

CRM User Forum

April 20, 2022

Cornelia Ellis – John Kuehn

Valerie Eaton – Don Day



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Objectives

- Creating Constituent Interactions
- Using the Constituent “Interaction” Data List
- Using the Development “Workspace”
- Scouting Gives:
 - Appeal setup
 - Event setup
- Using Appeal Progress feature for quick updates
- Questions – Answers

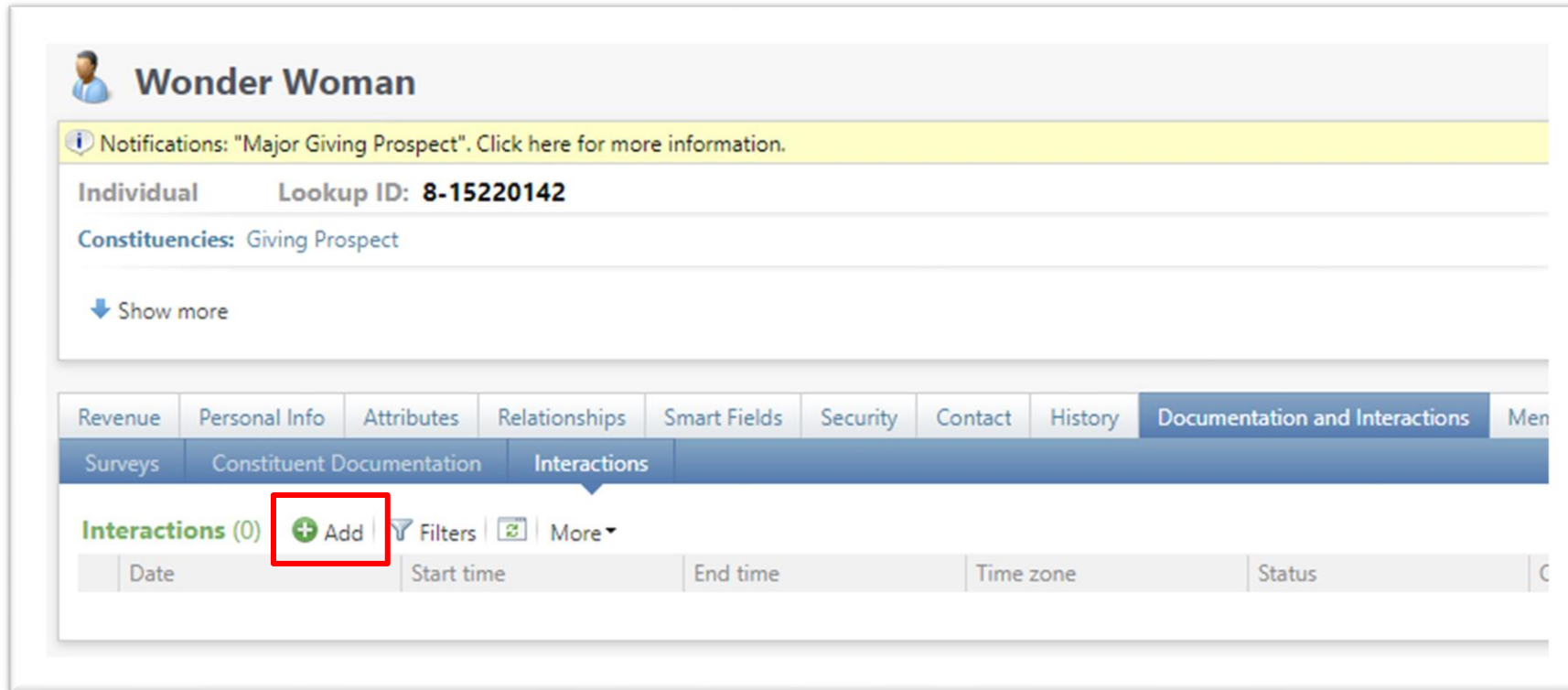


Why Use Constituent Interactions

- Site secured to your council
- Track activity with a constituent
- Can be assigned to other staff members
- Documents, notes and media can be connected to it
- Employees that come after you can have greater insights
- Promotes greatness in the council



Where to add interactions?



The screenshot displays a user interface for a constituent named "Wonder Woman". At the top, there is a notification bar with a yellow background stating: "Notifications: 'Major Giving Prospect'. Click here for more information." Below this, the constituent's details are shown: "Individual" with "Lookup ID: 8-15220142" and "Constituencies: Giving Prospect". A "Show more" link is available. The main navigation bar includes tabs for Revenue, Personal Info, Attributes, Relationships, Smart Fields, Security, Contact, History, Documentation and Interactions, and Men. The "Interactions" subtab is selected, showing a header with "Interactions (0)", a green "+ Add" button (highlighted with a red box), a "Filters" icon, and a "More" dropdown. Below the header is a table with columns: Date, Start time, End time, Time zone, Status, and C.

Navigate to your constituent and proceed to the document and interactions tab. On the interaction subtab you will find an add button.



