

CRM User Forum

June 15, 2022

Cornelia Ellis – John Kuehn

Valerie Eaton – Don Day



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Objectives

- Blackbaud Merchant Services
 - New username and password needed
- Blackbaud CRM Hosting Migration – items changing
- Automating Credit Card processes
- Creating an “unworked constituent” listing
- Using the “Volunteer Award” data list
- Questions – Answers



Changes to Blackbaud Merchant Services



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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
 - If not done by 8/1/22, your current passwords may stop working



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Losing revenue due to outdated credit card data?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”



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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.



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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.



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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

[i](#) 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.



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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.



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.



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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



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



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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



Automating Your Credit Card Process



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Credit Card Processing Change

- Automates Credit Card Processing
- Processes Credit Cards first then sends the batch to you to edit and commit
- Editing the batch entails:
 - Entering Post date
 - Confirming inbound channel
 - Removing lines that do not have an authorization code because of failure of the Credit Card
- Follow up with donors of the cards that did not work to fix the pledge or recurrence.



What Changes?

- Eliminates the Generate Payment Processes
- Creates new Credit Card processes
- Ensures that a donor's recurrence or installment gets completed on the date that they request
- Ensures that the payment is completed even when an employee is on vacation
- Piloted by Chief Seattle, Erie Shores, Del Mar-Va



New Process

- Three Credit Card processes
- Two run by themselves
- Third is used as normal or eliminated if you put your single CC transaction in as a pledge and let the system take the payment when runs.

✓ L609 Credit Card Processing Batch

Use for Batch Processing

✓ L609 Credit Card Processing Pledges

Finds payments, takes credit cards, creates Pledge Payment batch

✓ L609 Credit Card Processing Recurring

Finds Payments, takes credit cards, creates recurring batch to commit



Interested in Change

- Create Jira Ticket with Member Care
- Have it assigned to John Kuehn
- You will be contacted if questions arise
- Generate payment process will be turned off when new Credit Card Processors are created.



Creating an Unworked Constituent Listing



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Creating an “Unworked Constituent” list

 **Revenue**

More tasks

-  [Apel progress results](#)
-  [Gift in Kind List](#)
-  [Recurring Gift List](#)
-  [Revenue Data Hygiene](#)

Reports

-  [BSA Appeal Constituent Export \(OLTP\)](#)
-  [BSA Appeal Constituent Report \(OLTP\)](#)
-  [BSA Appeal Progress Export \(OLTP\)](#)
-  [BSA Appeal Progress Report \(OLTP\)](#)

Transactions

-  [Transaction search](#)
-  [Batch entry](#)
-  [Batch search](#)
-  [Add a pledge](#)



Include

BSA Appeal Constituent Export (OLTP)

Site: Abraham Lincoln Council

Report Code: 2022

Annual Appeal(s):

- (144) EN22 - 2022 Endowment Campaign
- (144) R22 - 2022 Gifts-in-Kind
- (144) S22 - 2022 Friends of Scouting

Multi-year Appeal(s):

- (144) CB22-2022 Camp Bunn Cabin

☐ Only include multi-year appeal revenue for: 2022

Include

Exclude

Breakdown

Filter

☐ Include All

☒ Include Prior Year 1 Giving

☒ Include Current Year Constituent Appeal/Response (Worked) Info

☐ Include Barcode Numbers

☒ Include Prior Year 2 Giving

☒ Include Current Year \$0 Pledge (Worked) Info

☒ Include Prior Year 3 Giving

☐ Include Donor Status Stats



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Exclude

BSA Appeal Constituent Export (OLTP)

Site: Abraham Lincoln Council

Report Code: 2022

Annual Appeal(s):

- (144) EN22 - 2022 Endowment Campaign
- (144) R22 - 2022 Gifts-in-Kind
- (144) S22 - 2022 Friends of Scouting

Multi-year Appeal(s):

- (144) CB22-2022 Camp Bunn Cabin

☐ Only include multi-year appeal revenue for: 2022

Include

Exclude

Breakdown

Filter

- ☐ Exclude All
- ☒ Exclude Current Year Donors
- ☐ Exclude Current Year Non-Donors
- ☒ Exclude Current Year Worked Constituents (via an Appeal Response)
- ☒ Exclude Current Year Worked Constituents (via a \$0 Pledge)
- ☐ Exclude Current Year Solicitees
- ☐ Exclude Current Year Non-Solicitees
- ☐ Exclude Current Year Non-Donor, Non-Solicitees
- ☒ Exclude Constituents Marked as Do Not Solicit
- ☒ Exclude Constituents Marked as Deceased
- ☒ Exclude Constituents Marked as Inactive



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Breakdown

BSA Appeal Constituent Export (OLTP)

Site: Abraham Lincoln Council

Report Code: 2022

Annual Appeal(s):

- (144) EN22 - 2022 Endowment Campaign
- (144) R22 - 2022 Gifts-in-Kind
- (144) S22 - 2022 Friends of Scouting

Multi-year Appeal(s):

(144) CB22-2022 Camp Bunn Cabin

☐ Only include multi-year appeal revenue for: 2022

Include

Exclude

Breakdown

Filter

☐ Breakdown by All

☐ Break Down by BSA Structure

☐ Break Down by Giving Category

☐ Break Down by Solicitor

☐ Break Down by Revenue BSAFR Group

☐ Anchor to Latest Revenue or Constituent Appeal

☐ Sort by Name (Last/First) Only



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Filter

BSA Appeal Constituent Export (OLTP)

Site: Abraham Lincoln Council

Report Code: 2022

Annual Appeal(s):

- (144) EN22 - 2022 Endowment Campaign ☐
- (144) R22 - 2022 Gifts-in-Kind ☐
- (144) S22 - 2022 Friends of Scouting ☒

