

# CRM User Forum

February 16, 2022

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# Objectives

- Finishing up Year 2021
  - Global write-off process – timing and how-to
  - Reports for the council's 990 & fiscal audit
  - Prior-year payments
  - Beginning of the year GL transactions (PeopleSoft)
- Batch
  - Using Group ID to credit units in FOS appeal
- Using Appeal Progress feature for quick updates



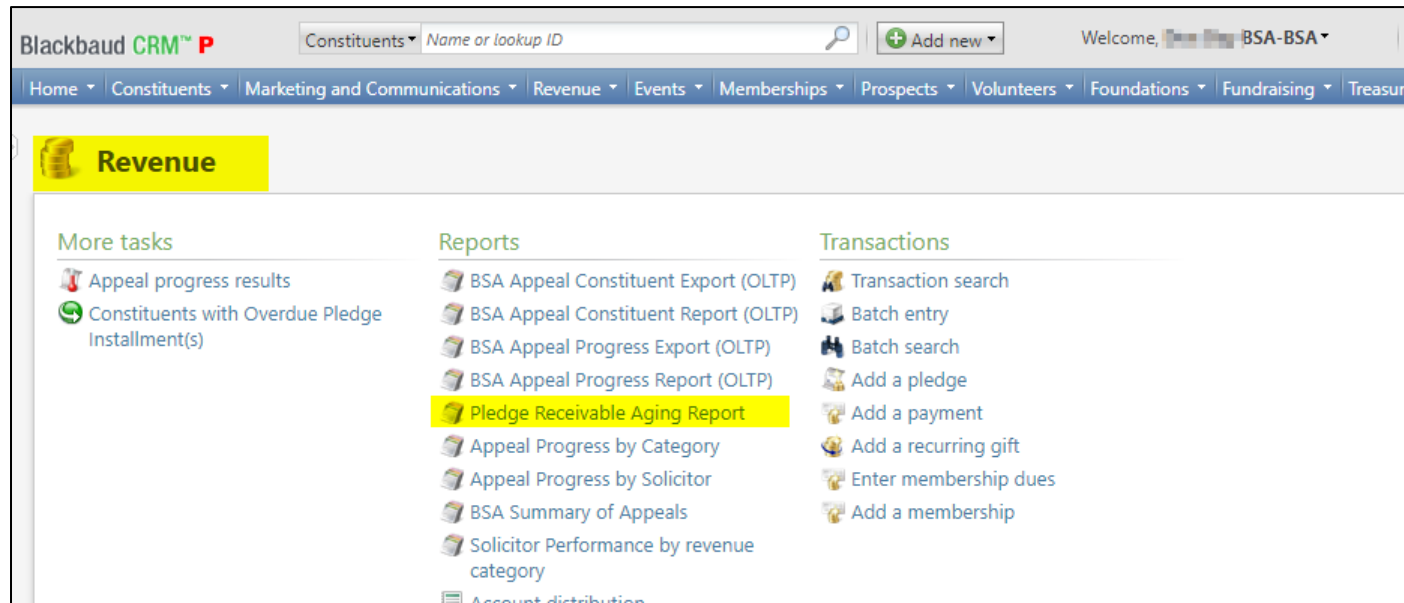
# Finishing Up 2021



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# Global Write Offs

- Determine collectible value
- Create the Pledges Receivable Aging Report
- Blackbaud CRM ~ Revenue ~



# Determine collectible value

## Create the Report

1. BSA Organization – your council
2. Report Code – year
3. Appeal – must be run for each open appeal with outstanding donor pledge values
4. Click “View Report”
5. Wait...



