with Current Year inbound channel as we approach year-end



Appeal: [redacted] 2025 Friends of Scouting

Description:	2025 Friends of Scouting	Start date:	11/15/2024
Business unit:		End date:	12/31/2025
Category:	Annual Giving (Friends of Scouting)	Goal:	$0.00
Report code:	2025	Status:	Active
Site:	[redacted]	Membership:	

Revenue Summary | Contributions | Payments | Balances | Revenue Details (Splits) | Revenue Details (Write-offs

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

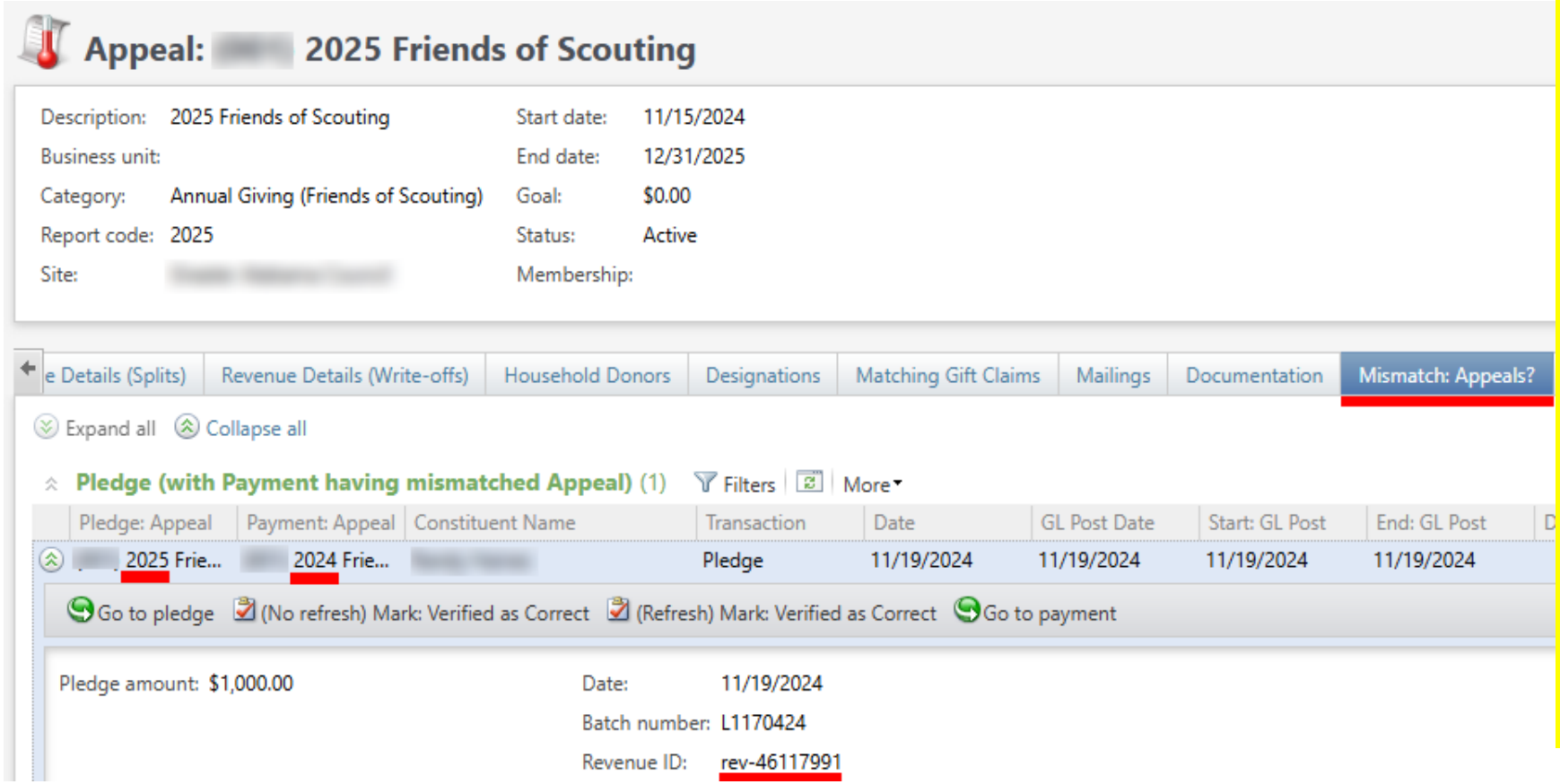
Constituent equal to: | Transaction equal to: | Application no

< 1 2

GL Post Date	D...	R...	Balance	Designation	Inbound Channel
11/19/2024			$2,500.00	[redacted]	FY - Friends of Scouting
11/19/2024			$250.00	[redacted]	FY - Friends of Scouting

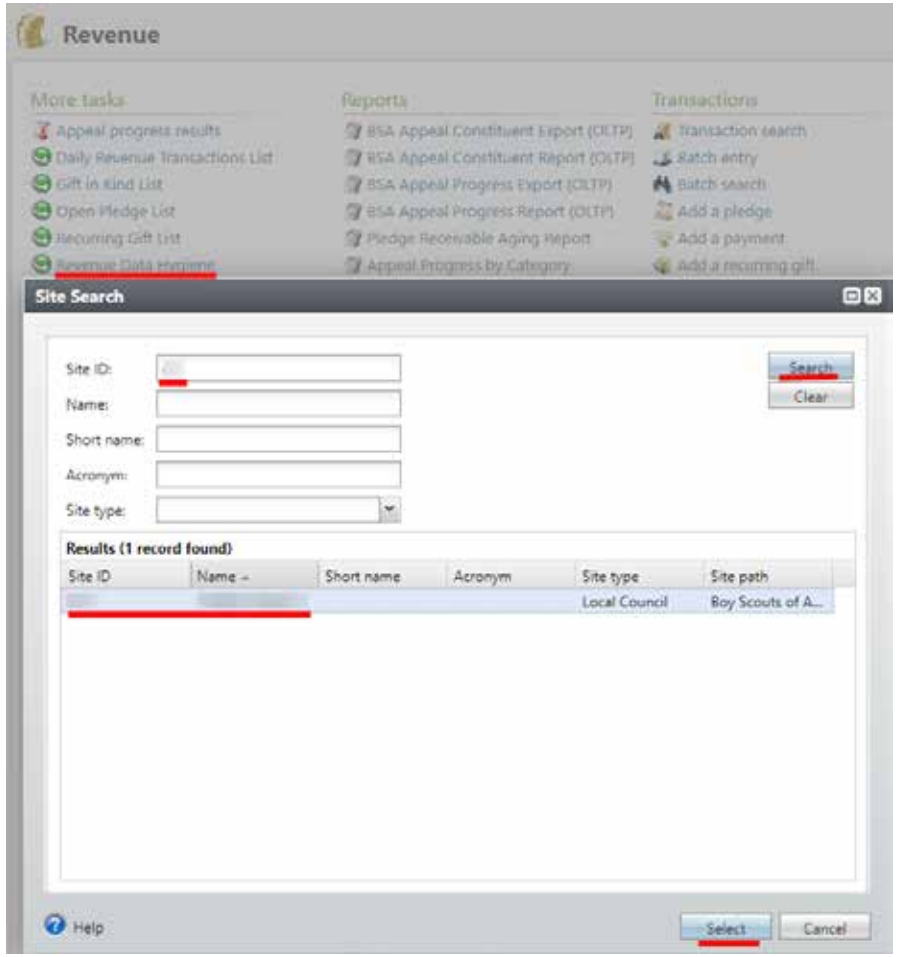
2025 Appeal. Postdates of 2024 with Future Year inbound channel.

Mismatched Appeals



Review your appeals and visit the Mismatch: Appeals tab. If data populates, review and fix in an update batch. This example shows a 2025 pledge that has a payment attached. The payments have a 2024 appeal on them. This throws your reports off. Dropping the chevron allows you to see the Revenue ID's need for your update batch.

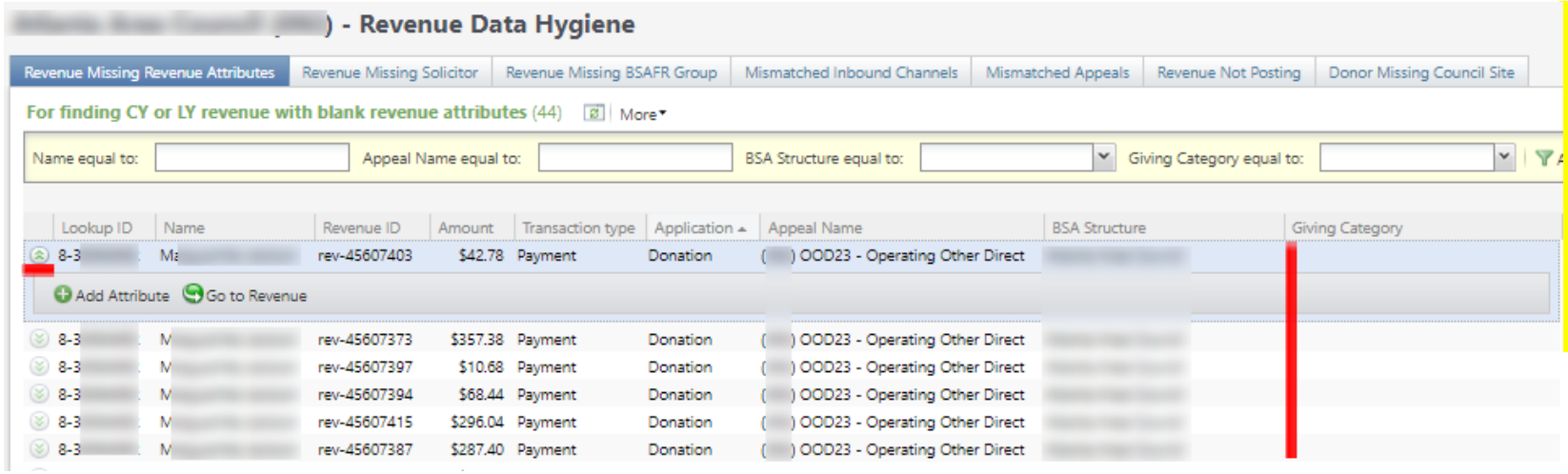
Revenue Data Hygiene



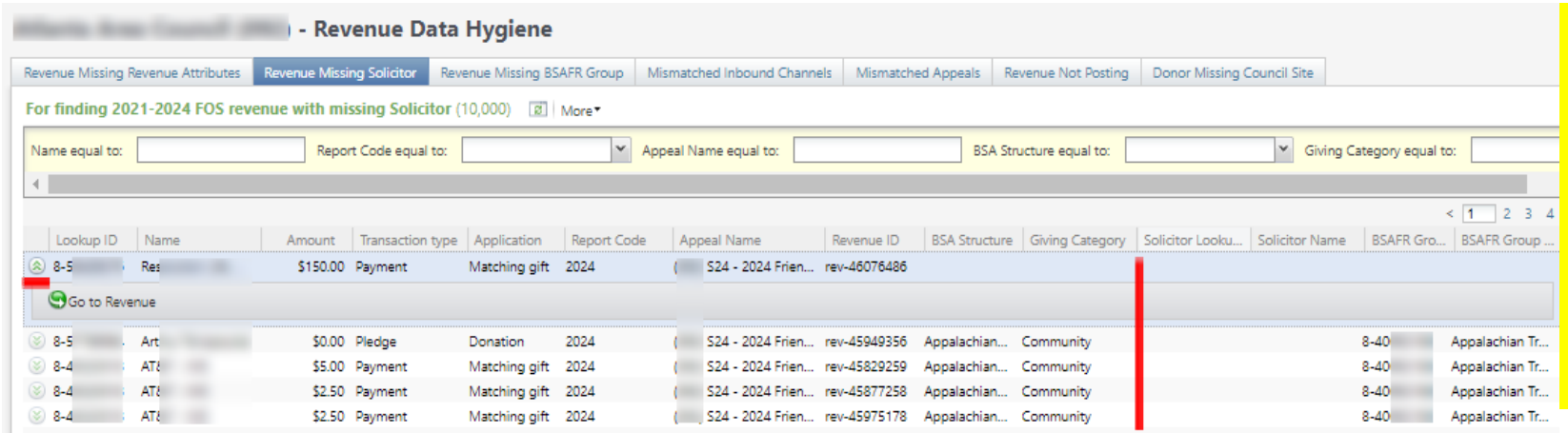
We have a set of data lists to help councils more quickly locate potential issues with their revenue.

