

CRM User Forum

March 16, 2022

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Objectives

- Reports for the council's 990 & fiscal audit
- Using recognition programs
- Batch
 - Using the revenue update batch
 - Using Group ID to credit units in FOS appeal
- Using Appeal Progress feature for quick updates



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.



National Recognition Program

- Heritage Society
 - Criteria Varies by Council
- James E. West
 - Gift of \$1,000 or more designate to Endowment
 - Contains 4 cumulative giving levels
 - Can be automated for your council
- Second Century Society – Current
 - Gift or pledge paid over 5 years of \$25,000 or more
 - Pledge paid over 5 years
 - 4 levels of distinction
- Second Century Society – Deferred
 - Planned gift created with value of \$25,000 or more
 - 4 levels of distinction
- President Leadership Council
 - Gifts contributed to the BSA Foundation of \$1,000,000 or more
 - Revenue from fund benefits a local council
 - Pledges must be paid over 5 years
 - 3 levels of distinction



Recognition Program Description

- **James E. West** - BSA Foundation Website:

<https://www.bsafoundation.org/donor-information/donor-recognition/westfellowship/>

- **Second Century Society** – BSA Foundation Website:

<https://www.bsafoundation.org/donor-information/secondcentury/>

- **President Leadership Council** – BSA Foundation Website:

<https://www.bsafoundation.org/donor-information/presidents-leadership-council/>



Recognition Program Resources

- BSA Foundation Local Council Resources:
<https://www.bsafoundation.org/bsa-council/councilresources/>
- Program Descriptions
- Donor application forms for recognition
- The forms are important with deferred and endowment gifts because they communicate to the council the donor restrictions.
- Ways to order supplies



Forms

Boy Scouts of America James E. West Fellowship

James E. West Fellowship

James E. West was the first Chief Scout Executive of the Boy Scouts of America. He served in that position for more than three decades. Many individuals and corporations make these gifts either on behalf of someone else—such as in honor of an Eagle Scout, Silver Beaver recipient, a retirement, a special accomplishment, or anniversary—or in memory of a special individual.



To Become a Fellow

A gift to a local council, designated by the donor to the council endowment fund, qualifies for membership as a James E. West fellow. The gift must be in addition to—and not replace or diminish—the donor's annual Friends of Scouting support. A minimum gift of \$1000 in cash or marketable securities qualifies for the Bronze level membership. Donors may make cumulative gifts to reach Silver, Gold, and Diamond member levels. For example, 5 years of giving at the Bronze level would qualify for Silver level membership.

Application Process

The donor fills out the James E. West Fellowship Application and returns it directly to the local council. The local council will then request the appropriate James E. West recognition items from BSA Supply by calling 1-800-323-0732.

Name(s) to appear on certificate: _____

Company name (if applicable): _____

Mailing address: _____

City: _____ State: _____ Zip code: _____

Phone: _____ Email address: _____

Second Century Society | 2019 Application



Thank you for nominating a new member to the Second Century Society. They join other Second Century members who have given over \$200,000,000 in the last four years! They deserve our gratitude and recognition.

Donor Info*

Name(s) _____

Mailing Address _____

City _____ State _____ Zip Code _____

Email Address _____

Must be completed in full. Information is used by the Donor Engagement Committee, led by national board members and trustees, for invitations to exclusive member events and society updates.

Gift Info

Exact Gift Amount \$ _____ Gift Date _____

Gift Description _____

Gift Type Cash Planned Endowment Payment Terms _____

Certificate Info

Name(s) to appear on certificate or company name, if applicable. _____

_____ Certificate Date _____



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Adding James E. West or Second Century Gifts

- Place gift or pledge in CRM batch and commit to donor record.
- Upload recognition form to document tab on revenue record.
- Proceed to the donor revenue\recognition tab and add the recognition
- It will save with the base amount for the level it is connected to
- We can automate this process if you have a specific designation for James E. West.
 - The system will look for funds attached to that designation and assign the recognition level that is appropriate.
 - James E. West will be moved to the next level upon giving additional dollars that move them to the next level.



