
CRM User Forum

May 18, 2022

Cornelia Ellis – John Kuehn

Valerie Eaton – Don Day



Prepared. For Life.™

Objectives

- Blackbaud Merchant Services
 - New username and password needed
- Blackbaud CRM Hosting Migration – items changing
- Batch entry – deleting batches – don't do it
- Using the Constituent “Interaction” Data List
- Preparing for the IRS 990
- Using Appeal Record Data Lists for quick updates
- Questions – Answers



Changes to Blackbaud Merchant Services



Prepared. For Life.™

BBMS Platform Upgrade

- Blackbaud Merchant Service Platform Upgrade
- Improves security
- Provides single sign-on if you use multiple Blackbaud products
- Moves BBMS to the cloud



BBMS Platform Upgrade

- Steps
 - BSA users will need to follow prompts to link account to new platform
 - You will also create a blackbaud.com User ID and Password replacing your current Username and Password for BBMS
 - You will go to blackbaud.com to sign in after you complete this process



Proceed to sign into your BBMS Account

Blackbaud Merchant Services Sign in

Access the Blackbaud Merchant Services web portal.

Enter your Blackbaud Merchant Services username and password. These credentials are different than your blackbaud.com login. Contact your organization's Blackbaud Merchant Services administrator, [chat with Support](#), or click the **Forgot password?** link if you don't know your login information.

Take advantage of helpful resources.

To learn more about Blackbaud Merchant Services, visit our [website](#). We provide how-to documentation, weekly webinars, and free product Support to ensure that you're getting the most out of our end-to-end payment processing solution.

Minimize disruptions in monthly giving.

Losing revenue due to outdated credit card data? Minimize disruptions in monthly giving and save your staff time with [Credit Card Updater](#). This value-added service is available to Blackbaud Merchant Services clients using Altru®, Blackbaud CRM™, Luminate Online™, and Raiser's Edge™. [Subscribe](#).

Sign in

Username

bbmsoldcolony

Password

Sign in

Forgot Password?

Chat with Support

Sign up

Fill in your current username and password provided by National when your account was created or what it is currently.



Blackbaud Merchant Services

i This page is only available until 8/1/2022. For compliance, you must link your account before this date.

We've moved to Blackbaud ID (BBID) for the Blackbaud Merchant Services Web Portal. To simplify your login process and comply with the latest software security standards, you will no longer enter your Blackbaud Merchant Services Web Portal credentials after you link your account. You'll access the Blackbaud Merchant Services Web Portal and your other Blackbaud solutions with a single login.

On this page, you can link your Blackbaud ID to your existing account, sign in using Blackbaud ID if you've already linked your account, or use the classic sign-in.



Link account

Link your Blackbaud ID to your Blackbaud Merchant Services account.



Blackbaud ID sign in

Already linked your account?
Sign in using your Blackbaud ID.



Classic sign in

Not ready to link your account? Sign in using your Blackbaud Merchant Services account.

This screen appears. We may have told you to use "Classic sign in" at the bottom. You now need to link your account to a blackbaud.com username and password. Click the square that says, "Link account"



Prepared. For Life.™

Blackbaud Merchant Services

! Blackbaud Merchant Services is moving to Blackbaud ID

With Blackbaud ID, you can access Blackbaud Merchant Services and your other Blackbaud solutions with a single login.

Select **Sign in with Blackbaud ID** to link your Blackbaud Merchant Services account to your existing Blackbaud ID. If you don't have a Blackbaud ID, select **Sign up with Blackbaud ID**. For more information, see [Blackbaud ID](#).

Sign in with Blackbaud ID

or

Sign up with Blackbaud ID

[Use classic sign-in instead](#)

This screen will appear. Select "Sign up with Blackbaud ID". This will prompt you to create a Blackbaud ID so that you can then link your BBMS account to it.



Prepared. For Life.™

Sign up

Email address

jkuehn@bsamail.org

Password

.....



Must contain at least 12 characters and 3 of the following:

- ✓ - Capital letter
- ✓ - Lowercase letter
- ✓ - Number
- ✓ - Special character (!, #, %, etc.)

Confirm password

.....



First name

John

Last name

Kuehn

By continuing below, you are agreeing to the Blackbaud, Inc. [Terms of Use](#) and [Privacy Policy](#).

Sign up

Create your Blackbaud ID by filling in the blanks.

Use your scouting.org email address.

NOTE: The person creating the slide had a previous Blackbaud ID created so for demo purpose a different BSA email address is being used.

Create your password and enter your first and last name.



