

CRM User Forum

April 28, 2021

Cornelia Ellis – John Kuehn – Don Day



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Objectives

- Gifts of stock & procedures for acceptance
- Designation – changing in batch
- Taking anonymous donations
- Managing duplicate constituents
- New – Volunteer Award(s) data list



Gifts of Stock

- Stock is Payment Method
- Stock is not on year-end Contribution Statement
- Stock is an item donated. The donor gets letter thanking them for donating ## shares of stock from Company XYZ on date XX/XX/XXXX.
- Contribution value is determined by broker, based on the day they sent the stock to your council. What the BSA sells it for is not the value the donor receives.



Procedures for accepting Stock

- Can be a payment on a pledge.
- Can be a donation.
- Once stock is recorded, it must be sold to finish the process.
- GL Distribution page is printed and given to accounting to determine gains and losses via journal entries.





John D. Kuehn

3/23/2021 Pledge: \$3,000.00

Transaction summary

Pledge amount: \$3,000.00

Date: 3/23/2021

Batch number:

Revenue ID: rev-44176142

Summary

Balance: \$0.00

Total paid: \$3,000.00

Past due: \$0.00

Status

Acknowledgements: Not acknowledged

Post status: Not posted

Post date: 3/23/2021

Post process ID:

Donor provides a pledge at the beginning of the year for your FOS Appeal.

Details

Letters

BSAFR

Attributes

Benefits

Documentation

GL Distributions

Tributes

VNE TEST

Installment/Write-

Details

Original amount: \$3,000.00

Send reminders: Yes

Subtype:

Revenue reference:

Source code:

Effort:

Inbound channel: Friends of Scouting

Appeal: (662) S21 - 2021 Friends of Scouting

Revenue category:

Designations (1) | More ▾



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Tasks

- Edit payment
- Edit original amount
- Sell stock**
- Change constituent on payment
- Edit revenue ID
- Delete payment
- Change receipt preference

More information

- History
- Revenue and recognition

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query
- John D. Kuehn
- Application Users
- GL account system import - Import
- Giving Category Table Entries
- BSA Structure Table Entries
- Business Processes
- Data Tune-Up

John D. Kuehn
3/23/2021 Payment: \$3,000.00

Transaction summary

Payment amount: \$3,000.00 Date: 3/23/2021
 Receipt amount: \$3,000.00 Batch number:
 Revenue ID: rev-44176145

Status

Acknowledgements: Not acknowledged
 Receipt preference: Per payment
 Receipt status: Not received
 Receipt date:
 Receipt number:
 Post status: Not posted
 Post date: 3/23/2021
 Post process ID:

Payment method

Payment method: Stock
 Number of units: 5.000
 Median price: 600.0000
 Issuer: PWC
 Symbol: xyz

Instead of cash the donor decides to send you Stock. Stock is a piece of paper that you must convert to cash. It can be added to the pledge to pay it off. Once your council sells the stock you must update the payment and sell the stock.

- Details
- Letters
- BSAFR
- Attributes
- Benefits
- Documentation
- GL Distributions
- Tributes
- VNE TEST
- Matching Gifts
- Lockbox
- Stock Sales**

Stock sale totals

Units sold: 0.000 Total sale amount: \$0.00 Total proceeds: \$0.00
 Units remaining: 5.000 Total gain/loss: \$0.00 Total fees: \$0.00

Stock sales (1)

Type	Date	Amount	Gain/loss	Fee	Net proceeds	No. units
Stock	3/23/2021	\$3,000.00				5.000

The info inputted for the sale is the amount it sold for, the fees paid, the units sold and the low, median, and high the day it sold. Median x Unit Sold = Sale amount.

Sell stock

Issuer: PWC

Date of sale: 3/23/2021

Sale amount: \$4,000.00

Fees: \$25.00

Units sold: 5,000

Price per share: Low 700.0000 Median 800.0000 High 900.0000

GL post status: Not Posted

GL post date: 3/23/2021

Gain: **\$1,000.00** Units remaining: **0.000**

Help Save Cancel





John D. Kuehn

3/23/2021 Payment: \$3,000.00

Transaction summary



Payment amount: \$3,000.00

Date: 3/23/2021

Receipt amount: \$3,000.00

Batch number:

Revenue ID: rev-44176145

Status

Acknowledgements: Not acknowledged

Receipt preference: Per payment

Receipt status: Not received

Receipt date:

Receipt number:

Post status: Not posted

Post date: 3/23/2021

Post process ID:

Payment method

Payment method: Stock (sold \$4,000.00)

Number of units: 5.000

Median price: 600.0000

Issuer: PWC

Symbol: xyz

Once the stock is sold, the stock sales tab will be complete. One can see the gain or loss for the stock. The amount the council receives may be higher or lower than what the donor records as a charitable contribution on the day he or she donated the shares.

