

CRM User Forum

September 22, 2021

Cornelia Ellis – Rich White

John Kuehn – Don Day



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Objectives

- Batch entry – review of batch types
- Creating payment RECEIPTS – review of process
- Creating an “unworked donor list”
- Using Endowment Recognition programs – James E West, etc
- Questions





BATCH ENTRY – REVIEW OF TYPES







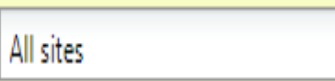


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Batch Entry








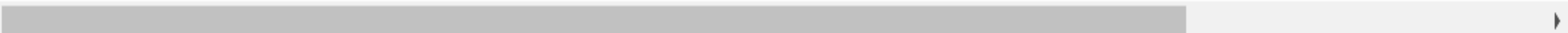
 **Batch Entry** 

Uncommitted Batches **Committed Batches**

Uncommitted batches (0)  **Add**  **Batch search**  **More** ▼

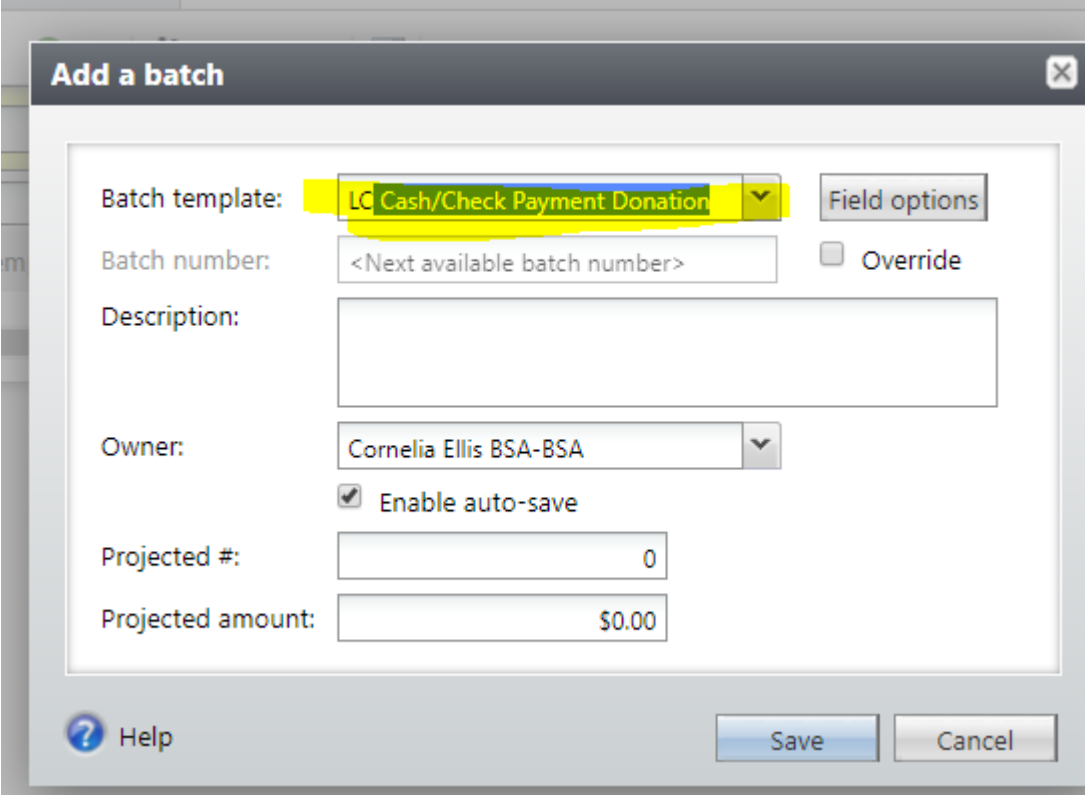
Date range:  **Sites:**  ☐ **Show only batches with exceptions**  **Apply**  **Reset**