Prepared. For Life.™

Confirm your Blackbaud ID



Blackbaud Authentication Services <noreply@blackbaud.com>

To John Kuehn

[Reply](#) [Reply All](#) [Forward](#) [...](#)

Tue 5/17/2022 11:34 AM

Retention Policy 3 Year Delete (3 years)

Expires 5/16/2025

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

TeamViewer

+ Get more add-ins

blackbaud®

Hi John,

To finish setting up your account, please confirm your email address within 24 hours.

[Confirm](#)

[Need help?](#)

You will receive an email to verify your email and activate your Blackbaud.com account. Find the email and click the confirm button. It may go to your other email or your spam folder. My confirmation email went to my Other folder.



Prepared. For Life.™

Link your Blackbaud Merchant Service Account to your Blackbaud ID

To link your Blackbaud Merchant Services account to your Blackbaud ID, sign in using your existing Blackbaud Merchant Services credentials.

This is the last time you will use these credentials to sign in. After you link your account, you will sign in to Blackbaud Merchant Services using your Blackbaud ID.

Username *

bbmsoldcolony

Password *

.....

⚠ Invalid credentials

Sign in

[Forgot password?](#)

After you click the confirm button it will take you to a page asking you to log into your BBMS account. Use your current username and password to do this. This is not your Blackbaud ID. This will be the last time you use these credentials to enter your account.



Prepared. For Life.™

Confirm account link

You are about to link these two accounts:

Blackbaud ID

John Kuehn
jkuehn@bsamail.org



Blackbaud Merchant Services

bbmsoldcolony
Boy Scouts - Old Colony Council

Confirm

Cancel

Once you type in your current username and password for BBMS, this screen will ask you if you want to link your BBMS account with your Blackbaud ID. You will click the **“Confirm”** button.



Prepared. For Life.™

Boy Scouts - Old Colony Council

Welcome

The new **Blackbaud Merchant Services** Web Portal improves your day-to-day experience, streamlines processes, and applies the latest security standards. From the portal, you can:

- Manage multiple merchant accounts under one login.
- Easily add, view, and manage transactions.
- Review disputed transactions — including both chargebacks and direct debit returns — from a consolidated location.
- Add and manage users and customize their level of access with preset roles.
- Update your organization's **Blackbaud Merchant Services** account info, such as contact details, disbursement information, email settings, and more.

In addition to the features available today, soon you'll be able to:

- Add and manage account configurations
- Order and register Payment Terminal and MobilePay Terminal devices
- Download a transaction report PDF

Note: In the meantime, you can still access these features by logging in to the [classic web portal](#) and choosing 'Classic sign in.'

Stay tuned for more enhancements and what's coming soon in the next generation Blackbaud Merchant Services Web Portal.

Link additional accounts to Blackbaud ID

The new **Blackbaud Merchant Services** Web Portal uses Blackbaud ID for easier access with more security. You link all your individual accounts to your Blackbaud ID. If you used multiple accounts in the classic portal, you'll link each account to your Blackbaud ID separately. Select **Link another account** to associate each account with your Blackbaud ID.

Note: You can only link one account at a time.

[Link another account](#)

Updates

Your disbursements are currently being withheld

5/10/2022 -- Important End of Support Notification

1/1/2022 -- Disbursement Schedule - 2022

You will now be logged in. You will no longer see Your old username of bbms(councilname). You will see your initials. When you log out you will log back in with your Blackbaud User ID. The site will look very similar. Notifications are now under control panel. You will now sign in at blackbaud.com



Prepared. For Life.™

Sign in

to continue to Blackbaud.com

Email address

jkuehn@bsamail.org

Password

Forgot password?

☐

Remember my email

Sign in

To sign into your BBMS account you will need to go to www.Blackbaud.com and click the “Sign in” icon in the upper right corner. The “Sign in” screen will appear. Use your newly created Blackbaud ID and click the blue sign in button.



Blackbaud CRM is moving



Prepared. For Life.™

Blackbaud CRM is moving

- Expect very few changes in CRM
- Moving to a new hosting site to save \$\$
- Expect no change in speed or service
- Items which you may need to review:
 - A new URL for signing into CRM will be provided
 - Links to “O-Data” feeds will change and will need to be refreshed
 - CRM will be shut down over a weekend in June



Batch Entry – Never DELETE Committed Batches



Prepared. For Life.™

Never DELETE a Committed Batch

- Data in the batch is how it is formatted, so if deleted it is lost forever & cannot be retrieved
- Removes important batch details about how transactions were entered into CRM and placed on donor record
- Deleting a batch does not delete committed transactions
- Revenue changes should be done through a Revenue Update Batch only



Constituent Interactions



Prepared. For Life.™

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



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 navigation bar with tabs for Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, Volunteers, Foundations, Fundraising, and Treasury. Below this, a search bar shows 'wonder woman' and an 'Add new' button. On the left, a 'Shortcuts' sidebar lists various functions like 'Query', 'John D. Kuehn', and 'GL account system import'. The main content area is titled 'Constituents' and features a 'More tasks' section with a red box 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.



