

CRM User Forum

May 26, 2021

Cornelia Ellis – John Kuehn – Don Day

Sylvia Flores



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Objectives

- Processing refunds in Scouting Give
- Adjusting revenue
- Reconciling – making your accounting person's job easier
- New National Service Territories and how they will impact CRM
- Volunteer Award Lists
- Data Clean Up



Refunds in Scouting Gives

- <https://payments.scouting.org/login>



Issue a Refund

Within Payment Platform:

- Click on “WePay Payments” within the left-hand blue navigation bar.
- Do a search on the Donor’s name (In this case “Michael Harrington”)
- Identify which donation to issue a refund for

The screenshot shows the WePay Payment History interface. On the left is a blue navigation bar with options: Scheduled, WePay Payments, and WePay Reconciliation. The main area has a search bar for "Council Name or Number" and a "WePay Payment History" section. A search for "Michael Harrington" has been performed. The results are shown in a table with columns: Name, Product Name, Transaction No, Transaction Date, Settlement Date, Order ID, Gross, Trans Fee, National Fee, and Net. The third transaction is highlighted with a red box.

Name	Product Name	Transaction No	Transaction Date	Settlement Date	Order ID	Gross	Trans Fee	National Fee	Net
Michael Harrington	Scouting Gives Online Donations	2083240004	2021-05-25T06:00	2021-05-25T06:00	b7b7b249-3d60-49c9-98ed-af2ac2cea65d	\$525	\$11.85	\$0	\$513.15
Michael Harrington	Scouting Gives Online Donations	1981676719	2021-05-25T06:00	2021-05-25T06:00	4096f12a-f52e-4d7f-b686-5d38159ecd97	\$515	\$11.63	\$0	\$503.37
Michael Harrington	Scouting Gives Online Donations	1170595176	2021-05-25T06:00	2021-05-25T06:00	af1a1d5c-9148-4502-8005-cc522c5b1d1e	\$515	\$11.63	\$0	\$503.37

At the bottom, it shows "Total: 3723 Payments" and a pagination bar with "10 / page" and a dropdown menu.



Scheduled

Wepay Payments

Wepay Reconciliation

Council Name or Number

Council Name or Number

Wepay Payment History

Michael Harrington

Download

Refresh

Show: Filter Options

Trans Fee	National Fee	Net	Merchant ID	Recurring ID	Council No	Council Name	Description	Email	Phone	Form Name	Frequency	Status	Refund
\$11.85	\$0	\$513.15	968872176	1657	635	Bay-Lakes Council	Council635	qa@scouting.org	5251128888		monthly	released	Refund
\$11.63	\$0	\$503.37	968872176	1922	635	Bay-Lakes Council	Council635	qa@scouting.org	5251128888		quarterly	released	Refund
\$11.63	\$0	\$503.37	968872176	1934	635	Bay-Lakes Council	Council635	qa@scouting.org	5251128888		monthly	released	Refund

Total 3723 Payments

<

1

...

369

370

371

372

373

>

10 / page

- Using the scroll bar, scroll all the way to the right until you see “Refund”
- Click on “Refund”

The screenshot shows a web application interface. On the left is a dark blue sidebar with navigation links: 'Scheduled', 'Wepay Payments', and 'Wepay Reconciliation'. The main content area has a header with a search bar labeled 'Council Name or Number'. Below this is a section titled 'Wepay Payment History' with a search filter set to 'Michael Harrington'. A table displays payment history with columns: 'Trans Fee', 'National Fee', 'Net', and 'M'. The table contains three rows of data. A 'Refund' pop-up window is centered over the table. The window has a blue header 'Refund' and a text input field labeled 'Reason' containing the text 'Requested by donor'. At the bottom of the pop-up are two buttons: 'Refund' and 'Cancel'. In the background, another table is visible with columns: 'Description', 'Email', 'Phone', 'Form Name', 'Frequency', 'Status', and 'Refund'. This table contains three rows of data, each with a 'Refund' link. At the bottom right of the background table is a '10 / page' dropdown menu.