# Pledge Receivable Aging Report

Blackbaud CRM™ P

Constituents

Welcome, BSA-BSA

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

## Pledge Receivable Aging Report

BSA Organization  **1** Report Code  **3**

Appeal  **2**  **4**



# Pledge Aging Receivable Report

- Print report and give to management to review:
  - All open pledges
  - Determine who will still pay
  - Sign and date
- After management review, proceed to Pledge Write-Off process



# Pledge Write-off Procedure

- Determine when your council needs to write-off pledges.
- Pledges written off by appeal
- You will use your current Global Pledge Write-off business process
- You will edit the selection in your current business process





### Global Pledge Write-off

edge write-off processes (276) + Add

Name	Description
L144	Pledge Write-Off Proc
L144 Abraham Linco...	Just change the select
L003	Pledge Write-Off Proc
L022	Pledge Write-Off Proc
L583	Pledge Write-Off Proc
L382	Pledge Write-Off Proc
Start process	
Edit	
Delete	
As	
L618	Pledge Write-Off Proc
L104	Pledge Write Off Proc
L303	Pledge Write-Off Proc
L157	Pledge Write-Off Proc
L468	Pledge Write-Off Proc
L092	Pledge Write-Off Proc
L368	Conversion Pledge W
L220	Pledge Write-Off Proc
L574	Pledge Write-Off Proc
L635	Pledge Write-Off Proc
L695	Global Write-Off
L449	Pledge Write-Off Proc
L006	Pledge Write-Off Proc