 **Columns** ▼  **Clear all filters**

 Batch numb...	 Batch template	 Description	 Owner	 Status	 Date ad...	 Category
						



Add a Batch



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

- Batch template:** A dropdown menu with "LC Cash/Check Payment Donation" selected and highlighted in yellow.
- Field options:** A button located to the right of the Batch template dropdown.
- Batch number:** A text field containing "<Next available batch number>".
- Override:** An unchecked checkbox labeled "Override" located to the right of the Batch number field.
- Description:** A large, empty text area.
- Owner:** A dropdown menu with "Cornelia Ellis BSA-BSA" selected.
- Enable auto-save:** A checked checkbox labeled "Enable auto-save" located below the Owner dropdown.
- Projected #:** A text field containing the value "0".
- Projected amount:** A text field containing the value "\$0.00".

At the bottom of the dialog, there is a "Help" button (represented by a question mark icon) on the left, and "Save" and "Cancel" buttons on the right.



Revenue Batch Templates

- LC Cash/Check Payment Donation
- LC Credit Card Payment Donation
- LC Gift-in-kind & Service Contribution
- LC Pledge Commitment
- LC Pledge Commitment with Credit Card
- LC Pledge Payment Cash/Check
- LC Pledge Payment Credit Card
- LC Recurring Gift Commitment (monthly or other schedule)
- LC Stock & Securities Received



PAYMENT RECEIPTS



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Finding a Receipt

- Receipts are ready to view the next day in CRM
- They generate as a nightly process
- To find - jump to the receipt from Payment Revenue Record



CRM Payment Record

Transaction summary

Payment amount: \$100.00	Date: 8/12/2021
Receipt amount: \$100.00	Batch number: L0728921
	Revenue ID: rev-44516455

Status

Acknowledgements: Not acknowledged
Receipt preference: Per payment
Receipt status: Receipted
Receipt date: 9/21/2021
Receipt number: 2492769
Post status: Posted
Post date: 8/12/2021
Post process ID: gl-10006979

Payment method

Payment method: Check
Check number: 565
Check date:

Details

Details Letters Attributes BSAFR Documentation VNE TES

Details

Proceed to the revenue record you need a receipt for. The system generates receipts each night for the revenue entered during the day. The Receipt History link will not be there until the process runs.



Receipt History

Blackbaud CRM™ S

Constituents wonder woman

+ Add new

Home Constituents Marketing and Communications Revenue Events Memberships Prospects Volunteers Foundations Fundra

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
- GL Accounts Not On Revenue - Export
- GL Accounts to delete - Import selection

8/12/2021 Payment: \$100.00 - Receipt History

Receipt history (1) More

Receipt number	Process date	Receipt date	Previous receipt number	Marked for re-receipt date
2492769	9/21/2021	9/21/2021		

The Receipt History page opens. Click the hyperlink that is the process date. Remember the process date.





Tasks

- Start process
- Edit process
- Set format options
- Generate WSF
- Create job schedule
- Delete process

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



Receipt revenue list

Receipts process

Description: system-wide receipts process for all BSA councils

Receipt type:	Per payment	Output format:	Standard
Include selection:		Create output selection:	No
Mark revenue 'Received':	Yes	Overwrite existing selection:	No
Receipt date:	9/21/2021	Output selection name:	
Letter template:	generic receipt3.18.15(2).docx	Output selection type:	
Label template:			

[Recent status](#) [History](#) [Job schedules](#)

History (3,116) More

	Status	Status messa...	Started by	Started	Ended	Duration	Number
	Completed	Completed	John Kuehn BSA-BSA	9/21/2021 10:38:34 AM	9/21/2021 1...	1 minute 52 ...	58
	Merge letter	Merge label					
	Completed	Completed	4096JobUser	4/20/2021 9:47:07 PM	4/20/2021 9:...	5 minutes 43...	1286
	Completed	Completed	4096JobUser	4/19/2021 9:18:23 PM	4/19/2021 9:...	5 minutes 10...	1608
	Completed	Completed	4096JobUser	4/18/2021 9:43:26 PM	4/18/2021 9:...	4 minutes 13...	52

The link brings you to the receipting process. You want to click the history tab and look for the receipt process date. This will give you a stack of receipts created on that day. You will need to drop the chevron and merge the documents for that day.