Add an interaction for Wonder Woman

Summary:

Recruitment Lunch for Major Gift Appeal

Status:

Pending

Owner:

John D. Kuehn

Category:

Outbound

Contact method:

Visit

Subcategory:

Volunteer Cultivation

Event:

Expected date:

4/20/2022

Actual date:

mm/dd/yyyy

Expected start time:

11:30 AM

Actual start time:

hh:mm AM

Expected end time:

1:00 PM

Actual end time:

hh:mm AM

Time zone:

(GMT-06:00) Central Time (US & Cai

Location:

Sites:

Site

Boy Scouts of America

*

Comments

Having lunch to recruit Wonder Woman as Major gift chair.

Participants

Participant

Don Day

*

Help

Save

Cancel

Provide a summary to your interaction and then fill in the needed fields. Needed fields will be highlighted in yellow. The interaction will automatically make the creator the owner. It can be assigned to someone else.

Provide comments to your interaction and select a participant. In this case I am taking Don Day to the meeting with me.

Once completed, click save.

This interaction is in a pending state. Once the meeting is over, you should mark as complete and add any meeting notes that are needed.



Wonder Woman

Notifications: "Major Giving Prospect". Click here for more information.

Individual Lookup ID: 8-15220142

Constituencies: Giving Prospect

Show more

Revenue Personal Info Attributes Relationships Smart Fields Security Contact History Documentation and Interactions Memberships Communications Summary Education Prospect

Surveys Constituent Documentation Interactions

Interactions (1) Add Filters More

Date	Start time	End time	Time zone	Status	Owner	Summary	Contact method	Sites
4/20/2022	11:30 AM	1:00 PM	(GMT-06:00) Central Tim...	Pending	John D. Kuehn	Recruitment Lunch for M...	Visit	BSA National Council

Edit interaction Edit responses Delete

Summary: Recruitment Lunch for Major Gift Appeal

Status: Pending
Category: Outbound
Subcategory: Volunteer Cultivation
Owner: John D. Kuehn
Participants: Wonder Woman; Don Day

Belongs to: Wonder Woman
Expected date: 4/20/2022
Expected start time: 11:30 AM
Expected end time: 1:00 PM
Time zone: (GMT-06:00) Central Time (US & Canada)
Sites: BSA National Council

Actual date:
Actual start time:
Actual end time:
Contact method: Visit
Location:

Comment: Having lunch to recruit Wonder Woman as Major gift chair.

Once saved your interaction will look like this on the subtab. You can edit it or edit the response. By clicking the summary link, it will take you to the interaction home page.



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All interactions for Wonder Woman

Visit on 4/20/2022 - Interaction



777 Lucky Street
Las Vegas, NV 65666
johnkuehn66@yahoo.com

Lookup ID: 8-15220142

Spouse:
Richard White
Household:
Wonder Woman and Richard White

Primary business:
S.H.I.E.L.D

Active constituencies: Giving Prospect

Details

Responses

Documentation

Attributes

Details



Edit



Owner:	John D. Kuehn	Expected date:	4/20/2022	Actual date:
Status:	Pending	Expected start time:	11:30 AM	Actual start time:
Category:	Outbound	Expected end time:	1:00 PM	Actual end time:
Subcategory:	Volunteer Cultivation	Time zone:	(GMT-06:00) Central Time (US & Canada)	Location:
Contact method:	Visit			
Event:				
Sites:	BSA National Council			
Summary:	Recruitment Lunch for Major Gift Appeal			
Participants:	Wonder Woman; Don Day			
Comment:	Having lunch to recruit Wonder Woman as Major gift chair.			

This is the interaction home page once you click the summary link.

You can click the document tab and add items such as pdf, documents or media links. Items added here are site secured to your council because the interaction is site secured to your council.



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Add an interaction for John D. Kuehn

Summary:

Visit with John on CRM help

Status:

Pending

Category:

Outbound

Subcategory:

Follow Up

Expected date:

4/20/2022

Expected start time:

10:00 AM

Expected end time:

10:30 AM

Time zone:

(GMT-06:00) Central Time (US & Cai

Sites:

Site

Heart of America Council

*

Owner:

John D. Kuehn

Contact method:

Phone Call

Event:

Actual date:

mm/dd/yyyy

Actual start time:

hh:mm AM

Actual end time:

hh:mm AM

Location:

Comments

ask for help

Participants

Participant

*

?

 Help

Save

Cancel

This is an interaction create by a person in Heart of America Council but assigned to me as the owner.

This will show on my interaction tab on my constituent record in CRM as well as my Development Workspace in CRM as an action item for me to complete.



Interaction Data List

- Allows you to see all constituent interactions in your council
 - You can see who created them
 - You can see who they were assigned to
 - You can see if the activity was completed
- Provides a tool for management to use



Interaction Data List Location

The screenshot displays the Blackbaud CRM™ P interface. At the top, there is a search bar with 'wonder woman' entered and an 'Add new' button. Below this is a navigation bar with tabs for Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, Volunteers, Foundations, Fundraising, and Treasury. On the left, a 'Shortcuts' sidebar lists various functions like 'Add this page to shortcuts', 'Manage my shortcuts', 'Query', and 'GL account system import'. The main content area is titled 'Constituents' and features a 'More tasks' section with a red border around the 'Interactions Data List' link. Other sections include 'Recognition' (with links to Recognition Programs List, Volunteer Award List, Recognition programs, Constituent recognition processes, and Tributes), 'Reports' (with links to BSA Duplicate Constituent Report, BSA Eagles Listbuilder, BSA Top Prospects Listbuilder, BSA Employer-Employee Relationship, Constituent profile, Constituent recognition credits, and Constituent tributes), 'Constituents' (with links to Constituent search and Constituent map), 'Individuals and households' (with links to Add an individual, Add a household, and Add a group), and 'Committee' (with links to Committee search and Add a committee).