#### Edit pledge write-off process

##### General

Name: L382

Description: Pledge Write-Off Process

Selection: L382 Global Write Off Query (Ad

Post status: Do not post

Post date: mm/dd/yyyy

Site: Allegheny Highlands Council

##### Write-off reason

Reason code: UNC - Uncollectable

Details: 2017 Write Off

##### Output

☐ Create output selection

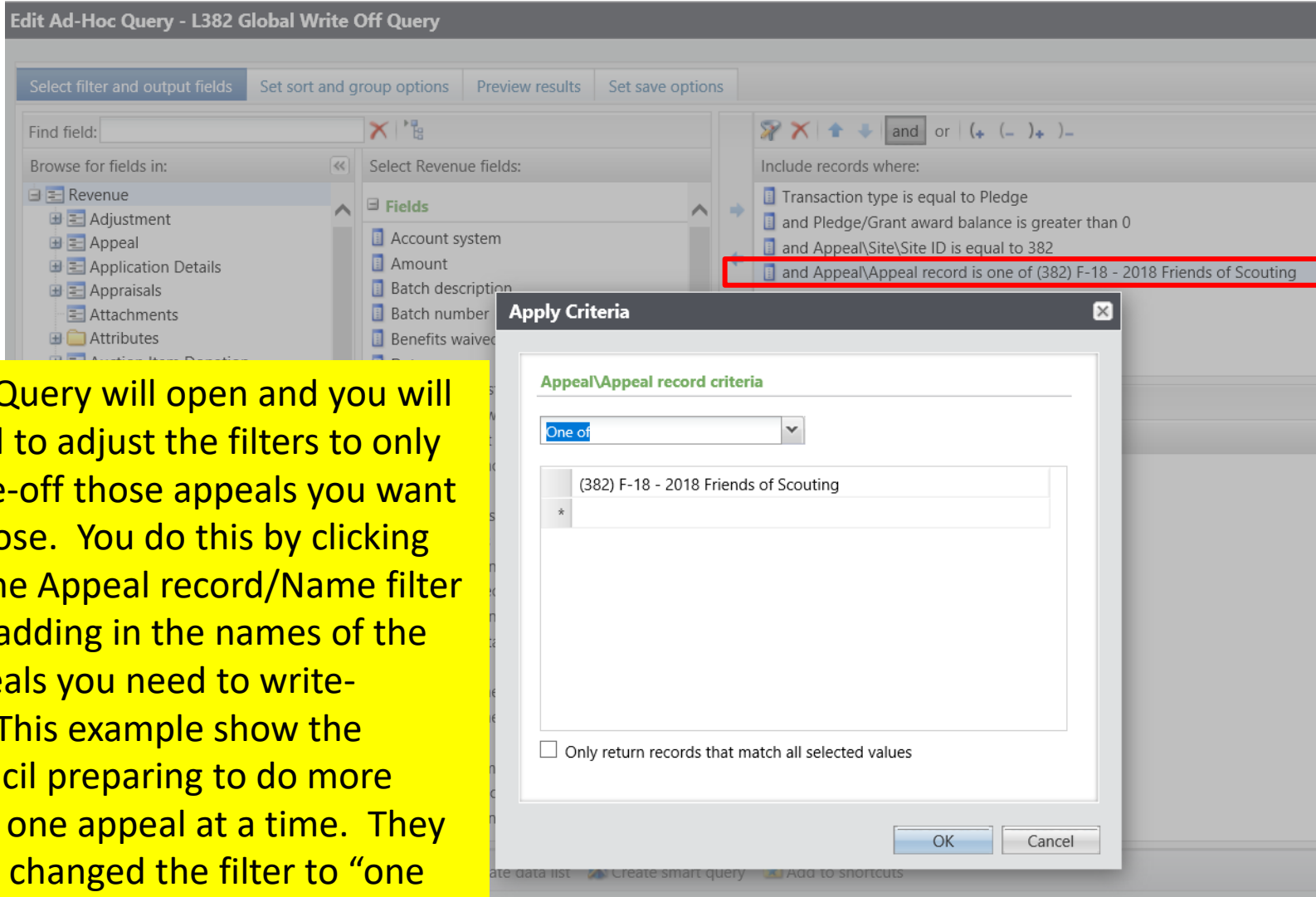
☐ Overwrite existing selection

Selection name:

Help Save Cancel

Go to the Global Pledge Write-off processes and edit your routine. No need to create a new routine. When the edit window opens click the pencil to edit the query attached as the selection.





The Query will open and you will need to adjust the filters to only write-off those appeals you want to close. You do this by clicking on the Appeal record/Name filter and adding in the names of the appeals you need to write-off. This example show the council preparing to do more than one appeal at a time. They have changed the filter to “one of” and then can now list multiple appeals.



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### Edit Ad-Hoc Query - L382 Global Write Off Query

[Select filter and output fields](#)[Set sort and group options](#)[Preview results](#)[Set save options](#)

Results (78 records found)

Appeal\Name	Pledge/Grant award balance
(382) F-18 - 2018 Friends of Scout...	\$250.00
(382) F-18 - 2018 Friends of Scout...	\$600.00
(382) F-18 - 2018 Friends of Scout...	\$500.00
(382) F-18 - 2018 Friends of Scout...	\$40.00
(382) F-18 - 2018 Friends of Scout...	\$30.00
(382) F-18 - 2018 Friends of Scout...	\$20.00
(382) F-18 - 2018 Friends of Scout...	\$1,200.00
(382) F-18 - 2018 Friends of Scout...	\$1,000.00
(382) F-18 - 2018 Friends of Scout...	\$95.00
(382) F-18 - 2018 Friends of Scout...	\$30.00
(382) F-18 - 2018 Friends of Scout...	\$60.00
(382) F-18 - 2018 Friends of Scout...	\$100.00
(382) F-18 - 2018 Friends of Scout...	\$720.00
(382) F-18 - 2018 Friends of Scout...	\$45.45
(382) F-18 - 2018 Friends of Scout...	\$75.00
(382) F-18 - 2018 Friends of Scout...	\$20.00

Always preview your query before saving it and running your routine to make sure only your appeals are showing and that only the appeals you want to write-off are listed.



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If you need to exclude specific constituents from the write-off process, you can add the line Constituent\Lookup ID to the Include records where window, then change the operator from 'Equal to' to 'Not one of', then list as many Lookup IDs as necessary. If you want to exclude specific pledges, you can do the same with the field 'Revenue ID is not one of'

The screenshot displays a software interface with two main sections. The top section, titled 'Include records where:', contains a list of search criteria. The bottom section, titled 'Results fields to display:', contains a list of fields to be shown in the results.