Prepared. For Life.™

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.



Prepared. For Life.™

BSA National Council (000) - Interaction List

Interaction list for your council (10,000) 2 | 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		
000	NETBSA\anmoran	Anna Marie Moran	Ray T. Capp	stepping back from Scouting	Mailing	2/9/2022	2/9/2022		
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		

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.



Prepared. For Life.™

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 shows the interaction created earlier for my recruitment meeting with Wonder Woman.



Prepared. For Life.™

Annual IRS Form 990



Prepared. For Life.™

Fundraising reports for IRS 990

- Fundraising supports the 990 with Schedule B Part 1
- This is a listing of all donor that made a \$5,000 or greater contribution to your council during 2021.
- The process to attain this list is like running contribution statements.
- The 990 User guide is under Reports in CRM User Guides = IRS 990 Schedule B
- Download – read – follow process



To Obtain Your List

- Proceed to Administration / Exports
 - The export is under the site LC Global and is used by all councils.
- Click the Chevron and click Start Export.
- Once the Export completes, download to Excel.
- Follow directions and mail merge it to the word template for format



Exports

Exports (5) + Add Filters More

Sites: Selected sites Apply Reset

Search Columns Save list Open list Clear all filters

Last run...	Name	Query / Selection
00:39:00	LXXX Current Member/Relative Non-...	LXXX Current Member/Relative Non-Donors
00:02:41	Contribution Statement Data Single ...	Contribution Statement Data Single >= \$250 or Benefited
00:02:23	Contribution Statement Data Cumula...	Contribution Statement Data Cumulative >= \$250 or Benefite
00:02:28	Contribution Statement Data Cumula...	Contribution Statement Data Cumulative > \$0
00:02:31	990 Schedule B Part 1 Data	990 Schedule B Part 1 - New

Start export

Set format options Edit Delete Assign p

Click the chevron and click the start button. It runs based on your security. The screen below will populate, once completed just select your download type and save the data file to your computer for use with merging with the template. (You can do something else and grab your file later.) It might migrate to the history tab if someone else runs the process after you.

There is no need to edit this process.
Just click START EXPORT.

990 Schedule B Part 1 Data - Export

Name: 990 Schedule B Part 1 Data

Query name\Export definition: 990 Sch

Description: DO NOT EDIT THIS PROCESS - JUST RUN IT

Export type: Ad-hoc

Recent Status History Job Schedules

Recent status

Download output

Status:
Status message:
Started by:
Started: 5/17/2022 3:17:50 PM
Ended: 5/17/2022 3:20:21 PM
Duration: 2 minutes 31 seconds

Download to CSV
Download to XLSX
Multiple files

Server name: D2PBBISEC108V
Total records processed: 7
Number of exceptions: 0
Records successfully processed: 7



Prepared. For Life.™

Save your data to your desktop

BUSINESS	Site ID	ID	Last	First	Address	City	State	ZIP	Amount
	1 444					Trotwood	OH	45426-243	#####
	2 444					Dayton	OH	45458-958	#####
	3 444					Dayton	OH	45405-395	#####
	4 444								#####
	5 444					Dayton	OH	45414-264	#####
	6 444					Mason	OH	45040-755	#####
	7 444					Dayton	OH	45414	#####

Download and save the merge template. You will need to update the header with your council's name and EIN. Change the Date.

Name of Organization		Employer identification number	
< Council Name>		<Employer ID Number>	
Part I Contributor (2019)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
IF {MERGESEQ} = 0 "" "" {MERGESEQ} {IF {MERGEFIELD First} = "" "{MERGEFIELD Last}" "{MERGEFIELD First} {MERGEFIELD Last}" {MERGEFIELD Address} {MERGEFIELD City} {MERGEFIELD State} {MERGEFIELD ZIP}			
		{MERGEFIELD Amount \# "\$#,###,###0.00}	Person



Prepared. For Life.™

Name of Organization	Employer identification number
< The Best BSA Council >	< 98-9389982734789>

Part I Contributors (2019)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$ 7,000.00	Person
2		\$ 5,000.00	Person
3		\$ 12,960.00	Person
4		\$ 7,150.22	Person
5		\$ 5,000.00	Person
6		\$ 20,793.49	Person
7		\$ 10,000.00	Person

Conduct a normal table merge from your saved Excel data sheet. The directions highlight the process. Once merged – save and print for your Scout Executive to use.