- A pop-up window will appear
- Type in the reason for the refund, and click on “Refund”, if you want to proceed with the refund, or “Cancel” if you decide not to proceed with the refund.



All Payments
BSA Payment Portal

Welcome, Scout Executive635

Council Name or Number

Success
Refunded Successfully!

OK

Wepay Payment History

Michael Harrington

Download Refresh Show Filter Options

Trans Fee	National Fee	Net	Merchant ID	Recurring ID	Council No	Council Name	Description	Email	Phone	Form Name	Frequency	Status	Refund
\$11.85	\$0	\$513.15	968872176	1857	635	Bay-Lakes Council	Council#35	qa@scouting.org	5251128888		monthly	released	Refund
\$11.43	\$0	\$503.37	968872176	1922	635	Bay-Lakes Council	Council#35	qa@scouting.org	5251128888		quarterly	released	Refund
\$11.43	\$0	\$503.37	968872176	1934	635	Bay-Lakes Council	Council#35	qa@scouting.org	5251128888		monthly	Refunded	

Total 3723 Payments

1 369 370 371 372 373 10 / page

- When you click on “Refund”, a message will pop-up indicating that the refund was successful.
- Click OK.



Scheduled

Wepay Payments

Wepay Reconciliation

Council Name or Number

Council Name or Number

Wepay Payment History

Michael Harrington

Download

Refresh

Show: Filter Options

Trans Fee	National Fee	Net	Merchant ID	Recurring ID	Council No	Council Name	Description	Email	Phone	Form Name	Frequency	Status	Refund
\$11.85	\$0	\$513.15	968872176	1657	635	Bay-Lakes Council	Council635	qa@scouting.org	5251128888		monthly	released	Refund
\$11.63	\$0	\$503.37	968872176	1922	635	Bay-Lakes Council	Council635	qa@scouting.org	5251128888		quarterly	released	Refund
\$11.63	\$0	\$503.37	968872176	1934	635	Bay-Lakes Council	Council635	qa@scouting.org	5251128888		monthly	Refunded	

Total 3723 Payments

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1

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369

370

371

372

373

>

10 / page

- When you click “OK, you will notice that the donation has been refunded.



Stop Recurring Payments

The screenshot displays the Wepay Payments interface. On the left, a blue navigation bar contains three items: "Scheduled" (highlighted with a red box), "Wepay Payments", and "Wepay Reconciliation". The main content area is titled "Scheduled Payments" and features a search bar with "Michael Harrington" entered (also highlighted with a red box). Below the search bar, there are buttons for "Download", "Refresh", and "Show: Filter Options". A table lists scheduled payments with columns: Name, Product Name, Merchant ID, Recurring ID, Description, Amount, Frequency, and Phone. The table contains six rows, all for "Michael Harrington" with a monthly frequency of \$527.15. The last row, with Recurring ID 2187, is highlighted with a red box. At the bottom, a pagination bar shows "Total 216 Payments", a set of page numbers (1, 18, 19, 20, 21, 22), and a "10 / page" dropdown.

	Name	Product Name	Merchant ID	Recurring ID	Description	Amount	Frequency	Phone
+	Michael Harrington		968872176	2181	Council635	\$527.15	monthly	525112
+	Michael Harrington		968872176	2182	Council635	\$527.15	monthly	525112
+	Michael Harrington		968872176	2183	Council635	\$527.15	monthly	525112
+	Michael Harrington		968872176	2184	Council635	\$527.15	monthly	525112
+	Michael Harrington		968872176	2185	Council635	\$527.15	monthly	525112
+	Michael Harrington		968872176	2187	Council635	\$527.15	monthly	525112

While in Payment Platform:

- Click on “Scheduled” within the left-hand blue navigation bar.
- Do a search on the Donor’s name (In this case “Michael Harrington”)
- Identify which recurring payment that needs to be stopped.



