

CRM User Forum

August 17, 2022

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Objectives

- Optimizing batch data entry
- Understanding the “Pledges Receivable Aging” report
- Creating the “Summary of Appeals” report
- New Data Lists available in CRM
 - Organization Donor List
 - Household donors
 - Revenue data hygiene
 - Appeal data list updates
- Move to Azure – update on issues experienced
- Questions – Answers



Optimizing Batch entry process



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Batch Data Entry Tricks

- Customize your batch before putting data into it
- * or % when typing in appeal with short name
- Lead typing in drop down fields such as BSA structure, Giving Category and Inbound Channel

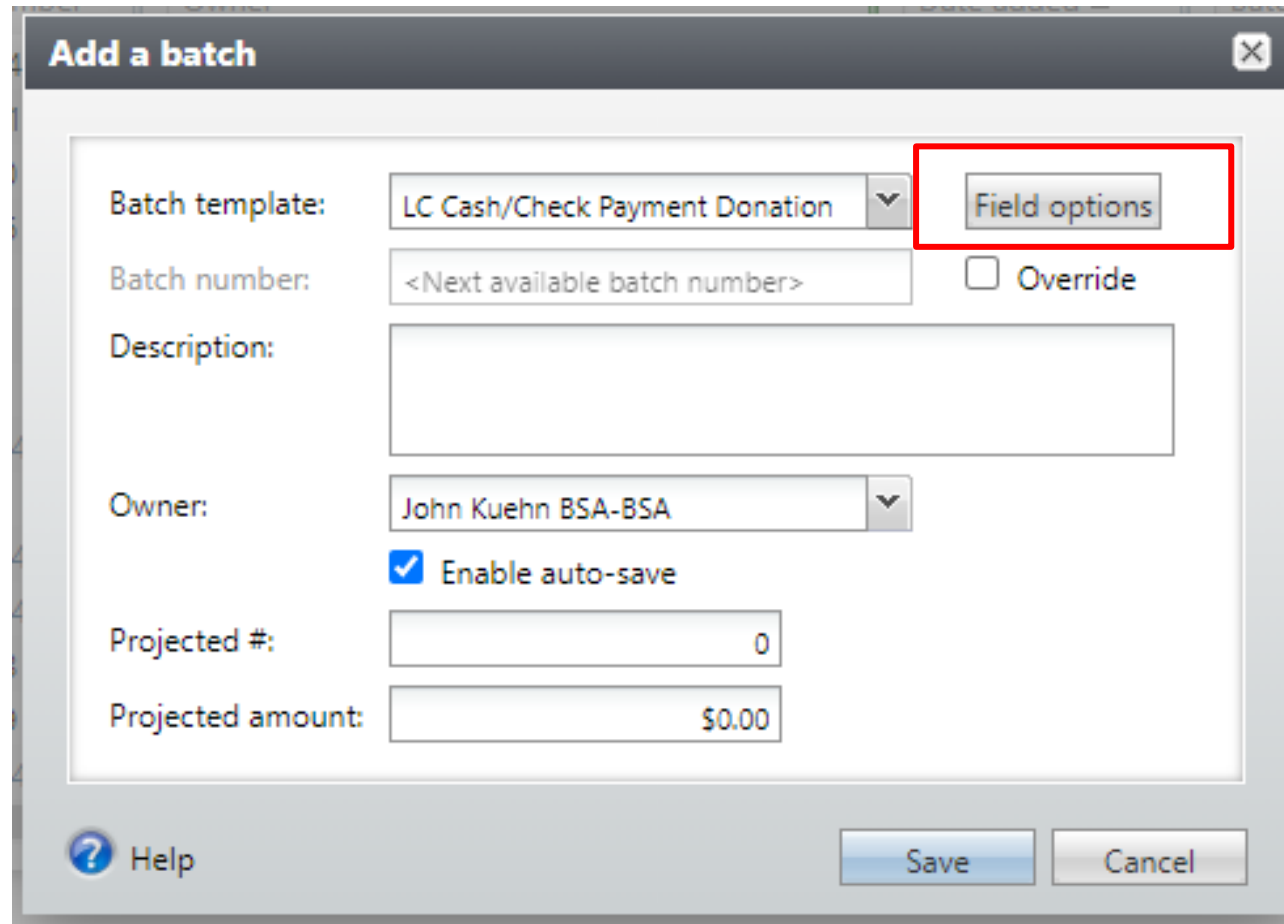


Customize your batch

- Use this process if you have many lines in the batch with the same information
- On each line, the donor and the amount will be the only difference
- Customize information will repeat on each line
 - Create a batch
 - Before saving click "fields options"
 - Define what each field will be then save



Create a batch and click the Field Options box



The screenshot shows a software dialog box titled "Add a batch". It contains several input fields and a button. The "Batch template" dropdown is set to "LC Cash/Check Payment Donation". The "Batch number" field shows "<Next available batch number>". The "Description" field is empty. The "Owner" dropdown is set to "John Kuehn BSA-BSA". The "Enable auto-save" checkbox is checked. The "Projected #" field shows "0" and the "Projected amount" field shows "\$0.00". The "Field options" button is highlighted with a red rectangle. At the bottom, there are "Help", "Save", and "Cancel" buttons.

