

CRM User Forum

May 15, 2024

John Kuehn ~ Cornelia Ellis ~ Valerie Eaton



Prepared. For Life.™

Objectives

Project Codes – reason for separate codes from 000
GIK Financial VS Non-financial Contributions
Scouting Gives Batch Processing
Questions – Answers



Project Codes

- To identify various projects
- Each code should be unique in its meaning
- May be used in all three funds
- May be used combination of accounts and classes as needed

Example:

000

159

298



Project Code – Not just 000

- Project Codes that are in Blackbaud must be in PeopleSoft
- Work closely with accounting staff to get the right project code assigned to appeal
- Easy to reconcile if there is a separate project code for each appeal



Project Code/Designation

- All funds in CRM must be connected to an appeal.
- The designation and the project code direct the money to FOS/Contribution/Special event in PeopleSoft.
- The designation tab under the Appeal Progress screen should have a default designation number.



CRM Designation

The Designation does 3 items **30708011**

1. The red digits represent the council number. This tells PeopleSoft which council's GL should receive the transaction.
2. The green digits represent the Project Code in PeopleSoft the transaction should record against. CRM allows up to 4 digits for a project code.
3. The blue digit is the Fund. In the example above we have a "1". This designation will send it to your operating fund. 2 = Capital, 3 = Endowment



Appeal - Tab



Appeal: ED24 Eagle Dinner

Description: 2024 Eagle Dinner Start date: 1/1/2024
Business unit: End date: 12/31/2024
Category: Special Events Goal: \$0.00
Report code: 2024 Status: Active
Site: 1 [redacted] Membership:

- Revenue Summary
- Balances
- Contributions
- Payments
- Revenue Details (Splits)
- Matching Gift Claims
- Designations**
- Mailings
- Documentation
- Mismatch: Appeals?

Designations (1) Edit list of appeal designations More ▾

Designation ▲	Default designation
509981 DESA - Operating	✓

Benefits (0) View benefits catalog Add More ▾

Level	From	To	Benefits
-------	------	----	----------



Designation Creation

- See if your designation is in CRM before requesting it.
- Use a new designation worksheet to request a new designation.
- The designation worksheet will have you determine which Inbound Channels should work with your project code
- Hint – If you want to know which contribution accounts in PeopleSoft are connected to an Inbound Channel look at the new designation worksheet.



Designations

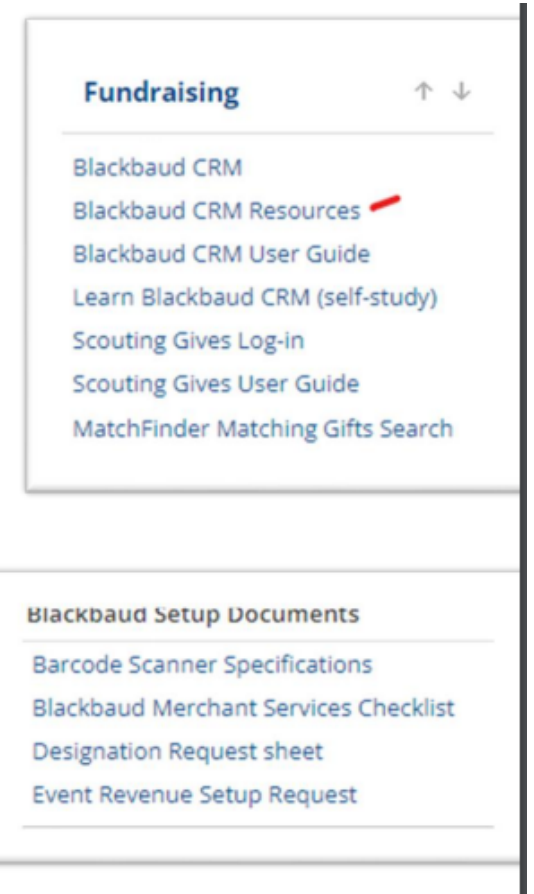
- Use the LXXX New Designation Form (New Designation)
- Use the LXXX BCRM Event Revenue Form (Special Event)