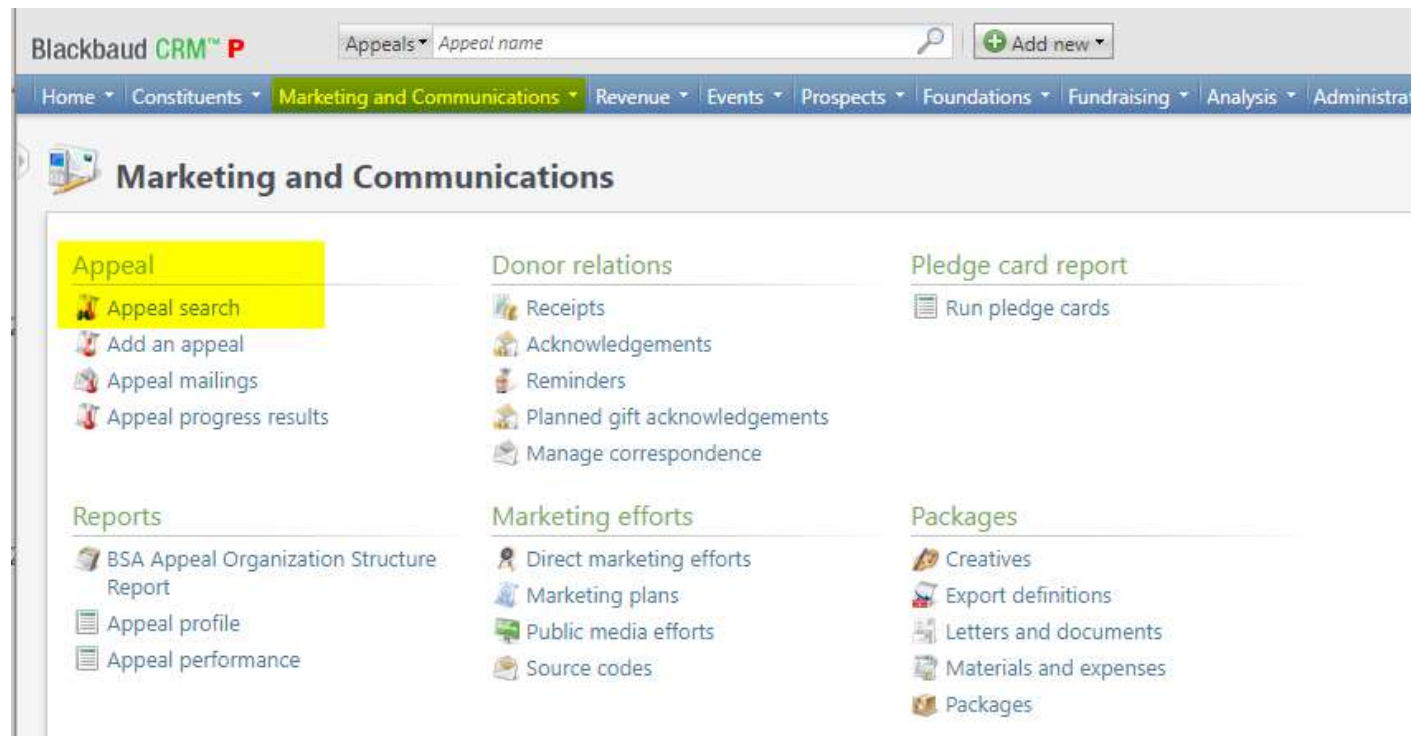
Prepared. For Life.™

Tracking Your Appeal Progress



Prepared. For Life.™

Navigating to the Appeal Record



Prepared. For Life.™

Appeal Search

Appeal Search

Name: Category:

Business unit: Report code:

☐ Include inactive Event:

Site:

Results (1 record found)

Name	Description	Category	Is active	Site
<u>S20 - Friends Of Scouting</u>	2020 Friends of Sco...	Annual Giving (Frien...	Yes	



Prepared. For Life.™

Multiple tabs available

Blackbaud CRM™ P Appeals 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 ▾



Prepared. For Life.™

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 SummaryContributionsPaymentsBalancesRevenue Details (Splits)Matching Gift ClaimsDesignationsMailingsDocumentationMismatch: Appeals?Solicitor Credits by GroupPrior 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)