Found on
home page of
Constituent
Functional
Area.



Recognition Reports

Site Search

Site ID: Search Clear

Name:

Short name:

Acronym:

Site type: ▼

Results (1 record found)

Site ID	Name ▼	Short name	Acronym	Site type	Site path
000	BSA National C...			National	Boy Scouts of Ameri...

Help Select Cancel

To access data list type in the site ID of your council. This would be your council number.

Your council will populate at the bottom. Select your council and click select. This will take you to the Data List page.



BSA National Council (000) - Interaction List

Interaction list for your council (10,000)  More ▾

Creator equal to: ▾ Owner equal to: Date on or after:   Apply  Reset


Council #	Creator	Owner	Constituent	Summary	Contact Method	Date	Actual Date	Category	Subcategory
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Email	2/4/2008	2/4/2008	Outbou...	Announce..
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Email	4/7/2009	4/7/2009	Outbou...	Thank You
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Email	4/16/2009	4/16/2009	Inbound	Announce..
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Email	4/16/2009	4/16/2009	Outbou...	Pledge
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Email	4/16/2009	4/16/2009	Outbou...	Thank You
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Email	4/27/2009	4/27/2009	Outbou...	Meeting N.
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Fax	9/4/2008	9/4/2008	Outbou...	Attendance
000	Blackbaud Conversions	Mark V. Moshier	ExxonMobil Foundati...	TPAS Conversion	Mailing	4/10/2008	4/10/2008	Inbound	Inquiry
000	Blackbaud Conversions	Mark V. Moshier	Mark V. Moshier	TPAS Conversion	Visit	4/7/2009	4/7/2009	Outbou...	Thank You
000	NETBSA\anmoran	Anna Marie Moran	Samuel R. Walton	Analysis meeting	Meeting	11/3/2020	11/3/2020	Other	Follow Up
000	NETBSA\anmoran	Anna Marie Moran	Ray T. Capp	stepping back from Scouting	Mailing	2/9/2022	2/9/2022	Other	
000	NETBSA\asholder	Ashley N. Holder	Paul Kolensky	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Robert N. Trumpis	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Lori Hamming	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Paula Anderson	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Clint R. Cox	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Jude C. Gorski	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Danielle Reilly	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Tina L. Wolfe	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	Robert A. McCabe	2020 December Holiday Email	Email	12/18/2020	12/18/2020		
000	NETBSA\asholder	Ashley N. Holder	John D. Carlson	2020 December Holiday Email	Email	12/18/2020	12/18/2020		

You will need to click apply to run the data list. If you have items, they will populate. You can filter by an on or after a specific date, owner and creator. Other filters can be added for sorting. You can also download into excel.



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BSA National Council (000) - Interaction List

Interaction list for your council (1)  More ▾

Creator equal to: ▾ Owner equal to: Date on or after:   Apply  Reset

Council #	Creator	Owner	Constituent	Summary	Contact Method	Date	Actual Date	Category	Subcategory	Status	Completed
000	NETBSA\jkuehn	John D. Kuehn	Wonder Woman	Recruitment Lunch for Major Gift ...	Visit	4/20/2022		Outbou...	Volunteer C...	Pending	No

This is filtered by owner. It show the interaction I created earlier for my recruitment meeting with Wonder Woman.



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Development Workspace

- Newly permissioned area in CRM
- Lies under the Fundraising Tab
- This brings together all action items that are your responsibility
 - Batches
 - Interactions
 - Event Activities
 - Appeal Mailing Activities



Workspace Location

The screenshot shows the Blackbaud CRM interface. At the top, there is a search bar with 'wonder woman' and an 'Add new' button. Below this is a navigation bar with tabs: Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, Volunteers, Foundations, Fundraising, Treasury, and Web. The 'Fundraising' tab is highlighted and enclosed in a red box. A red arrow points from this box to the 'Workspaces' section in the main content area. The 'Workspaces' section is also enclosed in a red box and contains a link to 'Development workspace'. On the left side, there is a 'Shortcuts' sidebar with various links. At the bottom left, there is a BSA logo and the text 'Pre'.

Blackbaud CRM™ P

Constituents wonder woman

+ Add new

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

Fundraising

Fundraising

- Add purpose and designation
- Designation search
- Purpose search
- Campaign search
- Add a campaign
- Campaign hierarchy search
- Fundraising hierarchies

Donor challenges

- Donor challenge search
- Add a donor challenge
- Update donor challenges

Configuration

- Add a purpose
- Benefits catalog
- Fundraising purpose types
- Naming opportunity facilities
- VSE subcategories

Workspaces

- Development workspace

Naming opportunities

- Naming opportunity search
- Add a naming opportunity

Reports

- Campaign recognition credit
- Campaign summary
- Designation progress
- Decapitalization fund
- FEP benchmarking comparison
- Fundraising hierarchy progress

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
- APTG Default

Pre

Add to your home page

The image shows a CRM Home page on the left and a 'Customize home page' dialog box on the right. A red arrow points from the 'Customize' button on the Home page to the dialog. In the dialog, the 'Fundraising' functional area is selected, and the 'Development workspace' task is checked in the 'Show' column. The 'Development workspace' task is also highlighted in the Home page's Fundraising section.