- Details
- Letters
- BSAFR
- Attributes
- Benefits
- Documentation
- GL Distributions
- Tributes
- VNE TEST
- Matching Gifts
- Lockbox
- Stock Sales

Stock sale totals



Units sold: 5.000 Total sale amount: \$4,000.00 Total proceeds: \$3,975.00

Units remaining: 0.000 Total gain/loss: \$1,000.00 Total fees: \$25.00

Stock sales (2)



More ▾

Type	Date	Amount	Gain/loss	Fee	Net proceeds	No. units	Low price	Median price	High price
Stock	3/23/2021	\$3,000.00				5.000	500.0000	600.0000	700.0000
Sold stock	3/23/2021	\$4,000.00	\$1,000.00	\$25.00	\$3,975.00	5.000	700.0000	800.0000	900.0000

Transaction history by post date

Account system: Local Cour

All dates | **3/23/2021** Payment | **3/23/2021** Sold stock

GL distributions (10) Filters [Icons] More ▾

View: All [Dropdown] | Apply [Icon] Reset [Icon]

Account	Description	Debit amou...	Credit amo...	Reference	Post date	Status ▾
▲ Pledge Edit						
→ L662-1-1001-015-00	L662-1-FOSC-STOC-L66200511-UNR. : FRIENDS OF SCOUTING	\$3,000.00		Kuehn-Pledge Payment for bookabl...	3/23/2021	Not posted
→ L662-1-1301-051-00	L662-1-FOSC-PAPL-L66200511-UNR. PAYMENT-on-Pledge-Receiveable(CY): FRIENDS OF SCOUTIN		\$3,000.00	Kuehn-Pledge Payment for bookabl...	3/23/2021	Not posted
▲ Sold stock - 3/23/2021 - \$4,... Edit						
→ xxxx-x-8006-xxx-xx	Expense: Brokerage Services (8006) - fees on sale	\$25.00		Kuehn-Fees	3/23/2021	Not posted
→ xxxx-x-CASH-xxx-xx	Council's "Cash" Checking/Deposit Account where check/wire transfer from asset sale is deposited	\$1,000.00		Kuehn-Gain	3/23/2021	Not posted
→ xxxx-x-CASH-xxx-xx	Council's "Cash" Checking/Deposit Account where check/wire transfer from asset sale is deposited	\$3,000.00		Kuehn-Sold Stock	3/23/2021	Not posted
→ xxxx-x-6601-xxx-xx	Stock Sale: Gain/Loss On Investment (6601)		\$1,000.00	Kuehn-Gain	3/23/2021	Not posted
→ xxxx-x-CASH-xxx-xx	Council's "Cash" Checking/Deposit Account where check/wire transfer from asset sale is deposited		\$25.00	Kuehn-Fees	3/23/2021	Not posted
→ xxxx-x-STOC-xxx-xx	Deposit Account at Broker (where securities were received by the broker); may be same as CASH.		\$3,000.00	Kuehn-Sold Stock	3/23/2021	Not posted

The GL Distribution tab can be printed and provided to the controller to help with entries in PeopleSoft. Gains and Losses are manual journal entries.

Designations



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CRM Designation

Designations have 3 set of numbers **06209812**

- The **red digits** represent the Council Number. This tells CRM which PeopleSoft Account the transaction should go to.
- The **green digits** represent the “Project Code” in PeopleSoft the transaction should record against.
- The **black digit** is the Fund. In the example above we have a “2”. This number will send it to your Capital fund.
- The **Inbound Channel** determines the account number. “Friends of Scouting = 4001”
- The **Revenue Category** determines “Restriction” or the sub-account for “Special Events”.



