

CRM User Forum

August 18, 2021

Rich White – John Kuehn – Don Day



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Objectives

- Summer cleanup:
 - Creating an “unworked list”
 - Creating the Pledges Aging Receivable report
- Creating payment reminders – review of process
- Adding an event for Scouting Gives – important pre-steps
- Questions



SUMMER CLEANUP



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UNWORKED LIST



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“Easy Button” Reports

- Appeal Constituent Report
 - Unworked or worked report
 - Flat list report
 - Export to PDF or Excel
- Appeal Progress Report
 - How are we doing this year compared to prior year
 - Export to PDF or Excel



“Easy Button” Reports

The screenshot displays the Blackbaud CRM P interface. At the top, there is a navigation bar with the following tabs: Home, Constituents, Marketing and Communications, **Revenue** (highlighted in yellow), Events, Memberships, Prospects, Foundations, Fundraising, and Analysis. Below the navigation bar, the main content area is titled "Revenue" with a stack of coins icon. The "Revenue" section is divided into three columns: "More tasks", "Reports", and "Transactions".

- More tasks:** Includes "Appeal progress results".
- Reports:** Includes a list of reports. Two red arrows point from the "Appeal progress results" task to the "BSA Appeal Constituent Report (OLTP)" and "BSA Appeal Progress Report (OLTP)".
- Transactions:** Includes "Transaction search", "Batch entry", "Batch search", and "Add a payment".

The "Reports" list includes the following items:

- BSA Appeal Constituent Export (OLTP)
- BSA Appeal Constituent Report (OLTP)** (highlighted in yellow)
- BSA Appeal Progress Export (OLTP)
- BSA Appeal Progress Report (OLTP)** (highlighted in yellow)
- Pledge Receivable Aging Report
- Appeal Progress by Category
- Appeal Progress by Solicitor
- BSA Summary of Appeals
- Solicitor Performance by revenue category
- Account distribution



BSA Appeal Constituent Report

BSA Appeal Constituent Report (OLTP)

Site: 1 Report Code: 2

Annual Appeal(s):
All ☐ 3
(144) 2021 Eagle Recognition Event ☐
(144) EN21 - 2021 Endowment Campaign ☐
(144) R21 - 2021 Gifts-in-Kind ☐

Multi-year Appeal(s):
☐ Only include multi-year appeal revenue for:

4

Include Exclude Breakdown Filter

☐ Include All

☐ Include Prior Year 1 Giving ☐ Include Current Year Constituent Appeal/Response (Worked) Info

☐ Include Prior Year 2 Giving ☐ Include Current Year \$0 Pledge (Worked) Info

☐ Include Prior Year 3 Giving ☐ Include Donor Status Stats

[View report](#)



BSA Appeal Constituent Report - Exclude

BSA Appeal Constituent Report (OLTP)

Site: 1 Report Code: 2

Annual Appeal(s): 3 Multi-year Appeal(s):

4 ☐ Only include multi-year appeal revenue for:

[View report](#)

Include Exclude Breakdown Filter

☐ Exclude All

☐ Exclude Current Year Donors ☐ Exclude Current Year Solicitees ☒ Exclude Constituents Marked as Do Not Solicit

☐ Exclude Current Year Non-Donors ☐ Exclude Current Year Non-Solicitees ☒ Exclude Constituents Marked as Deceased

☐ Exclude Current Year Worked Constituents (via an Appeal Response) ☐ Exclude Current Year Non-Donor, Non-Solicitees ☒ Exclude Constituents Marked as Inactive

☐ Exclude Current Year Worked Constituents (via a \$0 Pledge)



BSA Appeal Constituent Report - Breakdown

BSA Appeal Constituent Report (OLTP)

Site: 1

Report Code: 2

Annual Appeal(s): 3

Multi-year Appeal(s):

☐ Only include multi-year appeal revenue for:

4

☐ Breakdown by All

☐ Break Down by BSA Structure ☐ Anchor to Latest Revenue or Constituent Appeal

☐ Break Down by Giving Category ☐ Sort by Name (Last/First) Only

☐ Break Down by Solicitor

☐ Break Down by Revenue BSAFR Group

[View report](#)



BSA Appeal Constituent Report – Filter - View

BSA Appeal Constituent Report (OLTP)

Site: 1

Report Code: 2

Annual Appeal(s):

- All ☐
- (144) 2021 Eagle Recognition Event ☐
- (144) EN21 - 2021 Endowment Campaign ☐ 3
- (144) R21 - 2021 Gifts-in-Kind ☐

4

Multi-year Appeal(s):

☐ Only include multi-year appeal revenue for:

Include

Exclude

Breakdown

Filter

As of Date:

Filter on BSA Structure:

Current Year Minimum Giving:

Filter on Giving Category:

Prior Year(s) Minimum Giving:

Filter on Solicitor:

☒ Prior Year Minimum is Cumulative

View report

5



BSA Appeal Constituent Report (OLTP)

CY Appeal: S21 - 2021 Friends of Scouting
 PY1 Appeal: S20 - 2020 Friends of Scouting
 PY2 Appeal: S19 - 2019 Friends of Scouting
 PY3 Appeal: S18 - 2018 Friends of Scouting

As of 8/18/2021

Pack 0422 (Individual, Lapsed, Unworked)

Community Campaign, [No Solicitor],

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY2	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00
PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Crew 2727 (Individual, Lapsed, Unworked)

Family Campaign, C

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY2	\$185.00	\$185.00	\$0.00	\$0.00	\$185.00
PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Fabrication, LLC (Organization, Lapsed, Unworked)

Community Campaign, [No Solicitor],

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$100.00	\$0.00	\$100.00	\$0.00	\$0.00
PY2	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00
PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Deb (Individual, Lapsed, Unworked)

Family Campaign, F

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY2	\$50.00	\$50.00	\$0.00	\$0.00	\$50.00
PY3	\$50.00	\$50.00	\$0.00	\$0.00	\$50.00

Abid



Report Cookbook

- Can be found on the 'Files' tab of the BBCRM Users Forum on Workplace
- Contains 'recipes' for several reports

Unworked List for Annual Appeal by BSA Structure with 1 Year History

Description: This example shows how to generate a report listing unworked donors for a selected annual appeal by BSA Structure and including one year of giving history.