**Include records where:**


- Appeal\Site\Site ID is equal to 027
- and Appeal\Appeal record is one of (027) F19 - 2019 Friends of Scouting, (027) F20 - 2020 Friends of Scouting, (027) FG21 - 2021 Fresno Golf Tournament, (027) F21 - 2021 Friends of Scouting
- and Transaction type is equal to Pledge
- and Pledge/Grant award balance is greater than 0
- and Constituent\Lookup ID is not one of 8-12345678, 8-87654321 or is blank

**Results fields to display:**

- Appeal\Name
- Pledge/Grant award balance
- Constituent\Name
- Constituent\Lookup ID



If you need a list of what was written off after the process has been run, go to Analysis>Information Library>LXXX Example Council Folder, then copy the LXXX Written Off Revenue query. Double click the Write-off\Details line, then replace what is in there with what you had listed under Details. That will show a list of who and what was written off.

Global pledge write-off list

**L549**

Name:

L549

Description:

Pledge Write-Off Process

Reason code:

UNC - Uncollectable

Details:

2021 Annual Write-off - MKH 1/21/22

Selection:

L549 Global Write Off Query (Ad-hoc Query)

Create ou

GL post status:

Not posted

Output s

GL post date:

1/21/2022

Overwrite

and

or

(+)

(-)

(+)

(-)

Include records where:

Appeal\Site\Site ID is equal to 549

and Write-offs\Details begins with Type in whatever you listed under your Write-off process>edit>write-off reason>details here

Apply Criteria

Write-offs\Details criteria

Begins with

Value

Output field

2021 Annual Write-off - MKH 1/21/22

OK

Cancel

# IRS 990 Schedule B



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# IRS 990 Schedule B

- Creation process like creation of contribution statements
- Download and review data via export
- Merge Excel data to Word template provided
- User guide is under Administration with the CRM User Guides on MyBSA or in CRM in Marketing Communication under Letters and Documents.



# Location of CRM Tools

Marketing and Communications | Revenue | Events | Memberships

## Letters and Documents

Letters | Documents

**Documents (5)** + Add | Filters | More

Type: [ ] Sites: Selected sites

Name
<None>
990 Schedule B Part I Job Aid
990 Schedule B Part I Template
Contribution Statement Job Aid
Contribution Statement Template
Contribution Statement Template - Margin Option 1

Exports | **Administration**

**Exports (4)** + Add | Filters | More

Sites: Selected sites | Apply | Reset

Search | Columns | Save list

Name
990 Schedule B Part 1 Data
Contribution Statement Data Cumulative >= \$250 or Benefited
Contribution Statement Data Cumulative Donations > \$0
Contribution Statement Data Single >= \$250 or Benefited





# Remember:

- 990 Schedule B are based on contributions (pledges/straight donations/etc.) a person has given during the year. Pledge Payments do not count towards this, so if a donor is missing from the results, they may not have made any new contributions during the year. We use an accrual basis instead of a cash basis, which means that if a donor pledged \$5,000 but only paid \$4,000, they will show up as a \$5,000 donor.
- Don't worry if businesses on your 990s show as 'individuals' in the spreadsheet. Column D of the 990 Schedule B Part 1 form shows the type of contribution, not the type of constituent. The 3 choices are Person, Payroll and Noncash. The mail merge assumes "Person" for all contribution types.



# Prior Year Pledge Payment



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# Prior Year Pledge Payment

- Why do them?
- How do they feed to the GL?
- How do I make PY payment show as current year contributions?
- Did you write-off all pledges in PeopleSoft at year end?



# Reasons to use this function

## Accuracy of Donor Record

If you use a payment as a new donation in 2022, you may fail to ask the donor for their 2022 gift.

Follow the intentions of your donors

Eventually the donor will be able to see their records and this can help reduce unnecessary question from the donor.



# Prior Year Payment Process

- You should use this feature until the end of March.
- This keeps donor records intact
- Prior year payment relieve pledge you hold open and have moved from 1301 to 1321
- Prior year payments build current year contributions with account 4002 through monthly journal entry if you have written off all pledges in the PeopleSoft.