Home Page Navigation:

- Home
- Customize
- Constituents
 - Constituent search
 - Organization search
- Prospects
 - Manage research lists
 - Add a giving prospect
- Revenue
 - Batch entry
- Fundraising
 - Add purpose and designation
 - Designation search
 - Development workspace

Customize home page Dialog:

☐ Use default layout
☒ Use this layout:

Functional area	Show	Task
Constituents	<input type="checkbox"/>	Campaign search
Marketing and Communications	<input type="checkbox"/>	Add a campaign
Revenue	<input type="checkbox"/>	Campaign hierarchy search
Events	<input type="checkbox"/>	Fundraising purpose types
Memberships	<input type="checkbox"/>	Add a purpose
Prospects	<input checked="" type="checkbox"/>	Development workspace
Volunteers	<input type="checkbox"/>	Naming opportunity search
Foundations	<input type="checkbox"/>	Add a naming opportunity
Fundraising	<input type="checkbox"/>	Naming opportunity facilities
Treasury	<input type="checkbox"/>	VSE subcategories
Web	<input type="checkbox"/>	Fundraising hierarchies
Analysis	<input type="checkbox"/>	Campaign recognition credit

Save Cancel

Add to your home page by clicking the customize button on your home page in CRM. Navigate to the Fundraising functional area and then select Development Workspace.



Development Workspace

My Assignments

Donors

Organization Calendar

KPIs

Smart Queries

My assignments (17)

+ Add

Filters

More

- + Mailing task
- + Event task
- + Interaction
- + Batch

Type:

Include completed

Apply

Reset

Type	Subject	Details	Date due	Date completed
No date due				
Batch	12	Model Scores and Ratings		
Batch	A0064502	Revenue		
Batch	CONS-REQ_20220418_3171	Constituent		
Past				
Interaction	aswdf	John D. Kuehn	10/8/2021	
Event task	Reserve Location	APTG Default Event	1/1/2022	
Event task	Configure cost	APTG Default Event	1/15/2022	
Interaction	test	John D. Kuehn	1/19/2022	
Event task	Develop Advertisements	APTG Default Event	2/13/2022	
Batch	CUB155	Constituent	3/2/2022	
Event task	Sent out invites to last year participants	APTG Default Event	3/13/2022	
Last 7 days				
Batch	A0064448	Revenue	4/15/2022	
Next 7 days				
Interaction	Recruitment Lunch for Major Gift Appeal	Wonder Woman	4/20/2022	
Interaction	Visit with John on CRM help	John D. Kuehn	4/20/2022	
Batch	A0064503	Revenue	4/20/2022	
Batch	A0064504	Revenue	4/20/2022	
Future				
Event task	Order event food	APTG Default Event	5/31/2022	
Event task	Pay Bill	APTG Default Event	6/20/2022	

My Assignment tab shows those items I am responsible for.

Items past the due date are coded in red and should be addressed.

The space also shows those items that should be worked on in the future.

Act on each item from here by dropping the chevron next to the item.

Add items here by using the add button.



Development Workspace

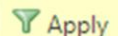
[My Assignments](#)[Donors](#)[Organization Calendar](#)[KPIs](#)[Smart Queries](#)**Donors (36)** **Filters****More**

Show giving:

Today

Greater than:

\$0.00



Apply



Reset

Date	Name	Amount	Designation	Transaction type
4/19/2022		\$25,000.00	55100001 Council Genera - Opera...	Payment
4/19/2022		\$15,000.00	55100001 Council Genera - Opera...	Payment
4/19/2022		\$700.00	54608031 Moby Dick Golf Classi - ...	Payment
4/19/2022		\$500.00	54600001 Council Genera - Opera...	Payment
4/19/2022		\$500.00	54600001 Council Genera - Opera...	Payment
4/19/2022		\$365.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		\$365.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		\$330.00	61500501 Friends of Scouting - O...	Payment
4/19/2022		\$200.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		\$120.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		\$100.00	54600353 Yawgoog Alumn - Endo...	Payment
4/19/2022		\$100.00	61500501 Friends of Scouting - O...	Payment
4/19/2022		\$84.16	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		\$50.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		\$50.00	54600353 Yawgoog Alumn - Endo...	Payment
4/19/2022		\$50.00	54600353 Yawgoog Alumn - Endo...	Payment
4/19/2022		\$50.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		\$50.00	61500501 Friends of Scouting - O...	Payment
4/19/2022		\$50.00	17201941 FRIENDS OF SCOUTING...	Payment
4/19/2022		\$50.00	54600353 Yawgoog Alumn - Endo...	Payment
4/19/2022		\$50.00	17201941 FRIENDS OF SCOUTING...	Payment

The Donor tab can display a list of donations that have been processed by date. This is a listing of items for 4.19 as of the time I took my screen shot.

36 items had been committed for the day.