BSA Appeal Constituent Report (OLTP)

Site: Alpha Council Report Code: 2020

Annual Appeal(s): All
(102) F20 - 2020 Friends of Scouting
(104) ADM20 - Maui Annual Recognition Dinne...
(104) BEL20 - Big Island Eagle Luncheon

Multi-year Appeal(s): All
(102) CC11 - Capital Campaign 2010
(102) CCMY - Capital Campaign
(102) CCMY - Capital Campaign

☐ Only include multi-year appeal revenue for 2020

Include Exclude Breakdown Filter

☐ Include All
☒ Include Prior Year 1 Giving ☒ Include Current Year Constituent Appeal/Response (Worked) Info
☐ Include Prior Year 2 Giving ☒ Include Current Year \$0 Pledge (Worked) Info
☐ Include Prior Year 3 Giving ☐ Include Donor Status Stats

Include Exclude Breakdown Filter

☐ Exclude All
☒ Exclude Current Year Donors
☐ Exclude Current Year Non-Donors
☒ Exclude Current Year Worked Constituents (via an Appeal Response)
☒ Exclude Current Year Worked Constituents (via a \$0 Pledge)
☐ Exclude Current Year Solicitees
☐ Exclude Current Year Non-Solicitees
☐ Exclude Current Year Non-Donor, Non-Solicitees
☒ Exclude Constituents Marked as Do Not Solicit
☒ Exclude Constituents Marked as Deceased
☒ Exclude Constituents Marked as Inactive



PLEDGES AGING RECEIVABLE



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Pledge Aging Receivable Report

- Print report and give to management to review:
 - All open pledges
 - Share with management to determine how to contact those behind in payment
- Is a “data warehouse” report
- When should follow-up begin on donors behind in payments?





Revenue

More tasks

- Appeal progress results
- Recurring Gift List

Reports


- BSA Appeal Constituent Export (OLTP)
- BSA Appeal Constituent Report (OLTP)
- BSA Appeal Progress Export (OLTP)
- BSA Appeal Progress Report (OLTP)
- Pledge Receivable Aging Report
- Appeal Progress by Category
- Appeal Progress by Solicitor
- BSA Summary of Appeals
- Solicitor Performance by revenue category
- Account distribution
- Adjusted revenue
- Giving activity
- Giving detail
- Matching gift claim summary
- Projected income
- Recurring gift missed payments
- Revenue annual statement
- Revenue by payment method


Transactions


- Transaction search
- Batch entry
- Batch search
- Add a payment



Pledge Receivable Aging Report

 **Pledge Receivable Aging Report**

BSA Organization  Area Council 1 Report Code 2021 2 View Report

Appeal  F21 - 2021 Friends of Scouting 3 4



Run Date: 8/18/2021

Pledge Receivable Aging Report

Page 1 of 17

Run Time: 8:00:13

[REDACTED] Council

Selection Options:

BSA Organization: [REDACTED]
Report Code: 2021
Appeal: [REDACTED] S21 - Friends of Scouting 2021
Giving Category: ALL

Appeal: [REDACTED]
BSA Structure: [REDACTED]
Giving Category: Community Gifts

Constituent Name	Pledge	Pledge	Pledge	Current	Past Due		
	Date	Amount	Balance	Due	30+	60+	90+
[REDACTED] Phone No: (714) [REDACTED]	22-Jun-21	515.00	343.34	0.00	0.00	0.00	0.00
Community Gifts Total:		515.00	343.34	0.00	0.00	0.00	0.00

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Run Date: 8/18/2021

Pledge Receivable Aging Report

Page 6 of 17

Run Time: 8:03:15

Appeal:
BSA Structure:
Giving Category:

1

Family Gifts

Constituent Name	Pledge Date	Pledge Amount	Pledge Balance	Current Due	Past Due		
					30+	60+	90+
[REDACTED] Phone No: (847) 772-4413	11-Jun-21	250.00	250.00	0.00	0.00	0.00	0.00
[REDACTED] Phone No: (847) 772-4413	10-Mar-21	125.00	125.00	0.00	0.00	0.00	125.00
[REDACTED] Phone No: (847) 772-4413	12-May-21	125.00	62.50	0.00	0.00	0.00	0.00
[REDACTED] Phone No: (847) 772-4413	25-Jun-21	128.75	85.84	0.00	0.00	0.00	0.00
[REDACTED] Phone No: (847) 772-4413	11-Jun-21	250.00	250.00	50.00	0.00	0.00	0.00
[REDACTED] Phone No: (847) 772-4413	11-Jun-21	125.00	83.34	0.00	0.00	0.00	0.00
Family Gifts Total:		1,003.75	856.68	50.00	0.00	0.00	125.00
Five Creeks Total:		1,128.75	919.20	50.00	0.00	0.00	125.00