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

Revenue Data Hygiene

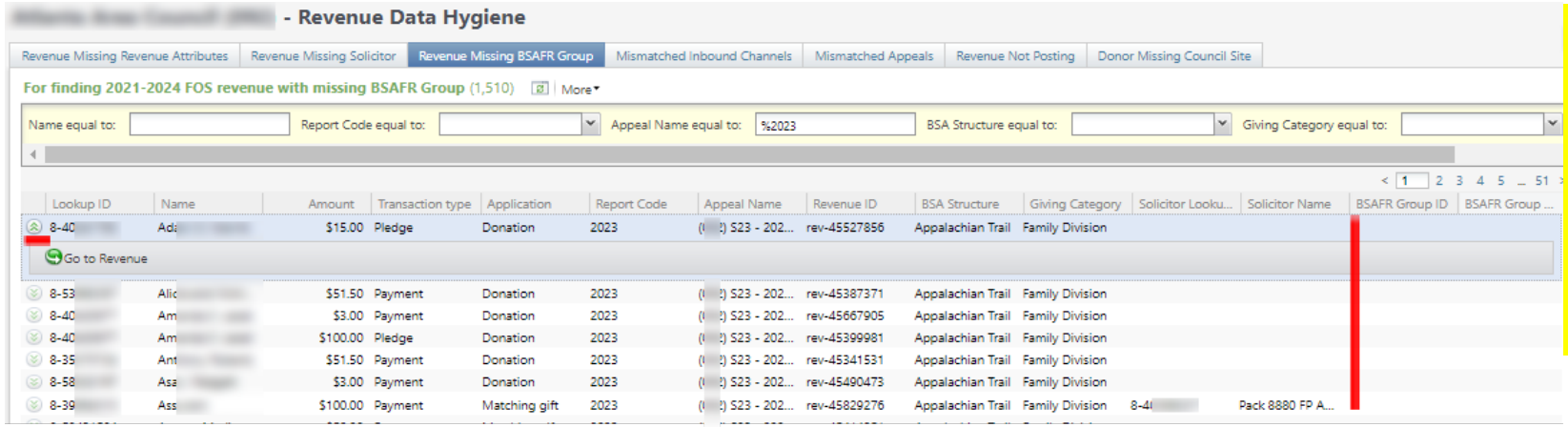


The Revenue Missing Revenue Attributes tab will find any revenue from the current or last calendar year that is missing either a BSA Structure or a Giving Category.



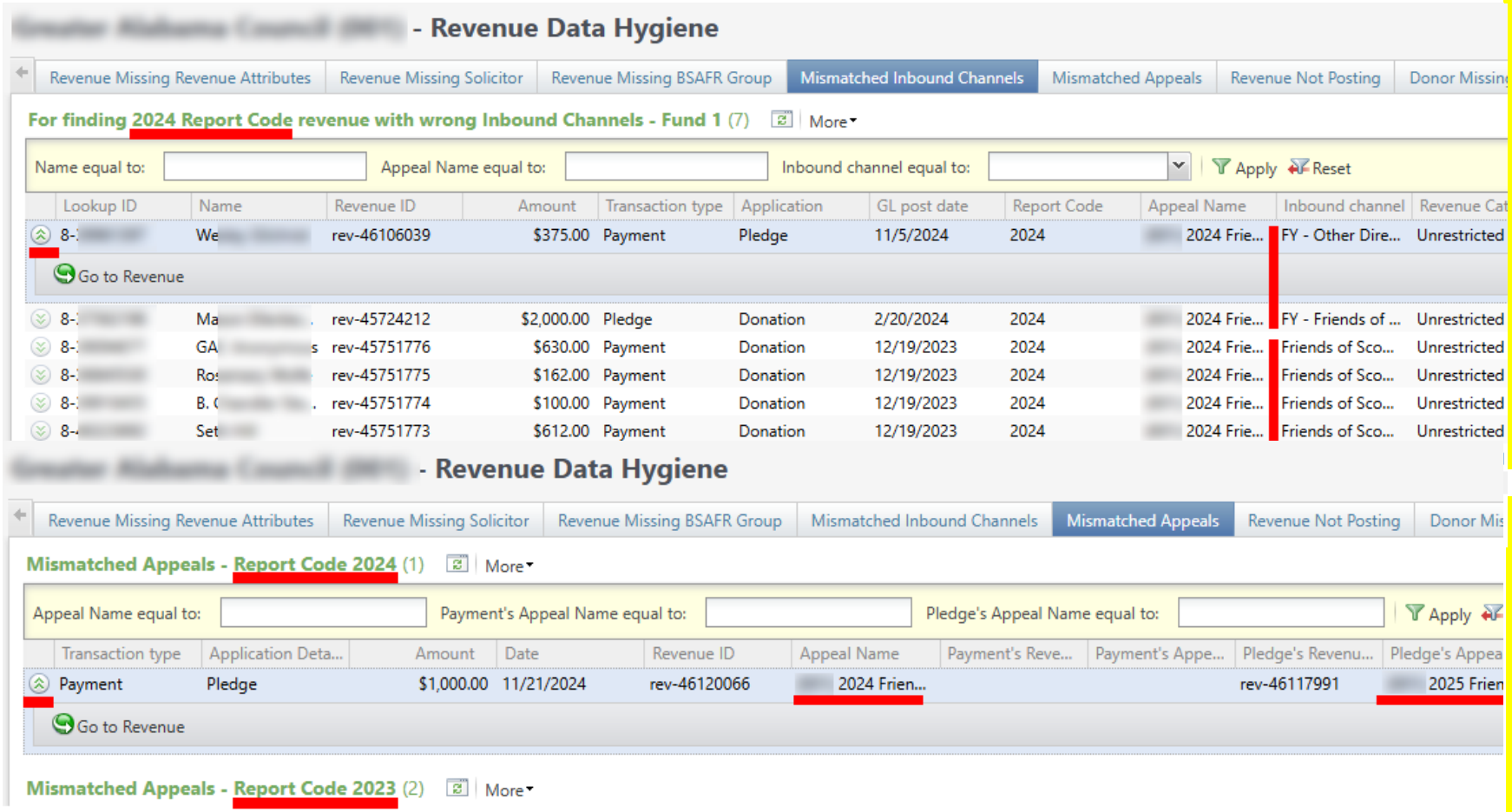
The Revenue Missing Solicitor tab will find any revenue with report code 2021-2024 and appeal category of Friends of Scouting that is missing a Solicitor.

Revenue Data Hygiene



The Revenue Missing BSAFR Group tab will find any revenue with report code 2021-2024 and appeal category of Friends of Scouting that is missing a BSAFR Group.

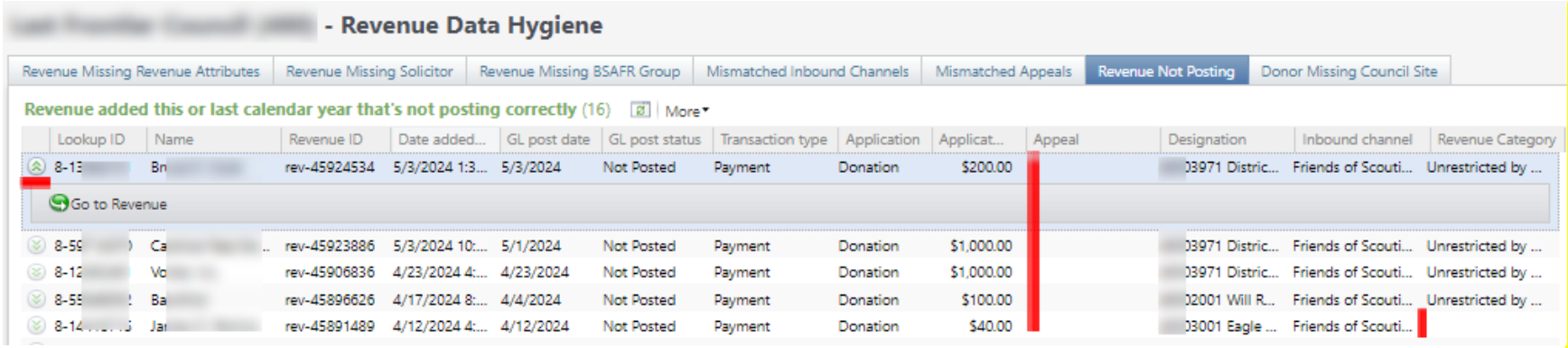
Revenue Data Hygiene



The Mismatched Inbound Channels tab has two data lists that will find any revenue with report code 2024 in Fund 1 where revenue with a 2023 or 2025 post date has a CY Inbound Channel *or* a 2024 post date and a PY or FY Inbound Channel, and a similar list for 2023 revenue

The Mismatched Appeals tab has two data lists that will find any 2024 or 2023 report code revenue where the appeal of the pledge doesn't match the appeal of the payment

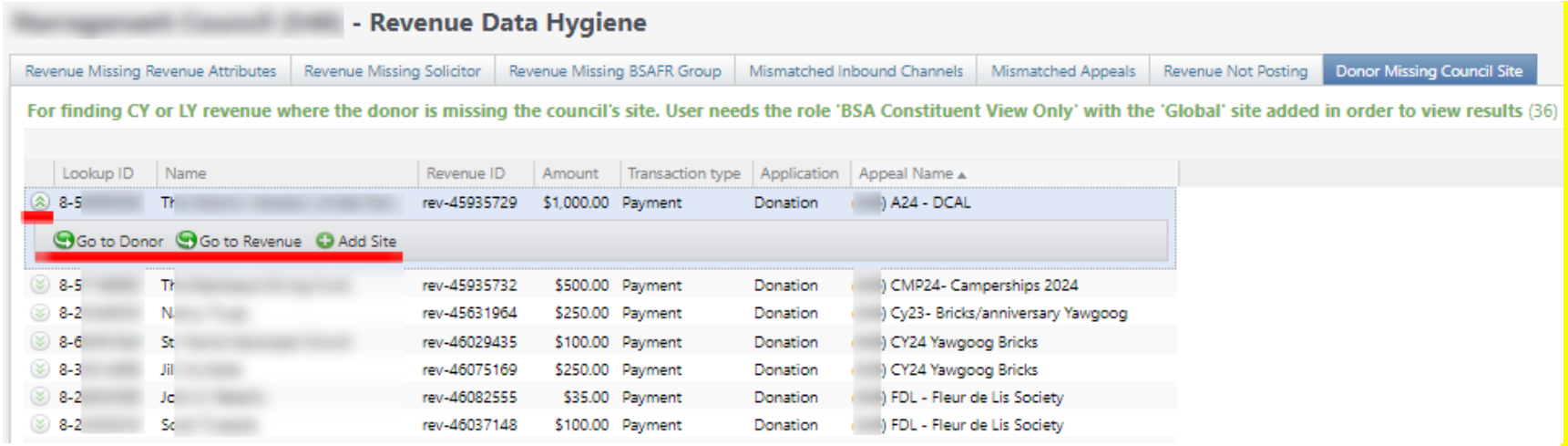
Revenue Data Hygiene



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.