Development Workspace

My Assignments Donors Organization Calendar KPIs Smart Queries

Calendar List

+ Add | Exp

Jump to date: 4/19/2022

Filters

Customize style

- ☒ Appeal mailings
- ☒ Events
- ☒ Calendar items
- ☒ Marketing efforts
- ☒ Plan activities

The Organizational Calendar will show your events, appeals and appeal mailing that are scheduled.

April 2022							Day	Week	Month	Year
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday				
27	28	29	30	31	01	02				
L177 Sporting Clays Event 2022										
L177 Friends of Scouting 2022										
L177 Bourbon & Bowties East Village 2022										
L449 Scouting Golf Classic 2022										
2022 Olympic District Awards Banquet										
L449 Council Pinewood Derby 2022										
2022 Corporate Pintwood Derby										
(L624) - 2022 GAC 100th Anniversary Gala Event										
L177 Bourbon & Bowties Ankeny 2022										
L177 STAR Scouting Trailblazer Award Event 2022										
L177 Woodland Trails Golf Event 2022										
L177 Square Knot Bourbon 2022										
L177 Bourbon & Bowties Pella 2022										
L177 Bourbon & Bowties Marshalltown 2022										
(587) Popcorn 2022										
(283) Values Event 2022						L138 2022 Scouting Clays				
(635) SC22 - 2022 Sporting Clays										
L550 VR22 Virtual Run										
(212) 2022 Oktoberfest										
				(212) 2022 Eagle Banquet	L138 2022 Lawn Social					
				L004 PATRON LUNCHEON 2022	L138 2022 George Meany					
				6:30 PM L051 Americanism/DES	L138 2022 Golf Classic					
					L138 2022 Distinguished Citizen					
03	04	05	06	07	08	09				
L177 Sporting Clays Event 2022										
L177 Friends of Scouting 2022										
L177 Bourbon & Bowties East Village 2022										
L449 Scouting Golf Classic 2022										
2022 Olympic District Awards Banquet										
L449 Council Pinewood Derby 2022										
2022 Corporate Pintwood Derby										



Development Workspace

[My Assignments](#) [Donors](#) [Organization Calendar](#) [KPIs](#) [Smart Queries](#)

KPIs (31) [More](#)

Name	Description	KPI
2022 FOS tracking		Total Revenue for a Designation
Apollo		Total Revenue for an Appeal
Arrowhead		Total Revenue for an Appeal
Arrowmoon		Total Revenue for an Appeal
Big Cypress		Total Revenue for an Appeal
Brahman		Total Revenue for an Appeal
Brazos		Total Revenue for an Appeal
BSAF 2018 Accepted Asks	shows 2018 accepted asks against...	Opportunities Amount by Selection
BSAF CY Accepted Asks	shows accepted asks against CY G...	Opportunities Amount by Selection
BSAF CY Committed revenue	committed revenue - pledges and...	Opportunities Amount
BSAF GFL Campaign Accepted...	returns sum of accepted opportu...	Total Revenue Record Money in Selection
Bucktail Council KPI		Total Revenue for a Designation
Campaign totals		Total Revenue Record Money in Selection
Copperhead		Total Revenue for an Appeal
David Crockett		Total Revenue for an Appeal
ETL minutes: Blackbaud OLAP	Tracks the total time in minutes to...	Data warehouse ETL refresh minutes
Flaming Arrow		Total Revenue for an Appeal
George Strake		Total Revenue for an Appeal

The KPI tab will show Key Performance indicators that have been created in the system. You should only see your KPI's if you have created any. Site security is enabled on this tab.





Development Workspace

[My Assignments](#)[Donors](#)[Organization Calendar](#)[KPIs](#)[Smart Queries](#)

Smart queries (252) More ▾

Name	Description	Type ▲	Category
Appeal			
L216 Sandy Smith		Appeal	
Pledge Card Sample	Pledge Card	Appeal	Prospect List
Constituent			
L030- LYBUNT	For donors that gave "Last Year B...	Constituent	Prospect List
L030- SYBUNT	Donors that gave "some Year But ...	Constituent	Prospect List
No Pledge 2017	Did not pledge in 2017	Constituent	
last year not this		Constituent	
Unworked Donors		Constituent	
Gave in the Past		Constituent	
L165 Donors of \$500 or more sinc...	La Salle Council Donors of \$500 o...	Constituent	Donor List
Last year Donors		Constituent	
L324 Unworked Donors		Constituent	
L578 Pledge Card Test		Constituent	
Mvd unworked donors		Constituent	
Copy of LYBUNT 2018		Constituent	
Copy of Unworked Donors		Constituent	
ALL 2017		Constituent	Revenue History
L553 LYBUNT 2019		Constituent	
Copy of SYBUNT 2017		Constituent	

If your council has created a smart query, they will show here. You will also see items that other councils have create but did not site secure. When creating queries or smart queries you should always site secure it to your council.





netbsa\jkuehn - Application User

Display name: John Kuehn BSA-BSA Is system administrator: Yes
Linked to constituent: John D. Kuehn Can customize home page: Yes
Site: Boy Scouts of America Is active: Yes

System Roles CMS Roles Permissions Business Process Ownership Tasks Features Code Tables Batch Types KPIs **Email Preferences**