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PAYMENT REMINDERS



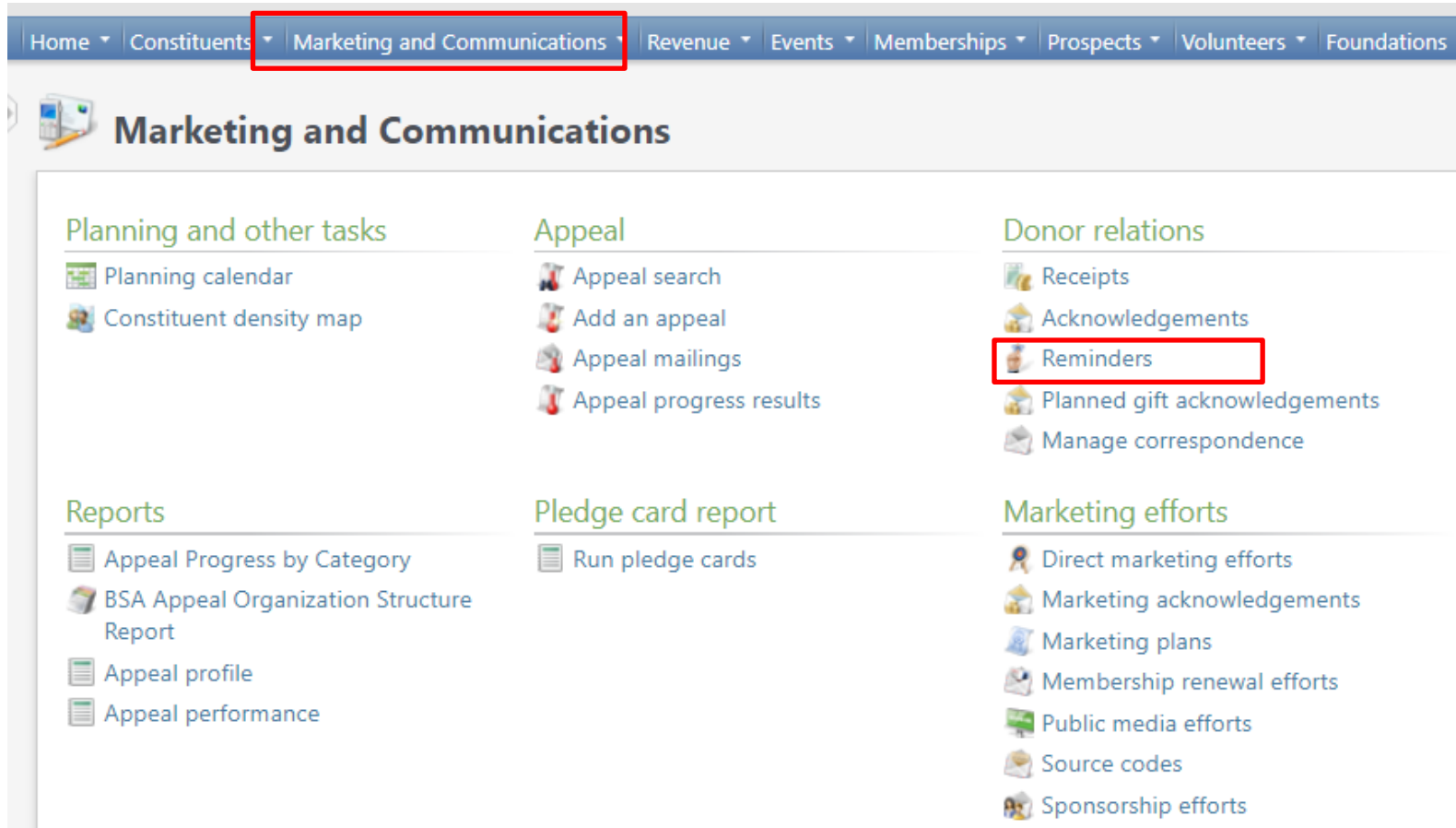
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Reminders – Cash is King

- Should be ran monthly
- Past Due
- Current Month
- Next Month
- New Reminders
- Selections need to be updated each year to bring in new pledges.



Reminder Location



The screenshot displays the BSA Marketing and Communications dashboard. At the top, a navigation bar contains several menu items: Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, Volunteers, and Foundations. The 'Marketing and Communications' menu item is highlighted with a red rectangular box. Below the navigation bar, the main content area is titled 'Marketing and Communications' and is organized into a grid of categories. The categories include 'Planning and other tasks', 'Appeal', 'Donor relations', 'Reports', 'Pledge card report', and 'Marketing efforts'. Within the 'Donor relations' category, the 'Reminders' link is highlighted with a red rectangular box. The 'Reminders' link is accompanied by a small icon of a person with a speech bubble.


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

Marketing and Communications

- Planning and other tasks**
 - Planning calendar
 - Constituent density map
- Appeal**
 - Appeal search
 - Add an appeal
 - Appeal mailings
 - Appeal progress results
- Donor relations**
 - Receipts
 - Acknowledgements
 - Reminders**
 - Planned gift acknowledgements
 - Manage correspondence
- Reports**
 - Appeal Progress by Category
 - BSA Appeal Organization Structure Report
 - Appeal profile
 - Appeal performance
- Pledge card report**
 - Run pledge cards
- Marketing efforts**
 - Direct marketing efforts
 - Marketing acknowledgements
 - Marketing plans
 - Membership renewal efforts
 - Public media efforts
 - Source codes
 - Sponsorship efforts








Reminder Processes



 **Reminders**










Reminders

Review Reminders

Reminder processes (4)  Add  Filters  More ▾

Sites:  

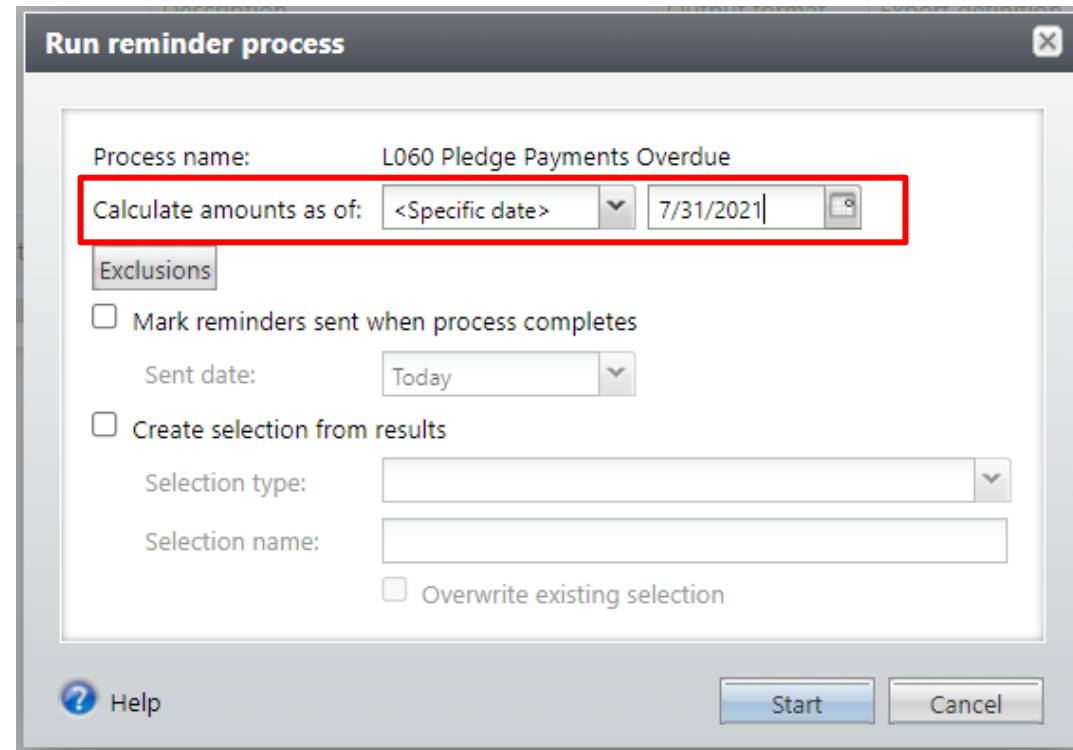
 Apply  Reset

Name	Description	Output format
 L060 Pledge Payment Reminders Current Month	Current Month Reminders	
<div> Start process  Set format options  Edit  Delete  Assign permissions</div>		
 L060 Pledge Payments Due Next Month	Next Month Pledge Reminders	
 L060 Pledge Payments New This Month	Used to bill new pledges put in this mont...	
 L060 Pledge Payments Overdue	Last month or older pledge reminders	



Past Due Reminders

- Looks for pledges that have an installment date on or before the last month.
- Run at the first of the month using the last day of previous month as run date.