Find Donor and Copy Receipt Text

The document stack will open in Word. Use the find feature to locate your donor. In this case, it is Wonder Woman who lives in Las Vegas. Copy the text and paste it to a new document for your use in sending a receipt.

Wonder Woman
777 Lucky Street
Las Vegas, NV 65666

Dear Wonder,

The Boy Scouts of America acknowledge, with thanks, the receipt of \$100.00 on 8/12/2021, which you have so generously contributed. Your receipt amount is \$100.00 on receipt number 2492769.

Sincerely,

Scout Executive

The Boy Scouts of America is recognized as a nonprofit organization by the IRS
IRS Code: Section 501(c)(3).



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 reports are highlighted in yellow: "BSA Appeal Constituent Report (OLTP)" and "BSA Appeal Progress Report (OLTP)". Two red arrows originate from the "Appeal progress results" task and point to these two highlighted reports.
- Transactions:** Includes "Transaction search", "Batch entry", "Batch search", and "Add a payment".



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):

☐ Only include multi-year appeal revenue for:

4 [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 ☐

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

The BSA logo, featuring a stylized eagle with a shield on its chest, set against a blue background.

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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



USING RECOGNITION PROGRAMS



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Recognition Programs

- Heritage Society
- James E. West
 - \$1,000 - \$24,999 benefiting council endowment
- Second Century – Current Gifts
 - \$25,000+ payable over 5 years for Fund 1,2 or 3
- Second Century – Deferred Gifts
 - \$25,000+ planned gift for Fund 1,2 or 3
- Presidents Leadership Circle
 - \$1,000,000 conducted through BSA Foundation



Planned Gift Addition

- Person must have constituency of Giving Prospect
- Proceed to Prospect Tab / Planned Gifts Sub Tab
- Add planned gift

The screenshot displays the ScoutLink profile for Bruce Wayne. At the top, the name 'Bruce Wayne' is shown next to a profile picture. Below this, the 'Individual' type and 'Lookup ID: 8-16246765' are listed. A row of 'Constituencies' includes Donor, Planned giver, Giving Prospect (highlighted with a red box), Recognized donor, Event registrant, and Relation Only. A 'Show more' link is visible below the constituencies. The main navigation bar at the bottom contains tabs for Revenue, Security, Contact, Personal Info, History, Relationships, Prospect (highlighted with a red box), Attributes, and Documents. Under the 'Prospect' tab, there are sub-tabs: Prospect Summary, Plans, Prospect Team, Planned Gifts (highlighted with a red box), Funding Interests, Campaigns, and Pro. Below the sub-tabs, the 'Planned gifts (1)' section shows an '+ Add' button (highlighted with a red box), a 'Filters' button, and several status icons. A table header is partially visible at the bottom with columns for Constituent, Date, Status, and Vehicle. Red arrows indicate the flow from the 'Giving Prospect' constituency to the 'Prospect' tab, then to the 'Planned Gifts' sub-tab, and finally to the '+ Add' button.



Adding A Bequest – Planned Gift

Add a planned gift

Prospect plan: Status: **Accepted** Expected maturity year: [Import from PGM](#)

Planned gift vehicle: **Bequest** Subtype: ☐ Anonymous gift ☒ **Revocable**

Values

Gift amount: \$50,000.00 Date: 9/21/2021

Recognition amount: \$50,000.00

Net present value: \$0.00 As of: mm/dd/yyyy

Realized amount: \$0.00

Remainderman %: 0.0000

Remainder value: \$0.00 As of: mm/dd/yyyy

Probate status: Pending As of: mm/dd/yyyy

Other details

☐ Gift is contingent
☐ Gift value is nominal
☐ Living Trust
☒ Do not receipt

Planned Gift Details | **Planned Giving Relationships** | **Assets** | **Sites**

Designation	Amount	Net present val...	Category	Type	Use code
30700001 NO NA...	\$50,000.00	\$0.00			
*					

After a person is a Giving Prospect, you can add a Planned Gift to them. When you click “Add” this form opens. Pick the type of planned gift and fill in the amount. Make the status Accepted. This is a Bequest so the donor can change their mind, so it is Revocable.