Batch template:	LC Cash/Check Payment Donation	Field options
Batch number:	<Next available batch number>	<input type="checkbox"/> Override
Description:		
Owner:	John Kuehn BSA-BSA	
	<input checked="" type="checkbox"/> Enable auto-save	
Projected #:	0	
Projected amount:	\$0.00	



Sample Fields Customized

To customize click the field you want to make the same and then move to the bottom and fill in the blank with what it should be. Then move to the next field and repeat the process until you have completed the fields you want to make the same on each line.

Selected fields	Default value	Hidden	Required	Lock...
Application	Donation			🔒
Payment method	Check			
Check number				
Appeal	(307) A22 - 2022 Ann...		✓	🔒
Opportunity		✓		🔒
Designation				🔒
Inbound channel	Friends of Scouting		✓	

Field defaults

Appeal: (307) A22 - 2022 Annual Giving Can

☐ Hidden
☒ Required

Field defaults
Group ID: Troop 1910 BT Keller - 662 (266857)
<input type="checkbox"/> Hidden <input checked="" type="checkbox"/> Required



Fields highlighted are customized.

	Constituent	Lookup ID	Group ID	Amount	Receipt...	Date	GL post date	Deposit Reference	Revenue type
1			Troop 1910 BT Keller - 662 (266857)	\$0.00	\$0.00	8/17/2022	8/17/2022	Deposit 8.16 FR	Payment
*									

Appeal	Designation	Inbound channel	Revenue category	Giving Category	BSA Structure
(307) A22 - 2022 Annual Giving Campaign	30708011 Invest in Charactor-Counci -...	Friends of Scouting	Unrestricted by donor	Family	Mustang



* or % with appeal short name verses appeal search

These slides demonstrate a wild card symbol before the appeal short name. After placing it in the field and then clicking tab, the appeal with autofill without search if short name is unique.

The screenshots show a software interface with a 'Main' tab and a 'Revenue' sub-tab. The interface includes a 'Properties' section with fields for 'Owner', 'Projected No.', 'Current No.', 'Projected total', and 'Current total'. Below this is a table with columns: 'Other method', 'Check number', 'Appeal', and 'Designation'. The 'Appeal' column contains the text '%S22' in the left screenshot and 'S22 - 2022 Friends' in the right screenshot. The 'Designation' column contains the text 'Council Gener...' in the right screenshot. The 'Check number' column contains the value '5698' in both screenshots. The 'Other method' column is empty in both screenshots. The 'Revenue category' column is visible in the right screenshot and contains the text 'Unrestricted by donor'.

Other method	Check number	Appeal	Designation
	5698	%S22	

Other method	Check number	Appeal	Designation	Inbound channel	Revenue category
	5698	S22 - 2022 Friends	Council Gener...	Friends of Scouting	Unrestricted by donor



If appeal short name not unique it will return choices

Note that three of the appeal in this council use "S22" in the short name. Two use the same short name.

Recommendation: is that you make all short name unique.

The screenshot shows a 'Revenue Appeal Search' window with the following search criteria:

- Name: %S22
- Business unit: [dropdown]
- Category: [dropdown]
- Report code: [dropdown]
- Event: [text input]
- Site: [dropdown]
- ☐ Limit to appeals sent to constituent
- ☐ Include inactive

Buttons: Search, Clear

Results (3 records found)

Name	Description	Category	Is active	Site	Event
PS22 - 2022...	2022 Project Sales	Project Sales (Maj...	Yes	[redacted]	[redacted]
PS22 - 2022...	2022 Traveling Day Camp	Project Sales (Maj...	Yes	[redacted]	[redacted]
S22 - 2022 ...	2022 Friends of Scouting	Annual Giving (Fri...	Yes	[redacted]	[redacted]

Buttons: Select, Cancel



Lead type with the letter the word begins with.

- In this example the user typed a "C" and all the possible entries that begin with "C" show up for a quick pick.
- You can also type the full word.

Category	Giving Category	BSA Structure
	<input type="text" value="C"/> Camp Barstow Sponsor	
	<div><div>Camp Barstow Sponsor</div><div>Camp Coker Sponsor</div><div>Capital Campaign</div><div>Community</div><div>Council Leadership</div></div>	