Go To: Appeal Progress Results Under Revenue

The screenshot shows a software interface with a top navigation bar containing several menu items: Marketing and Communications, Revenue, Events, Memberships, Prospects, Volunteers, Foundations, and Fundraising. The 'Revenue' menu is selected and highlighted with a dashed box. Below the navigation bar, the 'Revenue' section is displayed, featuring a stack of gold coins icon and the title 'Revenue'. Underneath, there are three columns of options: 'More tasks', 'Reports', and 'Transactions'. The 'More tasks' column includes 'Appeal progress results' (highlighted in yellow), 'Constituents with Overdue Pledge Installment(s)', and '1'. The 'Reports' column lists four report options: 'BSA Appeal Constituent Export (OLTP)', 'BSA Appeal Constituent Report (OLTP)', 'BSA Appeal Progress Export (OLTP)', and 'BSA Appeal Progress Report (OLTP)'. The 'Transactions' column lists four transaction options: 'Transaction search', 'Batch entry', 'Batch search', and 'Add a pledge'.

Marketing and Communications ▾ Revenue ▾ Events ▾ Memberships ▾ Prospects ▾ Volunteers ▾ Foundations ▾ Fundraising ▾

 **Revenue**

More tasks

-  Appeal progress results
-  Constituents with Overdue Pledge Installment(s)
- 1

Reports

-  BSA Appeal Constituent Export (OLTP)
-  BSA Appeal Constituent Report (OLTP)
-  BSA Appeal Progress Export (OLTP)
-  BSA Appeal Progress Report (OLTP)

Transactions

-  Transaction search
-  Batch entry
-  Batch search
-  Add a pledge



Enter the Council Number then click Search
Highlight the Council Number then click Select

The screenshot shows a 'Site Search' dialog box with the following fields and controls:

- Site ID:
- Name:
- Short name:
- Acronym:
- Site type:
- Buttons: Search, Clear

Results

Site ID	Name ▲	Short name	Acronym	Site type	Site path
---------	--------	------------	---------	-----------	-----------






Buttons: Help, Select, Cancel



Select the Appeal

Click on the chevron next to the Appeal

2022

		615	Mountaineer Area Council	2022	Annual Giving (Friends of S...	Yes	(615) F22 Friends of Scouting 2022
	Go to appeal		Edit appeal		Mark inactive		



Click on the “Designations” tab

 **Appeal: (615) F22 Friends of Scouting 2022**

Description:	Annual Friends of Scouting Campaign	Start date:	1/1/2022
Business unit:		End date:	12/31/2022
Category:	Annual Giving (Friends of Scouting)	Goal:	
Report code:	2022	Status:	Active
Site:	Mountaineer Area Council	Membership:	

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

Contributions - posted 4/27/2021  More ▾



Adding the Designation as the Default



Appeal: (615) F22 Friends of Scouting 2022

Description: Annual Friends of Scouting Campaign Start date: 1/1/2022
Business unit: End date: 12/31/2022
Category: Annual Giving (Friends of Scouting) Goal: [REDACTED]
Report code: 2022 Status: Active
Site: Mountaineer Area Council Membership:

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

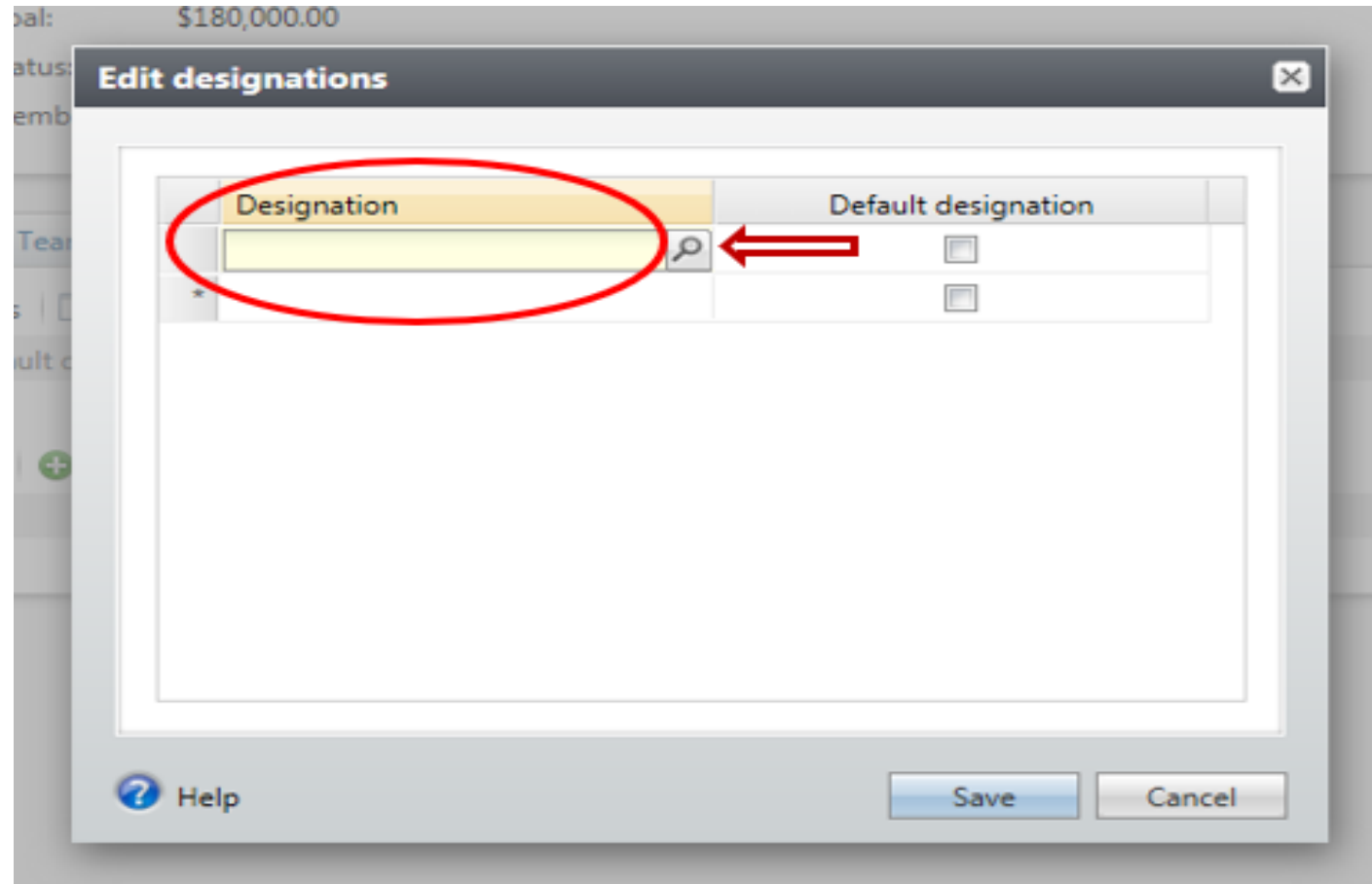
Designations (1) [Edit list of appeal designations](#) [More](#)

Designation	Default designation
61500501 Friends of Scouting - Operating	



Edit Designations

Search for Designation by typing in box or search for number



Add as many designations for this Appeal but only one can be the Default

of Scouting Campaign Start date: 1/1/2022

Edit designations [X]

Designation	Default designation
61500501 Friends of Scouting - Org [Search]	<input type="checkbox"/>
* [Add]	<input type="checkbox"/>

[?] Help [Save] [Cancel]



Anonymous Donors

- Identified individual that does not want gifting published
- Monies received that one does not know the donor



Pledge marked as Anonymous



John D. Kuehn

2/25/2021 Pledge: \$220.00

Transaction summary

Constituent requests to remain anonymous for this pledge.

Pledge amount: \$220.00

Date: 2/25/2021

Batch number: L0706014

Revenue ID: rev-44427075

Summary

Balance: \$180.00

Total paid: \$40.00

Past due: \$20.00

Status

Acknowledgements: Not acknowledged

Post status: Posted


Post date: 2/25/2021

Post process ID: gl-10006778



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Constituent marked as gives Anonymously

 **John D. Kuehn**

Notifications: "Major Giving Prospect" and "Revenue Given This Year". Click here for more information.