Add Recognition to a Constituent

- Go to constituent record
- Navigate to Revenue Tab / Recognitions Sub Tab
- Click “Add” button next to Recognition Programs
- Add appropriate recognition
- We will demo all three. Should be added after Pledge, Contribution or Planned Gift is added to the system.





Bruce Wayne

Individual Lookup ID: 8-16246765

Constituencies: Donor **Planned giver** Giving Prospect Event registrant Relation Only

↓ Show more

As you can see Bruce is a Planned Giver and has made two gifts. One is an endowment gift of \$1,000 and one is a pledge for \$100,000 paid over 5 years for the capital appeal.

Revenue Security Contact Personal Info History Relationships Attributes Documentation and Interactions Memberships Communications Smart Fields Events Summa

Revenue History Revenue Summary Recognition Recognition Summary Recognition History Gifts Tributes Accounts

Revenue history (4) More ▾

Group by: Type: Date range:

Revenue type: Campaigns: Start date: End date:

Revenue filter:

Sites:

Apply Reset

Date ▾	Amount	Balance	Transaction	Application	Revenue type	Detail	Category	Campaigns
9/21/2021	\$1,000.00		Payment	Donation	Gift	30708963 General Trust Fund - Endowment	Permanently restricted ...	
9/21/2021	\$100,000.00	\$100,000.00	Pledge	Donation	Gift	30700002 NO NAM - Capital	Temporarily restricted b...	
8/27/2021	\$1,000.00		Auction donation	Donation	Gift	30700381 MOS - Fall Dinner/Auctio - Ope...		
8/25/2021	\$500.00	\$500.00	Pledge	Donation	Gift	30708151 BE Golf Tournamen - Operating	Event - Advertising	



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Add a James E. West

Navigate to the recognition tab under Revenue and click "Add". Select your recognition program and the level. Bronze is for \$1,000

Bruce Wayne

Individual Lookup ID: 8-16246765

Constituencies: Donor Planned giver Giving Prospect

Show more

Revenue Summary Contact Personal Info Rel

Revenue History Revenue Summary Recognition

Expand all Collapse all

Recognition programs (0) Add Filter

Program	Level
---------	-------

Declined recognition levels (0) Add Filter

Recognition level	Date declined
-------------------	---------------

Named recognition history Filters Filter

Recognition defaults from Bruce Wayne (0)

Recipient constituent

Recognition defaults to Bruce Wayne (0)

Source constituent

Add a constituent recognition

Details

Recognition program: James E. West Fellowship

Recognition level: **Bronze Member**

Status: Active

Date achieved: 9/21/2021

Comments:

☐ Anonymous

Declined Levels

Declined recognition program levels
<input type="checkbox"/> Bronze Member
<input type="checkbox"/> Silver Member
<input type="checkbox"/> Gold Member

Reason:

Help Save Cancel



Add a Second Century - Current

Bruce Wayne
Individual Lookup ID: 8-16246765
Constituencies: Donor Planned giver Giving Prospect
Show more

Revenue Summary Contact Personal Info Rel
Revenue History Revenue Summary Recognition

Expand all Collapse all

Recognition programs (1) Add Filter

Program	Level
Bruce Wayne	
James E. West Fellowship	Bronze Member

Declined recognition levels (0) Add Filter

Recognition level	Date declined
-------------------	---------------

Named recognition history Filters Filter

Recognition defaults from Bruce Wayne (0)

Recipient constituent

Recognition defaults to Bruce Wayne (0)

Source constituent

Add a constituent recognition

Details

Recognition program: Second Century Society - Current Gi
Recognition level: \$100,000 Member with Distinction
Status: Active
Date achieved: 9/21/2021
Comments:
☐ Anonymous

Declined Levels

Declined recognition program levels	
<input type="checkbox"/>	\$25,000 Member with Distinction
<input type="checkbox"/>	\$100,000 Member with Distinction
<input type="checkbox"/>	\$500,000 Member with Distinction

Reason:

Help Save Cancel

After clicking the “Add” button select your level. In this case, Bruce has done a \$100,000 gift paid over 5 years for the capital appeal.