Run reminder process

Process name: L060 Pledge Payments Overdue

Calculate amounts as of: <Specific date> 7/31/2021

Exclusions

☐ Mark reminders sent when process completes

Sent date: Today

☐ Create selection from results

Selection type: [dropdown]

Selection name: [text box]

☐ Overwrite existing selection

Help Start Cancel



Current Month Reminders

- Looks for pledges with a next installment date of this month.
- Run at beginning of month and use the last date of the month as run date.

Run reminder process

Process name: L060 Pledge Payment Reminders Current Month

Calculate amounts as of: <Specific date> 8/31/2021

Exclusions

☐ Mark reminders sent when process completes

Sent date: Today

☐ Create selection from results

Selection type: [dropdown]

Selection name: [text box]

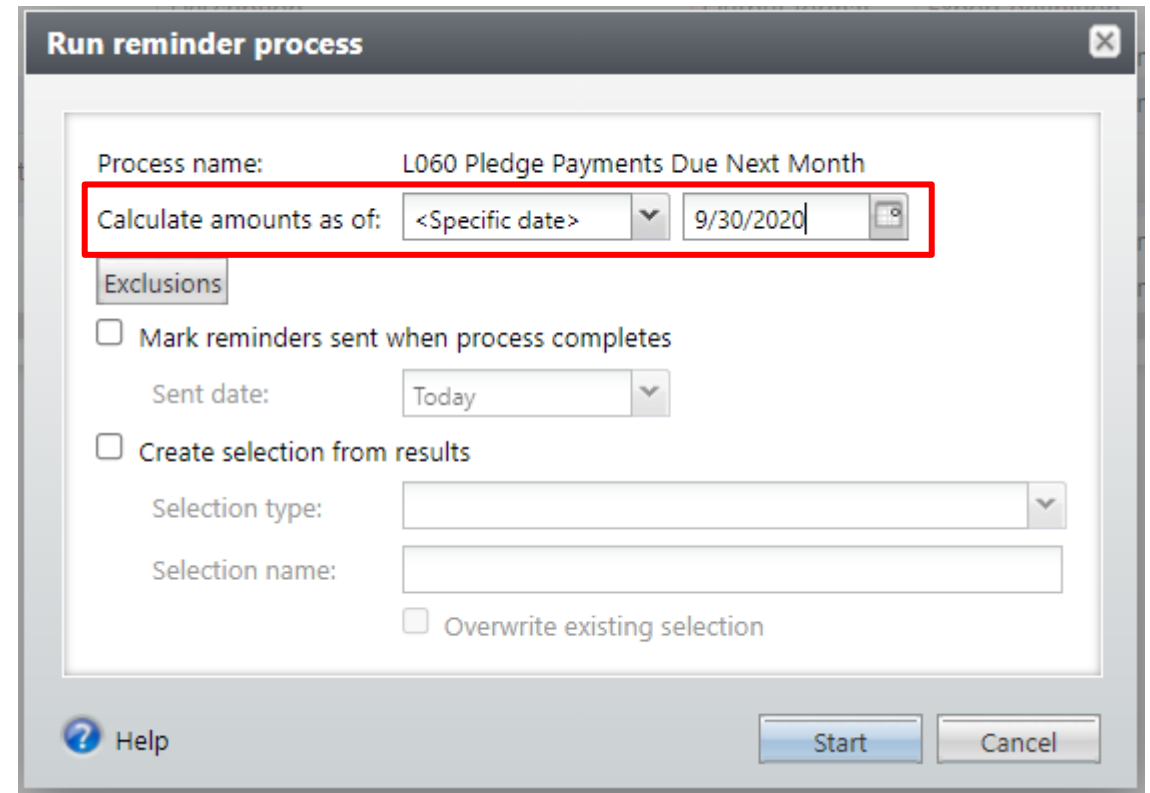
☐ Overwrite existing selection

Help Start Cancel



Next Month Reminders

- Looks for pledges with next installment due next month.
- Run at end of current month using the last day of next month as run date.



Run reminder process

Process name: L060 Pledge Payments Due Next Month

Calculate amounts as of: <Specific date> 9/30/2020

Exclusions

☐ Mark reminders sent when process completes

Sent date: Today

☐ Create selection from results

Selection type: [dropdown]

Selection name: [text box]

☐ Overwrite existing selection

[? Help](#) [Start](#) [Cancel](#)



New This Month Reminder

- Looks for pledges never billed.
- Run using current date or the date that it runs.
- Once the bill is generated and you mark them as sent, these bills will move to normal processes.

Run reminder process

Process name: L060 Pledge Payments New This Month

Calculate amounts as of: Today

Exclusions

☐ Mark reminders sent when process completes

Sent date: Today

☐ Create selection from results

Selection type:

Selection name:

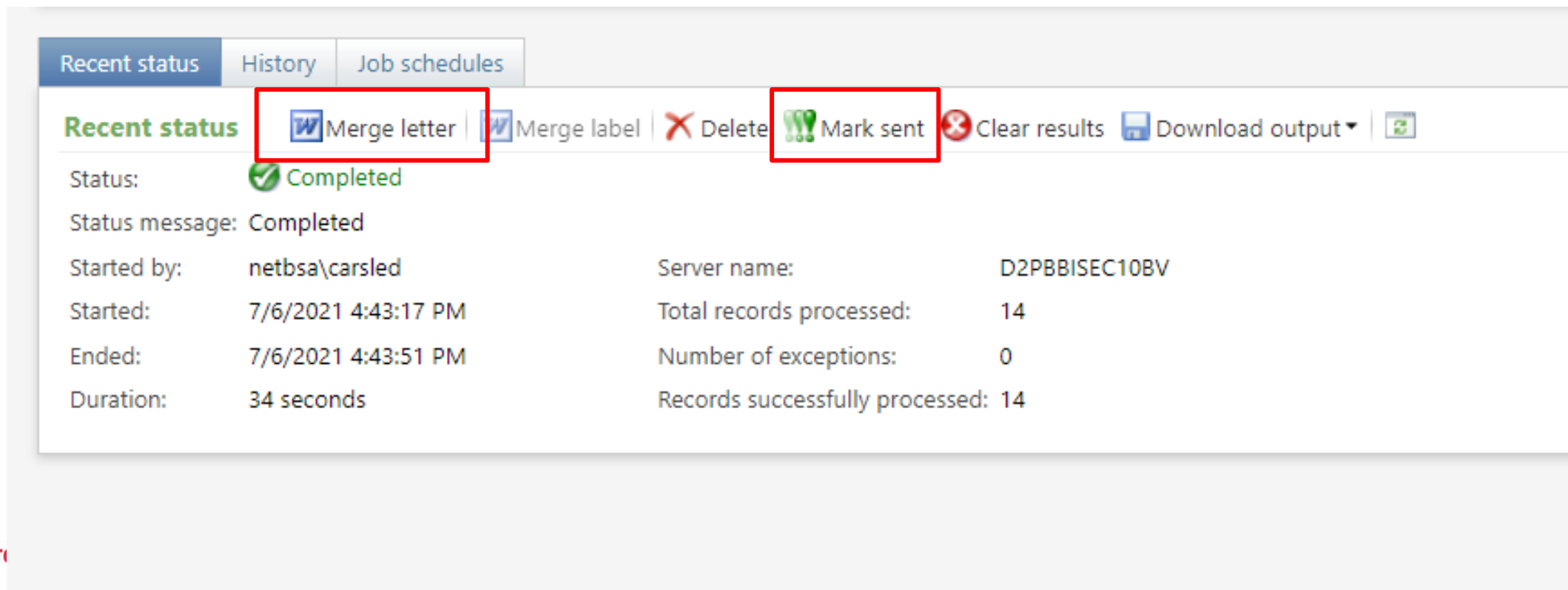
☐ Overwrite existing selection

Help Start Cancel



Generate Bills (Reminders)

- Process is the same for all bills
- Merge letter and review / Mark sent



The screenshot displays a software interface with a top navigation bar containing three tabs: "Recent status" (selected), "History", and "Job schedules". Below the tabs, a toolbar features several icons and labels: a document icon for "Merge letter", a document icon for "Merge label", a red "X" for "Delete", a green checkmark for "Mark sent", a red "X" for "Clear results", and a download icon for "Download output". The "Merge letter" and "Mark sent" buttons are highlighted with red rectangular boxes. Below the toolbar, the status is shown as "Completed" with a green checkmark icon. The status message is "Completed". The job details are as follows:

Started by:	netbsa\carsled	Server name:	D2PBBISEC10BV
Started:	7/6/2021 4:43:17 PM	Total records processed:	14
Ended:	7/6/2021 4:43:51 PM	Number of exceptions:	0
Duration:	34 seconds	Records successfully processed:	14

In the bottom left corner, there is a logo featuring a stylized eagle and the text "Pr".

Reminder Templates

- Located under Letters & Documents under Marketing and Communications.

The screenshot shows a web application interface titled "Letters and Documents". It has two tabs: "Letters" and "Documents", with "Documents" currently selected. Below the tabs, there's a header for "Documents (3)" with options to "Add", "Filter", and "More". A filter bar includes a "Type:" dropdown, a "Sites:" dropdown set to "Selected sites", and "Apply" and "Reset" buttons. The main content area displays a list of documents under two sections: "Acknowledgement" and "Reminders".

Name	Site
Acknowledgement	
Matthew Sumpter Thank You	Pikes Peak - Rocky Mountain Council
Reminders	
L060 Current and Next Month Reminder	Pikes Peak - Rocky Mountain Council
L060 Over Due Reminder	Pikes Peak - Rocky Mountain Council

Below the list, there are icons for "View document", "Edit", and "Delete". A detailed view of the "L060 Over Due Reminder" is shown below:

Name: L060 Over Due Reminder Cost: \$0.0000 per piece
Site: Pikes Peak - Rocky Mountain Council
Type: Reminders
Attachment: L060 Reminders_ScoutNET_Like_Pledge_Overdue 8.4.21.docx



Reminder Template Update

Blackbaud CRM™ P

Constituents Name or lookup ID Add new

Home Constituents Marketing and Communications

Reminders

Reminders Review Reminders

Reminder processes (4) Add Filters

Sites: Selected sites Apply Res

Name
L060 Pledge Payment Reminders Current Month
L060 Pledge Payments Due Next Month
L060 Pledge Payments New This Month
L060 Pledge Payments Overdue

Start process Set format options Edit

Edit reminder process

Name: L060 Pledge Payment Reminders Current Month

Description: Current Month Reminders

Site: Pikes Peak - Rocky Mountain Council

Output grouping: Commitment

Letter template: L060 Reminders_ScoutNET_Like_Pledge_Overdue 8.4.21.docx

Label template: <File not specified>

Output type: Export definition

Export definition: Custom Pledge Reminder Fields

Criteria

Generate reminders for

- ☐ All pledges
- ☐ All recurring gifts
- ☒ Custom selection

Selection: L060 Pledge Payments Due This

Exclusions

To update template, head to your reminder process and click edit. Once the form opens clear the file and then upload your updated template. If you use the same file name update the date in the name. Then update the template under documents.