Example: Revenue without an appeal may show, or revenue added with GL Post Dates that are far in the future. This may be an error from the user entering the revenue, and the revenue will not post until an appeal is added or those dates are past or corrected

Revenue Data Hygiene



The Donor Missing Council Site tab will show council revenue which is connected to donors who are not connected to the council's site.

Access:
Users will need the role 'BSA Constituent View Only' with the 'Global' site added in order to view results

Users will need the role 'BSA Site Security' with the 'Global' site added in order to add their site to the donor's record.

Pledge Receivable Aging Report

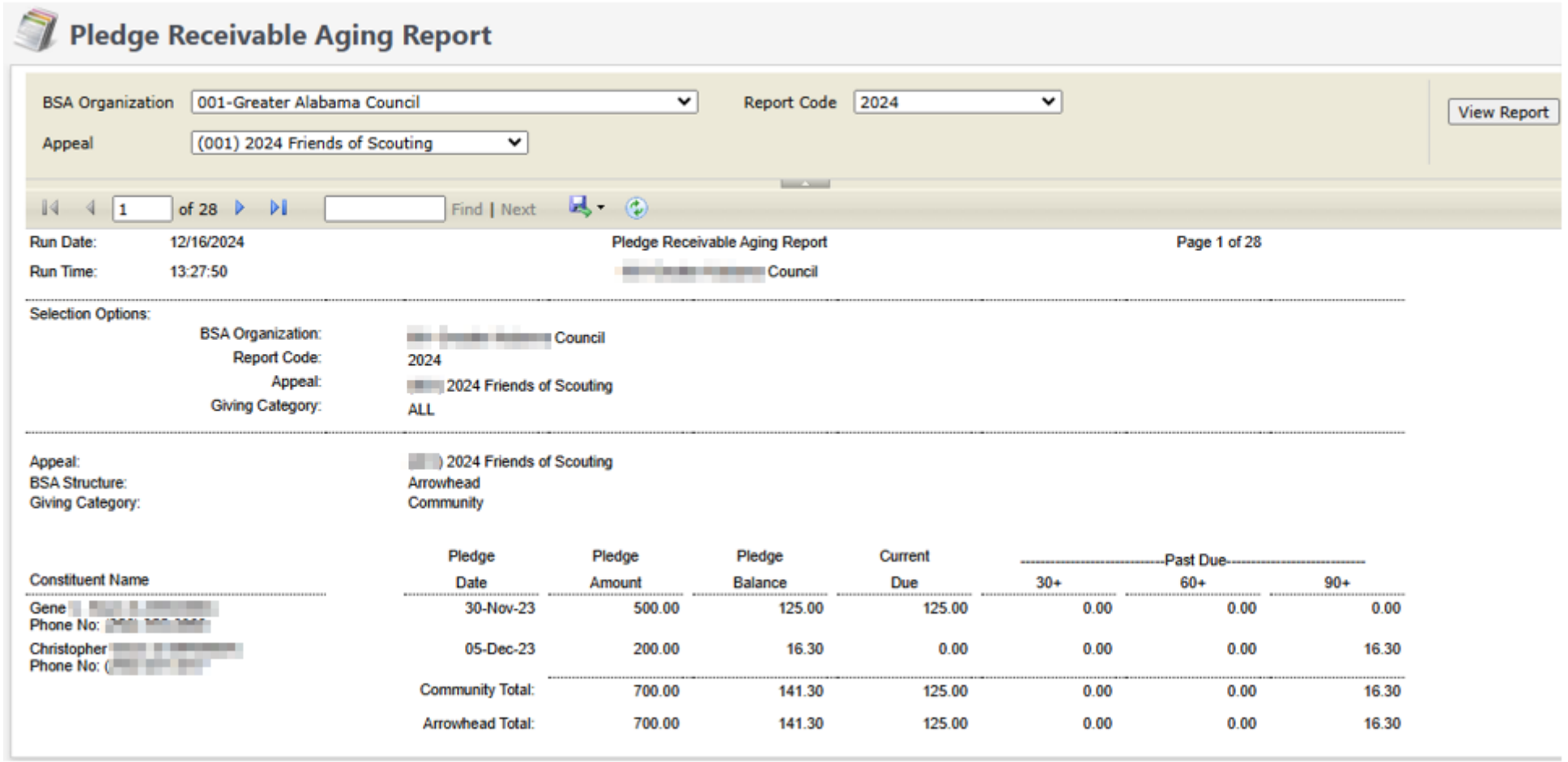
Pledge Receivable Aging Report

- 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.

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 Aging Report

BSA Organization: 001-Greater Alabama Council Report Code: 2024 View Report

Appeal: (001) 2024 Friends of Scouting

1 of 28 Find | Next

Run Date: 12/16/2024 Pledge Receivable Aging Report Page 1 of 28

Run Time: 13:27:50 [redacted] Council

Selection Options:

BSA Organization: [redacted] Council
Report Code: 2024
Appeal: [redacted] 2024 Friends of Scouting
Giving Category: ALL

Appeal: [redacted]) 2024 Friends of Scouting
BSA Structure: Arrowhead
Giving Category: Community

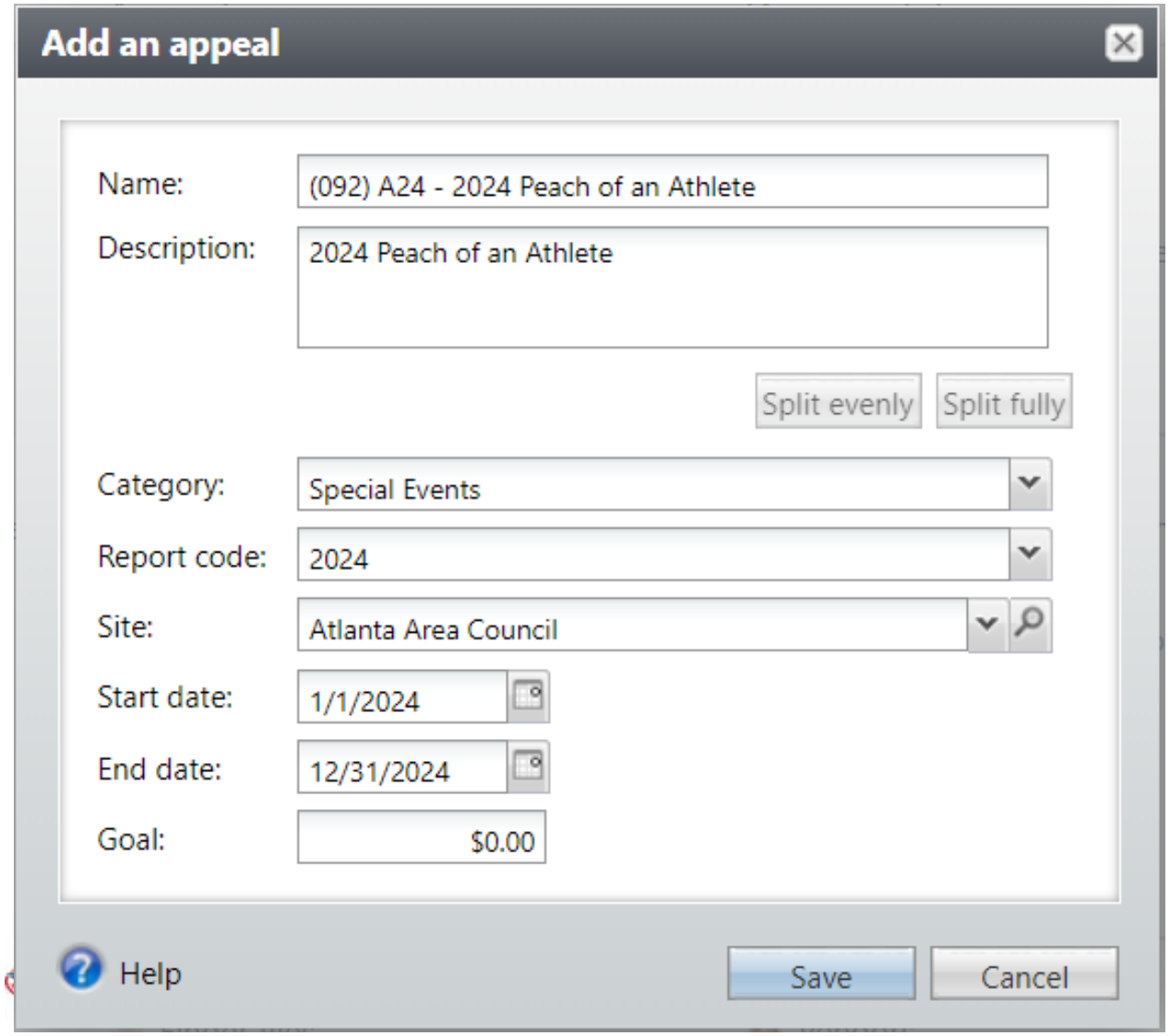
Constituent Name	Pledge Date	Pledge Amount	Pledge Balance	Current Due	Past Due 30+	Past Due 60+	Past Due 90+
Gene [redacted] Phone No: [redacted]	30-Nov-23	500.00	125.00	125.00	0.00	0.00	0.00
Christopher [redacted] Phone No: [redacted]	05-Dec-23	200.00	16.30	0.00	0.00	0.00	16.30
	Community Total:	700.00	141.30	125.00	0.00	0.00	16.30
	Arrowhead Total:	700.00	141.30	125.00	0.00	0.00	16.30

Creating a New Appeal

Creating 2025 Appeal

- Create all FY appeals at the same time
- Mirror the Appeal name from this year when creating 2025 appeals
- (XXX) (Council number in title)
- Marketing & Communications > Add an Appeal
- Remember to use FY inbound channels with monies applied to 2025 appeals with 2024 postdates.