Add Second Century - Deferred

The screenshot shows the BSA system interface for a constituent named Bruce Wayne. The main window displays the constituent's profile with tabs for Revenue, Summary, Contact, Personal Info, and Recognition. The Recognition tab is active, showing a table of recognition programs and levels. A modal dialog box titled 'Add a constituent recognition' is open, allowing the user to add a new recognition program. The dialog has a 'Details' section with fields for Recognition program (Second Century Society - Deferred), Recognition level (\$25,000 Second Century Society), Status (Active), Date achieved (9/21/2021), and Comments. There is also an 'Anonymous' checkbox. Below the details is a 'Declined Levels' section with a list of declined recognition program levels: Legacy Member, \$100,000 Second Century Society, and \$500,000 Second Century Society. A 'Reason' dropdown is at the bottom of the dialog. The dialog has 'Save' and 'Cancel' buttons.

Individual Lookup ID: 8-16246765
Constituencies: Donor Planned giver Giving Prospect

Revenue Summary Contact Personal Info Rel

Revenue History Revenue Summary Recognition

Expand all Collapse all

Recognition programs (2) Add Filter

Program	Level
Bruce Wayne	
Second Century Society - Current ...	\$100,000 Mem
James E. West Fellowship	Bronze Membe

Declined recognition levels (0) Add Filter

Recognition level	Date declined
-------------------	---------------

Named recognition history Filters

Recognition defaults from Bruce Wayne (0)

Recipient constituent

Recognition defaults to Bruce Wayne (0)

Source constituent

Add a constituent recognition

Details

Recognition program: Second Century Society - Deferred C

Recognition level: \$25,000 Second Century Society

Status: Active

Date achieved: 9/21/2021

Comments:

☐ Anonymous

Declined Levels

Declined recognition program levels

- ☐ Legacy Member
- ☐ \$100,000 Second Century Society
- ☐ \$500,000 Second Century Society

Reason:

Help Save Cancel

This is for the planned gift demonstrated earlier. Bruce has said he intends to provide \$50,000 to the BSA in his will through a bequest. Please note that you could include the planned gift in the comments so you can tie the recognition back to it. Next level is at \$100,000.



Recognition Summary

 **Bruce Wayne**

Individual **Lookup ID: 8-16246765**


Constituencies: Donor Planned giver Giving Prospect Event registrant Relation Only




↓ Show more

This is the summary after each program has been added. Please note that the James E West can be cumulative. If you click the hyperlink, this take you to a page where you can edit the recognition.

Revenue	Summary	Contact	Personal Info	Relationships	History	Attributes	Documentation and Interactions	Communications	Smart
Revenue History	Revenue Summary	Recognition	Recognition Summary	Recognition History	Gifts	Tributes	Accounts		

⬆ Expand all ⬆ Collapse all

⚙ **Recognition programs (3)**  Add  Filters  More ▾

Program ▲	Level	Member since	Status
 James E. West Fellowship	Bronze Member	9/21/2021	Active
 Second Century Society - Current Gifts	\$100,000 Member with Distinction	9/21/2021	Active
 Second Century Society - Deferred Gifts	\$25,000 Second Century Society	9/21/2021	Active

James E. West move to next level

[Bruce Wayne](#)
James E. West Fellowship - Bronze Member

Status: Active Total recognized: \$0.00
Expiration date: Amount to next level: \$1,000.00
Join date: 9/21/2021
Date achieved: 9/21/2021
Site: LC Global

Recognition history (1) [+ Add](#) [📅](#) [More ▾](#)

Year	Level	Date achieved	Recognition Amount	Comments
2021	Bronze Member	9/21/2021	\$0.00	✎ Edit