Email alert settings Edit

Email address: john.kuehn@scouting.org

Email alerts (22) More ▾

Alert ▲	Enabled
Appeal mailing task assigned alert	
Batch assigned alert	
Event task assigned alert	
Marketing plan item task assigned alert	
Prospect assigned alert	
Prospect plan assigned alert (primary manager)	
Prospect plan assigned alert (secondary manager)	
Prospect research request assigned alert	
Prospect research request canceled/rejected alert	
Prospect research request completed alert	
Prospect research request constituent assigned alert	
Prospect research request constituent canceled/rejected alert	
Prospect research request constituent completed alert	
Prospect research request constituent created alert	
Prospect research request constituent edited alert	
Prospect research request constituent unassigned/pending alert	
Prospect research request created alert	
Prospect research request edited alert	
Prospect research request unassigned/pending alert	
Task reminder alert	
Workflow alert issued	
Workflow task assigned alert	

My site admin has turned on email alerts for me. You might have prospect plan assignments also activated. We do not have a single research team so those are not used. This is important because the system can send you email notification on different activities in CRM.



Email Alerts Examples from CRM

A Revenue **batch** has been assigned to you



Blackbaud OnDemand Automated Mailer <DoNotReply@BlackbaudOnDen
To John Kuehn

Retention Policy 3 Year Delete (3 years)

Expires 4/10/2025

Reply

Reply All

Forward



Mon 4/11/2022 3:51 PM

TeamViewer

+ Get more add-ins

Revenue Update **Batch** A0064373 has been assigned to you. Please take action at your earliest convenience.

Batch location:

<https://login.blackbaudOnDemand.com/Links.aspx?SITEINFOID=8ef4fd55-3e51-49b3-a7ef-3a8e2f08c0c9&DATABASEID=92746840-87e9-48b5-8eb4-51ca2e302bc1&TARGET=webui%2fwebshellpage.aspx%3fdatabasename%3d92746840-87e9-48b5-8eb4-51ca2e302bc1%23pageType%3dp%26pageId%3d9C134444-4C5F-4C24-B493-DE3C4155D539>

An event task has been assigned to you



Blackbaud OnDemand Automated Mailer <DoNotReply@BlackbaudOnDen
To John Kuehn

Retention Policy 3 Year Delete (3 years)

Expires 4/18/2025

Reply

Reply All

Forward



Tue 4/19/2022 8:34 AM

TeamViewer

+ Get more add-ins

Pay Bill task has been assigned to you for the APTG Default Event.

Notes: Pay final bill after received.

Date due: 6/20/2022

For more information about this task, go to: <https://login.blackbaudOnDemand.com/Links.aspx?SITEINFOID=8ef4fd55-3e51-49b3-a7ef-3a8e2f08c0c9&DATABASEID=92746840-87e9-48b5-8eb4-51ca2e302bc1&TARGET=webui%2fwebshellpage.aspx%3fdatabasename%3d92746840-87e9-48b5-8eb4-51ca2e302bc1%23pageType%3dp%26pageId%3d9988B807-97B2-434C-8BE1-BBEE6B944B2C%26recordId%3dCC1DEFC7-68FC-4257-A45C-B0A64FBB6253>.



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Scouting Gives CRM Setup

- Appeals
- Events



Appeal Requirements

- Appeal created in CRM
- Default designation on the appeal established
- Start and end date added to appeal
- Scouting Give's appeal will stop taking monies on CRM appeal end date



Created CRM Appeal

 **Appeal: (088) MGSAD 2022**

Description:	2022 Manatee Good Scout Award Dinner	Start date:	3/14/2022
Business unit:		End date:	5/31/2022
Category:	Special Events	Goal:	\$100,000.00
Report code:	2022	Status:	Active
Site:	Southwest Florida Council	Membership:	

Revenue Summary

Contributions


Payments

Balances

Revenue Details (Splits)

Matching Gift Claims

Designations

Designations (4)  Edit list of appeal designations  More ▾

Designation ▲	Default designation
08800251 Distinguished Citize - Operating	
08800251 Distinguished Citize - Operating \ 08...	
08800251 Distinguished Citize - Operating \ 08...	
08800251 Distinguished Citize - Operating \ 08...	

This appeal has the needed components on it to facilitate creation of a Scouting Gives appeal.

1. Start and End Dates
2. Defaulted Designation



Scouting Gives Add an Appeal Selections

NAME & DESCRIPTION >

TYPE & COLOR >

BLACKBAUD CRM INFORMATION

Blackbaud Appeal
(088) MGSAD 2022

BSAFR Group

Blackbaud Designation
08800251 Distinguished Citize - Operating

Giving Category

Structure

Once the appeal is added in CRM, you can proceed to Scouting Gives and create an appeal. When you get to Blackbaud CRM Information your appeal and designations will appear in the dropdowns to select. You can also search for a specific group, giving category and structure that will default in incoming CRM batches.



CRM Event Requirements

- Event end date in the future
- Default designation added to your event
- Appeal attached to your event
- Registration Options added to your event



CRM Event Setup From

Edit event

General

Name: Manatee Good Scout Award Dinner - L088

Description: L088 Manatee Good Scout Award

Category: Distinguished Citizens Dinner

Sites:

Site
Southwest Florida Council
*

☐ Event is an auction

☒ Event allows designations on fees

Details

Start date: 5/31/2022 Start time: hh:mm AM

End date: 5/31/2022 End time: hh:mm AM

Location information

Location: Manatee Performing Arts Center

Room/Unit: Capacity: 0

Contact:

Help Save Cancel

Create your event in CRM.
Provide:

- name
- description
- start and end date
- other pertinent information that you might have.