John D. Kuehn
 Notifications: "Major Giving Prospect" and "Revenue Given This Year". C
 Individual Lookup ID: 8-13684237
 Constituencies: Committee member Donor Giving Prospect Event reg

Personal Information **Contact Information**

John David Kuehn
 Nickname: Maiden:
 Primary phone (214) 738-6025 (Mobile)
 Primary email john.kuehn@scouting.org

Show less

Attributes Contact **Revenue** Personal Info Security His

Revenue History Revenue Summary **Recognition** Recognition

Expand all Collapse all

Recognition programs (0) **Add** Filters More

Program Level

Declined recognition levels (0) Add More

Recognition level Date declined

Add a constituent recognition

Details

Recognition program: James E. West Fellowship
 Recognition level: Bronze Member
 Status: Active
 Date achieved: 3/15/2022
 Comments:
☐ Anonymous

Declined Levels

Declined recognition program levels

☐ Bronze Member
☐ Silver Member
☐ Gold Member

Reason:

Help Save Cancel

Sample to the left illustrates adding a James E. West. Same process for Second Century – Current. You would just pick a different recognition program in the Recognition Program drop down box. The lower picture demonstrates what it will look like once saved. The council needs to order the appropriate items to recognize the donor.

Recognition programs (1) Add Filters More

Program	Level	Member since	Status
John D. Kuehn			
James E. West Fellowship	Bronze Member	3/15/2022	Active



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Second Century Society - Deferred

- For planned Gifts of \$25,000 or higher
- Add planned gift
- Use the job aid called Planned Gifts under Constituents in the CRM User Guide
- Upload planned gift documentation onto the Planned Gift document tab
- Add appropriate Second Century Society – Deferred level
- Recognize your donor



Add Planned Gift

Donor needs constituency of Giving Prospect

Prospect Tab \ Planned Gifts Sub Tab \ Add Button

Edit planned gift

Import from PGM

Prospect plan:

Status:

Accepted

Expected maturity year:

2052

Planned gift vehicle:

Bequest

Subtype:

☐ Anonymous gift

☒ Revocable

Values

Other details

Gift amount:

\$25,000.00

Date:

3/15/2022

☐ Gift is contingent

Recognition amount:

\$25,000.00

☐ Gift value is nominal

Net present value:

\$0.00

As of:

mm/dd/yyyy

☐ Living trust

Realized amount:

\$0.00

☒ Do not receipt

Remainderman %:

0.0000

Remainder value:

\$0.00

As of:

mm/dd/yyyy

Probate status:

Pending

As of:

mm/dd/yyyy

Planned Gift Details

Planned Giving Relationships

Assets

Sites

Designation	Amount	Net present val...	Category	Type	Use code	Date added
30700003 NO NA...	\$25,000.00	\$0.00				
*						

Distribute evenly

Help


Save

Cancel



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Add Documentation to the Documentation Tab

 John D. Kuehn
3/15/2022 Bequest: \$25,000.00 John D. Kuehn - Prospect ▼

Planned gift vehicle: Bequest Subtype: Status: Accepted Expected maturity year: 2052

Revocable: Yes Anonymous gift: No

Values

Total gift amount: \$25,000.00
Original gift amount: \$25,000.00 Date: 3/15/2022
Recognition amount: \$25,000.00
Net present value: \$0.00 As of:
Realized amount: \$0.00
Remainderman %: 0.0000
Remainder value: \$0.00 As of:
Probate status: Pending As of:

Other details

Living trust: No
Gift is contingent: No
Gift value is nominal: No

Sites Planned Gift Details Planned Giving Relationships Assets Revenue Letters **Documentation** Campaigns Additions

Sites (1) Edit More ▼
Site
Boy Scouts of America



Prepared.

Add Second Century Society: Deferred Recognition

John D. Kuehn
Lookup ID: 8-13684237

Notifications: "Major Giving Prospect" and "Revenue Give

Individual Lookup ID: 8-13684237

Constituencies: Committee member Donor Planned give

Personal Information **Contact Info**

John David Kuehn
Nickname: Maiden:
Primary phone: (214) 738-60
Primary email: john.kuehn@

Show less

Prospect Attributes Contact Revenue Perso

Revenue History Revenue Summary Recognition

Expand all Collapse all

Recognition programs (1) **+ Add** Filters

Program Level

John D. Kuehn

James E. West Fellowship Bronze Member

Declined recognition levels (0) **+ Add**

Add a constituent recognition

Details

Recognition program: Second Century Society - Deferred C

Recognition level: \$25,000 Second Century Society

Status: Active

Date achieved: 3/15/2022

Comments: Bequest entered as Planned Gift on 3.15.22

☐ Anonymous

Declined Levels

Declined recognition program levels

☐ Legacy Member

☐ \$100,000 Second Century Society

☐ \$500,000 Second Century Society

Reason:

Help Save Cancel

Add the recognition after the planned gift is added to the constituent. Place in the comment box the type of planned gift and the date it was added to help tie process together.