# Account Flow for a PY Payment

Account	Debit	Credit	Debit	Credit
Beginning		200		0
1321		-20		-20
1001	20			
1321 Balance		180		-20
1321			20	
4002				20
1321 Balance				0

Account	Description	Debit amount	Credit amount
<b>Pledge</b>	<a href="#">Edit</a>		
→ L147-1-1321-000-00	L147-1-FOSP-PAPL-L14700001-UNR. PAYMENT-on-Pledge-Receiveable(PY): Council General		\$30.00
→ L147-1-1001-000-00	L147-1-FOSP-CASH-L14700001-UNR. PAYMENT-Cash etc: Council General	\$30.00	



# Accounts

- 1321 is your Contributions Receivable Prior year account. This is populated with pledges you expect to be paid late after you close your books(GJ from 1301). If you write-off all pledges this will have a zero balance.
- 4002 is your Contributions-FOS-Prior Year account. Dollars are move to here if there is negative balance in 1321 as you reconcile monthly during current year.



# In PeopleSoft

Beginning of the year in PeopleSoft, these GL transactions required:

- Journal entry to move balances to new accounts
- Run a Posted detail in PS and Pledge Receivable report in CRM

Contribution - Pledges

- 1331 (CR) to 1301 (DR) (move from future to current)
- 1301 (CR) to 1321 (DR) (move from current year to prior)
- Allowance
- 1391 (DR) to 1371 (CR) (move future to current)
- 1371 (DR) to 1381 (CR) (move current to prior)





# Batches



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# Using Group ID in batch

- Why?
  - Improves solicitor reporting
  - Units
  - Groups



# Revenue Batch

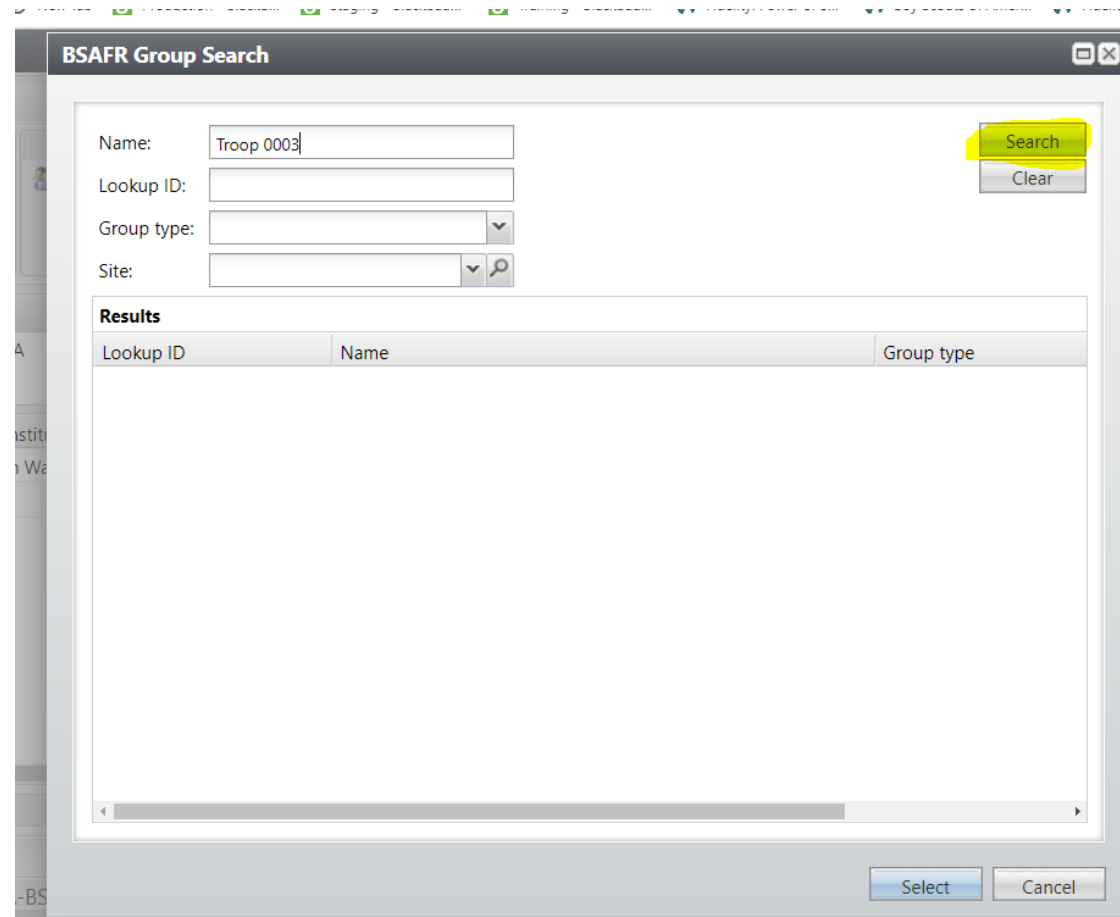
- When entering a Unit to a Revenue batch select the Constituent then in the Group ID enter the information of the Unit. (Troop 0003, etc)