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Scheduled

Wepay Payments

Wepay Reconciliation

Scheduled Payments

Q Michael Harrington

Download

Refresh

Show: Filter Options

Recurring ID	Description	Amount	Frequency	Phone	Email	FormName	Scheduled Date	Status
2181	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2182	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2183	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2184	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2185	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2187	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active

Total 216 Payments

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1

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18

19

20

21

22

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10 / page

- Once the recurring payment is identified, click on the “frequency” selection (In this case, “monthly”)



Scheduled

Wepay Payments

Wepay Reconciliation

Scheduled Payments

Michael Harrington

Download Refresh Show: Filter Options

Recurring ID	Description	Amount	Frequency	Phone	Email	FormName	Scheduled Date	Status
2181	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2182	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2183	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2184	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2185	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2187	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active

Total 216 Payments

< 1 >

22 >

10 / page

Payment Scheduled

End Date:

Wed Jun 23 2021

Scheduled

Fri Jul 23 2021

Scheduled

Mon Aug 23 2021

Scheduled

Thu Sep 23 2021

Scheduled

End Recurring Payment

- When you click on the frequency selection, the payment schedule will appear
- To stop future recurring payments, click on “**End Recurring Payment**” at the bottom of the future scheduled payments.



The screenshot shows a web application interface for managing payments. On the left is a dark blue sidebar with three menu items: 'Scheduled' (with a clock icon), 'Wepay Payments' (with a list icon), and 'Wepay Reconciliation' (with a document icon). The main content area is titled 'Scheduled Payments' and features a search bar with the text 'Michael Harr'. Below the search bar is a table of recurring payments. The table has columns for 'Recurring ID', 'Description', 'Amount', and 'Status'. It lists six entries, all with a description of 'Council635' and an amount of '\$527.15'. All entries are marked as 'Active'. Above the table are buttons for 'Download', 'Refresh', and 'Show: Filter Options'. A pop-up dialog titled 'End Recurring Payment' is overlaid on the table. It contains a 'Select End Date' field with the date '2021/05/31', an 'Add Comments' section with a text box containing 'Requested by the Donor', and two buttons at the bottom: 'End Recurring Payment' and 'Cancel'. At the bottom right of the main area, there is a footer that reads '© 2018 Boy Scouts of America - All Rights Reserved'.

Recurring ID	Description	Amount	Status
2181	Council635	\$527.15	Active
2182	Council635	\$527.15	Active
2183	Council635	\$527.15	Active
2184	Council635	\$527.15	Active
2185	Council635	\$527.15	Active
2187	Council635	\$527.15	Active

- When you click on “End Recurring Payment”, a pop-up screen will appear.
 - Enter the date the recurring payment needs to stop.
 - Enter the reason for stopping the recurring payment.
 - Click on “End Recurring Payment” if you are sure this is the action you want to take or click on “Cancel” to cancel out of stopping the recurring payment.



Scheduled

Wepay Payments

Wepay Reconciliation

Scheduled Payments

Michael Harr

Download Refresh Show: Filter Options

Recurring ID	Description	Amount	Frequency	Phone	Email	FormName	Scheduled Date	Status
2181	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2182	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2183	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2184	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2185	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Active
2187	Council635	\$527.15	monthly	5251128888	qa@scouting.org			Cancelled

Total 216 Payments

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22

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10 / page

- If you click on “End Recurring Payment”, you will be brought back to this screen, and you will see that the recurring payment schedule is cancelled.
- Recurring Payments will continue to show “Active”, even if their scheduled payments have been completed.
 - You can click on the frequency selection to determine whether a recurring payment has reached its intended schedule.
- **NOTE:** if it is within 10 days of the next recurring payment, that payment is already in process, and will take place.
 - Once the payment process is complete, you can issue a refund, if requested by the donor.



CRM Maintenance After Refund

- Look for a Scouting Gives Revenue Update Batch to arrive.
- Use the above batch to find the CRM revenue that needs to be zeroed out.
- If you canceled a recurrence, find recurrence in CRM and make it inactive.