Batches



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LC Revenue Update Batch

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



LC Revenue Update Batch

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



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

Enter a Description in the box

Click *Save*

Batch Entry

Uncommitted Batches

Committed Batches

Uncommitted batches (93) + Add 📄 More ▾

Date range: Last 7 days ▾

Batch template: ▾

Category: ▾

Owner: ▾

Sites: All sites ▾

☐ Show only batches with exceptions

Apply

Reset

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

Status

Date added

1. Data Entry

3/19/2015

3. Approve

3/19/2015

1. Data Entry

3/19/2015

1. Data Entry

3/19/2015

1. Data Entry

3/19/2015

3. Approve

3/20/2015

1. Data Entry

3/20/2015

1. Data Entry

3/20/2015

1. Data Entry

3/20/2015

1. Data Entry

3/20/2015

Data Entry and Commit

3/20/2015

Data Entry and Commit

3/20/2015

2. Review

3/23/2015

Add a batch

✕

Batch template: ▾

Field options

Batch number:

☐ Override

Description:

Owner: ▾

☐ Enable auto-save

Projected #:

0

Projected amount:

\$0.00

?

Help

Save

Cancel



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

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

Tasks

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

Configuration

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

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts

Recent searches

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

Recently accessed

- 3/11/2015 Payment:

Batch Entry

Uncommitted Batches | Committed Batches

Uncommitted batches (5) + Add [?] M

Date range: Last 7 days ▾ Batch

Owner: ▾ Sites: ▾

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

Edit ▾ Update status Commit

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

Batch A0000861

Main | Revenue

Batch | Constituent | Configuration | Processes | Messages

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

Properties

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

Revenue	Revenue ID	Constituent	Lookup ID	Amount
1				

Constituent Window

Information

Applications Matching gifts

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

Page 1 of 1

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



Update the transaction as needed

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

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

The main window is titled "Batch A0000861" and has tabs for Main and Revenue. The "Main" tab is active, showing a toolbar with icons for Save, Save and close, Export, Edit, Go to, Properties, Validate, Update projected totals, Set row message, Clear row message, Clear all, Show all, Select previous, Select next, and Filter.. Below the toolbar is a "Properties" section with fields for Owner (Chuck Kehoe BSA), Projected No. (1), Current No. (1), Projected total (76.0000), and Current total (125.0000).

The "Revenue" tab is also visible, showing a table with the following data:

Revenue	Revenue ID	Constituent	Lookup ID	Amount	Date	Revenue type	Application	Opp
1	125.00 Payment - Chuck...	rev-14557736	Chuck Kehoe	8-15191338	\$125.00	3/11/2015	Payment	<multiple>












Below the table is a "Constituent Window" section with a notification: "Notifications: 'Recent Address Change'. Click here for more information." The window has tabs for Individual and Information, and a "Personal" section with fields for Last name (Kehoe) and Address (Business).

The bottom of the interface shows a status bar with the following information: Owner: Chuck Kehoe BSA, Current #: 1, Projected #: 1, Current amount: \$125.00, Projected amount: \$76.00.



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

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

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


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

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



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


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


 **Batch Entry**

Uncommitted Batches

Committed Batches

Uncommitted batches (1)

 Add

 More

Date range: Last 7 days


Batch template:


Category:


Owner:


Sites: All sites


☐ Show only batches with exceptions


 Apply


 Reset


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

 Edit

 Update status

 Commit

 Validation report

 Delete

Batch type: Enhanced Revenue Batch

Date changed: 3/31/2015



Click Commit

In the Commit parameters screen, click Start

Commit parameters

Batch number: L0006162

Batch commit instructions

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

Exception batch number:

☐ Override

Results

- ☒ Create control report
- ☐ Create output selection

Selection name:

☐ Overwrite existing selection

Help

Start Cancel



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Adjustment History

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

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



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



Using Group ID in batch

- Why?
 - Improves solicitor reporting
 - Units
 - Groups



Revenue Batch

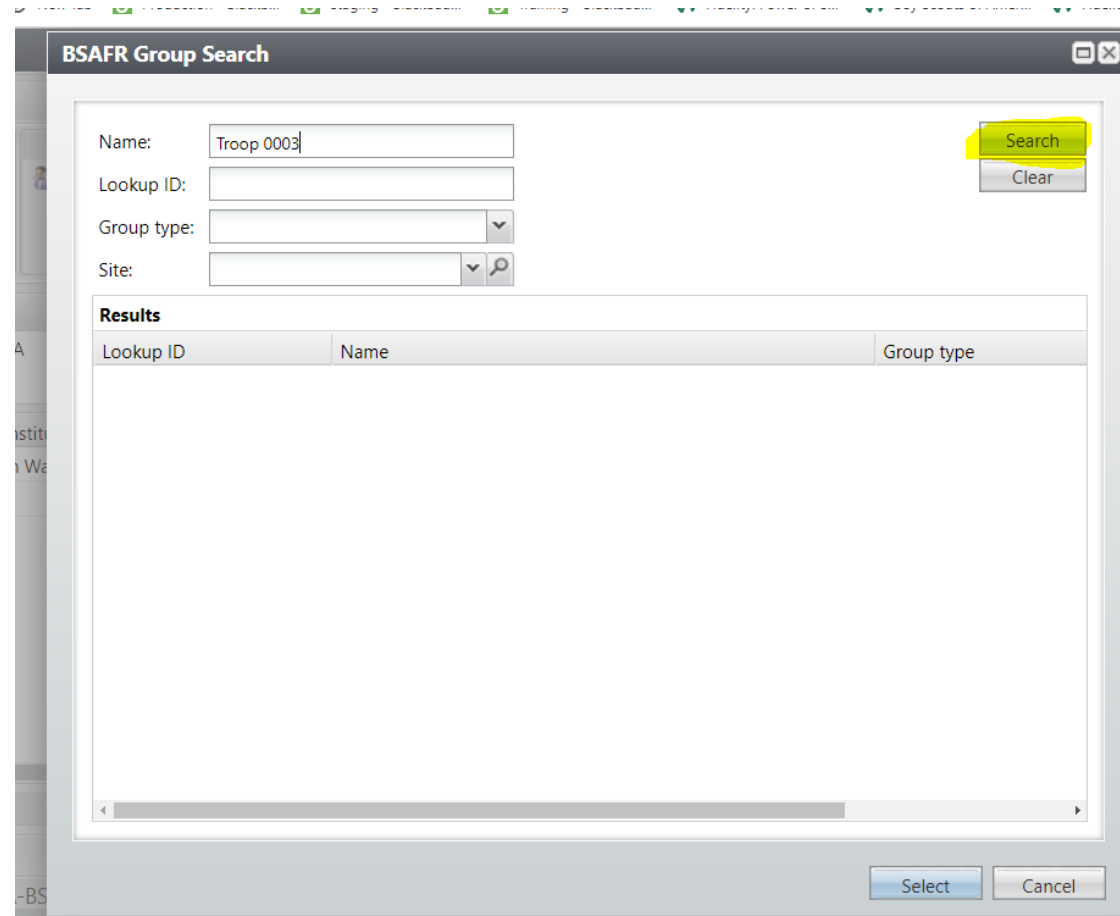
- When entering a Unit to a Revenue batch select the Constituent then in the Group ID enter the information of the Unit. (Troop 0003, etc)

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 status, Validate addresses (all rows), Update projected totals, Set row message). Below these is a 'Properties' section showing '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 of data shows a barcode of '1', a redacted Constituent field, a redacted Lookup ID, a redacted Group ID, an Amount of '\$0.00', and a Receipt amount of '\$0.00'. At the bottom, there is a 'Constituent Window' and a page indicator showing 'Page 1 of 1'.

Barcode	Constituent	Lookup ID	Group ID	Amount	Receipt a...
1	[Redacted]	[Redacted]	[Redacted]	\$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 interface. At the top, there are several tabs: "Constituent", "Configuration", and "Processes". The "Constituent" tab is active, showing "Solicit codes", "Edit", and "Go to" buttons. The "Configuration" tab shows "Properties" and "Customize fields" buttons. The "Processes" tab shows "Validate", "Update projected totals", "Update status", and "Set row message" buttons. Below the tabs, there is a summary section for "a Ellis BSA-BSA" showing "Projected No.: 0", "Projected total: 0.0000", "Current No.: 1", and "Current total: 0.0000". Below this is a table with the following columns: "Constituent", "Lookup ID", "Group ID", "Amount", "Receipt a...", and an empty column. The table contains one row for "John Warters" with a "Lookup ID" of "8-1578" and a "Group ID" of "Troop 0003 BT Ann Arbor". The "Amount" and "Receipt a..." columns show "\$0.00".