Individual **Lookup ID: 8-13684237**


Constituencies: Committee member Donor Giving Prospect Event registrant Relation Only

↓ Show more

Revenue Contact **Personal Info** Security History Relationships Attributes Document



Constituencies **Personal**

Expand all Collapse all

Personal information Edit Mark deceased Mark inactive 

First name: John
Middle name: David
Last name: Kuehn

Title: Title 2:
Suffix: Suffix 2:
Nickname: Gender: Male

Marital status: Maiden name:
Birth date:  Gives anonymously: Yes
Age:  Website:



Managing duplicate constituents



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Duplicate constituents

- Duplicates are common in any database
 - Multiple people adding records
 - People using nicknames on materials
 - Data being fed from other systems
- How do we minimize this
 - Review constituent records
 - Review “ScoutNET Merged Inactive Constituent” data list or create “BSA Duplicate Constituent Report”
 - Find in daily constituent searches



BSA Duplicate Constituent Report

- Customized tool that looks at the following:
 - identifies constituent records that have:
 - the same name and address AND
 - a ‘matching’ date of birth (a missing/blank DOB is considered a match).
 - the report displays key information for each constituent record that is helpful in determining which record to keep and which record(s) to merge/inactivate.



BSA Duplicate Constituent Report

The screenshot displays the Blackbaud CRM P interface. At the top, there is a navigation bar with the following items: Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, Volunteers, Foundations, and Fundraising. A search bar is located in the top right, with the text "Constituents" and "Name or lookup ID" and a search icon. To the right of the search bar is a "+ Add new" button and a user greeting "Welcome, Don Day BSA-BSA".



The main content area is divided into several sections:

- Analysis** (highlighted in yellow):
 - More tasks**: BSA Appeal Progress by Position, BSA Giving Dynamics Report, BSA Worker Performance by Giving Category, Decease Finder Constituent List, Eagle Scout Lists, NESAs and Alumni List, Pledge Card Export, Pledge Card Report, ScoutNET Merged Inactive Constituent.
 - Dashboards**: KPI dashboard, Web dashboard.
 - Sales reports**: Sales by membership.
 - Reports** (highlighted in yellow): BSA Duplicate Constituent Report, Constituent reports, Appeal reports, Revenue reports, Membership reports, Prospect management reports, Event reports, Fundraising reports, Volunteer reports, Marketing reports, Treasury reports.
 - Selections**: Import selections, View selections.
 - Advocacy reports**: Advocacy action item detail.
- Information library**: Information library, Ad-hoc query search, Smart query search, Smart query browse, Ad-hoc Query Upload Tool.
- Reporting services**: Report explorer, Report model generator.



BSA Duplicate Constituent Report

Blackbaud CRM™ P

Constituents  + Add new Welcome, Don Day BSA-BSA 

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Memberships ▾ Prospects ▾ Volunteers ▾ Foundations ▾ Fundraising ▾


BSA Duplicate Constituent Report

Site:

Include Person Records

Include Organization Records

Last Name Filter:

 View report



BSA Duplicate Constituent Report

BSA Duplicate Constituent Report

Site:

Include Person Records

Include Organization Records

Last Name Filter:

1 of 9 Find | Next

BSA Duplicate Constituent Report **Council 303**

George **Person** **Male**

317 Cypress Creek Rd, 39047

Lookup ID	Alternate ID	DOB	Revenue #	CBCEExists?	Latest Reg Date	Latest BSAFR Date
8-36639131	101423733	1982-08-16	0	No	3/1/2000	
8-37682167	110336704	1982-08-16	0	No	12/1/2018	

Adrienne **Person** **Female**

638 Warren Harding Dr, 39213

Lookup ID	Alternate ID	DOB	Revenue #	CBCEExists?	Latest Reg Date	Latest BSAFR Date
8-36609365	101136326	1984-09-05	0	No	10/1/1999	
8-39561687	126186988	1984-09-05	0	No	9/1/2011	

Callaway High School, **Organization**

601 Beasley Rd, 39206

Lookup ID	Alternate ID	DOB	Revenue #	CBCEExists?	Latest Reg Date	Latest BSAFR Date
8-36609011	100036089		0	No		
8-40115181	101134900		0	No		



