CRM Beginner Agenda

Blackbaud 101

1. Introduction
2. CRM Resources
   1. MyBSA User Guide
   2. MyBSA Resources
   3. [www.scouting.org/financeimpact](http://www.scouting.org/financeimpact)
   4. System helps
3. What is CRM
   1. Constituent Relationship management software
   2. Overtime – 360 degree view of activities with the constituent
   3. Place to store info to perpetuate long term involvement with constituent
   4. Institutional knowledge on a constituent
4. Admin
   1. What gives access
   2. Roles needed
   3. Connection to Constituent
   4. Email needed
   5. Email preferences
   6. Suspension and inactivation
5. CRM Navigation and Personalization
6. CRM Explorer
   1. Task
   2. Shortcuts
   3. Recent Searches
   4. Recently accessed
7. CRM Functional Areas
8. CRM Site Security
9. Constituents
   1. Type
   2. Searching
   3. Adding and Editing
   4. Households
   5. Revenue Tab
   6. Smart Fields
   7. Attributes
10. Add an individual
    1. Show duplicate checker and how it works
    2. Complete
       1. Address
       2. Email
       3. Phone
11. Create an organization
12. Create a household
13. Add Children to Household
14. Add Spouse
15. Interactions
    1. Why use
    2. How to create
    3. Locations to see and review.
16. Documentation and Notes
    1. When should one use a Note
    2. Create Notes
    3. Create Attachments
    4. Demonstrate notifications
17. Create Notifications
18. Groups / Committees
    1. What they are
    2. How they are used
    3. BSAFR Groups
    4. Create a group
    5. Make groups a committee
    6. Attache people to a group Record
    7. Discuss do’s and don’t with ending a group membership
19. Solicit Code
    1. Where are they
    2. How to use them
20. Reports
    1. Appeal Constituent Export / Report
    2. Appeal Progress Export / Report
    3. Appeal Progress by Category
    4. Appeal Progress by Solicitor
    5. Summary of Appeals
    6. Appeal Progress Results
    7. Daily Revenue Transaction List
    8. BSA Employer – Employee Relationships
    9. BSA Eagle List builder
    10. BSA Top Prospects List builder
    11. Daily Transaction List
    12. GL distribution report
    13. Write-off List

Revenue Entry

1. What shapes the GL
   1. Designation
   2. Inbound Channel
   3. Revenue Category
2. Batches
   1. Types of Batches
   2. Batch entry Start to Finish
   3. Barcodes
   4. Worked no gift records.
   5. Customized batch
   6. Apply payments override pledge payments.
   7. Donor advised funds.
   8. Matching Gift payments
3. Batch Features
   1. Solicitors
   2. Recognition Credits
   3. Apply Window
   4. Load Commitments
4. Create Practice Batches
5. BSAFR Groups
   1. What they are
   2. Why use the?
   3. How do I find my BSAFR groups
   4. How they work with pledge cards
   5. Should I still mark pledge cards if I don’t use them.
   6. How to evaluate your BSAFR Structure
   7. How to clean up your BSAFR Structure
6. Revenue Record Tabs
   1. Attributes
   2. Notes
   3. Solicitors
   4. Installment schedule
   5. Write offs
7. CC pledges and recurrence
   1. How they are entered
   2. How payment batches are created
   3. Credit Card Processing
8. Matching Gifts
9. Tributes
10. Reminders
    1. How to run
    2. How to update selection
    3. Consolidated reminders
11. Acknowledgements
    1. How they work
    2. How to run
    3. How to update selections
    4. How to update letters
12. End of Month End of year
    1. CY Vs FY – Inbound Channels, when to use
    2. PY - Inbound Channel
    3. Monthly reconciliation VS year end
    4. Detail Splits (Appeal Tab) and Inbound channel check
    5. Mismatched Appeals (Appeal Tab)
    6. Inbound channel Mismatch (Appeal Tab)
    7. Revenue Data Hygiene Data List
    8. GL Distribution Report
13. Global Write offs
14. Creating Events
    1. Designations
    2. Appeal
    3. Options
    4. Event Mapping
    5. Adding event registrations
    6. Scouting Gives
    7. Scouting Give Batches