

# CRM User Forum

September 21, 2022

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# Objectives

- Add an appeal in CRM
- Review types of batches
- Pledges Receivable Aging
- Creating an Unworked Constituent list
- New Data Lists available in CRM
  - Organization Donor List
  - Household donors
  - Revenue data hygiene
  - Appeal data list updates
- Questions – Answers



# Creating an appeal



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Application features ▾ Feature (e.g. Information Library) 🔍

Welcome, [User Name]

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

**Shortcuts**

- Add this page to shortcuts
- Manage my shortcuts

**Recent searches**

- Transaction search
- Constituent search
- Appeal progress results
- Appeal progress results

**Recently accessed**

- Batch Entry
- [Blurred]
- [Blurred]
- [Blurred]

## 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 re

- Run pledge c

### Reports

- BSA Appeal Organization Structure Report
- Appeal profile
- Appeal performance

### Packages

- Creatives
- Letters and documents
- Packages

### Configuration

- Address proc
- Letter templa
- Name format



**Marketing and Communications**

**Appeal**

- Appeal search
- Add an appeal
- Appeal
- Appeal

**Donor relations**

- Receipts
- Acknowledgements

**Pledge card**

- Run pledg

**Reports**

- BSA Ap Report
- Appeal
- Appeal

**Add an appeal**

Name: (###) Annual Giving Campaign for Council XXX 1

Description: 202X Annual Giving Campaign 2

Split evenly Split fully

Category: Annual Giving (Friends of Scouting) 3

Report code: 2023 4

Site: Council 5

Start date: 1/1/2023 6

End date: 12/31/2023 7

Goal: \$1,000,000.00 8

Help Save Cancel



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Home
Constituents
Marketing and Communications
Revenue
Events
Prospects
Fundraising
Analysis
Administration

**Appeal: ( ) S2022 Friends of Scouting 2022**

Description: Friends of Scouting 2022
Business unit:
Category: Annual Giving (Friends of Scouting)
Report code: 2022
Site: : Council

Start date: 1/1/2022
End date: 12/31/2022
Goal: \$1,000,000.00
Status: Active
Membership:

1
2

Revenue Summary
Designations
Prior Appeal
Contributions
Payments
Balances
Revenue Details (Splits)
Revenue Details (Write-offs)

**Contributions - posted 9/20/2022**

More

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
\$134,084.00	234	\$573.01	9/12/2022	12/13/2021

**Payments Received - posted 9/20/2022**

More

Payments Received	# of Payments	Average Payment	Most Recent Payme...	Mismatch: Appeal?	Mismatch: Inbound...
\$131,150.00	198	\$662.37	9/12/2022	Yes	Yes

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

More

Total Write-offs	# with Write-off
------------------	------------------

**Outstanding Balances - through 9/20/2022**

More

Total Balances	# Pledges with Balance	Average Balance	Final Installment Due	Mismatch: Appeal?
\$3,474.00	40	\$86.85	8/5/2022	Yes



# Type of batches - review



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# Committed Vs. Uncommitted Batches

## Uncommitted

- Filled out but not recorded
- All batches start as uncommitted



## Committed

- After steps are completed, commit a batch
- The batch has been entered and recorded