Attach Appeal and Default Designations

 **Manatee Good Scout Award Dinner - L088**

Event date: 5/31/2022

Site: Southwest Florida Council

Location: Manatee Performing Arts Center
502 3rd Avenue West
Bradenton, FL 34205

Room/Unit:

Contact:

Coordinator:

Category: Distinguished Citizens Dinner

Status:  Active

Lookup ID: 8-10002013

100%
50%
0%



Event expenses

Expense budget: \$0.00

Agreed expenses: \$0.00

Amount paid: \$0.00

0% of budget

Registrations

Tasks/Coordinators

Speakers

Expenses

Options

Invitations

Designations

Appeals

Appeals (1)  Edit appeals  More

Appeal	Start date	End date
(088) MGSAD 2022	3/14/2022	5/31/2022

 **Manatee Good Scout Award Dinner - L088**

Event date: 5/31/2022

Site: Southwest Florida Council

Location: Manatee Performing Arts Center
502 3rd Avenue West
Bradenton, FL 34205

Room/Unit:

Contact:

Coordinator:

Category: Distinguished Citizens Dinner

Status:  Active

Lookup ID: 8-10002013

100%
50%
0%



Event expenses

Expense budget: \$0.00

Agreed expenses: \$0.00

Amount paid: \$0.00

0% of budget

Registrations

Tasks/Coordinators

Speakers

Expenses

Options

Invitations

Designations


Appeals

Designations (4)  Edit  More

Designation	Default
08800251 Distinguished Citize - Operating	
08800251 Distinguished Citize - Operating \ 08800251-4231 Distinguished Citiz...	
08800251 Distinguished Citize - Operating \ 08800251-4202 Distinguished Citiz...	
08800251 Distinguished Citize - Operating \ 08800251-4250 Distinguished Citiz...	



Create Registration Options

 **Manatee Good Scout Award Dinner - L088**

Event date: 5/31/2022

Site: Southwest Florida Council


Location: Manatee Performing Arts Center
502 3rd Avenue West
Bradenton, FL 34205

Room/Unit:

Contact:


Coordinator:

Category: Distinguished Citizens Dinner

Status:  Active

Lookup ID: 8-10002013

100%
50%
0%



Event expenses


Expense budget: \$0.00

Agreed expenses: \$0.00

Amount paid: \$0.00

0% of budget

100%
50%
0%



Registrations

Tasks/Coordinators

Speakers

Expenses




Options







Invitations

Designations

Appeals

Docu...

Registration options (6)  Add  Copy from  More ▾

	Registration type	Name	Registration fee...	Receipt amount	Registration c...
	Sponsorship (Default)	Golden Eagle Sponsorship	\$7,500.00	\$6,300.00	16
	Sponsorship (Default)	Silver Eagle Sponsor	\$5,000.00	\$4,400.00	8
	Sponsorship (Default)	Guardian Sponsor	\$1,500.00	\$1,200.00	4
	Sponsorship (Default)	Patron Sponsor	\$500.00	\$350.00	2
	Sponsorship (Default)	Couple Seating	\$250.00	\$100.00	2
	Sponsorship (Default)	Individual Seating	\$125.00	\$50.00	1



Scouting Gives Event

- You have multiple screens to complete your event in Scouting gives
- Screen one – select your appeal and designations
- Screen two – does not apply to CRM
- Screen three – select your CRM registration options
- Event and registration options can be named differently in Scouting Gives versus how you have them in CRM.



Event Name
Manatee Good Scout Dinner

B **I** **U**  

Event to honor volunteers

Event Category
 Dinner

☐ Include meal options

Registrant will be able to select their meal preference. The following options will be provided: Food Allergy, Vegetarian, Vegan, Gluten-Free, Halal, Kosher, Lactose Intolerant, Other.

Event Location
Manatee Event Center

Room / Unit
Ball Room

Start Date
May 31, 2022

End Date
May 31, 2022

Start Time
5:00 pm

End Time
9:30 pm

Time Zone
US/Eastern

Blackbaud Appeal
(088) MGSAD 2022

Blackbaud Designation
08800251 Distinguished Citize - Operating

☐ Activate Goal Progress

Event Contact

Contact Name
john kuehn

Position Title
DFS

Phone Number
2147386025

Email
john.kuehn@scouting.org

Event Capacity

Event Capacity
250

Deactivate Event

☐ Deactivate event at full capacity

☒ Deactivate event on a certain day

☒ Day of Event ☐ Select Date

Select Date
Apr 20, 2022

The Blackbaud Appeal and the Blackbaud Designation fields are populated via the CRM / Scouting Gives sync. When creating your event, you select your appeal and designation attached to your event.




Event Documents (ONLY PDF FORMAT)

Reminder Council view is activated. You are viewing as Southwest Florida Council.