APPEALS & EVENTS



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Scouting Gives Event Setup

1. Create CRM Appeal

- Add designation to Designation Tab on appeal

2. Create CRM Event

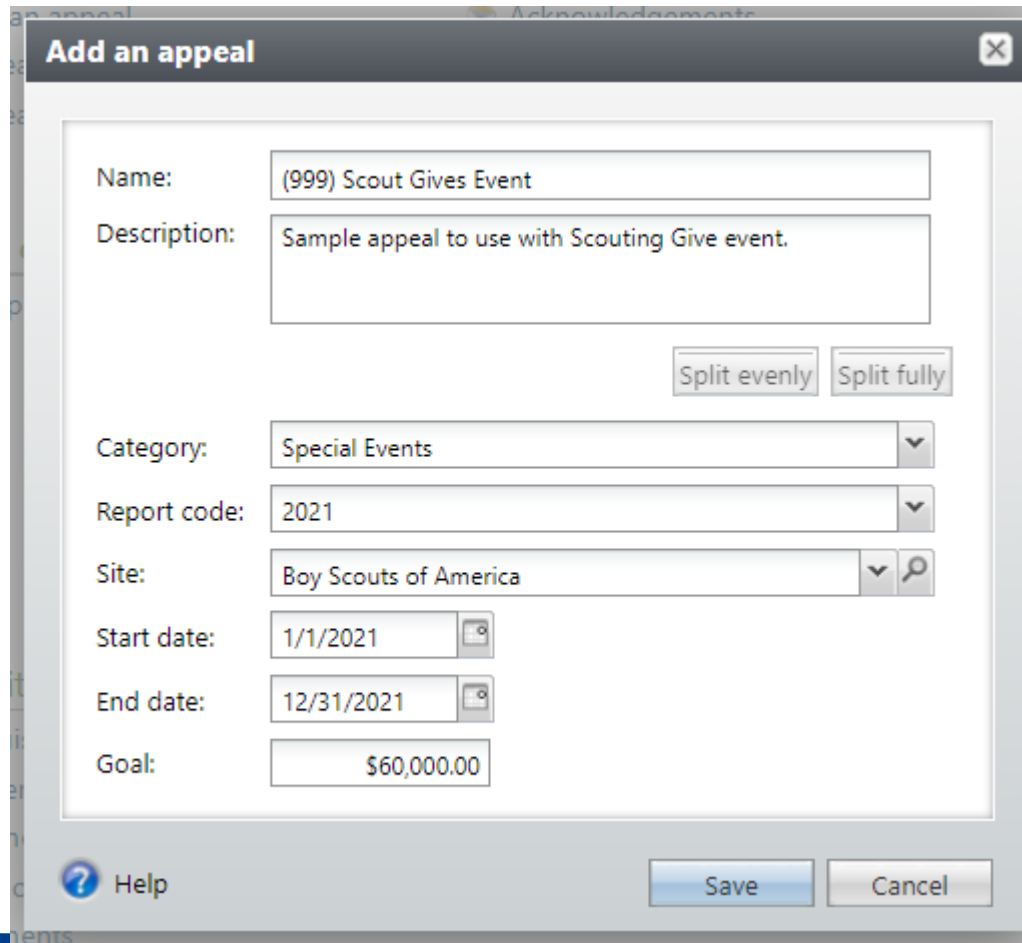
- Mark event to allow designation when creating event
- Add the appeal created above to the Appeal Tab on event
- Add the designation to the Designation Tab on event

3. Create Scouting Gives Event



Add Appeal

- Created under Marketing and Communications



The screenshot shows a dialog box titled "Add an appeal" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Name:** A text box containing "(999) Scout Gives Event".
- Description:** A text box containing "Sample appeal to use with Scouting Give event."
- Split options:** Two buttons, "Split evenly" and "Split fully", are located to the right of the description field.
- Category:** A dropdown menu showing "Special Events".
- Report code:** A dropdown menu showing "2021".
- Site:** A dropdown menu showing "Boy Scouts of America" with a search icon to its right.
- Start date:** A date picker showing "1/1/2021".
- End date:** A date picker showing "12/31/2021".
- Goal:** A text box showing "\$60,000.00".

At the bottom of the dialog, there is a "Help" button with a question mark icon, and "Save" and "Cancel" buttons.

Fill in appeal information to create the appeal. See sample on the left. Directions to add an appeal can be found with the CRM user guides.



Add Designation to Appeal

The screenshot shows the 'Appeal: (999) Scout Gives Event' interface. The top section contains metadata: Description (Sample appeal to use with Scouting Give event), Start date (1/1/2021), Business unit, End date (12/31/2021), Category (Special Events), Goal (\$60,000.00), Report code (2021), Status (Active), Site (Boy Scouts of America), and Membership. Below this is a navigation bar with tabs: Contributions, Revenue Details (Splits), Prior Appeal, Revenue Summary, Payments, Balances, Revenue Details (Write-offs), Team Setup, Matching Gift Claims, Designations, and More. The 'Designations' tab is highlighted with a red box. Below the navigation bar, the 'Designations (0)' section has a red box around the 'Edit list of appeal designations' link. An 'Edit designations' dialog box is open, showing a table with two columns: 'Designation' and 'Default designation'. The table contains one row with the designation '99905651 Scouting Give Event' and a checked checkbox in the 'Default designation' column. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Appeal: (999) Scout Gives Event

Description: Sample appeal to use with Scouting Give event. Start date: 1/1/2021
Business unit: End date: 12/31/2021
Category: Special Events Goal: \$60,000.00
Report code: 2021 Status: Active
Site: Boy Scouts of America Membership:

Contributions Revenue Details (Splits) Prior Appeal Revenue Summary Payments Balances Revenue Details (Write-offs) Team Setup Matching Gift Claims **Designations** More

Designations (0) Edit list of appeal designations More

Designation

Benefits (0) View benefits catalog Add More

Level Fro

Edit designations

Designation	Default designation
99905651 Scouting Give Event	<input checked="" type="checkbox"/>
*	<input type="checkbox"/>