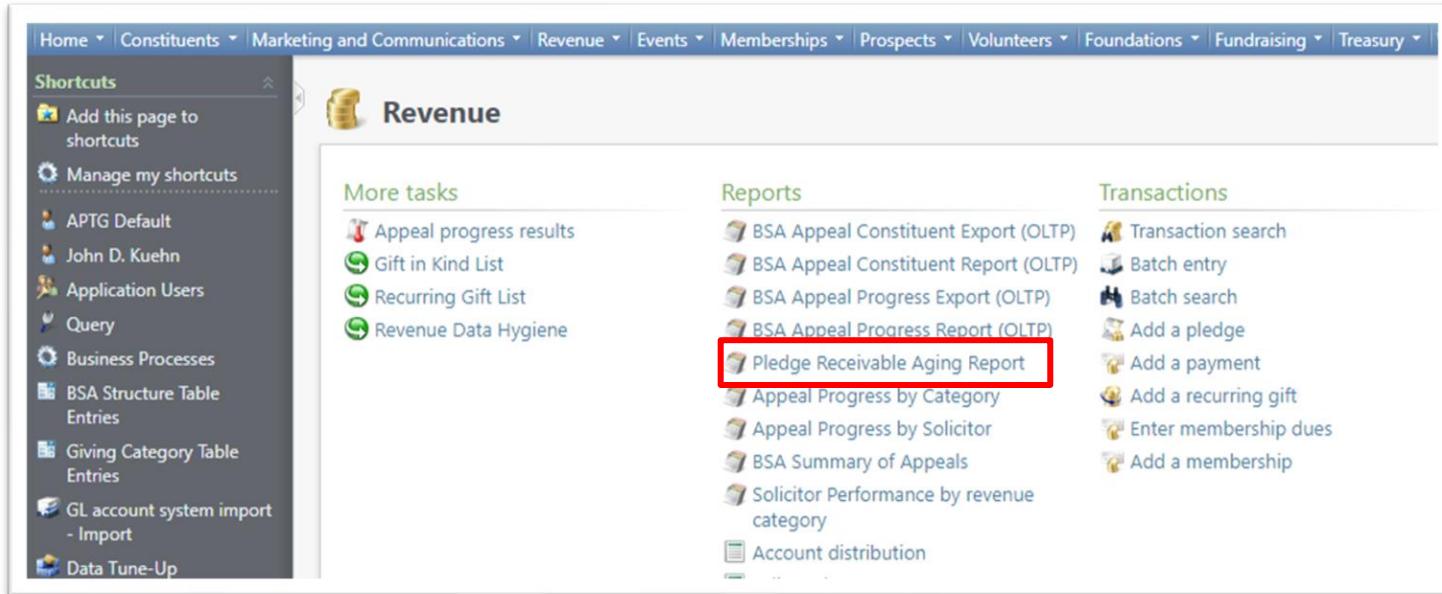
Pledges Receivable Aging Report



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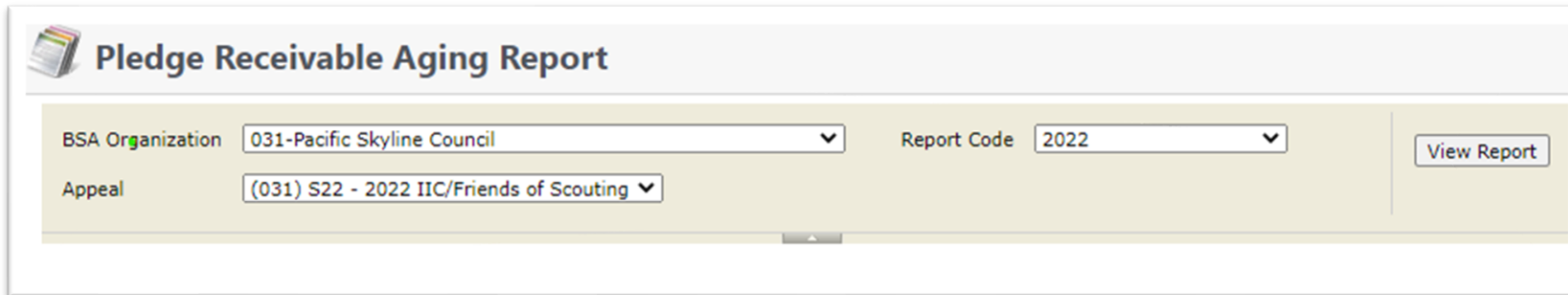
Pledge Receivable Aging Report

- Found under Revenue/Reports/Pledge Receivable Aging Report



How to Run

- Select your council
- Select the Report Code (Appeal Year)
- Select which appeal you would like the report for
- Click View Report



The screenshot shows a web form titled "Pledge Receivable Aging Report". It contains three dropdown menus: "BSA Organization" with the selected value "031-Pacific Skyline Council", "Report Code" with the selected value "2022", and "Appeal" with the selected value "(031) S22 - 2022 IIC/Friends of Scouting". A "View Report" button is located to the right of the dropdowns.

Pledge Receivable Aging Report	
BSA Organization	031-Pacific Skyline Council
Report Code	2022
Appeal	(031) S22 - 2022 IIC/Friends of Scouting
View Report	



Report Contains

- Report splits by Structure & Giving Category
- List donors who are past due
- Contains data from the previous days data entry

Run Date:	8/16/2022	Pledge Receivable Aging Report				Page 7 of 7	
Run Time:	20:08:25	031-Pacific Skyline Council					
Appeal:	(031) S22 - 2022 IIC/Friends of Scouting						
BSA Structure:	Pacific Skyline Council						
Giving Category:	Executive Board						
Constituent Name	Pledge Date	Pledge Amount	Pledge Balance	Current Due	-----Past Due-----		
					30+	60+	90+
	17-Feb-22	2,000.00	2,000.00	0.00	0.00	0.00	1,000.00
	08-Feb-22	2,000.00	2,000.00	2,000.00	0.00	0.00	0.00
	16-Feb-22	2,000.00	1,050.00	0.00	0.00	0.00	1,050.00
	17-Feb-22	2,000.00	1,000.00	0.00	0.00	0.00	1,000.00