Multi-year Appeal(s):

(144) CB22-2022 Camp Bunn Cabin ☐

☐ Only include multi-year appeal revenue for: 2022

Include

Exclude

Breakdown

Filter

As of Date:

Filter on BSA Structure:

Current Year Minimum Giving:

Filter on Giving Category:

Prior Year(s) Minimum Giving:

Filter on Solicitor:

☒ Prior Year Minimum is Cumulative



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Saving the Output

Include Exclude Breakdown **Filter**

As of Date: Filter on BSA Structure:

Current Year Minimum Giving: Filter on Giving Category:

Prior Year(s) Minimum Giving: Filter on Solicitor:

☒ Prior Year Minimum is Cumulative


1 of 4 Find | Next

- XML file with report data
- CSV (comma delimited)
- PDF
- MHTML (web archive)
- Excel
- TIFF file
- Word

alResponseDate	CYConstituentAppealResponse	CYAppealZ	YContribution	CYAmountPaid	CYWriteOff	CYBalance	CYSolicitorCredit	PY1AppealName	PY1Contribution	PY1AmountPaid	PY1WriteOff	PY1Balance	ReportAppearances
		False	\$0.00	\$0.00	\$0.00	\$0.00		(144) S21 - 2021 Friends of Scouting	\$50.00	\$50.00	\$0.00	\$0.00	1
		False	\$0.00	\$0.00	\$0.00	\$0.00		(144) S21 - 2021 Friends of Scouting	\$384.54	\$384.54	\$0.00	\$0.00	1



Marking Constituents with Appeal



Marketing and Communications

Planning and other tasks

- Planning calendar
- Constituent density map

Appeal

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

Reports

- Appeal Progress by Category
- BSA Appeal Organization Structure Report
- Appeal profile
- Appeal performance

Pledge card report

- Run pledge cards

Pledge Card Report

Main

Sort Options

Production Options

☒ Mark constituent with appeal

☐ Reprint for already marked records

☐ Print unmarked records

☐ Include Barcode in report

☐ Include To the Parents of

Prior X gift amounts (0-3):

Card Comment:

Stub Comment:



Using “Volunteer Award” data list



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Volunteer Award List

- Found under Constituents / Recognition
- This is a Data List
- Site secured via your council site
- Constituents show on the list because you have updated the award in ScoutNet / My Scouting Tools



How to Run

- Click Link
- Search and select your council
- Select which volunteer award you are seeing a list for
- Click "Apply"
- List may be downloaded and contains primary address, phone and email.




Data List Tabs


- List has three tabs.
- Each tab explains where the item can be found on the constituent record in CRM.
- Selective items sync to CRM for ScoutNet / My Scouting Tools

Heart of America Council (307) - Volunteer Awards List

Volunteer Award List Constituent Award Training Awards

Volunteer Award List - These can be found on the awards tab under the "Volunteer Tab" on the constituent record.  More ▾

Volunteer Award equal to: ▾ Deceased equal to: ▾ Inactive equal to: ▾

 Select a filter and click "Apply" or click here to load the list













Sample Data

Heart of America Council (307) - Volunteer Awards List

Volunteer Award List (40)  More ▾

Volunteer Award equal to: NESA Outstanding Eagle Deceased equal to: Inactive equal to: Apply Reset

	Council #	Council Name	Name	Lookup ID	First name	Middle name	Last Name	Suffix	Address	City	State	Zip	Email Type	Email Address	Phone Type
	307	Heart of America Co...	derrin						583 Monta Vista Dr						Home
	307	Heart of America Co...	Albert						3169 Provence Ln ...						
	307	Heart of America Co...	Richard						12411 Hollingswo...				Home Email Address	randrewcameron@icloud.com	Home
	307	Heart of America Co...	Thomas												
	307	Heart of America Co...	James												
	307	Heart of America Co...	Gus						1700 S. 8th St.						
	307	Heart of America Co...	Richard						12463 S Kenton St				Home Email Address	brick.huffman@scouting.org	Home
	307	Heart of America Co...	Zachary						208 Marinas Ave						Home
	307	Heart of America Co...	Casey						2117 Drury Ln				Home Email Address	casey.halsey@jedunn.com	Home
	307	Heart of America Co...	John						1803 SW Meyer Bl...						



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Tracking Your Appeal Progress



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Navigating to the Appeal Record

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 an '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 areas:

- Appeal** (highlighted in yellow):
 - 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



Appeal Search

Appeal Search

Name: S20 Category: Search
Business unit: Report code: Clear
☐ Include inactive Event: Site:

Results (1 record found) [+ Add](#)

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

[Help](#) [Select](#) [Cancel](#)



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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

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
	[REDACTED]	12/31/2021	Payment	Donation	\$17.50	\$17.50	Check Posted	12/31/2021
	[REDACTED]	12/28/2021	Payment	Donation	\$150.00	\$150.00	Check Posted	12/28/2021
	[REDACTED]	12/15/2021	Payment	Donation	\$61.20	\$61.20	Check Posted	12/15/2021
	[REDACTED]	12/10/2021	Payment	Donation	\$34.94	\$34.94	Check Posted	12/10/2021
	[REDACTED]	12/6/2021	Payment	Donation	\$17.50	\$17.50	Check Posted	12/6/2021
	[REDACTED]	11/9/2021	Payment	Donation	\$111.69	\$111.69	Check Posted	11/9/2021
	[REDACTED]	11/2/2021	Payment	Donation	\$43.67	\$43.67	Check Posted	11/2/2021

Download to CSV

Download to XLSX

Autosize all columns

Restore grid defaults



Add to Shortcuts

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: (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:





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



<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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Next Forum

July 20, 2022

10:00 am & 2:00 pm CT



Questions & Answers



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