Constituent	Lookup ID	Group ID	Amount	Receipt a...	
John Warters	8-1578	Troop 0003 BT Ann Arbor	\$0.00	\$0.00	



Tracking Your Appeal Progress



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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).

Blackbaud CRM™ P

Appeals + Add new

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

Marketing and Communications

Appeal

- Appeal search
- Add an appeal
- Appeal mailings
- Appeal progress results

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

Packages

- Creatives
- Export definitions
- Letters and documents
- Materials and expenses
- Packages





Council (400) - Appeal Progress Results

Contribution Summary

Payment Summary

Write-off & Balance Summary

Contributions by Region

Regions by Region

2022/23 Balance Summary

Appeal Progress

Contribution Summary (posted 3/15/2022) ... note: View write-off and balance totals on 'Write-off & Balance Summary' tab (263) [2](#) More ▾

Active equal to: Report Code equal to: Category equal to: Appeal equal to:

<input type="checkbox"/>	Site ID	Site Name	Report Cod...	Category	Active?	Appeal	Total Contr...	Goal
Multi-year								
<input type="checkbox"/>			Multi-year	Capital Campaign	Yes	C18 - 2018 Capital Campaign	\$27,122.00	\$0.00
<input type="checkbox"/>			Multi-year	Capital Campaign	Yes	CC18 - 2018 Capital Campaign	\$1,391,005.08	\$0.00
2022								
<input type="checkbox"/>			2022	Special Events	Yes	BG22 - Canton Brookside Golf	\$4,300.00	\$64,000.00
<input type="checkbox"/>			2022	Other Support	Yes	CA22 - 2022 Camperships	\$500.00	\$10,000.00
<input type="checkbox"/>			2022	Endowment	Yes	EN22 - 2022 Endowment	\$4,497.06	\$0.00
<input type="checkbox"/>			2022	Foundations & Trusts	Yes	FN22 - 2022 Foundations & Grants	\$46,000.00	\$155,000.00
<input type="checkbox"/>			2022	Annual Giving (Friends of Scoutin...	Yes	FS22 - 2022 Friends of Scouting	\$239,708.40	\$559,000.00
<input type="checkbox"/>			2022	Special Events	Yes	HD22 - 2022 Hill N Dale Sporting Clays	\$10,000.00	\$76,000.00
<input type="checkbox"/>			2022	Special Events	Yes	LA22 - 2022 Lawrence Sporting Clays	\$11,750.00	\$27,000.00
<input type="checkbox"/>			2022	Special Events	Yes	OE22 - 2022 Over the Edge	\$15,973.75	\$70,000.00
<input type="checkbox"/>			2022	Special Events	Yes	PG22 - 2022 Portage Golf	\$10,000.00	\$45,000.00
<input type="checkbox"/>			2022	Special Events	Yes	SA22 - 2022 Summit Adventure Weekend	\$3,468.40	\$18,100.00
<input type="checkbox"/>			2022	United Way - Allocations	Yes	UW22 - 2022 United Way	\$3,056.28	\$15,000.00
2021								
<input type="checkbox"/>			2021	Special Events	Yes	AU21 - 2021 Annual Auction	\$35,801.81	\$77,000.00
<input type="checkbox"/>			2021	Special Events	Yes	BG21 - 2021 Brookside Golf Outing	\$66,422.00	\$61,300.00
<input type="checkbox"/>			2021	Other Support	Yes	CA21 - 2021 Campership	\$675.00	\$0.00
<input type="checkbox"/>			2021	Other Support	Yes	CA21 - 2021 Campership	\$675.00	\$0.00



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:

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

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



Add to Shortcuts

Blackbaud CRM™ P

Appeals [+ Add new](#)

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

Tasks ▾
Reports ▾
Shortcuts 1
Add this page to shortcuts
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

April 20, 2022

10:00 am & 2:00 pm CST





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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