Running Reminder



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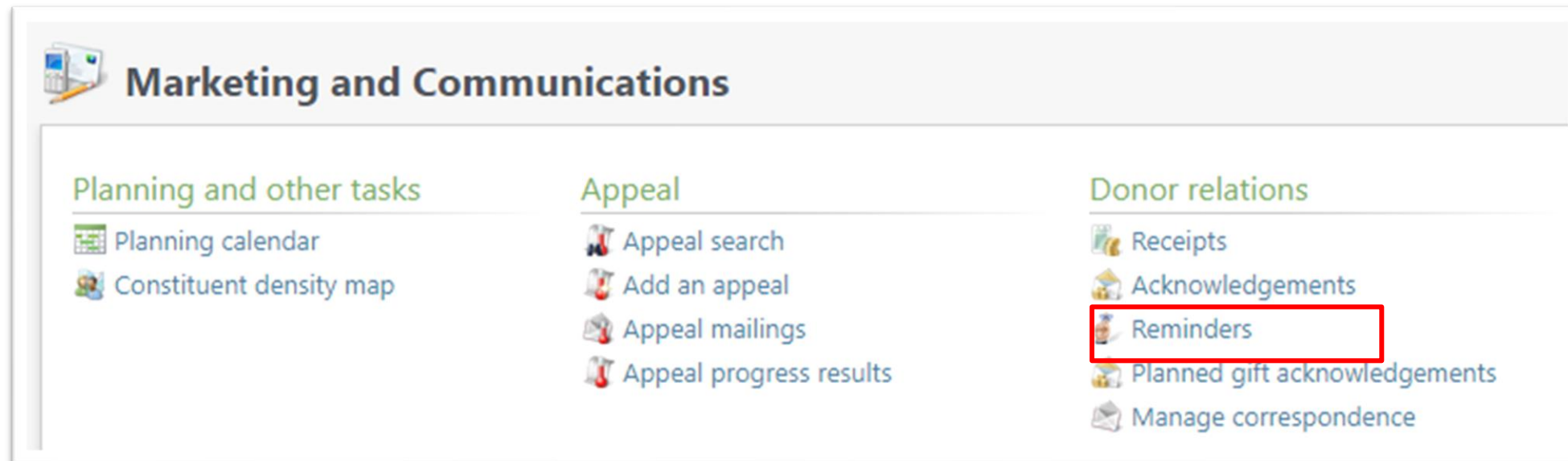
Reminders

- Where to find your reminder routines
- Determine your business process cycle (Month is currently August)
- How to run them
- Cash is King – Unpaid pledges do not pay the bills



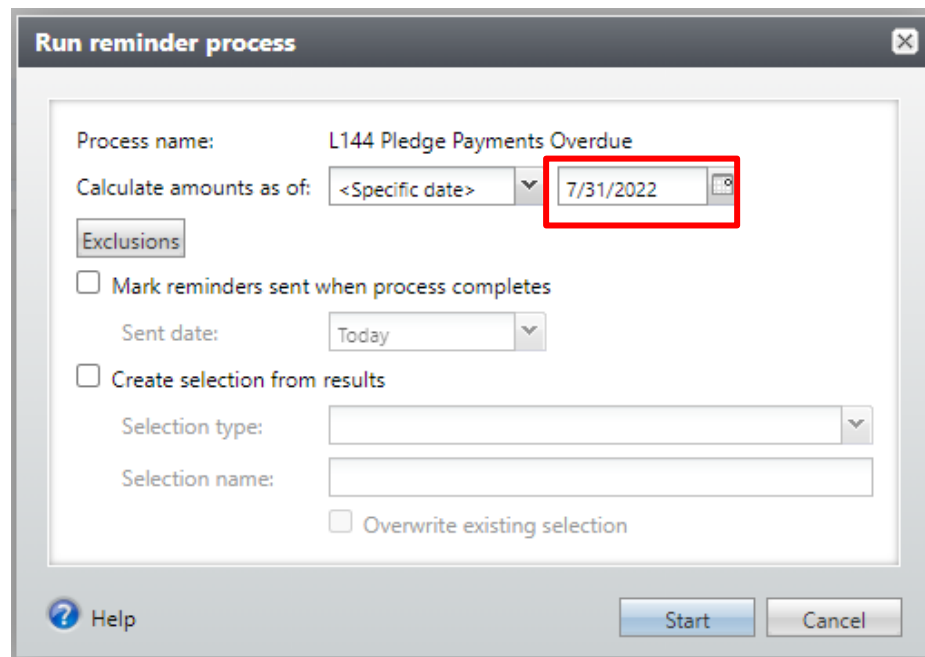
Reminder Routines Locations

- Marketing and Communications / Donor Relations / Reminders



Determine your business Cycle

- Will you run bills at the end of the month or beginning of the month?
- Pledge Payments Overdue should be run every month
 - When you start the process place the last day of the last month in the calculate amounts as of box.
 - Process looks for Pledges with open installment last month or older.