The screenshot displays the 'Revenue Batch' software interface. At the top, there are tabs for 'Main' and 'Revenue'. Below the tabs are several functional groups: 'Batch' (Save, Save and close, Export), 'Constituent' (Solicit codes, Edit, Go to), 'Configuration' (Properties, Customize fields), and 'Processes' (Validate, Update projected totals, Update status, Validate addresses (all rows), Set row message). Below these is a 'Properties' section with fields for Owner (Cornelia Ellis BSA-BSA), Projected No. (0), Current No. (1), Projected total (0.0000), and Current total (0.0000). The main data entry area is a table with columns: Barcode, Constituent, Lookup ID, Group ID, Amount, and Receipt a... The first row shows a barcode of 1, a redacted Constituent field, a redacted Group ID field, and Amount and Receipt a... values of \$0.00. The bottom of the window shows a 'Constituent Window' and a page indicator 'Page 1 of 1'.

Barcode	Constituent	Lookup ID	Group ID	Amount	Receipt a...
1				\$0.00	\$0.00



# Search for the BSAFR Group



A screenshot of a software dialog box titled "BSAFR Group Search". The dialog box has a title bar with standard window controls. Inside, there are four input fields: "Name:" with the text "Troop 0003", "Lookup ID:", "Group type:" with a dropdown arrow, and "Site:" with a dropdown arrow and a magnifying glass icon. To the right of these fields are two buttons: "Search" (highlighted in yellow) and "Clear". Below the input fields is a section titled "Results" containing a table with three columns: "Lookup ID", "Name", and "Group type". The table is currently empty. At the bottom of the dialog box are two buttons: "Select" and "Cancel".

Lookup ID	Name	Group type
-----------	------	------------



# Populate in the BSAFR Group

- The Group ID will populate with the Unit information. This will attach to the pledge or payment and will show on the Unit and Constituent's profile.

The screenshot displays the BSAFR Group management interface. At the top, there are tabs for 'Constituent', 'Configuration', and 'Processes'. The 'Constituent' tab is active, showing 'Solicit codes', 'Edit', and 'Go to' options. The 'Configuration' tab shows 'Properties' and 'Customize fields'. The 'Processes' tab shows 'Validate', 'Update projected totals', and 'Update status'. Below the tabs, there is a summary section for 'a Ellis BSA-BSA' with 'Projected No.: 0', 'Current No.: 1', 'Projected total: 0.0000', and 'Current total: 0.0000'. The main table has columns for 'Constituent', 'Lookup ID', 'Group ID', 'Amount', and 'Receipt a...'. The first row shows 'John Warters' as the constituent, a redacted 'Lookup ID', and 'Troop 0003 BT Ann Arbor' as the 'Group ID'. The 'Amount' and 'Receipt a...' columns show '\$0.00'.

Constituent	Lookup ID	Group ID	Amount	Receipt a...
John Warters	[REDACTED]	Troop 0003 BT Ann Arbor	\$0.00	\$0.00