Add an Appeal

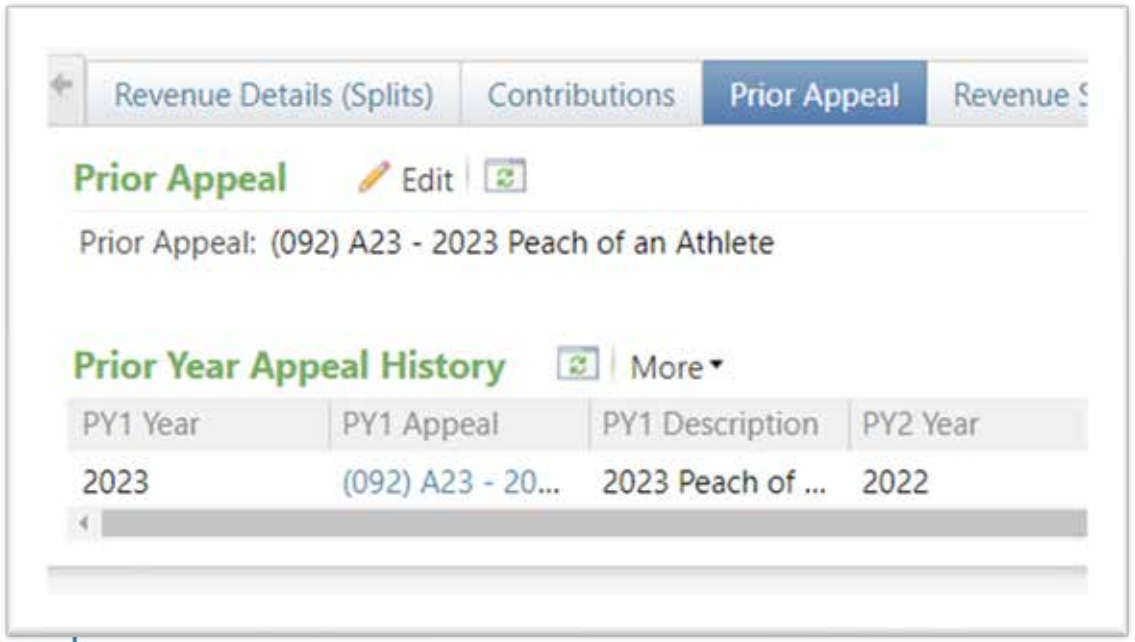


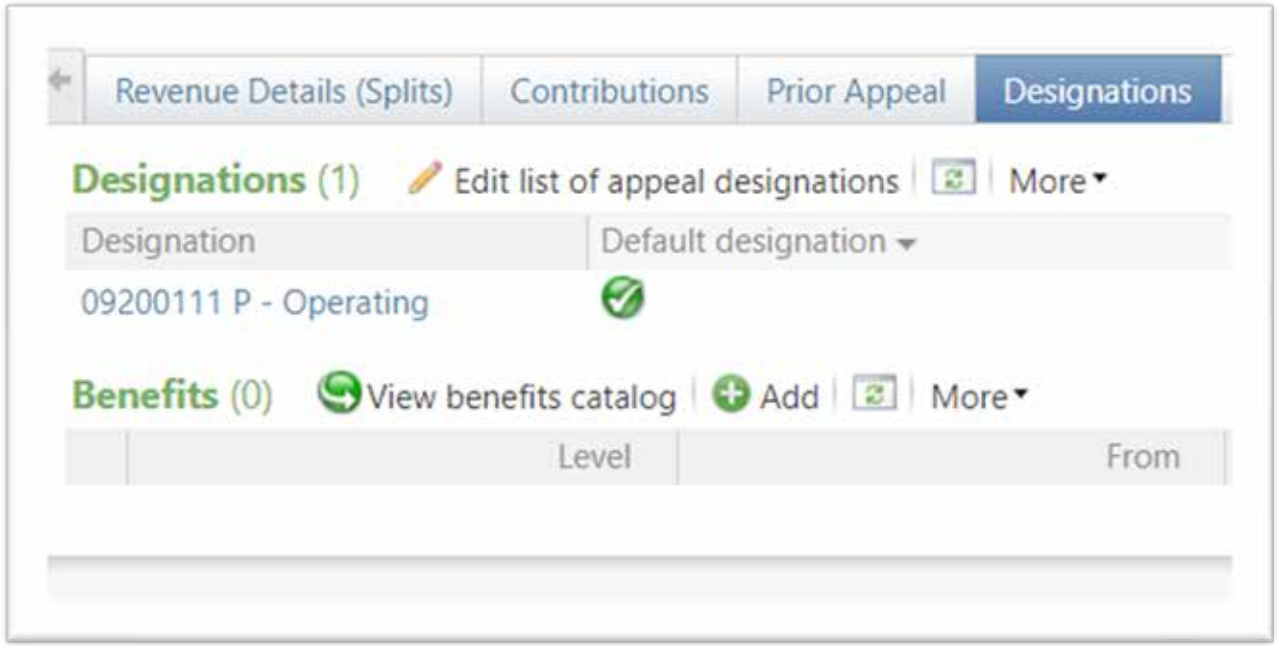
Name	Description
(092) A23 - 2023 Peach of an Athlete	2023 Peach of an Athlete
(092) M23 - 2023 Metro Classic Golf	2023 Metro Classic Golf
(092) OOD23 - Operating Other Direct	Operating Other Direct
(092) R23 - 2023 Eagle Scout Recognition	2023 Eagle Scout Recognitior
(092) S23 - 2023 Friends of Scouting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



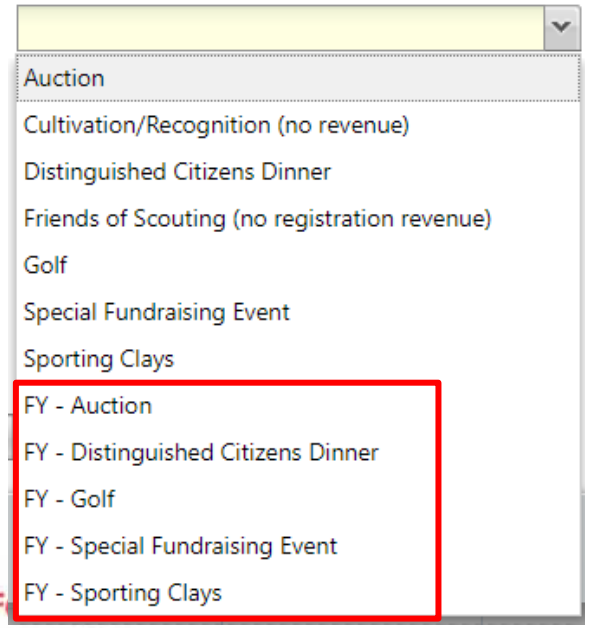


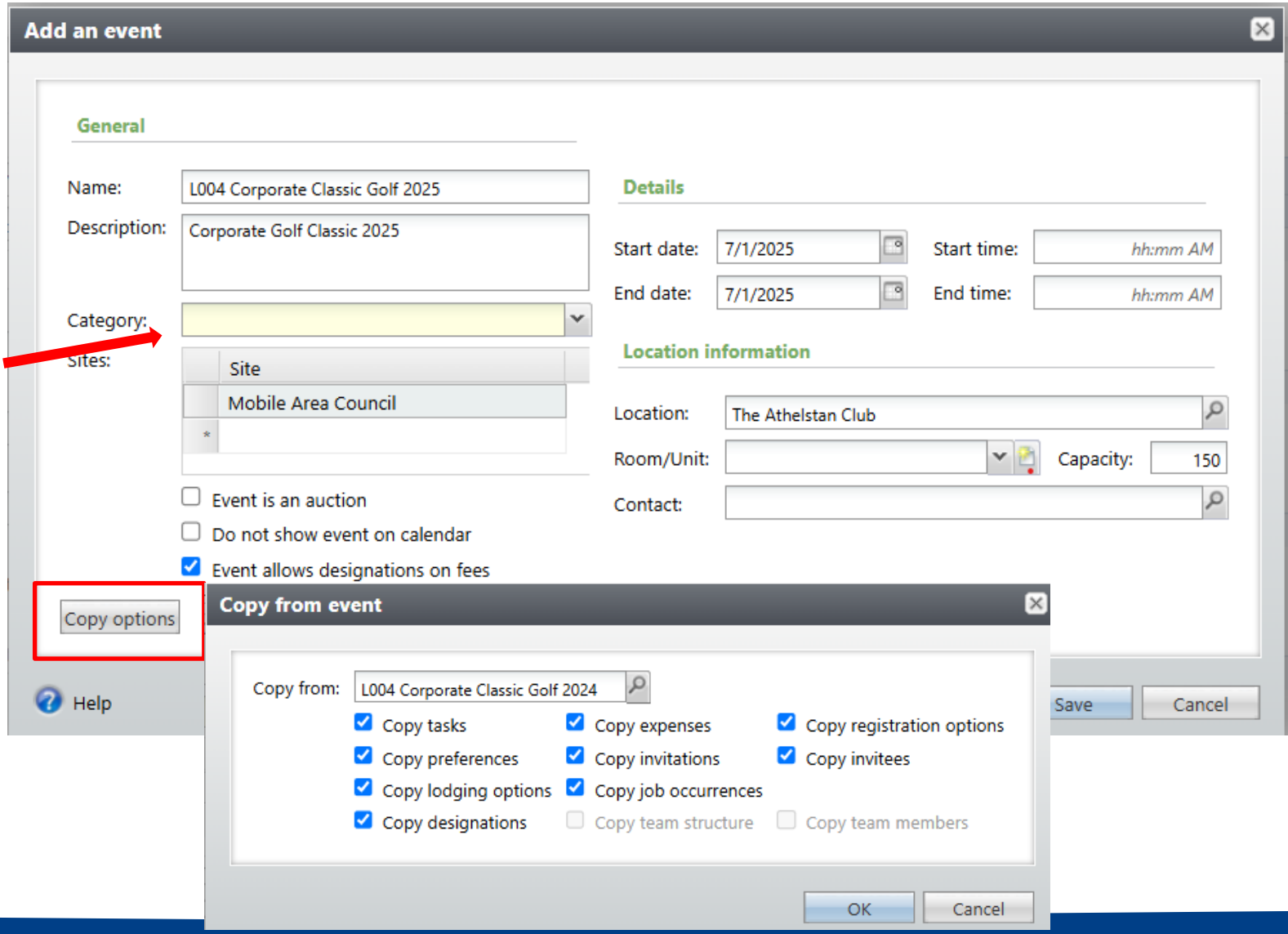
Adding a FY Event

- Create all repeat events at the same time
- Follow naming conventions from 2024 to 2025
- 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 2024, pick "FY" Category**
    2. **If not processing monies in 2024 pick non-FY Category**
5. Update options and dates with correct information when known