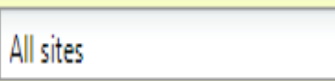






# Batch Entry








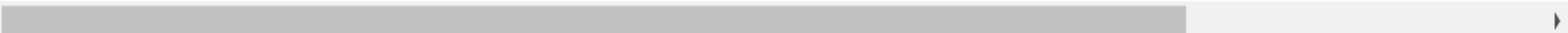
 **Batch Entry** 

**Uncommitted Batches** **Committed Batches**

**Uncommitted batches** (0)  **Add**  **Batch search**  **More** ▾

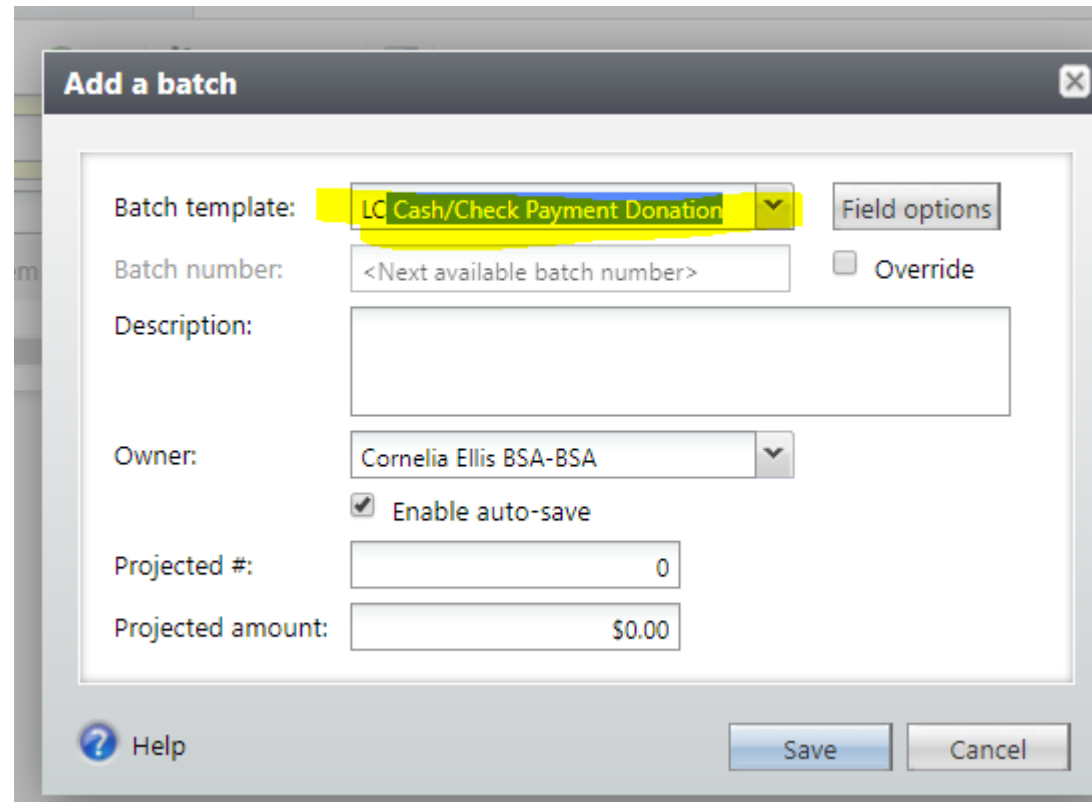
**Date range:**  **Sites:**  ☐ **Show only batches with exceptions**  **Apply**  **Reset**

 **Columns** ▾  **Clear all filters**

 <b>Batch numb...</b>	 <b>Batch template</b>	 <b>Description</b>	 <b>Owner</b>	 <b>Status</b>	 <b>Date ad...</b>	 <b>Category</b>
						



# Add a Batch



The screenshot shows a dialog box titled "Add a batch" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Batch template:** A dropdown menu with "LC Cash/Check Payment Donation" selected. A yellow highlight is placed over this dropdown.
- Field options:** A button located to the right of the Batch template dropdown.
- Batch number:** A text field containing "<Next available batch number>".
- Override:** An unchecked checkbox labeled "Override".
- Description:** A large, empty text area.
- Owner:** A dropdown menu with "Cornelia Ellis BSA-BSA" selected.
- Enable auto-save:** A checked checkbox.
- Projected #:** A text field containing "0".
- Projected amount:** A text field containing "\$0.00".

At the bottom of the dialog, there is a "Help" button (represented by a question mark icon) on the left, and "Save" and "Cancel" buttons on the right.



# Revenue Batch Templates

LC Cash/Check  
Payment Donation

LC Credit Card  
Payment Donation

LC Gift-in-kind &  
Service  
Contribution

LC Pledge  
Commitment

LC Pledge  
Commitment with  
Credit Card

LC Pledge Payment  
Cash/Check

LC Pledge Payment  
Credit Card

LC Recurring Gift  
Commitment  
(monthly or other  
schedule)