# Using Appeal Progress

The screenshot displays the Blackbaud CRM P interface. At the top, the header includes the Blackbaud CRM P logo, a search bar with 'Appeals' and 'Appeal name' filters, and a '+ Add new' button. Below the header is a navigation bar with tabs for Home, Constituents, Marketing and Communications (highlighted), Revenue, Events, Prospects, Foundations, Fundraising, Analysis, and Administration. The main content area is titled 'Marketing and Communications' and features a grid of functional links. The 'Appeal' section is highlighted in yellow and includes 'Appeal search', 'Add an appeal', 'Appeal mailings', and 'Appeal progress results'. Other sections include 'Donor relations' (Receipts, Acknowledgements, Reminders, Planned gift acknowledgements, Manage correspondence), 'Pledge card report' (Run pledge cards), 'Reports' (BSA Appeal Organization Structure Report, Appeal profile, Appeal performance), 'Marketing efforts' (Direct marketing efforts, Marketing plans, Public media efforts, Source codes), and 'Packages' (Creatives, Export definitions, Letters and documents, Materials and expenses, Packages).

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Appeals  + Add new

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

**Marketing and Communications**

Appeal	Donor relations	Pledge card report
Appeal search	Receipts	Run pledge cards
Add an appeal	Acknowledgements	
Appeal mailings	Reminders	
Appeal progress results	Planned gift acknowledgements	
	Manage correspondence	
Reports	Marketing efforts	Packages
BSA Appeal Organization Structure Report	Direct marketing efforts	Creatives
Appeal profile	Marketing plans	Export definitions
Appeal performance	Public media efforts	Letters and documents
	Source codes	Materials and expenses
		Packages



# Multiple tabs available

Blackbaud CRM™ P Appeals  [+ Add new](#) Welcome, Jenni

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

**Appeal: ( ) S20 - 2020 Friends of Scouting**

Description: 2020 Friends of Scouting Start date: 10/31/2019  
Business unit: End date: 12/31/2020  
Category: Annual Giving (Friends of Scouting) Goal: \$0.00  
Report code: 2020 Status: Active  
Site: Council Membership:

Revenue Summary **Contributions** Payments Balances **Revenue Details (Splits)** Matching Gift Claims Designations Mailings Documentation Mismatch: Appeals? **Solicitor Credits by Group** Prior Appeal

**Contributions - posted 2/18/2020** More ▾

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
\$87,940.01	277	\$317.47	2/18/2020	10/7/2019

**Payments Received - posted 2/18/2020** More ▾

Payments Received	# of Payments	Average Payment	Most Recent Payment	Mismatch: Appeal?	Mismatch: Inbound Channel?
\$39,141.11	189	\$207.10	2/18/2020	No	Yes

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



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# Contributions



## Appeal: ( ) S20 - 2020 Friends of Scouting

Description: 2020 Friends of Scouting      Start date: 10/31/2019  
Business unit:      End date: 12/31/2020  
Category: Annual Giving (Friends of Scouting)      Goal: \$0.00  
Report code: 2020      Status: Active  
Site: Council      Membership:

Revenue Summary   **Contributions**   Payments   Balances   Revenue Details (Splits)   Matching Gift Claims   Designations   Mailings   Documentation   Mismatch: Appeals?   Solicitor Credits by Group   Prior Appeal

### Contributions: Summary - posted 2/18/2020 More ▼

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
\$87,940.01	277	\$317.47	2/18/2020	10/7/2019

Expand all   Collapse all

⌵ Contributions: Not posted (pending)

⌵ Contributions: BSA Structure - posted (6)

⌵ Contributions: Giving Category - posted (3)

⌵ Contributions: Both BSA Structure & Giving Category - posted (12)



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# By Giving Category or by Structure

Revenue Summary

Contributions

Payments

Balances

Revenue Details (Splits)

Matching Gift Claims

Designations

Mailings

Documentation

Contributions: Summary - posted 2/18/2020

More

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contrib
\$87,940.01	277	\$317.47	2/18/2020	10/7/2019

Expand all

Collapse all

Contributions: Not posted (pending)

Contributions: BSA Structure - posted (6)

Contributions: Giving Category - posted (3)



More

Giving Category	Total Contributions	# of Contributions	Average Contribution
Board	\$25,750.00	21	\$1,226.19
Community	\$13,520.01	55	\$245.82
Family	\$48,670.00	201	\$242.14

Contributions: Both BSA Structure & Giving Category - posted (12)