- Only request new designations for new appeals
- The appeal may change but the designation stays the same



Blackbaud CRM Resources

- MyBSA / Fundraising / Blackbaud CRM Resources
- When screen opens slide to the bottom to find:
 - Designation Request Sheet
 - Event Revenue Setup Request
 - Read direction tab on worksheet, fill in information tab
 - Submit via Member Care ticket for service



GIK Financial VS Non-Financial

- Acknowledgements thank the donor for what they donated not dollar amount
- Financial = Cash & Marketable Securities
 - Fair Market Value – straightforward
- Non-Financial = Land, Building, Equipment, Rent, Use of Facilities, Materials, Supplies (food, clothing), Intangible Assets or Services
 - Fair Market Value – often more problematic



Statement of Budgeted Operations

Take Any Council ###					Boy Scouts of America			
Comparative Statement of Budgeted Operations - Unrestricted								
Period Ending: December 31, 2023								
Operating Fund	Current Period			Year to Date			Current Year	
	Budget	Actual	Last Year	Budget	Actual	Last Year	Budget	
Spec event cost direct benefit	-	(334,269)	(225,292)	(3,108,250)	(2,527,180)	(321,776)	(3,108,250)	
Net Special Events	-	22,995	(9,466)	1,815,000	342,379	311,079	1,815,000	
Legacies and bequests:								
Legacies and bequests contrib	1,250	(3,365)	1,785	15,000	10,671	59,315	15,000	
Net Legacies & Bequests	1,250	(3,365)	1,785	15,000	10,671	59,315	15,000	
Foundations and trusts:								
Foundations and trusts	-	12,386	2,400	250,000	141,114	141,028	250,000	
Net assets released found trst	-	35,000	37,471	250,000	371,593	129,034	250,000	
Net Foundations & Trusts	-	47,386	39,871	500,000	512,708	270,062	500,000	
Other direct:								
Other direct contributions	1,250	8,327	12,873	65,000	26,981	61,350	65,000	
Net assets release other direc	-	5,731	-	20,000	7,736	5,000	20,000	
Net Other Direct Contributions	1,250	14,058	12,873	85,000	34,717	66,350	85,000	
Total contributions of cash and other financial assets	5,000	94,425	110,641	2,895,000	1,344,742	2,242,310	2,895,000	
Contributions of non-financial assets	-	(1,925)	9,468	-	3,574	9,468	-	
Total Direct Support	5,000	92,500	120,109	2,895,000	1,348,316	2,251,778	2,895,000	



GIK and Inbound Channels

- GIK will work with most inbound channel if permissioned
- Account 4531 – Non-Financial Contributions
 - Found by using inbound channel – **Other Direct - Service Contributions**
- GIK Subtypes begin with Service

Service - Advertising	Service - Printing
Service – Fundraising & PR	Service – Transaction Fees
Service – Other Contribution	Service – Use of Facility



GIK Batch Fields

Constituent	Lookup ID	Amount	Date	Revenue ty...	Application	Payment method	
Kathleen	[REDACTED]	70	\$1,000.00	5/14/2024	Payment	Donation	Gift-in-kind
Ronald L.	[REDACTED]	60	\$1,000.00	5/14/2024	Payment	Donation	Gift-in-kind

Gift-in-kind subtype	Disposition	Item name	Gift-in-kind number of units	Fair market value per unit
Service - Other Contribution	To sell	Copy Paper	100	\$10.00
Service - Printing	To use	Annual Report Printing	500	\$2.00

Appeal	Designation	Inbound channel	Revenue category	Giving Category	BSA Structure
(001) 2023 Project Sales ...	00100001 General Use - ...	Other Direct - Service C...	Unrestricted by donor	Misc Other Direct	Greater Alabama Council
(001) 2023 Project Sales ...	00100001 General Use - ...	Other Direct - Service C...	Unrestricted by donor	Misc Other Direct	Greater Alabama Council

1. Note GIK Subtypes
2. Note Disposition
3. Note Inbound Channel
4. One may want to place in revenue reference field how FVM was determined.