Adjusting Revenue



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LC Revenue Update Batch

- **GL-Triggering Adjustments**
- Changes to the following fields trigger an adjustment in the GL:
 - Amount
 - Application
 - Benefits
 - Revenue - Constituent (Not *Recognition credit* constituent)
 - Designation - generates a reversal and updated GL distribution
 - Events
 - Inbound Channels
 - Payment method
 - Payment method subtypes
 - Revenue category



LC Revenue Update Batch

- Pledge
 - *When you adjust the designations on a pledge, you are prompted to adjust the installment schedule*
- Pledge Payment
- Recurring Gift
- Recurring Gift Payment
- Matching Gift Payment
- Event Registration Payment
- Any other Payment



Batch template: Select **LC Revenue Update Batch**

Enter a Description in the box

Click *Save*

Batch Entry

Uncommitted Batches

Committed Batches

Uncommitted batches (93)

Add

More

Date range:

Last 7 days

Batch template:

Category:

Owner:

Sites:

All sites

Show only batches with exceptions

Apply

Reset

Batch number	Batch template
L0009573	LC Pledge Commitment
L0009581	LC Cash/Check Payment
L0009670	LC Pledge Commitment
L0009678	LC Pledge Commitment
A0001024	LC Revenue Update Batch
L0009773	LC Cash/Check Payment
L0009802	LC Pledge Commitment
L0009820	LC Credit Card Payment
L0009877	LC Cash/Check Payment
LW000076	LC Pledge Write-Off (will not post)
L0009896	LC Import of Recurring Credit Card S
L0009939	LC Import of Recurring Credit Card S
L0010018	LC Pledge Commitment

Batch template:

Field options

Batch number:

Override

Description:

Owner:

☒ Enable auto-save

Projected #:

0

Projected amount:

\$0.00

Help

Save

Cancel

Status	Date added
1. Data Entry	3/19/2015
3. Approve	3/19/2015
1. Data Entry	3/19/2015
1. Data Entry	3/19/2015
1. Data Entry	3/19/2015
3. Approve	3/20/2015
1. Data Entry	3/20/2015
1. Data Entry	3/20/2015
1. Data Entry	3/20/2015
1. Data Entry	3/20/2015
Data Entry and Commit	3/20/2015
Data Entry and Commit	3/20/2015
2. Review	3/23/2015

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- Search for the **Revenue** record to be adjusted; the fields will automatically fill in the batch

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Prospects ▾ Foundations ▾ Fundraising ▾ Treasury ▾ Analysis ▾ Administration ▾ Data Integrity ▾ Workflow ▾

Tasks

- Configure email alerts
- Batch search
- Generate revenue update batch
- Generate step update batch

Configuration

- Batch numbering schemes
- Batch workflows
- Batch templates
- Revenue batch constituent security

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts

Recent searches

- Constituent search
- Batch search
- Event search
- Smart query search
- Ad-hoc query search

Recently accessed

- 3/11/2015 Payment:

Batch Entry

Uncommitted Batches | Committed Batches

Uncommitted batches (5) + Add [M]

Date range: Last 7 days Batch
Owner: Sites:

Batch number	Batch template
L0006184	LC Pledge Commi
A0000860	LC Revenue Upda
GLAcct_00078x1	Account by Accol
L0006185x1	LC Pledge Commi
A0000861	LC Revenue Upda

Edit Update status Commit

Batch type: Revenue Update Batch
Date changed: 3/31/2015

Batch A0000861

Main | Revenue

Batch | Constituent | Configuration | Processes | Messages

Save Save and close Export Edit Go to Properties Validate Update projected totals Set row message Clear row Clear all Show all

Update status

Properties

Owner: Chuck Kehoe BSA Projected No.: 1 Current No.: 1
Projected total: 76.0000 Current total: 0.0000

Revenue	Revenue ID	Constituent	Lookup ID	Amount
1				

Constituent Window

Information

Applications **Matching gifts**

Application	Application amount	Organization	Amount
-------------	--------------------	--------------	--------

Page 1 of 1

Owner: Chuck Kehoe BSA Current #: 1 Projected #: 1 Current amount: \$0.00 Projected amount: \$76.00



Update the transaction as needed

- If the entire transaction was entered in error, change the **Amount to \$0.00** and fill out all fields that are highlighted.
- It is important to use the correct **Adjustment Post date** because post date changes made in batch can affect a closed accounting period in PeopleSoft.