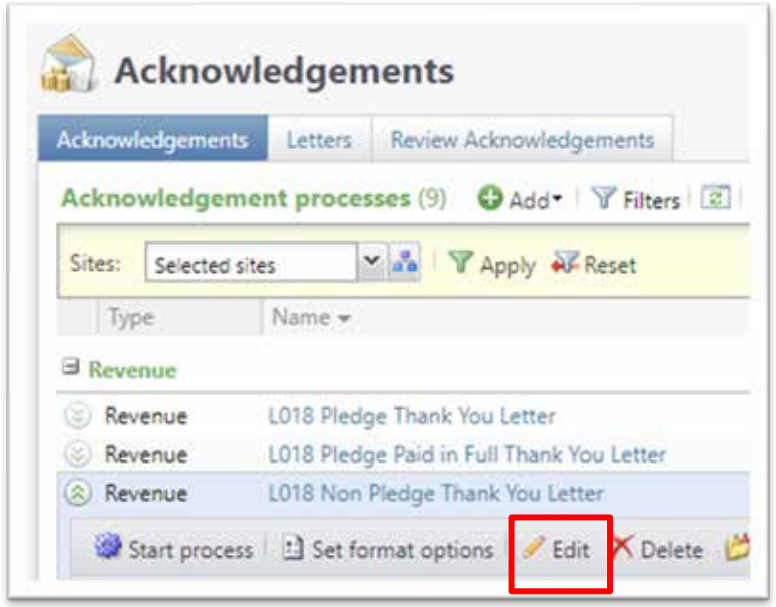


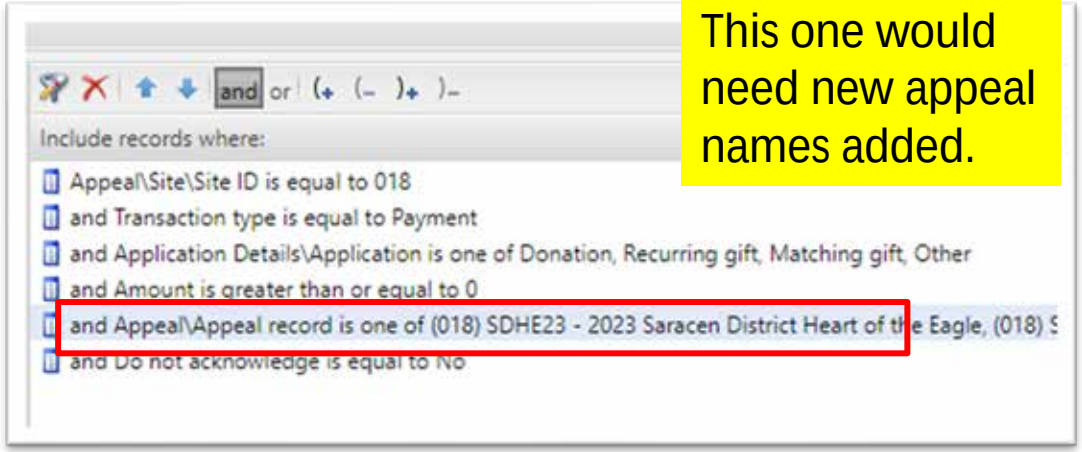
Updating Constituent Reminders and Thank Yous

Update Billing Reminders & Acknowledgements

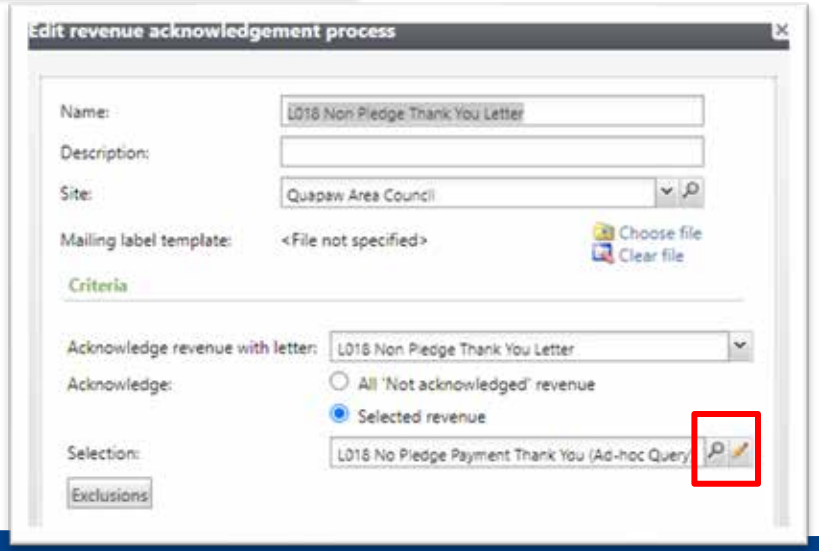
- Drop Chevron
- Click Edit
- Find Selection and click the pencil next to it
- Edit the Selection if needed
  - Add 2025 Appeal report Code
  - Add name of new appeal

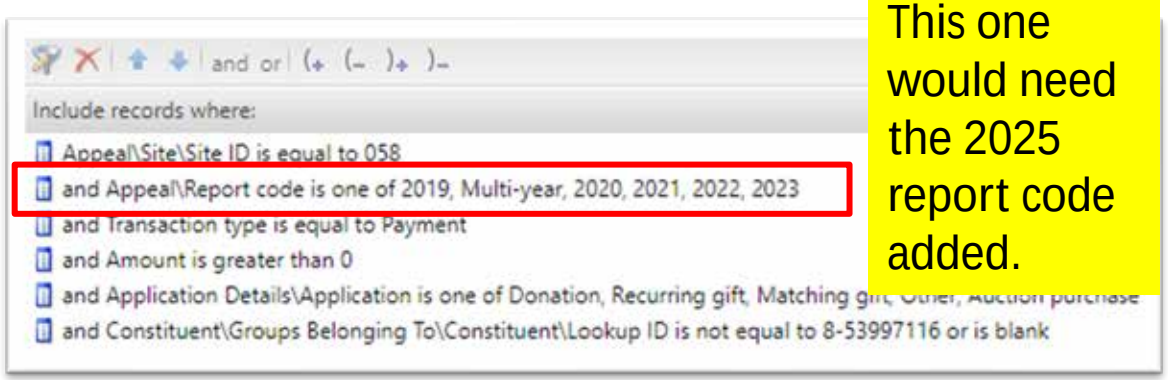
Acknowledgements





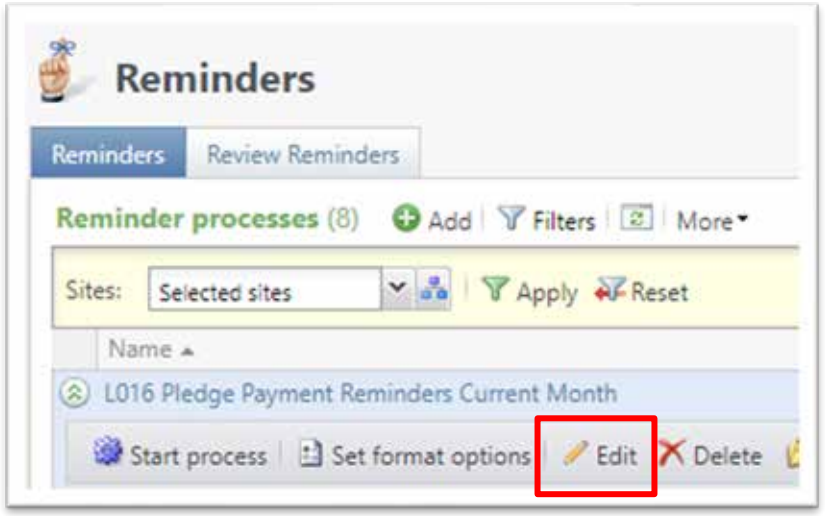
This one would need new appeal names added.

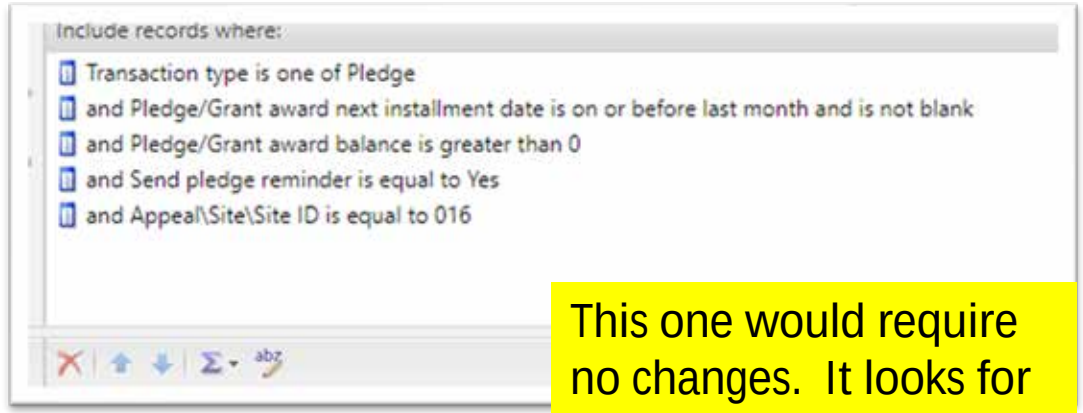




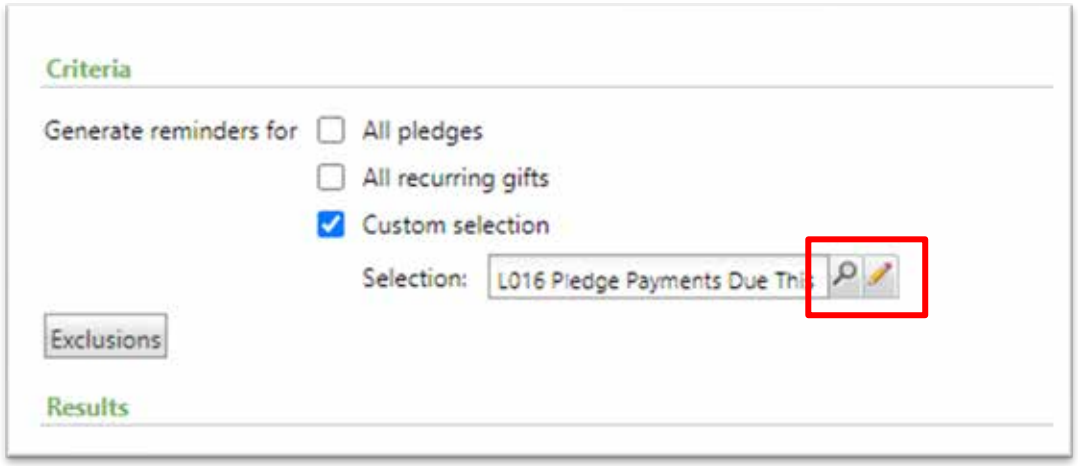
This one would need the 2025 report code added.