GIK Revenue Record

Status	Payment method
Acknowledgements: Not acknowledged	Payment method: Gift-in-kind
Receipt preference: Per payment	Subtype: Service - Other Contribution
Receipt status: Not received	Item name: Copy Paper
Receipt date:	Disposition: To sell
Receipt number:	Number of units: 100
Post status: Not posted	Fair market value per unit: \$10.00
Post date: 5/14/2024	
Post process ID:	

Details	Benefits	Matching Gifts	Letters	Attributes	Documentation	GL Distributions	Tributes
---------	----------	----------------	---------	------------	---------------	------------------	----------

Details

Original amount: \$1,000.00	Effort:
Finder number:	Appeal: (001) 2023 Project Sales - Gift in Kind
Source code:	

Inbound channel: Other Direct - Service Contributions
Revenue reference: Value based on what a case of paper costs

Details	Benefits	Matching Gifts	Letters	Attributes	Documentation	GL Distributions	Tributes
---------	----------	----------------	---------	------------	---------------	------------------	----------

Transaction history by post date

All dates **5/14/2024** Payment

GL distributions (3) More

View: All Apply Reset

Account	Description
Donation	Edit
→ L001-1-9430-000-99	L001-1-SRVC-GSRV-L00100001-UNR. DEPOSIT: Gift In
→ L001-1-4531-000-90	L001-1-SRVC-FRCY-L00100001-UNR. CONTRIBUTION:


GIK revenue record on the left. GL distribution is on the right. Transaction hits the contribution account of 4531. 9430 is a holding account that should be cleared each month with a credit and the appropriate expense account should be debited. Note the record info on the revenue record.



GIK Data List

 **Revenue**

More tasks

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

1. Found under Revenue \ More Tasks
2. Search for your site to produce site secured revenue
3. Select "On or After" GL post date
4. Click apply to retrieve your list
5. List can be downloaded with the "More" button

Gift In Kind List

For a GIK list for the current year, select first day of the year and click apply. Then download and remove those not needed. (2)  More ▾

GL post date on or after:   Apply  Reset

Council #	Re...	A...	Gift Date...	GL post date	D...	D...	D...	Donor City	D...	D...	GIK Item	GIK FMV Per It...	GIK # of It...	GIK Total Va...	GIK Subtype	GIK Dispositon
001	20...	(...	5/14/2024	5/14/2024	8...	R...	2...	Birmingham	AL	3...	Annual Report Printing	\$2.00	500	\$1,000.00	Service - Printing	To use
001	20...	(...	5/14/2024	5/14/2024	8...	K...	3...	Birmingham	AL	3...	Copy Paper	\$10.00	100	\$1,000.00	Service - Other Contribution	To sell



Scouting Give Batches



Prepared. For Life.™

Scouting Give Batches

- Created by Scouting Gives
- Need to be processed in order
- APTG Default constituent adjusted
- Check fields for accuracy
- These batch types are not run through your CRM credit card processor



SG Batch Processing order

- Commit ZAPTG Local Council Recurring Gift Commitment Batch before ZAPTG Local Council Recurring Gift Payment Batch

zAPTG Local Council Recurring Gift Payment Batch	Online Donation Recurring for 2024-05-12 for 438	5/12/2024
zAPTG Local Council Recurring Gift Commitment Batch	Online Donation Commitment for 2024-05-12 for 438	5/12/2024

- Commit ZAPTG Event Registration Batch before ZAPTG Local Council Donation Batch associated with the event.

zAPTG Event Registration Batch	Online Event Registrants for 2024-05-13 for 368	5/13/2024
zAPTG Local Council Donation Batch	Online Event Payments for 2024-05-13 for 368	5/13/2024

- May need to look at Date and Batch Description



SG Batches – Replace APTG Default

- APTG Default is a fake constituent that comes in with a batch from SG into CRM.
- You must replace this constituent or revenue will not commit

Constituent	Lookup ID	Group ID	Amount	Receipt amo...	Date	GL post date
APTG Default	8-46000804		\$20.60	\$20.60	1/18/2024	1/18/2024

- Constituent info is found towards the end of the batch line on who gave the contribution.