List and Reports

- Recognition Programs List under Constituents
- Planned Gift Detail report under Prospects




Planned Gift Detail Report



Planned Gift Detail

Selected planned gifts:

L307 Planned Gift Selection (Ad- 


Group by:

Prospect 

Gift status:



Gift vehicle:



Gift date:


This year 

Include data for associated households

- ☐ Show member data for each household
- ☐ Show household data for each member

From: 1/1/2021 

To: 12/31/2021 

1 of 1 Find | Next 

Planned Gift Detail

Selected planned gifts: L307 Planned Gift Selection (Ad-hoc Query)

Gift vehicle:

Group by:

Prospect

Gift date:

This year

Gift status:

Prospect
Gift Vehicle

Gift Date

Designation

Gift Status

Plan Type

Gift Amount

Remainder Value

Wayne, Bruce

\$50,000.00

\$0.00

Bequest

9/21/2021

30700001 NO NAM -
Operating

Accepted

\$50,000.00

\$0.00

Total

\$50,000.00

\$0.00

9/21/2021

Prepared by: NETBSA/jkuehn

Page 1 of 1

This is a report found under the Prospect functional area. Type in your selection. Yours looks like this one except it has LXXX with XXX being your council number. I ran it for this year and it brought in the planned gift for Mr. Wayne.



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Recognition Program List

This is found under the functional area of Constituents. It will ask you to select your site and then each tab will run for you. You can filter and download to excel.

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Constituents

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

Heart of America Council (307) - Recognition Programs List

James E. West Fellowship 1910 Society Members Founder Circle Members Second Century Current Gift Members Second Century Deferred Gift Members

James E. West Fellows in your council. (928) More ▾

Deceased equal to: Inactive equal to: City equal to: State equal to: Recog...

Deceased	Inactive	Lookup ID	First name	Middle name	Last Name	Suffix	Address	City	State	Zip	Email Type
Yes	No				Frankenstein				MO	64110-3310	
No	No				Cunningha...				KS	66208-5246	Home Email Address
No	No				Tempel				KS	66211-1728	Home Email Address
No	No				Rittel				MO	64050-1218	Home Email Address
No	No				Dickinson				KS	66205-2724	Home Email Address
No	No				Lang						
No	Yes				Modlin				MO	64052-2819	Home Email Address
Yes	No				Entriiken				MO	64133-2421	
Yes	No				Degenfelder				MO	00001	
Yes	No				Rich decsd				MO	00001	
No	No				Ross	Jr			MO	64063-6235	



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Tributes and Revenue

- Should be added in CRM for Memorials and Tributes
- Can be done in Batch
- Tributes can also be created under constituents, so they are ready to use during batch entry.



Creating a Tribute

The screenshot shows a software interface with a top navigation bar containing tabs: Marketing and Communications, Revenue, Events, Memberships, Prospects, Volunteers, Foundations, Fundraising, and Tre. Below this is a sidebar with a 'Tributes' section. The main area displays a list of tributes, all of which are 'in memory of' type. A modal dialog box titled 'Add a tribute' is open, containing the following fields:

- Tribute type:** A dropdown menu with 'in memory of' selected.
- Tributee:** A text field containing 'Clark Kent' with a search icon.
- Name format:** A dropdown menu with 'Clark Kent' selected.
- Create tribute text:** A button.
- Tribute text:** A text field containing 'in memory of Clark Kent'.
- Default designation:** A text field containing '30708963 General Trust Fund - Endowment' with a search icon.
- Default tribute letter:** A dropdown menu with 'L307 Tribute Letter' selected.
- Sites:** A table with a header 'Site' and one row containing 'Heart of America Council'.


At the bottom of the dialog box are buttons for 'Help', 'Save', and 'Cancel'.

Go to Constituents and click Tributes. Then Click the “Add” button. Select your type of tribute. Find the constituent. Select name format and then click create Tribute Text. Add the default designation and a tribute letter if you have created one.