BSA Duplicate Constituent Report

██████, Michael							
261 Willow Ln, ██████						Person	Male
<u>Lookup ID</u>	<u>Alternate ID</u>	<u>DOB</u>	<u>Revenue #</u>	<u>CBCExists?</u>	<u>Latest Reg Date</u>	<u>Latest BSAFR Date</u>	
8-40243967	12024204	1970-11-04	0	Yes	1/1/2020		
8-40052987	130318920	1970-11-04	8	No		3/4/2014	
<u>Revenue ID</u>	<u>Date</u>	<u>Amount</u>	<u>Appeal</u>				
rev-43417811	7/31/2019	\$0.00	(303) 19FOS - 2019 Friends of Scouting				
rev-42339229	5/31/2018	\$0.00	(303) 18FS - 2018 Friends of Scouting				
rev-41660296	12/5/2017	\$0.00	(303) 17FS - 2017 Friends of Scouting				
124369441	5/12/2016	\$150.00	(303) 16FS - 2016 Friends of Scouting				
123118139	2/24/2015	\$300.00	(303) 15FS - 2015 Friends of Scouting				
PAS-136353411	2/24/2015	\$300.00	(303) 15FS - 2015 Friends of Scouting				
122087834	3/4/2014	\$150.00	(303) 14FS - 2014 FOS				
PAS-134471398	3/4/2014	\$150.00	(303) 14FS - 2014 FOS				



BSA Duplicate Constituent Report

- Similar to Duplicate Persons Report in ScoutNET
 - ScoutNET report ignores gender differences
 - CRM Report ignores suffix differences
 - CRM Report ignores middle name differences
- Each report is useful but can provide differing results



Volunteer Award List

- Found under Constituents / Recognition
- This is a data list
- Site secured via council site
- Constituents show on the list because the award was updated in ScoutNet



How To Run

- Click Link
- Search and select the council
- Select which volunteer award you are seeking a list for
- Click Apply
- List may be downloaded and contains primary address, phone and email



Volunteer Awards Data List

The screenshot displays the Blackbaud CRM P interface. At the top, the navigation bar includes 'Home', 'Constituents', 'Marketing and Communications', 'Revenue', 'Events', 'Memberships', 'Prospects', 'Foundations', 'Fundraising', and 'Analysis'. The 'Constituents' menu item is highlighted with a red circle containing the number '1'. Below the navigation bar, the left sidebar contains sections for 'Shortcuts', 'Recent searches', and 'Recently accessed'. The 'Volunteer Award List' is highlighted in yellow in the 'Shortcuts' section, with a red circle containing the number '2' next to it. The main content area is titled 'Constituents' and features several categories: 'Recognition' (with 'Volunteer Award List' highlighted), 'Reports' (including 'BSA Duplicate Constituent Report', 'BSA Eagles Listbuilder', and 'BSA Top Prospects Listbuilder'), 'Individuals and households' (with 'Add an individual' and 'Add a group'), 'Committee' (with 'Committee search' and 'Add a committee'), 'Constituents' (with 'Constituent search'), and 'Organizations' (with 'Organization search' and 'Add an organization').



Site ID – Search - Select

Site ID: 1

Name:

Short name:

Acronym:

Site type: 2

Results (1 record found)

Site ID	Name	Short name	Acronym	Site type
640	Greater New York Council 3			Local Council



Choose Award Type

Volunteer Award – Constituent Award – Training Awards

Filter by Award or Deceased or Inactive

Blackbaud CRM™ P

Constituents Welcome, [User] -BSA

Home | Constituents | Marketing and Communications | Revenue | Events | Memberships | Prospects | Volunteers | Foundations | Fundraising

Greater New York Council (640) - Volunteer Awards List

Volunteer Award List | Constituent Award | Training Awards

Volunteer Award List - These can be found on the awards tab under the "Volunteer Tab" on the constituent record.

Volunteer Award equal to: Deceased equal to: Inactive equal to:

Select a filter and click "Apply" or click here to load the list



Volunteer Awards List(s)

- **Volunteer Awards**

- can be found on the awards tab under the "Volunteer Tab" on the constituent record.

- **Constituent Awards**

- can be found as a constituent attribute on the "Attributes Tab" on the constituent record.

- **Training Awards**

- can be found as a constituent attribute on the "Attributes Tab" on the constituent record.