The screenshot displays the PeopleSoft Batch A0000861 interface. The top navigation bar includes links for Home, Constituents, Marketing and Communications, Revenue, Events, Prospects, Foundations, Fundraising, Treasury, Analysis, Administration, Data Integrity, and Workflow. A left sidebar contains sections for Tasks (Configure email alerts, Batch search, Generate revenue update batch, Generate step update batch), Configuration (Batch numbering schemes, Batch workflows, Batch templates, Revenue batch constituent security), Shortcuts (Add this page to shortcuts, Manage my shortcuts), Recent searches (Constituent search, Batch search, Event search, Smart query search, Ad-hoc query search), and Recently accessed.

The main content area is titled "Batch A0000861" and features a "Main" tab. Below the tab are several toolbars: "Batch" (Save, Save and close, Export), "Constituent" (Edit, Go to), "Configuration" (Properties, Customize fields), "Processes" (Validate, Update status, Update projected totals), and "Messages" (Clear row message, Clear all, Show all, Select previous, Select next, Filter...). The "Properties" section shows "Owner: Chuck Kehoe BSA", "Projected No: 1", "Current No: 1", "Projected total: 76.0000", and "Current total: 125.0000".

A table lists revenue transactions with the following columns: Revenue ID, Constituent, Lookup ID, Amount, Date, Revenue type, Application, and Opp. The first row is highlighted in yellow:

Revenue ID	Constituent	Lookup ID	Amount	Date	Revenue type	Application	Opp	
1	125.00 Payment - Chuck...	rev-14557736	Chuck Kehoe	8-15191338	\$125.00	8/11/2015	Payment	<multiple>












Below the table is a "Constituent Window" with a highlighted notification: "Notifications: 'Recent Address Change'. Click here for more information." The window also shows "Individual" and "Information" tabs, and fields for "Personal" and "Primary contact" information, including "Last name: Kehoe" and "Address type: Business".

The bottom of the interface shows a status bar with "Page 1 of 1" and summary information: "Owner: Chuck Kehoe BSA | Current #: 1 | Projected #: 1 | Current amount: \$125.00 | Projected amount: \$76.00".



Make sure that Adjustment reason, Adjustment details and Adjustment post date is filled out.

Make sure the accounting person is asked what Adjustment Post date.

Constituent		Configuration		Processes		Messages	
		 Properties	 Customize fields	 Validate	 Update projected totals		 Clear row message
Edit	Go to			 Update status		Set row message	 Clear all
							 Show all


Projected No.: 0	Current No.: 1
Projected total: 0.0000	Current total: 1,000.0000

ment date	Adjustment reason	Adjustment details	Adjustment post status	Adjustment post date	
3/25/2020	Error - Data Entry Error	Wrong appeal	Not posted	3/25/2020	Not





In the batch header, click **Update projected totals** in the Processes section, and click **OK**

In the batch header, click **Validate in the Processes** section, and click **OK**

 **Batch Entry**

Uncommitted Batches

Committed Batches


Uncommitted batches (1)  Add  More ▾

Date range: Last 7 days ▾



Batch template: ▾


Category: ▾






Owner: ▾

Sites: All sites ▾ 

☐ Show only batches with exceptions

 Apply  Reset

Batch number	Batch template	Description	Owner	Status	Date added	Category
 L0000181	LC Cash/Check Payment	test	Terri Twine BSA	Data Entry	3/31/2015	Revenue