APTG Donor First Name	APTG Donor Last Name	APTG Donor Address 1	APTG Donor Address 2	APTG Donor City	APTG Donor State
Jennifer		1436	-		MN



APTG Default Replacement

Constituent Search by Name or Lookup ID

Name/Lookup ID: Address:
Last/Org/Group name: City:
First name: State:
Suffix: ZIP:
Lookup ID:
Sites:
Email address:
 Match all criteria exactly

Show advanced search options

Results (1 record found)

Lookup ID	Name	Constituen...	Address	City	State	ZIP	Email addr...	Suffix
8-6036	Plante, Jen...	Individual	1436				r.d.p..	



APTG Default

- Once the constituent is replaced, expose the constituent window.
- Compare phone number.
- Compare email address.
- Click the pencil to edit the constituent info if needed.

The screenshot displays the APTG software interface. At the top, there are several tabs: 'Batch', 'Constituent', 'Constituent', and 'Configuration'. The 'Constituent' tab is active, showing options like 'Solicit codes', 'Edit', and 'Go to'. Below the tabs is a 'Properties' section with a table containing columns for 'BSA Structure', 'Payment method', 'Other method', and 'Given anonymously'. The 'Payment method' is set to 'Cash'. Below the properties is a 'Constituent Window' with a notification: 'Notifications: "Major Giving Prospect". Click here for more information.' The window has tabs for 'Individual', 'Household', 'Business', and 'Information'. The 'Individual' tab is selected, showing 'Personal' and 'Primary contact' information. The 'Personal' section includes fields for Last name (Default), First name (APTG), Middle name, Title, Suffix, Nickname, Maiden name, Marital status, Birth date, and Gender (Male). The 'Primary contact' section includes fields for Address type (Business), Country (United States), Address (1325 W Walnut Hill Ln, Irving, TX 75038-3008), Phone type (Business), Phone number ((972) 580-2033), Email type (Business Email Address), and Email address (john.kuehn@scouting.org).

Batch	Constituent	Constituent	Configuration
Save Save and close Export	Solicit codes	Edit Go to	Properties Customize fields Validate Update status Validate addresses

BSA Structure	Payment method	Other method	Given anonymously
	Cash		<input type="checkbox"/>
			<input type="checkbox"/>

Constituent Window

Notifications: "Major Giving Prospect". Click here for more information.

Individual Household Business Information

Personal

Last name: Default
First name: APTG
Middle name:
Title:
Suffix:
Nickname:
Maiden name:
Marital status:
Birth date:
Gender: Male

Primary contact

Address type: Business
Country: United States
Address: 1325 W Walnut Hill Ln
Irving, TX 75038-3008
Phone type: Business
Phone number: (972) 580-2033
Email type: Business Email Address
Email address: john.kuehn@scouting.org

APTG Events

Registration Batch

	Registrant ID	Registrant	Event	Registration option	Guests
1		Harlin R. [REDACTED]	APTG Default Event	Individual Registration (Default)	
2		APTG Default	APTG Default Event	Individual Registration (Default)	
*					

Registration Payments

Properties					
	Constituent	Lookup ID	Group ID		Amount
1	Harlin R. [REDACTED]	[REDACTED]			\$154.50
2	APTG Default	8-46000804			\$150.00
*					

- Fix Registrant by searching for constituent.
- Search for your event.
- Make sure registration option is correct.
- Commit registration batch
- Fix constituent on Registration payment
- Use apply window to attach to registration



APTG Other Batches

- Online Donation
- Online Pledge
- For both batches
 - Update APTG Default constituent
 - Add Group ID, Giving Category, BSA Structure, inbound channel
 - Edit constituent info if needed
 - Commit batch.