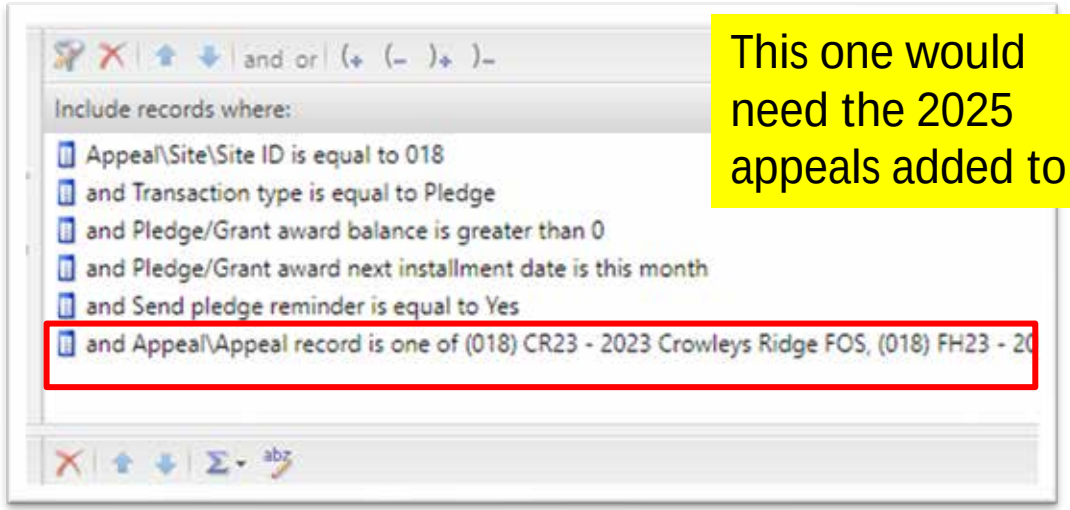
Reminders





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



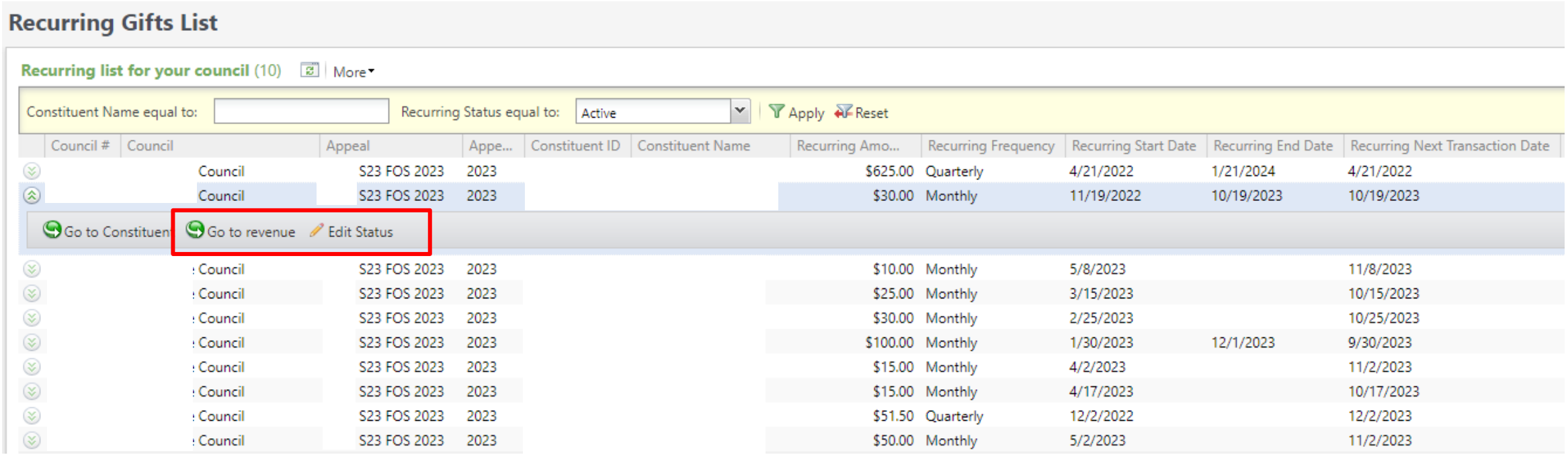


This one would need the 2025 appeals added to it.

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

Maintaining Recurring Gifts



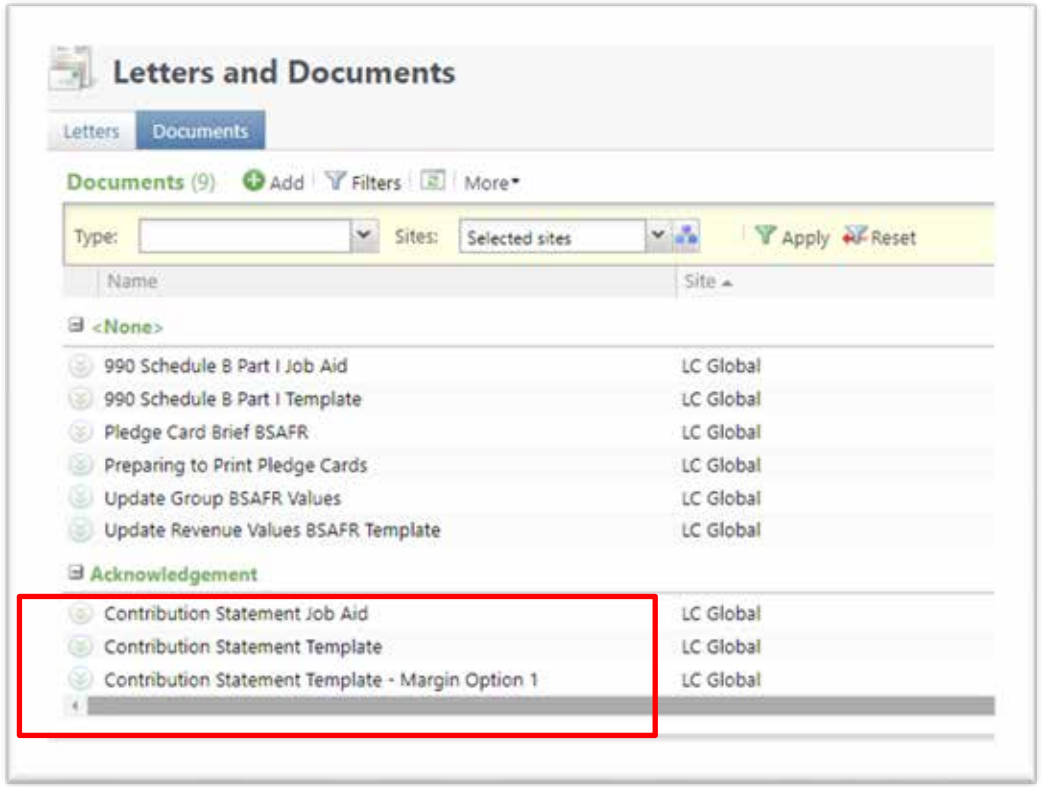
Council #	Council	Appeal	Appe...	Constituent ID	Constituent Name	Recurring Amo...	Recurring Frequency	Recurring Start Date	Recurring End Date	Recurring Next Transaction Date
	Council	S23 FOS 2023	2023			$625.00	Quarterly	4/21/2022	1/21/2024	4/21/2022
	Council	S23 FOS 2023	2023			$30.00	Monthly	11/19/2022	10/19/2023	10/19/2023
	Council	S23 FOS 2023	2023			$10.00	Monthly	5/8/2023		11/8/2023
	Council	S23 FOS 2023	2023			$25.00	Monthly	3/15/2023		10/15/2023
	Council	S23 FOS 2023	2023			$30.00	Monthly	2/25/2023		10/25/2023
	Council	S23 FOS 2023	2023			$100.00	Monthly	1/30/2023	12/1/2023	9/30/2023
	Council	S23 FOS 2023	2023			$15.00	Monthly	4/2/2023		11/2/2023
	Council	S23 FOS 2023	2023			$15.00	Monthly	4/17/2023		10/17/2023
	Council	S23 FOS 2023	2023			$51.50	Quarterly	12/2/2022		12/2/2023
	Council	S23 FOS 2023	2023			$50.00	Monthly	5/2/2023		11/2/2023

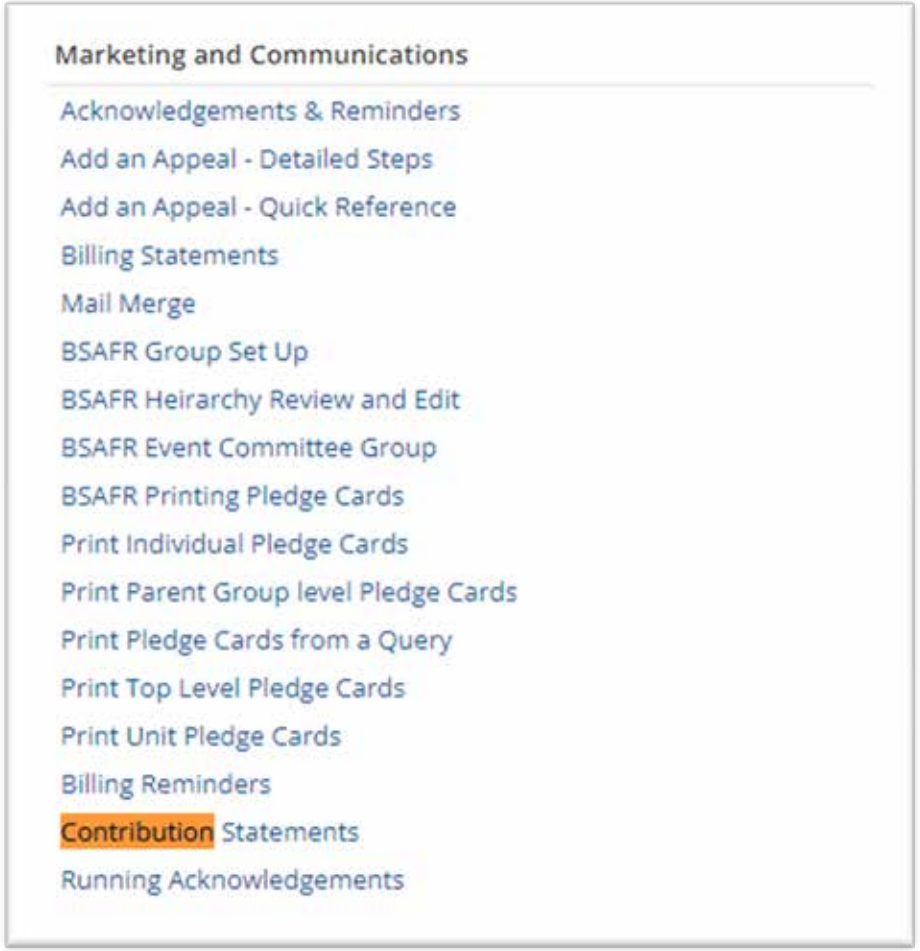
This council will need to click **Go to Revenue** and then edit the recurrence and change it to the 2025 Appeal. If the recurrence needs to be adjusted from active to terminated or lapsed, you can do this by clicking **Edit Status**.