 Edit ▾  Update status  Commit  Validation report  Delete

Batch type: Enhanced Revenue Batch

Date changed: 3/31/2015



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Click Commit

In the Commit parameters screen, click Start

Commit parameters

Batch number: L0006162

Batch commit instructions

- ☒ Validate batch before committing
- ☒ Check for duplicate constituents
- ☐ Delete batch after committing

Exception batch number:

☐ Override

Results

- ☒ Create control report
- ☐ Create output selection

Selection name:

☐ Overwrite existing selection

Help



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Adjustment History

To review GL-triggering adjustments on the transaction, navigate to the **Adjustment History** tab:

1. Login to CRM, and navigate to the Revenue area
2. Click **Transaction search**
 - a. Search for the transaction that has been adjusted
 - b. Click the transaction row to select
3. On the **Transaction summary** page, click on the **Adjustment History** tab.



4. Click **View report** in the top right corner of the tab
 - a. The report will display Adjustment details including date, field that was adjusted, and the values before and after the adjustment was made
 - b. Click the *Save icon* in the toolbar to export the report to Excel
 - c. Click the *Print icon* in the toolbar to print the report



Making reconciliations easier



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Blackbaud - *Run each month*

Reports needed from Blackbaud:

Appeal Progress Results

Pledge Receivable Aging Report

BSA Summary of Appeals

Query – LXXX All Donors for Specific Appeal

PeopleSoft

Reports needed from PeopleSoft:

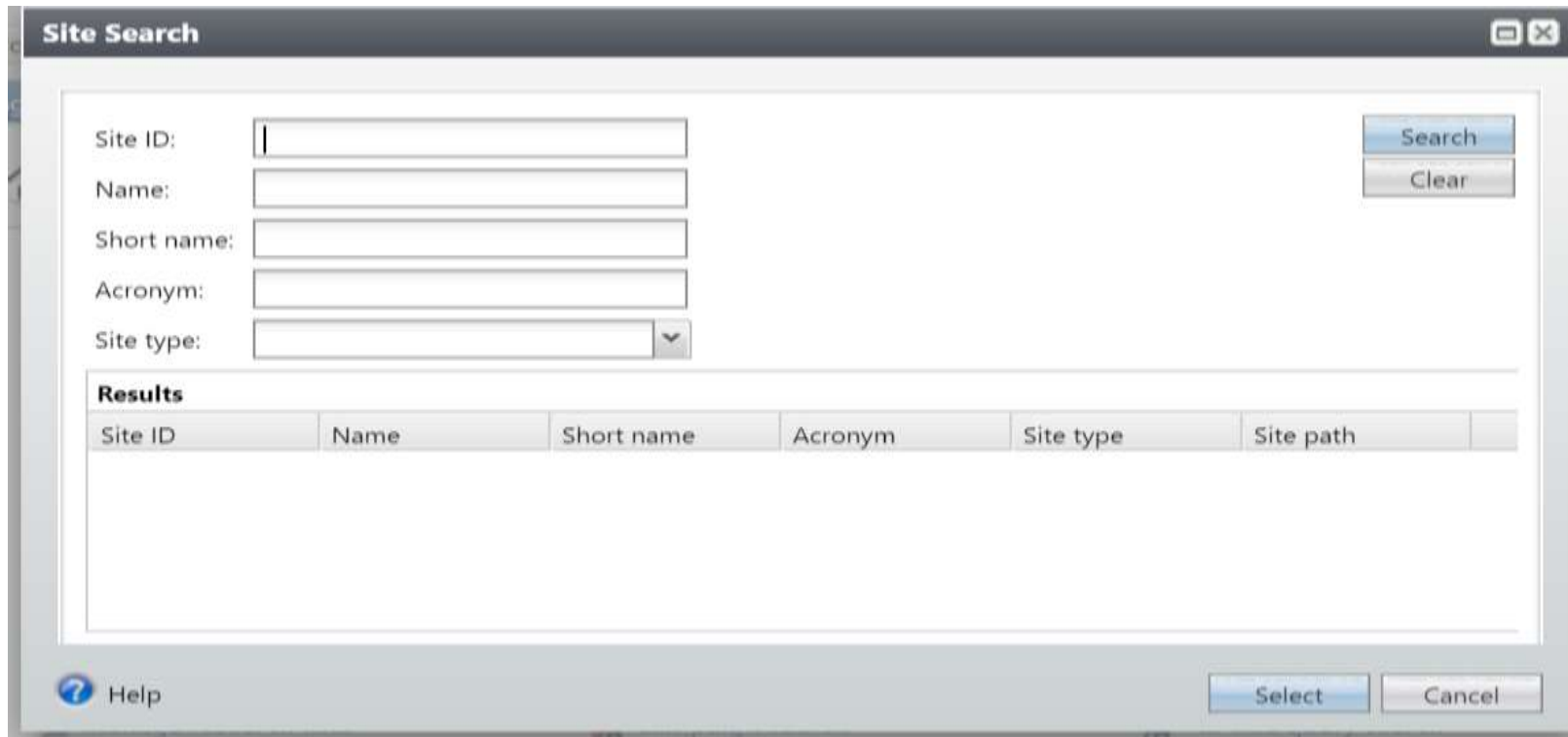
Trial Balance

Posted Detail Report



Appeal Progress Results

- Revenue>Appeal Progress Results>Council Number



The image shows a 'Site Search' dialog box with a title bar containing a maximize button and a close button. The dialog contains several input fields: 'Site ID:', 'Name:', 'Short name:', 'Acronym:', and 'Site type:' (which is a dropdown menu). To the right of these fields are two buttons: 'Search' and 'Clear'. Below the input fields is a section titled 'Results' which contains a table with the following headers: 'Site ID', 'Name', 'Short name', 'Acronym', 'Site type', and 'Site path'. The table is currently empty. At the bottom left of the dialog is a 'Help' button with a question mark icon. At the bottom right are 'Select' and 'Cancel' buttons.

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



Appeal Progress Results

The Appeal Progress Results will give the following information.

Appeal Revenue Summary tab:

- Total Contributions

- Payments Received

- Write-offs

- Outstanding Balances



Appeal Progress Results

Revenue Summary

Balances

Contributions

Payments

Revenue Details (Splits)

Matching Gift Claims

Designations

Mailings

Documentation

Contributions - posted 1/2/2018

More

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
\$65,955.00	124	\$531.90	10/16/2017	2/23/2017

Payments Received - posted 1/2/2018

More

Payments Received	# of Payments	Average Payment	Most Recent Payment	Mismatch: Appeal?	Mismatch:
\$63,680.00	117	\$544.27	12/27/2017	No	No

Write-offs - will not post (manual PeopleSoft journal entry required)

More

Loading...

Outstanding Balances - through 1/2/2018

More

Total Balances	# Pledges with Balance	Average Balance	Final Installment Due	Mismatch: Appeal
\$2,275.00	2	\$1,137.50	9/12/2017	No

Contributions: \$65,955.00 **Outstanding Balances:** \$2,275.00



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Pledge Receivable Aging Report

Revenue>Pledge Receivable Aging Report>Council>Report
Code

2,275.00	2,275.00	0.00	0.00	0.00	2,275.00
----------	----------	------	------	------	----------

- *Pledge Balance: \$2,275.00*

*To get the number that should be in 1301, 1304, etc. run
the Pledge Receivable Aging Report.*



Query – LXXX All Donors by Specific Appeal

Analysis>Information Library>LXXX Example Council or Council's folder

Run the query LXXX Donors by Specific Appeal. Total the columns for Total Contributions and Outstanding Pledge.

\$65,955.00	\$2,275.00
-------------	------------

Contributions: \$65,955.00 Outstanding Pledge: \$2,275.00



PeopleSoft

- In PeopleSoft run the Trial Balance and Posted Detail for more information.
- Run the Posted Detail report by account number – 1301, 1304, 4001, 4201, etc.
- Review the reports and match them with the amounts on the Blackbaud reports.