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



[Home](#) > [Council Support](#) > [Council Funding and Finance](#) > [Council Administration](#) > CRM Resources

COUNCIL SUPPORT

Council Management ▼
Support

Council Funding and ▼
Finance

CRM Resources

CRM Process Videos

CRM (Blackbaud) User Forum Presentations

[Report Cookbook \(for OLTP\) BSA Appeal Progress & Appeal Constituent Reports](#)

2024

January 2024 User Forum – [Slide Deck](#) – [recording](#)

– Creating 2023 Contribution Statements – Pledge Write-offs – Prior Year – Events & Mapping -Updating Reminders

February 2024 User Forum – [Slide Deck](#) – [recording](#)

– Finishing Up 2023 – Year-End GL Transactions – Tracking 2024 Appeals – BSAFR in Batch

2023

January 2023 User Forum – [Slide Deck](#) – [recording](#)

– Creating 2022 Contribution Statements – Cleaning Up Unposted batches

February 2023 User Forum – [Slide Deck](#) – [recording](#)

– Global Write-off – Reports for 990 – Beginning GL FR Transactions – Using Group ID in batch

March 2023 User Forum – [Slide Deck](#) – [recording](#)



Member Care

- Phone 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](#)

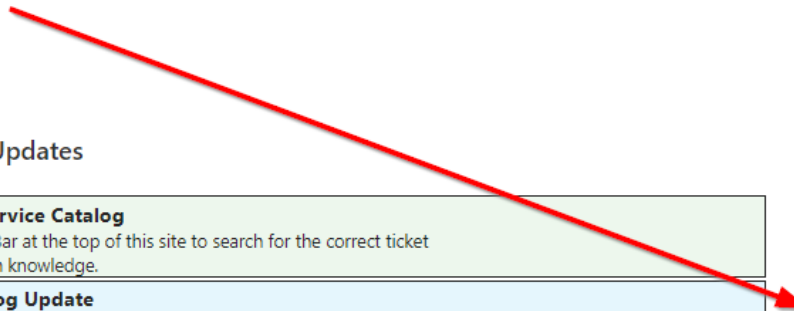
[My Open Tickets](#) | [My Closed Tickets](#) | [Knowledge Base](#) | [Report Security Issue](#) | [Report Phishing Attempt](#) | [Password Reset](#) | [Office365](#) | [HR Gateway](#) | [MyBSA](#)

Announcements & Updates

-  **Search the Service Catalog**
Use the Search Bar at the top of this site to search for the correct ticket type or to search knowledge.
-  **Service Catalog Update**
A new form has been created to make adding or removing Scout Executive Designees and System Admins easier. Scout Executives can submit up to 3 requests on a single form.
-  **Andy the Chatbot**
January 16, 2024, the new and improved Andy was introduced. To reach out to Andy for Assistance, please click on the 'Andy the Chatbot' link on the right.

IT Online Service Catalog

-  I am a National Employee
-  I am a Council Employee
-  Andy the Chatbot



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](#)





General Assistance



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

When possible, open a ticket by selecting the service from the Service Catalog and use the "Open A Request" link. Doing so will ensure all the necessary information is collected and the ticket can be quickly routed to the right department/team.

Tickets opened using the General Assistance option, go into the general queue and are answered in the order received.

Hi, Don. When you submit this form, the owner will see your name and email address.


* Required


1. **Description** * 


A brief description of your problem:


Enter your answer






1. **Description** * 
A brief description of your problem.

Enter your answer 


2. **Application** * 
If you are needing assistance with an application, please enter application below (Example: Blackbaud, Peoplesoft, Membership, Adobe, etc.) (optional)

Enter your answer 

3. **Attachment(s)** (Non-anonymous question) 
(optional)

 Upload file 

File number limit: 10 · Single file size limit: 10MB · Allowed file types: Word, Excel, PPT, PDF, Image, Video, Audio

Submit 

Fill in the Boxes – Add an Attachment

CLICK - Submit



Prepared. For Life.™

Next Forum

July 17, 2024

10:00 am & 2:00 pm CT



Questions & Answers



Prepared. For Life.™