Create New Event



Payment Methods

	Credit Card	<input checked="" type="checkbox"/>
	e-Check	<input checked="" type="checkbox"/>
	Bill Me Later	<input type="checkbox"/>

Payment Settings

- ☒ Allow registrant to pay transaction fees
- ☐ Allow donation in addition to the registration fee
- ☐ Allow tribute during event registration or donation

Registration Types

[+ADD REGISTRATION TYPE](#)

CRM Type	Display Name	Price	
CRM Golden Eagle Sponsorship	Registration Name Golden Eagle Sponsorship	Price \$ 7,500.00	
CRM Individual Seating	Registration Name Individual	Price \$ 125.00	Remove Registration
CRM Silver Eagle Sponsor	Registration Name Silver Eagle Sponsor	Price \$ 5,000.00	Remove Registration
CRM Guardian Sponsor	Registration Name Guardian Sponsor	Price \$ 1,500.00	Remove Registration
			Remove Registration

On the payment screen you can select your CRM registration types from your event. To select more than one you use the Add Registration Type button to add more selections. Once you have your CRM Types added you can adjust the name of the types that display on Scouting Gives.

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	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





Council (400) - Appeal Progress Results

[Contribution Summary](#)
[Payment Summary](#)
[Write-off & Balance Summary](#)
[Contributions by Region](#)
[Regions by Region](#)
[All Councils by Region](#)
[Appeal Progress Results](#)

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

Business unit:

Category: Annual Giving (Friends of Scouting)

Report code: 2020

Site: Council

Start date: 10/31/2019

End date: 12/31/2020

Goal: \$0.00

Status: Active

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)



By Giving Category or by Structure

Revenue SummaryContributionsPaymentsBalancesRevenue Details (Splits)Matching Gift ClaimsDesignationsMailingsDocumentation

Contributions: Summary - posted 2/18/2020More

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

Expand allCollapse 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

Business unit:

Category: Annual Giving (Friends of Scouting)

Report code: 2021

Site: [REDACTED] Council

Start date: 1/1/2021

End date: 12/31/2021

Goal: \$200,000.00

Status: Active

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
		12/31/2021	Payment	Donation	\$17.50	\$17.50	Check Posted	12/31/2021
		12/28/2021	Payment	Donation	\$150.00	\$150.00	Check Posted	12/28/2021
		12/15/2021	Payment	Donation	\$61.20	\$61.20	Check Posted	12/15/2021
		12/10/2021	Payment	Donation	\$34.94	\$34.94	Check Posted	12/10/2021
		12/6/2021	Payment	Donation	\$17.50	\$17.50	Check Posted	12/6/2021
		11/9/2021	Payment	Donation	\$111.69	\$111.69	Check Posted	11/9/2021
		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

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:



Next Forum

May 18, 2022

10:00 am & 2:00 pm CT





Resources

Council Business
Practices

Council Fiscal
Management and
Training

Journey to
Excellence

Council Funding and
Finance

Financial Planning

Funding The
Council

Council
Administration

Local Council
Financial Audits

Back Office

[Council Office Procedures](#)

[Council Stewardship Policies](#)

[FASB Accounting Changes and the BSA](#) – new for 2018

[Fiscal Management Procedures for Stewardship](#)

[Fiscal Policies And Procedures for BSA Units](#) – Revised November 2019

[Interpreting Financial Statements](#)

[Life Insurance Imputed Calculation](#)

[Local Council Accounting Manual](#)

[Local Council Financial Audit Tools](#)

[New York Conflict of Interest Policy](#)—Updated March 2014

[New York Conflict of Interest Policy](#)—March 2014

[Records Retention Policy](#)– Updated January 2019

Presentation: [Fringe Benefits: Employer-Provided Vehicles and Group-Term Life Insurance](#) –
Uploaded April 2014

[Record Camp Card Transactions—PeopleSoft](#)

[Record Product Sales](#) in General Ledger

[Time Study Forms](#)

[Blackbaud CRM User Forum](#)

[PeopleSoft Support](#)

- [Accounts Payable](#)
- [Asset Management](#)
- [Audit Adjustments](#)

www.scouting.org/financeimpact



Member Care Self-Service

- <http://membercare.scouting.org>



<http://membercare.scouting.org>



Online Support Center

Boy Scouts of America National Service Center

Need a resolution fast? Then, check out our knowledge base. We are hard at work updating knowledge and documentation.

Can't find what you are looking for in the knowledge base? Open a ticket using the service catalog below.

If you have feedback on how we can improve, please let us know by clicking on the link below.

[Click here](#)

What do you need help with?



[Search help](#)

Council Support

National Support

Scout Shops/NDC Support



New Council User or Transfer
Account & Access



Council Account Termination
Account & Access

Choose

“Council Support”

Then on right side:

“General Assistance”



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Summary – Description – Council

Summary

Blackbaud - need new giving category

A brief description of your problem.

Description - For quick resolutions please provide as much detail as possible.

Please provide me a list of giving categories

Council

006 Black Warrior Council



NTL/HAB employees select 999 and NDC/Scout Shop employees select 000



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User Name – Application - Attachments

Council #

006 Black Warrior Council

NTL/HAB employees select 999 and NDC/Scout Shop employees select 000

User Name

 Don Day

User ID *(optional)*


example: Jodavis

Application

Blackbaud CRM

Example: Blackbaud, Peoplesoft, Membership, etc.

Attachment *(optional)*

 Drag and drop files, paste screenshots, or
browse

Create Cancel



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Questions & Answers



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