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Constituent Tribute


 **in memory of Clark Kent**

Tribute text: in memory of Clark Kent

Tribute type: in memory of



Tributee: Clark Kent

Default designation: 30708963 General Trust Fund - Endowment

Is active:  Yes

Site: Heart of America Council

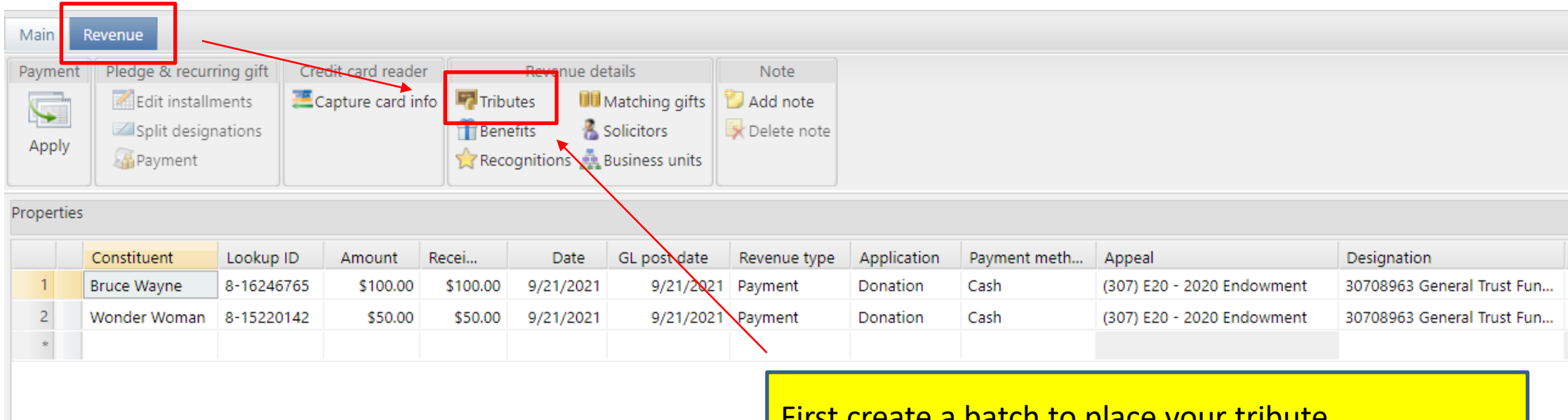
AcknowledgeesRevenueDonor Information

Acknowledgees (1)  Edit acknowledgees  More ▾

Acknowledgee	Lookup ID	Tribute letter
Clark Kent	8-57240164	L307 Tribute Letter



Attach Donations to Tributes in Batch



The screenshot shows a software interface with a 'Main' header and a 'Revenue' tab highlighted with a red box. Below the header, there are several functional areas: 'Payment' (with an 'Apply' button), 'Pledge & recurring gift' (with 'Edit installments', 'Split designations', and 'Payment' buttons), 'Credit card reader' (with a 'Capture card info' button), 'Revenue details' (with 'Tributes', 'Benefits', 'Recognitions', 'Matching gifts', 'Solicitors', and 'Business units' buttons), and 'Note' (with 'Add note' and 'Delete note' buttons). A red arrow points from the 'Tributes' button in the 'Revenue details' section to the 'Properties' table below. The 'Properties' table has columns: Constituent, Lookup ID, Amount, Recei..., Date, GL post date, Revenue type, Application, Payment meth..., Appeal, and Designation. It contains two rows of data.

	Constituent	Lookup ID	Amount	Recei...	Date	GL post date	Revenue type	Application	Payment meth...	Appeal	Designation
1	Bruce Wayne	8-16246765	\$100.00	\$100.00	9/21/2021	9/21/2021	Payment	Donation	Cash	(307) E20 - 2020 Endowment	30708963 General Trust Fun...
2	Wonder Woman	8-15220142	\$50.00	\$50.00	9/21/2021	9/21/2021	Payment	Donation	Cash	(307) E20 - 2020 Endowment	30708963 General Trust Fun...
*											

First create a batch to place your tribute donations into. In this case, two came in the mail. Once the lines are in batch, you need to click the Tribute button on the Revenue tab to attach it to the tribute.