Run reminder process

Process name: L144 Pledge Payments Overdue

Calculate amounts as of: <Specific date> 7/31/2022

Exclusions

☐ Mark reminders sent when process completes

Sent date: Today

☐ Create selection from results

Selection type:

Selection name:

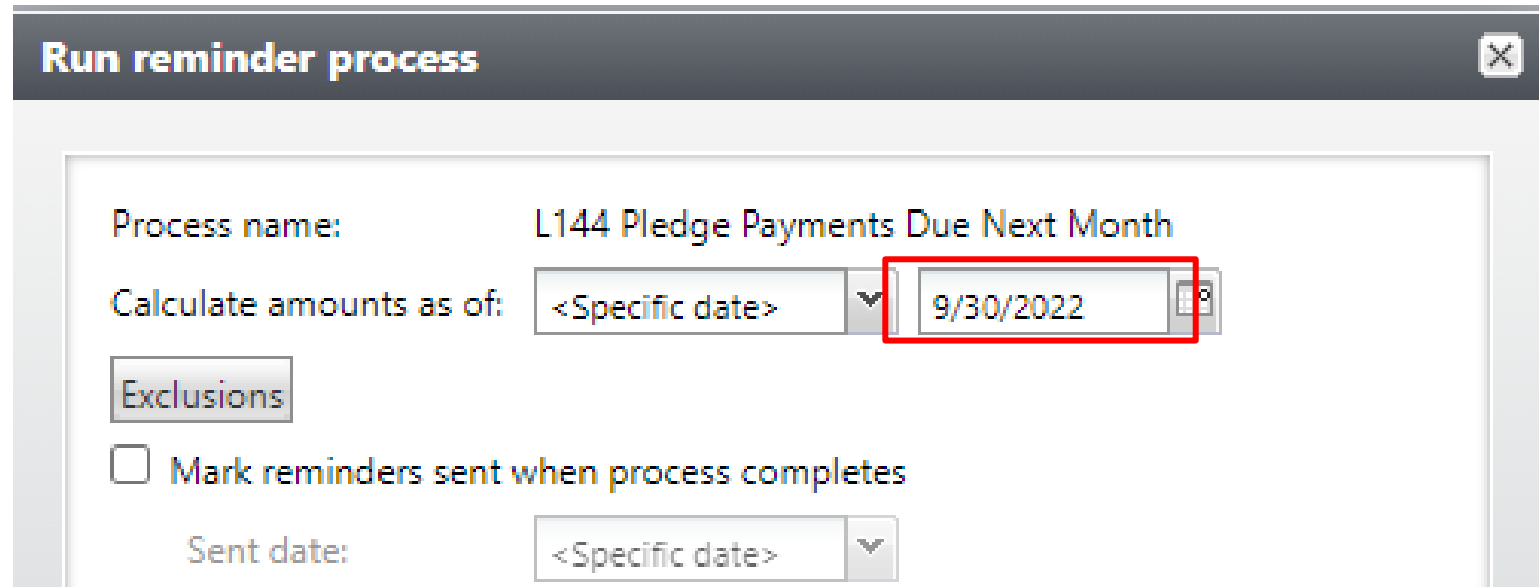
☐ Overwrite existing selection

Help Start Cancel



Bills at end of the month = Next month

- Click the start button and place the last day of next month in the Calculate amount as of Box.
- Process look for open installments next months.
- The installment could have any day of week on them



Run reminder process [X]

Process name: L144 Pledge Payments Due Next Month

Calculate amounts as of: <Specific date> 9/30/2022

Exclusions

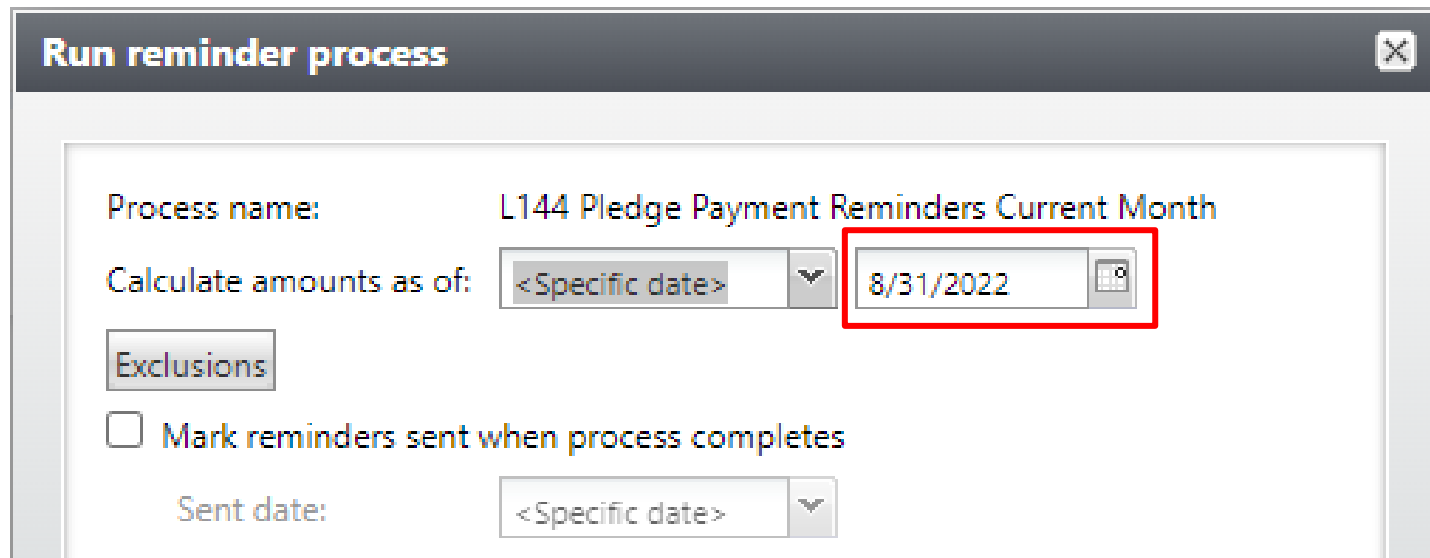
☐ Mark reminders sent when process completes