Click More to export

Blackbaud CRM™ P Application features Welcome, Richard Davies BSA-640

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Memberships ▾ Prospects ▾ Foundations ▾ Fundraising ▾ Analysis ▾ Administration ▾

Greater New York Council (640) - Volunteer Awards List

Volunteer Award List (1,924) ▾

Volunteer Award equal to: ▾ Deceased equal to: ▾ Inactive equal to: ▾

< 2 3 4 5 ... 20 >

	Council...	Council Name	Name	Lookup ID	First name	Middle name	Last Name	Suffix	Address	City	State
⊕	640	Greater New Y...	Frank C. O'Connell	00-0000000	Frank	C.	O'Connell		100 N. 1st St.	Brooklyn	NY
⊕	640	Greater New Y...	Frank C. O'Connell	00-0000000	Frank	C.	O'Connell		100 N. 1st St.	Brooklyn	NY
⊕	640	Greater New Y...	Frank C. O'Connell	00-0000000	Frank	C.	O'Connell		100 N. 1st St.	Brooklyn	NY
⊕	640	Greater New Y...	Frank C. O'Connell	00-0000000	Frank	C.	O'Connell		100 N. 1st St.	Brooklyn	NY
⊕	640	Greater New Y...	Frank C. O'Connell	00-0000000	Frank	C.	O'Connell		100 N. 1st St.	Brooklyn	NY
⊕	640	Greater New Y...	Frank C. O'Connell	00-0000000	Frank	C.	O'Connell		100 N. 1st St.	Brooklyn	NY
⊕	640	Greater New Y...	Frank C. O'Connell	00-0000000	Frank	C.	O'Connell		100 N. 1st St.	Brooklyn	NY



Volunteer Awards example

- Asian American Award
- Bronze Pelican
- Daniel C. Beard Masonic Scouter
- Distinguished Eagle Scout Award
- Distinguished Service Award
- District Award of Merit
- International Scouter's Award
- Kayaking BSA
- Medal of Merit (Adult)
- NESAs Outstanding Eagle Scout (NOESA)
- Scouter's Award
- Scoutmaster Award of Merit
- Silver Antelope
- Silver Beaver
- Silver Buffalo
- Silver Fawn
- St. George (Catholic)
- St. George (Episcopal)
- Unit Leader Award of Merit - CM
- Unit Leader Award of Merit - NL
- Unit Leader Award of Merit - SM
- Unit Leader Award of Merit - VC
- Venturing Leadership Award (Cncl. Adult)
- Veteran Award - 10 Years
- Veteran Award - 15 Years
- Veteran Award - 20 Years
- Veteran Award - 25 Years
- Veteran Award - 30 Years
- Veteran Award - 35 Years
- Veteran Award - 40 Years
- Veteran Award - 45 Years
- Veteran Award - 5 Years
- Veteran Award - 50 Years
- Veteran Award - 55 Years
- Veteran Award - 60 Years
- Veteran Award - 65 Years
- Veteran Award - 70 Years
- Veteran Award - 75 Years
- White Buffalo
- Whitney M. Young, Jr. Award
- William H. Spurgeon Award
- Woodbadge Complete
- Woodbadge Course
- Woodbadge Staff



Data Clean Up

- Giving Categories
- BSA Structure values



Giving Categories

- Review list in batch or
 - Request list from Member Care
- Determine giving categories to revise or delete
- Create ticket with Member Care to have updated



BSA Structure

- Review list in batch or
 - Request list from Member Care
- Determine structure to revise or delete
- Create ticket with Member Care to have updated



Next Forum

June 16, 2021

10:00 am or 2:00 pm CT





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

[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 November 2019

[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 User Forum](#)

[PeopleSoft Support](#)

- [Accounts Payable](#)
- [Asset Management](#)
- [Audit Adjustments](#)

www.scouting.org/financeimpact



Member Care Self-Service

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



<http://membercare.scouting.org>



Online Support Center

Boy Scouts of America National Service Center

Need a resolution fast? Then, check out our knowledge base. We are hard at work updating knowledge and documentation.

Can't find what you are looking for in the knowledge base? Open a ticket using the service catalog below.

If you have feedback on how we can improve, please let us know by clicking on the link below.

[Click here](#)

What do you need help with?



[Search help](#)

Council Support

National Support

Scout Shops/NDC Support



New Council User or Transfer
Account & Access



Council Account Termination
Account & Access

Choose

“Council Support”

Then on right side:

“General Assistance”



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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



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User Name – Application - Attachments

Council #

006 Black Warrior Council

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

User Name

 Don Day

User ID *(optional)*


example: Jodavis

Application

Blackbaud CRM

Example: Blackbaud, Peoplesoft, Membership, etc.

Attachment *(optional)*

 Drag and drop files, paste screenshots, or
browse

Create Cancel



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Questions & Answers



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