Prepared. For Life.™

By Giving Category or by Structure

Revenue Summary

Contributions

Payments

Balances

Revenue Details (Splits)

Matching Gift Claims

Designations

Mailings

Documentation

1

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)



Prepared. For Life.™


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) 2 More ▼								
BSA Structure	Giving Category	Inactive?	Group Name	Group Public Name	Solicitor Cre...			
<div> <div> <div></div> <div>Hoover</div> </div> </div>								
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			
<div> <div> <div></div> <div>Council</div> </div> </div>								
<div> <div> <div></div> <div>Inali</div> </div> </div>								
<div> <div> <div></div> <div>Kittan</div> </div> </div>								
<div> <div> <div></div> <div>Mesquakie</div> </div> </div>								
<div> <div> <div></div> <div>Saukenuk</div> </div> </div>								




Prepared. For Life.™

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: Equal to:

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

Verified	Constituent	Date	Transaction	Application	Split Amount	Total Amount	Check	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



Prepared. For Life.™

Add to Shortcuts

The screenshot displays the Blackbaud CRM P interface. At the top, there is a search bar for 'Appeals' with a search icon and an 'Add new' button. Below this is a navigation bar with tabs for Home, Constituents, Marketing and Communications, Revenue, Events, Prospects, Foundations, Fundraising, Analysis, and Administration. On the left side, there is a sidebar with a 'Shortcuts' section. A red circle with the number '1' highlights the 'Add this page to shortcuts' button in the Shortcuts section. The main content area shows the details for an 'Appeal: (111) S20 - 2020 Friends of Scouting'. The details include: Description: 2020 Friends of Scouting, Start date: 10/31/2019, Business unit: (blank), End date: 12/31/2020, Category: Annual Giving (Friends of Scouting), Goal: \$0.00, Report code: 2020, Status: Active, Site: (blank) Council, and Membership: (blank). Below the details, there are tabs for Revenue Summary, Contributions, Payments, Balances, Revenue Details (Splits), Matching Gift Claims, and Designations. The 'Revenue Details (Splits)' tab is selected, showing 'Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donation'. At the bottom of this section, there are input fields for 'Constituent equal to:', 'Transaction equal to:', and 'Application not equal to:'.

Blackbaud CRM™ P

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: (111) 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: (blank) 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:



Prepared. For Life.™



Council Support

[Council Management Support](#)[Contact Council Management Support](#)[Council Assessments](#)[Council Board 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 Business Solutions](#)[Home](#) > [Council Support](#) > [Council Funding and Finance](#) > [Council Administration](#)

Council Administration

The sections below provide tools for Council staff to assist them in the proper management of their Council. This is designed for staff use but may provide detailed information to volunteers interested in the particular topics.

[Accountable Plan Template](#)[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 April 2022[– – BSA Units PayPal and Venmo Reporting Update](#)[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 Resources](#)[BSA Fiscals Forum](#)[PeopleSoft Support](#)

- [Accounts Payable](#)

www.scouting.org/financeimpact



Council Support

[Council Management Support](#)

[Contact Council Management Support](#)

[Council Assessments](#)

[Council Board Resources](#)

[Council Business Practices](#)

[Council Fiscal Management and Training](#)

[Journey to Excellence](#)

[Council Funding and Finance](#)

[Home](#) > [Council Support](#) > [Council Funding and Finance](#) > [Council Administration](#) > CRM Resources

CRM Resources

CRM Process Videos

CRM (Blackbaud) User Forum Presentations

[Report Cookbook \(for OLTP\) BSA Appeal Progress & Appeal Constituent Reports](#)

2022

January 2022 User Forum – [Slide Deck](#) – [recording](#)

February 2022 User Forum – [Slide Deck](#) – [recording](#)

March 2022 User Forum – [Slide Deck](#) – [recording](#)

April 2022 User Forum – [Slide Deck](#) – [recording](#)

– Creating Constituent Interactions * Using the Constituent Interaction Data List * Using Development Workspace

* Scouting Gives Setup

2021




Member Care Self-Service

- <http://membercare.scouting.org>
- Creating an incident directly in JIRA



Prepared. For Life.™

<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”



Prepared. For Life.™

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



Prepared. For Life.™

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



Prepared. For Life.™

Next Forum

June 15, 2022
10:00 am & 2:00 pm CT



Prepared. For Life.™

Questions & Answers



Prepared. For Life.™