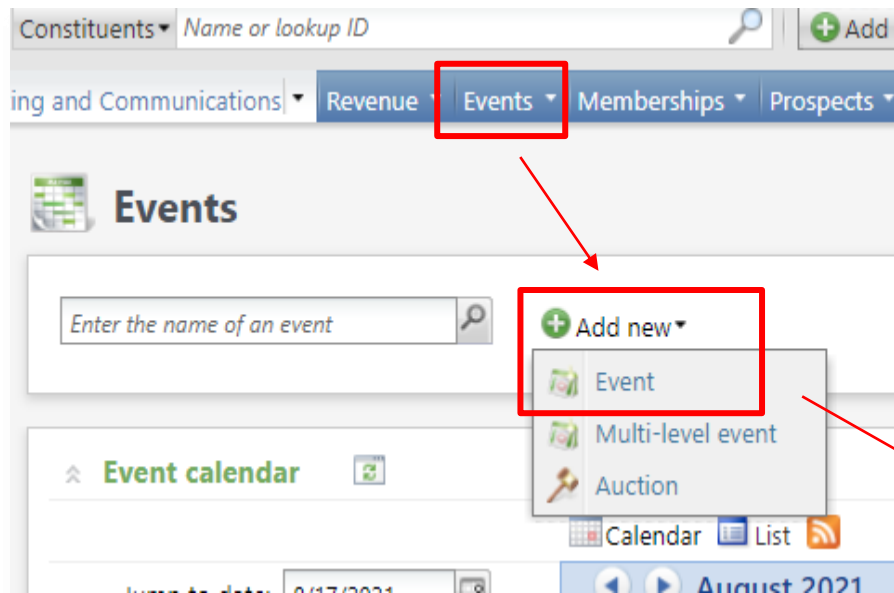
Help Save Cancel

Find the Designation tab on the appeal. Click Edit list of appeal designations. Search for and select your designation. Make one your default and click save.