Sent date: <Specific date>



Bills at the beginning of the Month = Current

- You would run these during the first few days of the new month
- Calculate values as of the last day of the month
- Each installment is on a different day of the month



Run reminder process

Process name: L144 Pledge Payment Reminders Current Month

Calculate amounts as of: <Specific date> 8/31/2022

Exclusions

☐ Mark reminders sent when process completes

Sent date: <Specific date>



Process to mail reminder

- Once you click start it will take you to your reminder home page.
- You will click the merge letter button to generate a word document of reminders.
- If they look fine – print & mail - "Mark sent"
- If there is an issue, "Clear results" - fix template or data in CRM then click start again.
- If wrong data is coming into the reminder adjust selection with correct appeal years.



Reminder Home Page Results

The screenshot displays the 'Recent status' tab of a web application. At the top, there are three tabs: 'Recent status' (selected), 'History', and 'Job schedules'. Below the tabs is a toolbar with several icons and labels: 'Merge letter' (with a red underline), 'Merge label', 'Delete' (with a red X), 'Mark sent' (with a green checkmark and a red underline), 'Clear results' (with a red X), 'Download output' (with a dropdown arrow), and a small green square icon. The main content area shows the following details:

Status:	Completed		
Status message:	Completed		
Started by:	netbsa\chrcall	Server name:	AZSCUSBBCRMPD1
Started:	8/16/2022 3:10:59 PM	Total records processed:	17
Ended:	8/16/2022 3:11:51 PM	Number of exceptions:	0
Duration:	52 seconds	Records successfully processed:	17

Merge Letter to send reminders to the printer

Mark Sent after sending reminders to the printer

If reminders do not look right and you need to make changes, Clear Results and start over.




Summary of Appeals Report



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BSA Summary of Appeals

 **BSA Summary of Appeals Report**

1 As Of Date: 8/17/2022 Site: 3 [Council Name] Council

2 Appeal Year: 2022 Appeal Selection: 4

- All ☒
- C22- Capital Gifts ☒
- E22 - Endowment Gifts ☒
- G22 - Golf 2022 ☒
- Q22- Operating Gifts 2022 ☒

5  View report

11 of 0 Find | Next



New Data Lists Available in CRM

Organization Donor List

Household Donors

Revenue Data Hygiene

Appeal Data List Updates



Organization Donor List

Constituents>Organization Donor List

Blackbaud CRM™ P

Constituents

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

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Information Library
- Shell Design: Refresh SQL Snapshots
- Business Processes
- Global Changes
- ETL refresh status
- Ad-hoc Query: LXXX CY Worked and Already Given Prospects for Specific Appeal (Selection)
- Ad-hoc Query: LVVV Batch Error 'In Account System "Local Council", the account...does not exist'
- Pseudo-Posting: Edit Selection First

Constituents

More tasks

- Interactions Data List
- Organization Donor List

Recognition

- Recognition Programs List
- Volunteer Award List

Reports

- BSA Duplicate Constituent Rep
- BSA Eagles Listbuilder

Site Search

Site ID:

Name:

Short name:

Acronym:

Site type:

Results (1 record found)

Site ID	Name	Short name	Acronym	Site type	Site path
				Local Council	Boy Scouts of A...



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Organization Donor List

Constituents>Organization Donor List

- Organizational Donor List

Organization Donor List (5,811)

More

Giving Years greater than or equal to:

Download to CSV

Download to XLSX

Autosize all columns

Restore grid defaults

e Giving greater than or equal to:

\$0.00

Apply

Reset

< 1 2 3 4 5 ... 59 >

	Giving Years	Lifetime Givi...	Lat	Organization	Org Address	Org City	Org State	Org Zip	Phones\Number	Contact ID	Contact Title	Contact FN	Contact MN	Contact LN	Contact Address
✓	0	\$2,362.00													
✓	0	\$200.00													
✓	0	\$600.00													
✓	0	\$2,700.00													
✓	0	\$500.00													
✓	0	\$75.00													
✓	0	\$200.00													
✓	0	\$10.00													
✓	0	\$5,000.00													
✓	0	\$25.00													
✓	0	\$25.00													
✓	0	\$750.00													
✓	0	\$450.00													
✓	0	\$300.00													
✓	0	\$200.00													
✓	0	\$400.00													
✓	0	\$2,000.00													
✓	0	\$150.00													
✓	0	\$100.00													