# Solicitor Credits

Revenue Summary	Contributions	Payments	Balances	Revenue Details (Splits)	Matching Gift Claims	Designations	Mailings	Documentation
Appeal Solicitor Credits by Solicitor Group ...note: solicitor's row is bold when fundraising goal is achieved (44)  More ▾								
BSA Structure	Giving Category	Inactive?	Group Name	Group Public Name	Solicitor Cre...			
[-] Hoover								
[-] Hoover	Family	No	Pack 3151 BP Wilton - 133 (163962)	Pack 3151	\$25.00			
[-] Hoover	Family	No	Pack 3153 FP Durant - 133 (163963)	Pack 3153	\$195.00			
[-] Hoover	Family	No	Troop 0127 BT Muscatine - 133 (164...	Troop 0127	\$780.00			
[-] Hoover	Family	No	Troop 0151 BT Wilton - 133 (164235)	Troop 0151	\$25.00			
[-] Hoover	Family	No	Troop 0426 BT Muscatine - 133 (100...	Troop 0426	\$850.00			
[-] Hoover	Family	No	Troop 1127 GT Muscatine - 133 (100...		\$250.00			
[-]  Council								
[-] Inali								
[-] Kittan								
[-] Mesquakie								
[-] Saukenuk								




# Revenue Details (Splits)









 **Appeal:** [REDACTED] **FS21-2021 Friends of Scouting**





Description: 2021 Friends of Scouting      Start date: 1/1/2021  
Business unit:      End date: 12/31/2021  
Category: Annual Giving (Friends of Scouting)      Goal: \$200,000.00  
Report code: 2021      Status: Active  
Site: [REDACTED] Council      Membership:

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

**Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (536)**  More ▾

Constituent equal to:    Transaction equal to:    Application not equal to:

Verified	Constituent	Date	Transaction	Application	Split Amount	Total Amount	Status	GL Post Date
	[REDACTED]	12/31/2021	Payment	Donation	\$34.94	\$34.94	Check   Posted	12/31/2021
	[REDACTED]	12/31/2021	Payment	Donation	\$17.50	\$17.50	Check   Posted	12/31/2021
	[REDACTED]	12/28/2021	Payment	Donation	\$150.00	\$150.00	Check   Posted	12/28/2021
	[REDACTED]	12/15/2021	Payment	Donation	\$61.20	\$61.20	Check   Posted	12/15/2021
	[REDACTED]	12/10/2021	Payment	Donation	\$34.94	\$34.94	Check   Posted	12/10/2021
	[REDACTED]	12/6/2021	Payment	Donation	\$17.50	\$17.50	Check   Posted	12/6/2021
	[REDACTED]	11/9/2021	Payment	Donation	\$111.69	\$111.69	Check   Posted	11/9/2021
	[REDACTED]	11/2/2021	Payment	Donation	\$43.67	\$43.67	Check   Posted	11/2/2021

 Download to CSV  
 Download to XLSX  
 Autosize all columns  
 Restore grid defaults



# Add to Shortcuts

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Appeals  [+ Add new](#)

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

Tasks ▾  
Reports ▾  
**Shortcuts**  
 **Add this page to shortcuts** 1  
Manage my shortcuts  
Batch entry  
Constituent search  
Transaction search  
Information library  
Reminders  
Appeal Progress by Category

## Appeal: (1111) S20 - 2020 Friends of Scouting

Description: 2020 Friends of Scouting      Start date: 10/31/2019  
Business unit:      End date: 12/31/2020  
Category: Annual Giving (Friends of Scouting)      Goal: \$0.00  
Report code: 2020      Status: Active  
Site: Council      Membership:

Revenue Summary | Contributions | Payments | Balances | **Revenue Details (Splits)** | Matching Gift Claims | Designations

**Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donation**

Constituent equal to:       Transaction equal to:  ▾      Application not equal to:



# Consider using conventional BSA structure

- Council
  - Executive Board chair
  - Special Gifts chair
  - Leadership chair
- District
  - Family chair
  - Community chair



# Next Forum

March 16, 2022

10:00 am & 2:00 pm CST



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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](http://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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