Contribution Statements

- Sent to donors in January
- Export files will be ready to run January 2, 2025.
- All payments for 2024 need to be entered before file generation
- Print and read Job Aid (Updated 2023).
  - Located MyBSA \ CRM User Guides \ Marketing and Communication \ Contribution Statements.
  - CRM \ Marketing & Communications \ Packages \ Letters & Documents \ Documents
  - January 2025 CRM Forum will detail process

CRM and MyBSA

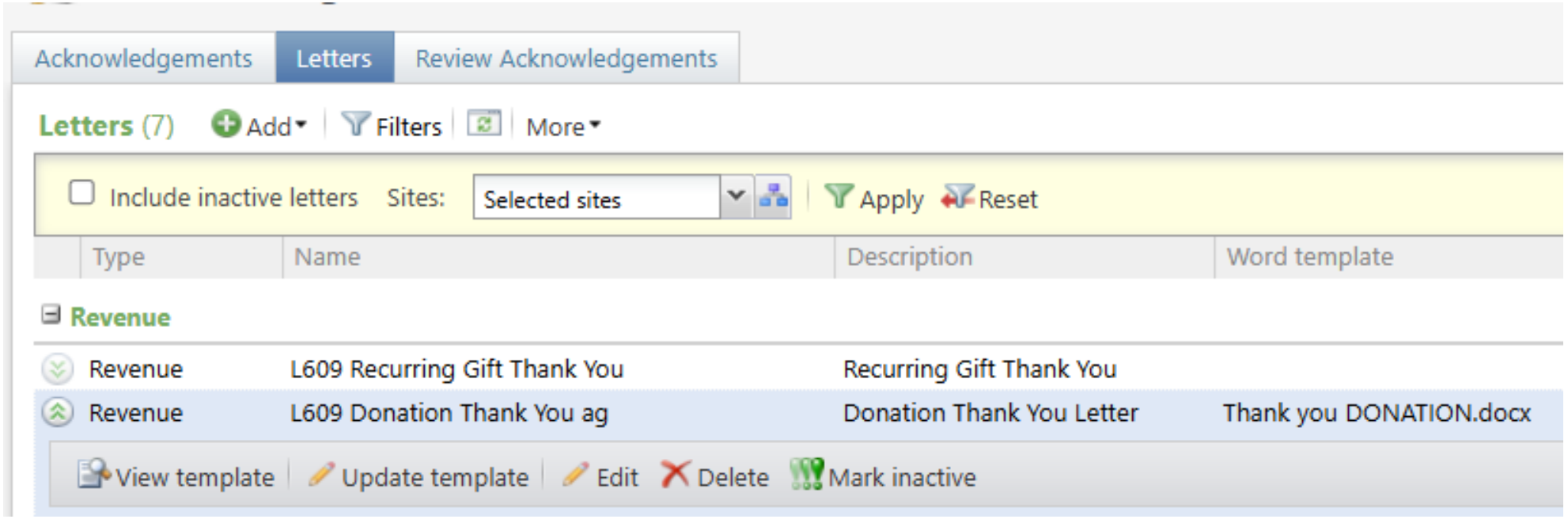




Scouting America Branding

- Review your templates for Boy Scouts of America
  - o Reminders
  - o Acknowledgement Letter Templates
  - o Pledge Card Report is being adjusted
  - o Key reports are being revised to see if Boy Scouts of America or BSA is on them

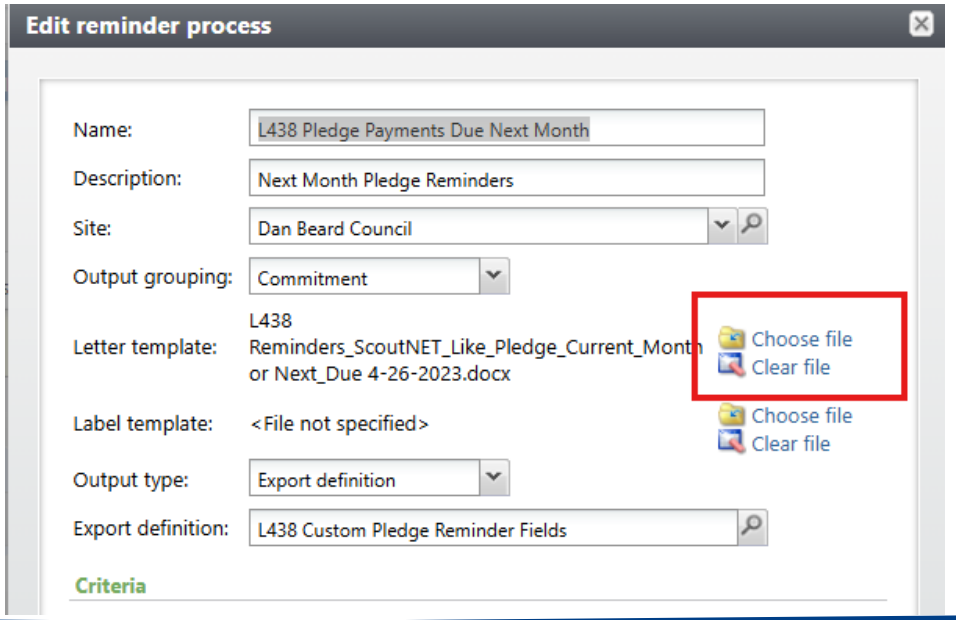
Acknowledgement Templates

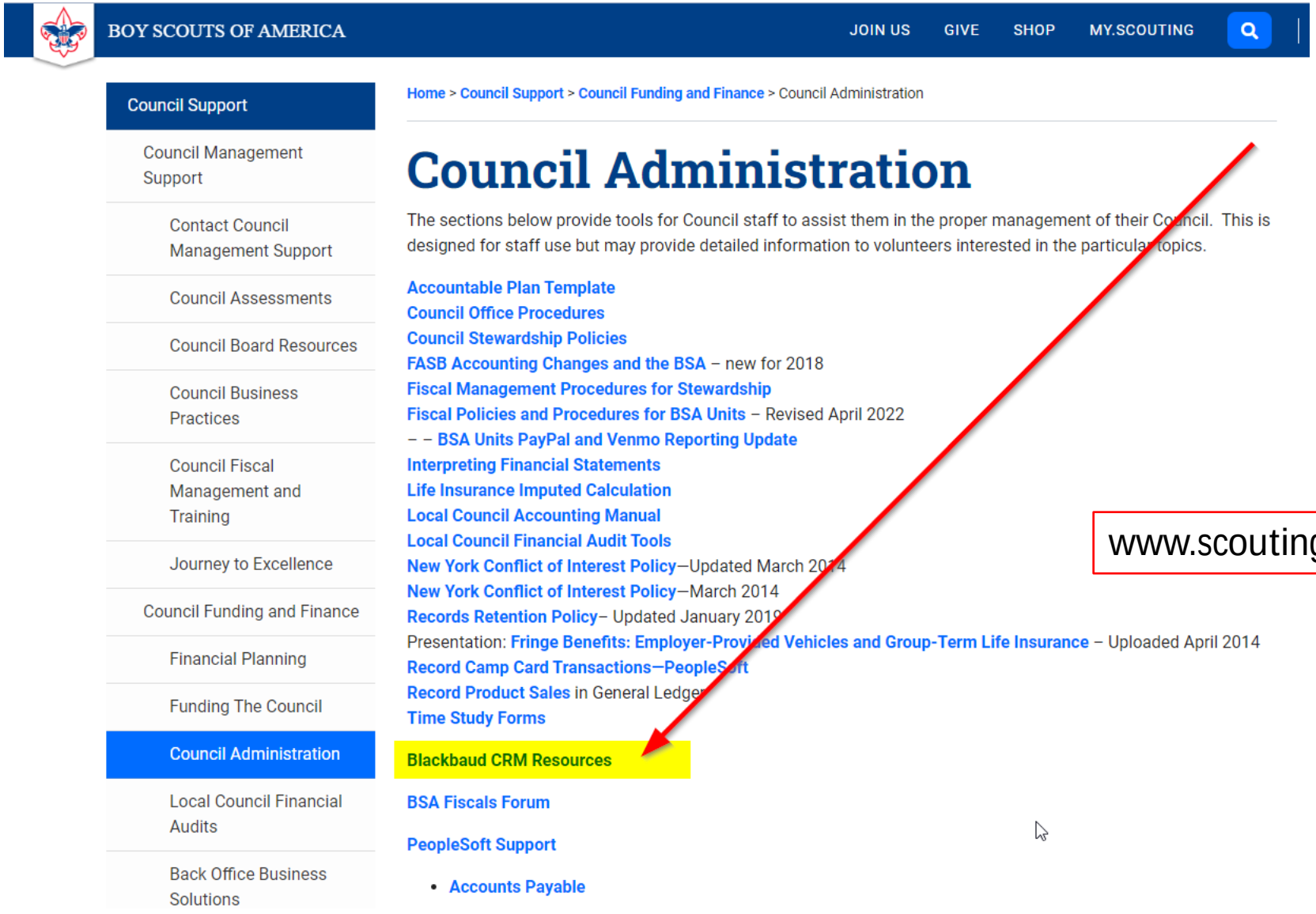


Found under Marketing Communications \ Acknowledgements
Drop the chevron and view templated.
Make changes – Save changes – Update template

Reminder Template

- Template located in Letters and Documents under Marketing and Communications.
- If it needs to be changed:
  - o Download template – Make changes – Save to desktop
  - o Clear old template
  - o Load new template