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Organization Donor List

Constituents>Organization Donor List

- Organizational Donor List															
Organization Donor List (1,703) 8 More▼															
Giving Years greater than or equal to: <input type="text" value="3"/> Lifetime Giving greater than or equal to: <input type="text" value="\$0.00"/> Apply Reset															
< 1 2 3 4 5 ... 18 >															
Contact Email ...	Contact Email ▼	Latest Donat...	First Gift Date	First Gift Am...	Largest Gift Date	Largest Gift	2022 Revenue	2021 Revenue	2020 Revenue	2019 Revenue	2018 Revenue	2017 Revenue	2016 Revenue	2014 Revenue	2013 Revenue
Home Email A...		\$2,500.00	8/27/1999	\$1,000.00	5/9/2011	\$5,000.00	\$0.00	\$2,000.00	\$2,075.00	\$0.00	\$3,500.00	\$3,500.00	\$5,000.00	\$2,500.00	\$2,500.00
Business Email ...		\$1,000.00	8/2/2018	\$1,200.00	8/2/2018	\$1,200.00	\$0.00	\$1,000.00	\$1,000.00	\$1,000.00	\$2,200.00	\$0.00	\$0.00	\$0.00	\$0.00
Business Email ...		\$500.00	5/8/2015	\$300.00	6/13/2017	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	\$500.00	\$0.00	\$0.00
Business Email ...		\$2,500.00	3/5/2009	\$1,000.00	2/11/2020	\$2,500.00	\$0.00	\$0.00	\$2,500.00	\$0.00	\$0.00	\$1,250.00	\$1,000.00	\$1,250.00	\$0.00
Business Email ...		\$1,000.00	5/26/2004	\$1,000.00	2/11/2008	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Business Email ...		\$1,250.00	8/28/2018	\$2,500.00	9/13/2019	\$2,500.00	\$1,250.00	\$0.00	\$0.00	\$2,500.00	\$2,500.00	\$0.00	\$0.00	\$0.00	\$0.00
Business Email ...		\$1,000.00	3/2/2018	\$1,000.00	7/7/2021	\$1,000.00	\$0.00	\$1,000.00	\$1,000.00	\$1,000.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00
		\$5,000.00	5/13/2003	\$2,000.00	3/4/2009	\$25,000.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,000.00
Home Email A...		\$1,000.00	2/28/2002	\$13,527.00	2/28/2002	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00	\$0.00



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Household Donors

Marketing and Communications>Appeal Search, select Appeal>Household Donors

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Constituents

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

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Information Library
- Shell Design: Refresh
- SQL Snapshots
- Business Processes
- Global Changes
- ETL refresh status
- Ad-hoc Query: LXXX CY Worked and Already Given Prospects for Specific Appeal (Selection)
- Ad-hoc Query: LVVV Batch Error "In Account System "Local Council", the account...does not exist"

Marketing and Communications

Planning and other tasks Appeal Donor relations

Planning calendar Appeal search Receipts

Appeal Search

Name: Category:

Business unit: Report code:

☐ Include inactive Event:

Site:

Results (1 record found)


Name	Description	Category	Is active	Site
S22 - 2022 FOS Campaign	2022 Friends of Sco...	Annual Giving (Frien...	Yes	



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Household Donors

Marketing and Communicatons>Appeal Search, select Appeal>Household Donors

 **Appeal:**

Description: 2022 Friends of Scouting

Start date: 1/1/2022

Business unit:

End date: 12/31/2022

Category: Annual Giving (Friends of Scouting)

Goal: \$0.00

Report code: 2022

Status: Active

Site:

Membership:

Revenue Summary

Contributions

Payments

Balances

Revenue Details (Splits)

Revenue Details (Write-offs)

Household Donors

Matching Gift Claims

Designations


Mailings

Documentation

Mismatch: Appeals?

Solicitor Credits

Household Donors (126)


 More


Household equal to:





Member Name equal to:

Gave to 2022 FOS? equal to:

Response to 2022 FOS? equal to:

 Apply

 Reset

Household	Member Lookup ID	Member Name	Member Age	Member Gender	Gave to 2022 FOS?	Response to 2022 FOS?
 Adam A	8-	Adam D. A	44	Male	Yes	Yes
 Adam A	8-	Benjamin A. A	14	Male	No	No
 Alan K	8-	Alan K	60	Male	Yes	Yes
 Alan K	8-	Paul K	17	Male	No	No



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Revenue Data Hygiene

Revenue>Revenue Data Hygiene, search for Council Site

The screenshot displays the Blackbaud CRM™ P interface. At the top, there is a search bar with the text "Constituents" and "Name or lookup ID", and an "Add new" button. Below this is a navigation menu with tabs for Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, and Volunteers. The "Revenue" tab is selected and highlighted with a red underline. On the left side, there is a "Shortcuts" panel with links to "Add this page to shortcuts", "Manage my shortcuts", "Information Library", "Shell Design: Refresh", "SQL Snapshots", "Business Processes", and "Global Changes". The main content area is titled "Revenue" and contains two sections: "More tasks" and "Reports". The "More tasks" section lists "Appeal progress results", "Gift in Kind List", "Recurring Gift List", and "Revenue Data Hygiene", with the last item highlighted by a red underline. The "Reports" section lists "BSA Appeal Constituent Export (OLTP)", "BSA Appeal Constituent Report (OLTP)", "BSA Appeal Progress Export (OLTP)", and "BSA Appeal Progress Report (OLTP)". At the bottom, there is a "Site Search" panel with a "Site ID:" label, a text input field containing "123", and a "Search" button.