PeopleSoft

Posted Detail Report:

- Run the Posted detail by date and account number. Check the ending balance. If the number don't match. Check for GJ, TP, CR in the report.

Total Activity:	18,055.00	16,955.00	1,100.00
1-1304-804-00 - Contrib Rec-Special Events-CY-Golf Tournament		Ending Balance:	2,275.00

1-1304 = \$2,275.00



- The Appeal Progress Results, Pledge Receivable Report and the LXXX All Donors for a Specific Appeal matches with PeopleSoft.
 - 1-1304 - *Outstanding Balances:* \$2,275.00



- Reports:
 - BSA Summary of Appeals
 - Account Distribution
 - Giving Activity
- Query
 - LXXX Revenue Added Today
 - LXXX Revenue All



National Service Territories

- Changes coming June 1
- Going away – Regions & Area
- Sixteen National Service Territories
- CRM will work the same
- Information Library – Queries will be grouped in 100s
 - 000-099
 - 100-199
 - Etc.



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 web application interface. At the top, the navigation bar includes the logo, a search bar for application features, and a list of menu items: Home, **Constituents** (highlighted with a red circle and the number 1), Meeting and Communications, Revenue, Events, Memberships, Prospects, Foundations, Fundraising, and Analysis. A left-hand sidebar contains sections for Shortcuts, Recent searches, and Recently accessed. The main content area is titled 'Constituents' and features several categorized lists. The 'Recognition' section includes 'Recognition Programs List', 'Volunteer Award List' (highlighted with a yellow background and a red circle with the number 2), and 'Tributes'. Other sections include 'Reports', 'Individuals and households', 'Committee', 'Constituents', and 'Organizations'.

Blackbaud CRM™ P

Application features ▾ Feature (e.g. Information Library) 🔍 + Add new ▾ Welcome

Home ▾ **Constituents** ▾ Meeting and Communications ▾ Revenue ▾ Events ▾ Memberships ▾ Prospects ▾ Foundations ▾ Fundraising ▾ Analysis ▾

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Information Library
- BSA Eagles Listbuilder
- Constituent search

Recent searches

- Volunteer Award List
- Constituent search

Recently accessed

- Greater New York Council (640) - Volunteer Awards List

Constituents

Recognition

- Recognition Programs List
- Volunteer Award List**
- Tributes

Reports

- BSA Duplicate Constituent Report
- BSA Eagles Listbuilder
- BSA Top Prospects Listbuilder

Constituents

- Constituent search

Individuals and households

- Add an individual
- Add a group

Committee

- Committee search
- Add a committee

Organizations

- Organization search
- 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			Local Council

3

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. More ▾

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 ▾ Feature (e.g. Information Library) 🔍 + Add new ▾ 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) 📄 More ▾

Volunteer Award equal to: ▾ Deceased equal to: ▾ Inactive equal to: ▾ | Apply 📌 Reset 🗑️

< 1 2 3 4 5 ... 20 >

	Counci...	Council Name	Name	Lookup ID	First name	Middle name	Last Name	Suffix	Address	City	State
📄	640	Greater New Y...	John J. O'Connell	0000000000	John		O'Connell		100 N. 1st St.	New York	NY
📄	640	Greater New Y...	John J. O'Connell	0000000000	John		O'Connell		100 N. 1st St.	New York	NY
📄	640	Greater New Y...	John J. O'Connell	0000000000	John		O'Connell		100 N. 1st St.	New York	NY
📄	640	Greater New Y...	John J. O'Connell	0000000000	John		O'Connell		100 N. 1st St.	New York	NY
📄	640	Greater New Y...	John J. O'Connell	0000000000	John		O'Connell		100 N. 1st St.	New York	NY
📄	640	Greater New Y...	John J. O'Connell	0000000000	John		O'Connell		100 N. 1st St.	New York	NY
📄	640	Greater New Y...	John J. O'Connell	0000000000	John		O'Connell		100 N. 1st St.	New York	NY



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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)
- NESA 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 Ldrship Awd. (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



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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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