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

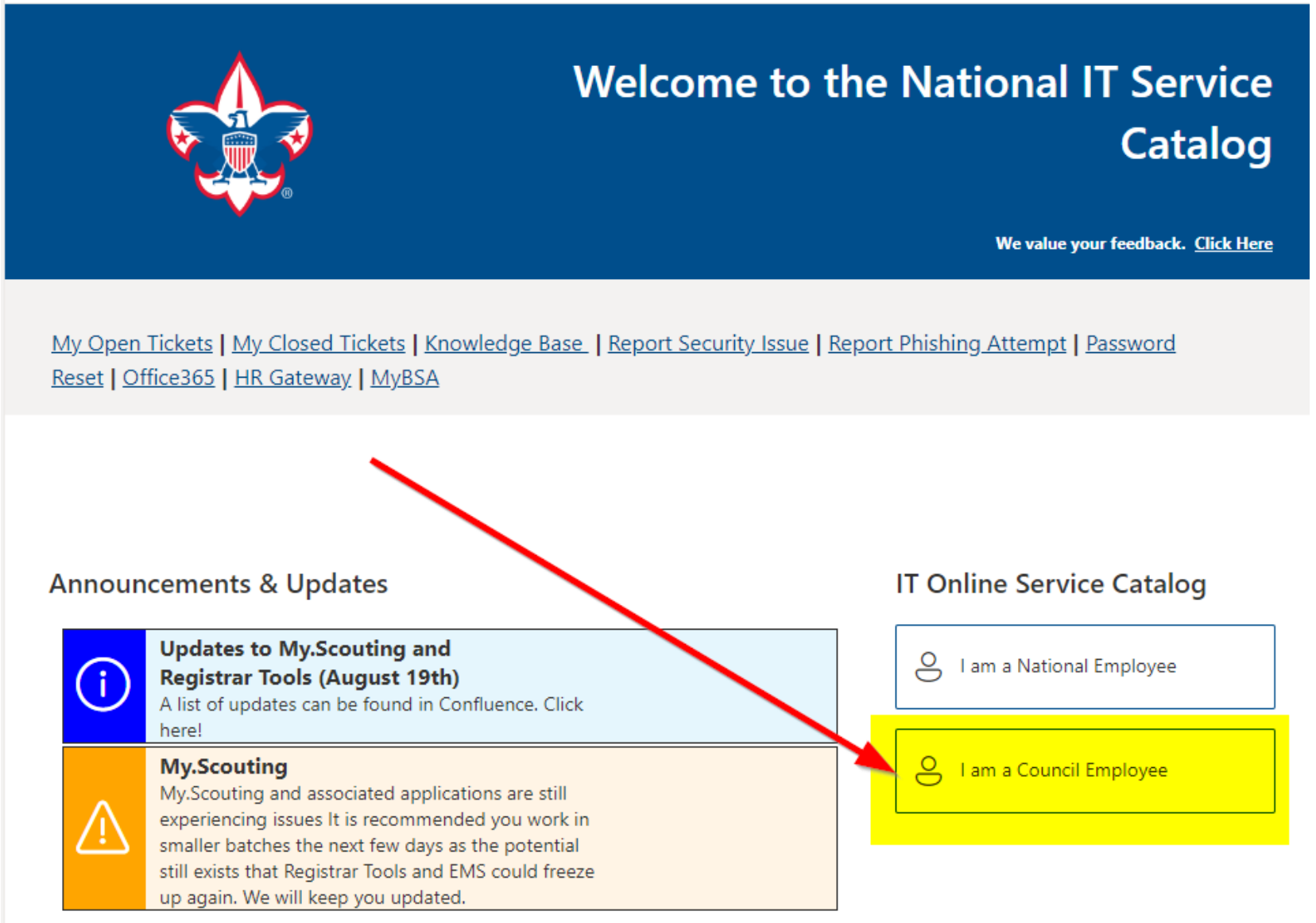
January 2022 User Forum – **Slide Deck** – **recording**
February 2022 User Forum – **Slide Deck** – **recording**
March 2022 User Forum – **Slide Deck** – **recording**
April 2022 User Forum – **Slide Deck** – **recording**
– Creating Constituent Interactions * Using the Constituent Interaction Data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

2021

Member Care

- Call 972-580-2489
- 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

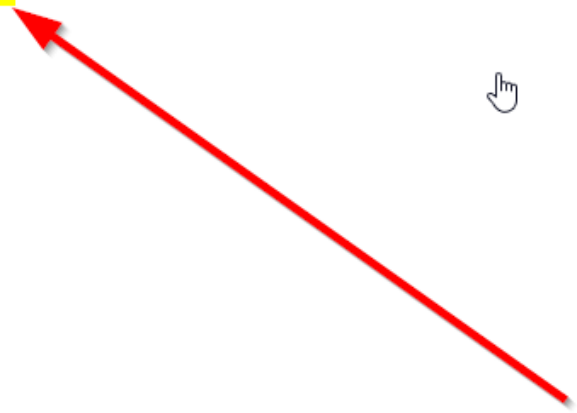
General Assistance

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

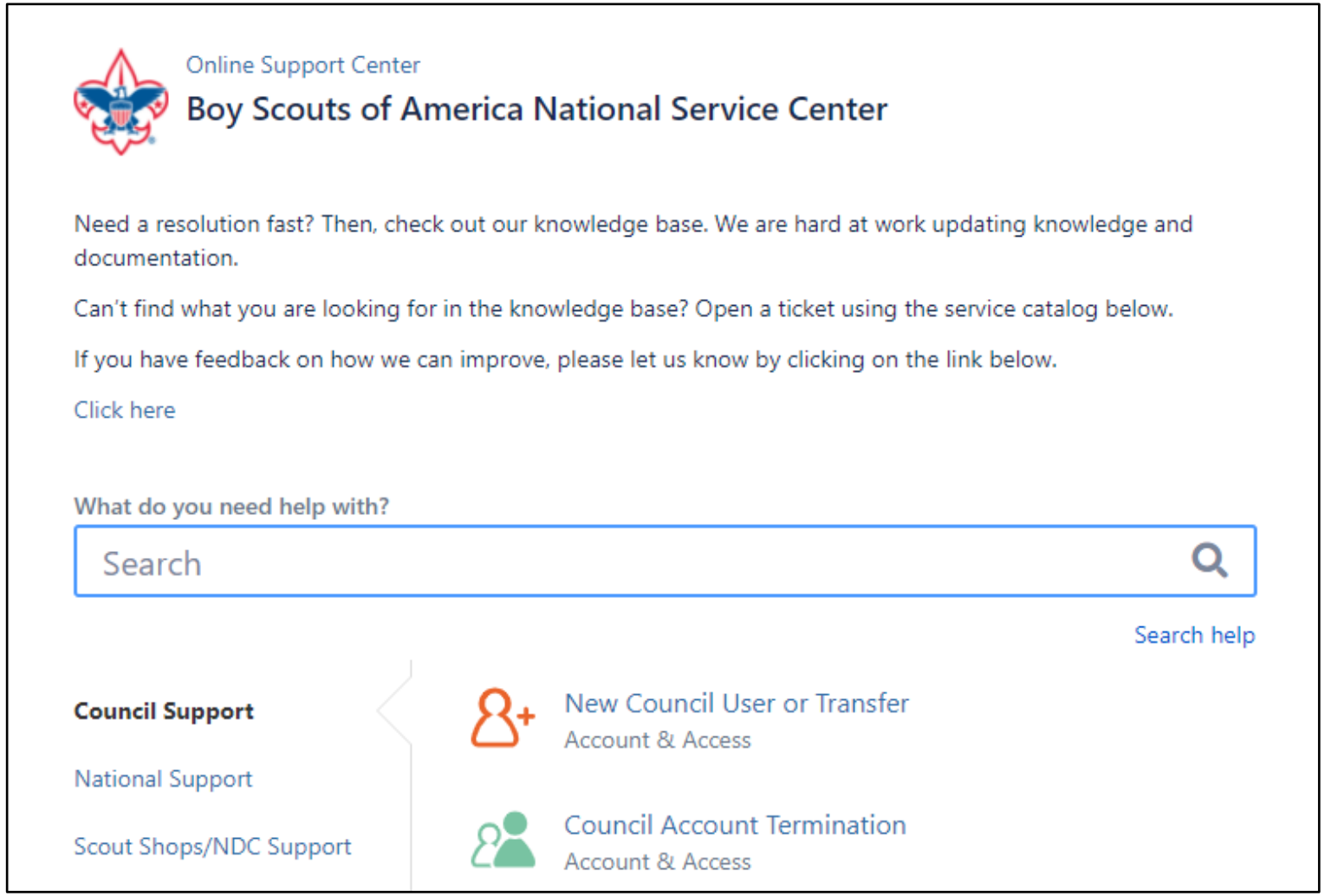
When possible, open a ticket by selecting the service from the Service Catalog Request link. Doing so will ensure all the necessary information is collected and quickly routed.

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.

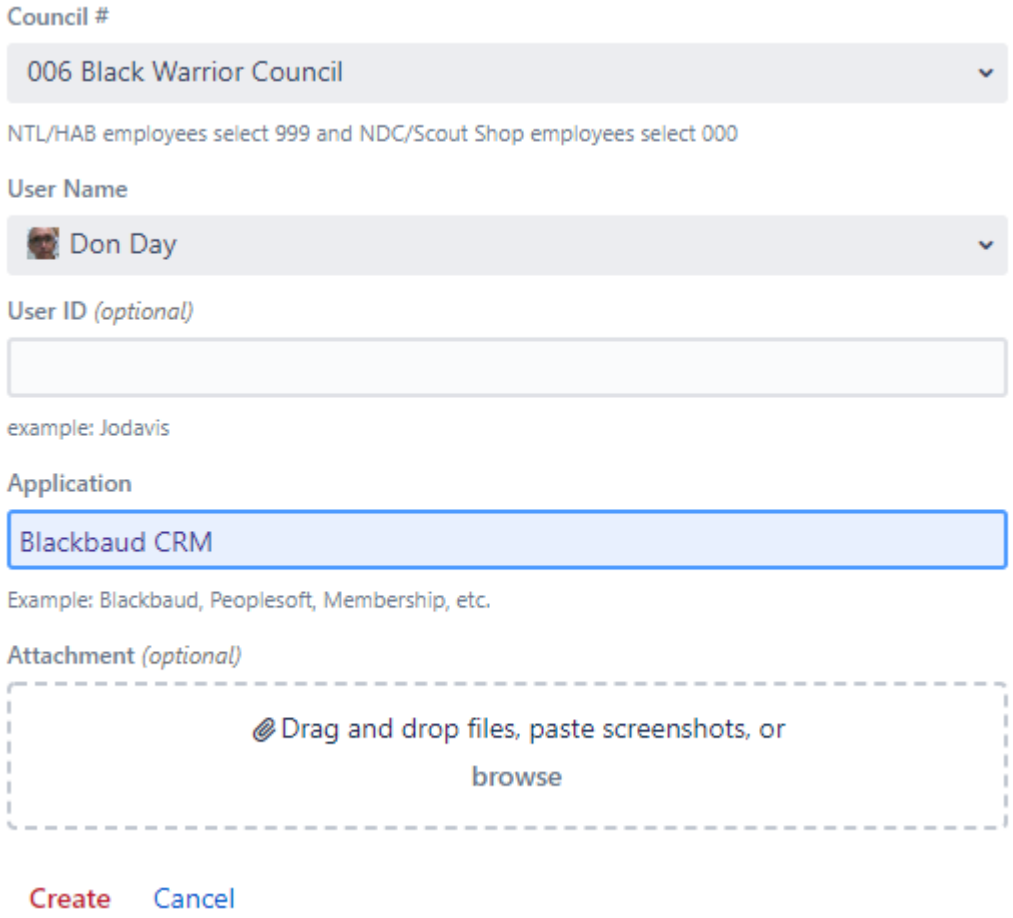
Please provide me a list of giving categories

Council #

006 Black Warrior Council

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

User Name – Application - Attachments



Next Forum

January 15, 2025
10:00 am & 2:00 pm CT

Questions & Answers