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Constituents Name or lookup ID Add new

Home Constituents Marketing and Communications **Revenue** Events Memberships Prospects Volunteers

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Information Library
- Shell Design: Refresh
- SQL Snapshots
- Business Processes
- Global Changes

Revenue

More tasks

- Appeal 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)

Site Search

Site ID: 123 Search






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Revenue Data Hygiene


Revenue>Revenue Data Hygiene, search for Council Site

- Revenue Data Hygiene

For finding CY or LY revenue with blank revenue attributes (548)  More ▾

Name equal to: Appeal Name equal to: BSA Structure equal to: Giving Category equal to:  Apply  Reset

Lookup ID	Name	Revenue ID	Amount	Transaction type	Application	Appeal Name ▾	BSA Structure	Giving Category
 8-	James	rev-	\$20.60	Payment	Recurring gift	S21 - 2021 Friends ...		
 8-	James	rev-	\$20.60	Payment	Recurring gift	S21 - 2021 Friends ...		


 Go to Revenue



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Appeal Data List Updates

Appeal Record>Revenue Summary and Appeal Record>Balances

 Appeal:

Description:

Business unit:

Category:

Report code:

Site:

Start date: 1/1/2020


End date: 12/31/2020

Goal: \$0.00


Status: Active

Membership:


Revenue SummaryContributionsPaymentsBalancesRevenue Details (Splits)Revenue Details (W

Contributions - posted 8/16/2022  More▼


Total Contributions	# of Contributions	Average Contribution	R
\$1,045,211.21	4127	\$253.26	1

Payments Received - posted 8/16/2022  More▼


Payments Received	# of Payments	Average Payment	N
\$954,989.03	4652	\$205.29	1

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

Total Write-offs	# with Write-off
\$92,990.85	454

Outstanding Balances - through 8/16/2022  More▼

Total Balances	# Pledges with Balance	Average Balance	F
----------------	------------------------	-----------------	---

 Appeal:

Description:

Business unit:

Category:

Report code:

Site:

Start date: 1/1/2022


End date: 12/31/2022

Goal: \$730,000.00

Status: Active


Membership:

Revenue SummaryContributionsPaymentsBalancesRevenue Details (Splits)Revenue Details (Write-offs)Household DonorsMatching Gift ClaimsDesignations


Balances: Summary - through 8/16/2022  More▼

Total Balances	# Pledges with Balance	Average Balance	Final Installment Due	Mismatch: Appeal?
\$25,046.67	52	\$481.67	6/24/2022	Yes


Expand all Collapse all

Balances: Not posted (pending)  More▼

Adjustment Post Status	GL Post Status	Total Balances	# of Pledges with Balance	Average Balance	Latest with Balance	Earliest with Balance	Mismatch: Appeal?
Not Posted		\$274,193.00	8	\$34,274.13	7/14/2022	7/14/2022	Yes

Balances: BSA Structure (3)  More▼

BSA Structure	Total Balances	# Pledges with Balance
<input type="text"/>	\$35.00	2
<input type="text"/>	\$7,553.34	15
<input type="text"/>	\$17,458.33	35

Balances: Giving Category (2)  More▼

Giving Category	Total Balances	# Pledges with Balance
<input type="text"/>	\$35.00	2
<input type="text"/>	\$25,011.67	50



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Blackbaud CRM is moving - Update



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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 July



Tracking Your Appeal Progress



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Navigating to the Appeal Record

The screenshot displays the Blackbaud CRM P web application 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 links. The 'Appeal' section is highlighted in yellow and includes 'Appeal search', 'Add an appeal', 'Appeal mailings', and 'Appeal progress results'. Other sections include 'Donor relations' (Receipts, Acknowledgements, Reminders, Planned gift acknowledgements, Manage correspondence), 'Pledge card report' (Run pledge cards), 'Reports' (BSA Appeal Organization Structure Report, Appeal profile, Appeal performance), 'Marketing efforts' (Direct marketing efforts, Marketing plans, Public media efforts, Source codes), and 'Packages' (Creatives, Export definitions, Letters and documents, Materials and expenses, Packages).

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Appeals Add new

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

Marketing and Communications

Appeal

- 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	

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

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

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

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

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

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



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Appeals [+ Add new](#)

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

Tasks ▾
Reports ▾

Shortcuts

Add this page to shortcuts 1

Manage my shortcuts

Batch entry

Constituent search

Transaction search

Information library

Reminders

Appeal Progress by Category

Appeal: (1111) S20 - 2020 Friends of Scouting

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

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

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

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





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 2019Presentation: [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

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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

September 21, 2022
10:00 am & 2:00 pm CT



Questions & Answers



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