Finding the

Main Revenue

Payment Pledge & recurring gift Credit card reader

Apply Edit installments Split designations Payment

Capture card info

Revenue details

Tributes Matching gifts Benefits Solicitors Recognitions Business units

Note Add note Delete note

Properties

	Constituent	Lookup ID	Amount	Recei...	Date	GL
1	Bruce Wayne	8-16246765	\$100.00	\$100.00	9/21/2021	
2	Wonder Woman	8-15220142	\$50.00	\$50.00	9/21/2021	
*						

Tributes

Tribute	Amount	Default designation
in memory of Clark Kent	\$100.00	30708963 General Trust F...
*		

Tributes

Tribute	Amount	Default designation
*Clark Kent	\$100.00	
*		

Distribute evenly

Help OK Cancel

The search box opens. I use an * followed by the name. It will search for any name that has this in it and fill in the correct tribute. You can just use a last name also. Do this for each line and then commit the batch.



Tribute Revenue

If the widow want to know what has come in for tributes, you can go to the tribute and look at the **Revenue** tab for the total the amount. In this case its \$150. If the widow would like to send out acknowledgements, you can download the **Donor Information** and send the addresses to the widow.



in memory of Clark Kent

Tribute text: in memory of Clark Kent
Tribute type: in memory of
Tributee: Clark Kent
Default designation: 30708963 General Trust Fund - Endowment
Is active: ☒ Yes
Site: Heart of America Council

Acknowledges Revenue Donor Information

Revenue (2)

Constituent	Date	Tribute amount	Transaction type
Bruce Wayne	9/21/2021	\$100.00	Payment
Wonder Woman	9/21/2021	\$50.00	Payment



in memory of Clark Kent

Tribute text: in memory of Clark Kent
Tribute type: in memory of
Tributee: Clark Kent
Default designation: 30708963 General Trust Fund - Endowment
Is active: ☒ Yes
Site: Heart of America Council

Acknowledges Revenue Donor Information

Donor Information (2)

Tribute type	Tributee	Anonymous?	Donor Name	Donor Address
in memory of	Clark Kent	No	Bruce Wayne	
in memory of	Clark Kent	No	Wonder Woman	777 Lucky Street

Tribute Revenue Report

Blackbaud CRM™ S

Constituents

Home **Constituents** Marketing and Communications Revenue Events Memberships Prospects Volunteering

Tasks

- Search for a tribute
- Add tribute letter
- Manage tribute types

Reports

- Tribute revenue**
- Constituent tributes

Shortcuts

- Add this page to shortcuts

Tributes

Tributes (1)

Type:

Date created:

Type Tribute

These reports are found under Constituents / Tributes. The reports are located on the left side under reports. Example of the one on the right is Tribute Revenue. Note report needs to be filtered by date or better yet by Appeal.

Tribute Revenue

Include... All records

Revenue date: from: to:

Appeal: Tribute type:

Designation:

1 of 1 Find | Next

Tribute Revenue

Filter selection: All records

Appeal: Designation:

Date: Today Tribute type: in memory of

Tribute text	Tributee	Date created	Total revenue applied	Is active
Donor	Revenue type	Date	Tribute amount	
in memory of Clark Kent	Clark Kent	9/21/2021	\$150.00	Yes
Bruce Wayne	Payment	9/21/2021	\$100.00	
Wonder Woman	Payment	9/21/2021	\$50.00	

9/21/2021 at 9:45 PM Prepared by: NETBSA\jkuehn Page 1 of 1

Data Clean Up

- Giving Categories
- BSA Structure values
 - Review list in batch or
 - Request list from Member Care
 - Determine giving categories OR structures to revise or delete
 - Create ticket with Member Care to have updated



Next Forum

October 27, 2021*
10:00 am or 2:00 pm CT

** Note this is a week later than usual*



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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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