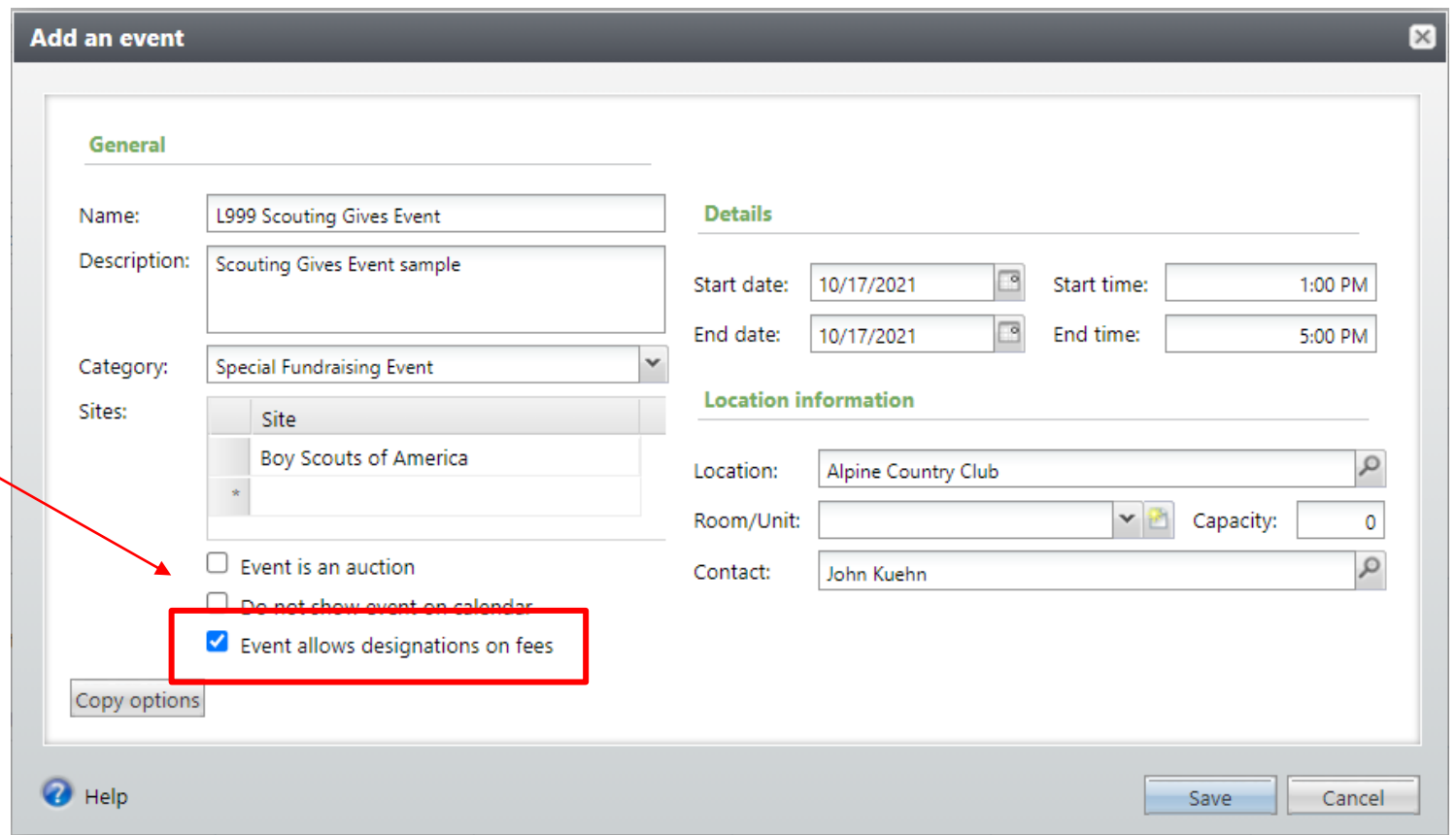
Create CRM Event

- Add an event under Events in CRM



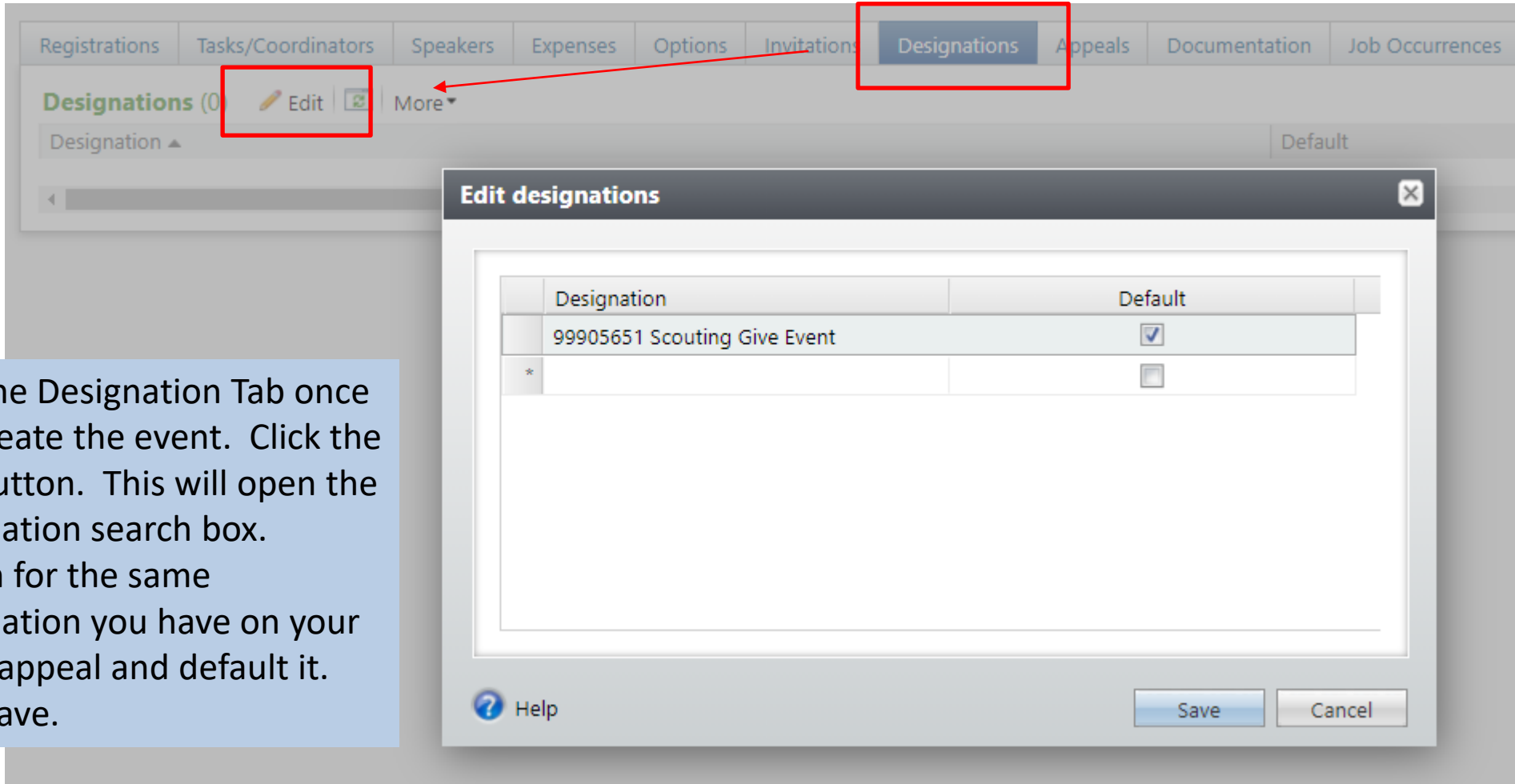
The screenshot shows the CRM navigation bar with tabs for 'Constituents', 'Revenue', 'Events', 'Memberships', and 'Prospects'. The 'Events' tab is selected and highlighted with a red box. Below the navigation bar, the 'Events' section is visible, featuring a search bar and a dropdown menu. The dropdown menu is open, showing options: 'Add new', 'Event', 'Multi-level event', and 'Auction'. The 'Add new' option is highlighted with a red box. A red arrow points from the 'Events' tab to the 'Add new' option.

Drop the chevron next to the search window and click add new Event. The Add and Event form opens. Fill in the form remembering to check the Allow Designations button.



The screenshot shows the 'Add an event' form. The form is divided into sections: 'General', 'Details', and 'Location information'. The 'General' section contains fields for 'Name' (L999 Scouting Gives Event), 'Description' (Scouting Gives Event sample), 'Category' (Special Fundraising Event), and 'Sites' (Boy Scouts of America). The 'Details' section contains fields for 'Start date' (10/17/2021), 'Start time' (1:00 PM), 'End date' (10/17/2021), and 'End time' (5:00 PM). The 'Location information' section contains fields for 'Location' (Alpine Country Club), 'Room/Unit' (empty), 'Capacity' (0), and 'Contact' (John Kuehn). At the bottom of the form, there are three checkboxes: 'Event is an auction' (unchecked), 'Do not show event on calendar' (unchecked), and 'Event allows designations on fees' (checked). The 'Event allows designations on fees' checkbox is highlighted with a red box. A red arrow points from the 'Add new' option in the navigation menu to the 'Event allows designations on fees' checkbox.

Add Event Designation



The screenshot shows the Scout24 web application interface. At the top, there is a navigation bar with tabs: Registrations, Tasks/Coordinators, Speakers, Expenses, Options, Invitations, Designations, Appeals, Documentation, and Job Occurrences. The 'Designations' tab is highlighted. Below the navigation bar, there is a section titled 'Designations (0)' with an 'Edit' button (pencil icon) and a 'More' dropdown menu. A red box highlights the 'Designations' tab and the 'Edit' button. A red arrow points from the 'Designations' tab to the 'Edit' button. Below this, a dialog box titled 'Edit designations' is open. The dialog box contains a table with two columns: 'Designation' and 'Default'. The table has two rows: one for '99905651 Scouting Give Event' with a checked checkbox, and another row with an asterisk and an unchecked checkbox. At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons. A 'Help' button is also visible at the bottom left of the dialog box.

Find the Designation Tab once you create the event. Click the edit button. This will open the designation search box. Search for the same designation you have on your event appeal and default it. Click save.



Add Event Appeal

The screenshot shows a web application interface for managing Scout events. At the top, there is a horizontal menu with tabs: Registrations, Tasks/Coordinators, Speakers, Expenses, Options, Invitations, Designations, Appeals, and Documentation. The 'Appeals' tab is highlighted with a red box. Below this menu, there is a section titled 'Appeals (0)' with a sub-section 'Appeal'. In this section, there is a button labeled 'Edit appeals' with a pencil icon, which is also highlighted with a red box. A red arrow points from this button to a dialog box titled 'Edit event appeals'. The dialog box has a close button (X) in the top right corner. Inside the dialog, there is a table with two rows: the first row has 'Appeal' in the first column and '(999) Scout Gives Event' in the second column; the second row has an asterisk (*) in the first column and an empty text input field in the second column. At the bottom of the dialog, there is a 'Help' button with a question mark icon, and two buttons labeled 'Save' and 'Cancel'.

Appeal	
(999) Scout Gives Event	
*	

Locate the Appeals Tab on your event. Click the Edit Appeals button to open an appeal search box. Select the appeal you created before you began your event creation. Click Save.



Scouting Gives

- Wait 5 minutes and your event will show in Scouting Gives to select and set up.



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

September 15, 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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