LC Stock &  
Securities  
Received



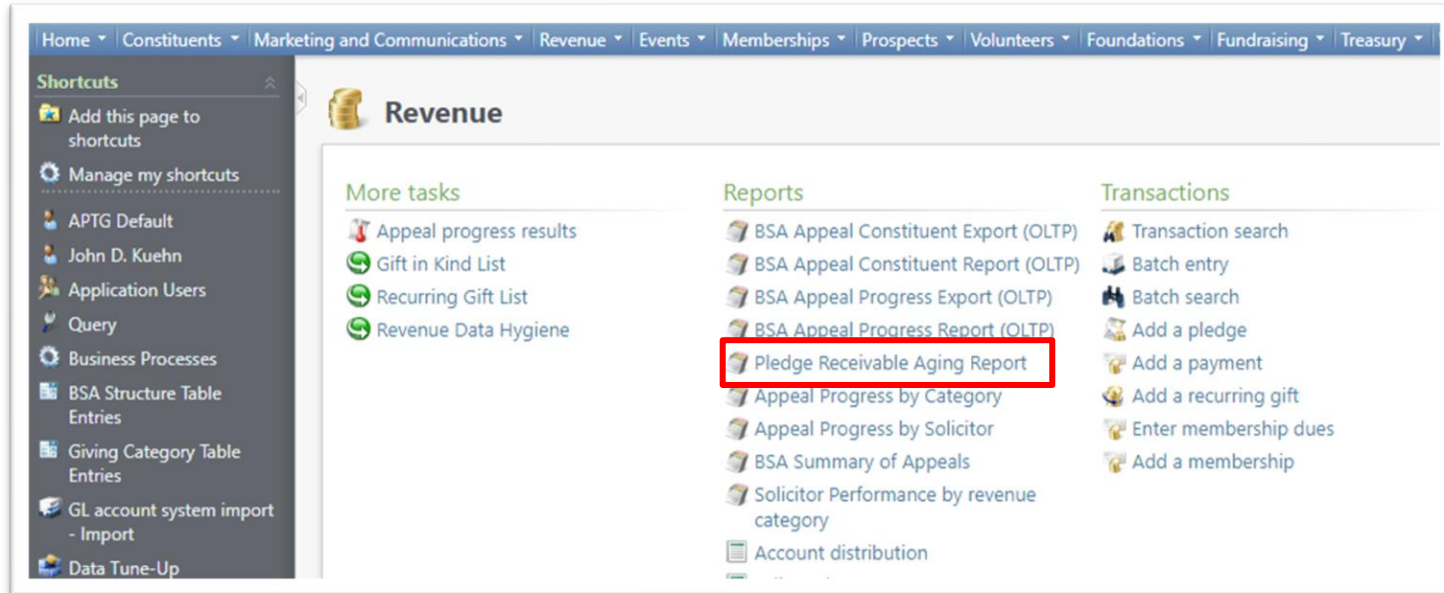
# Pledges Receivable Aging Report



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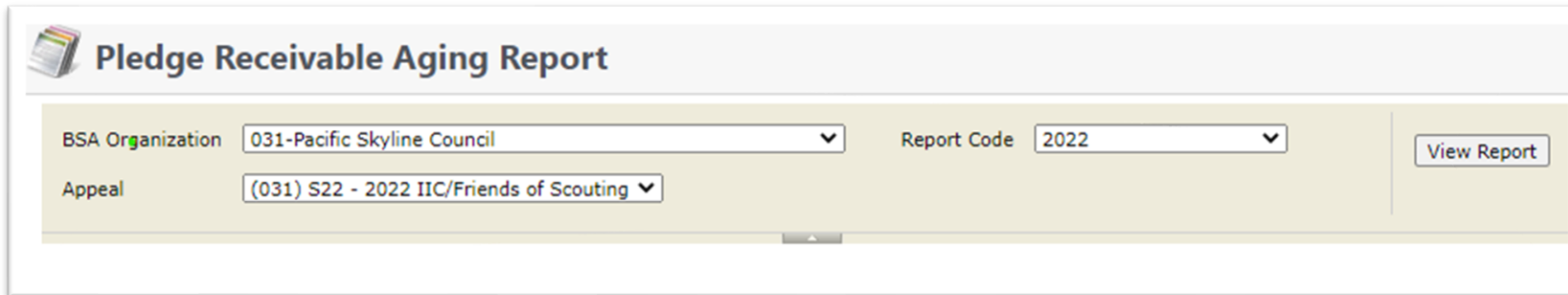
# Pledge Receivable Aging Report

- 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
<a href="#">View Report</a>	



# 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



# Unworked Constituent Listing



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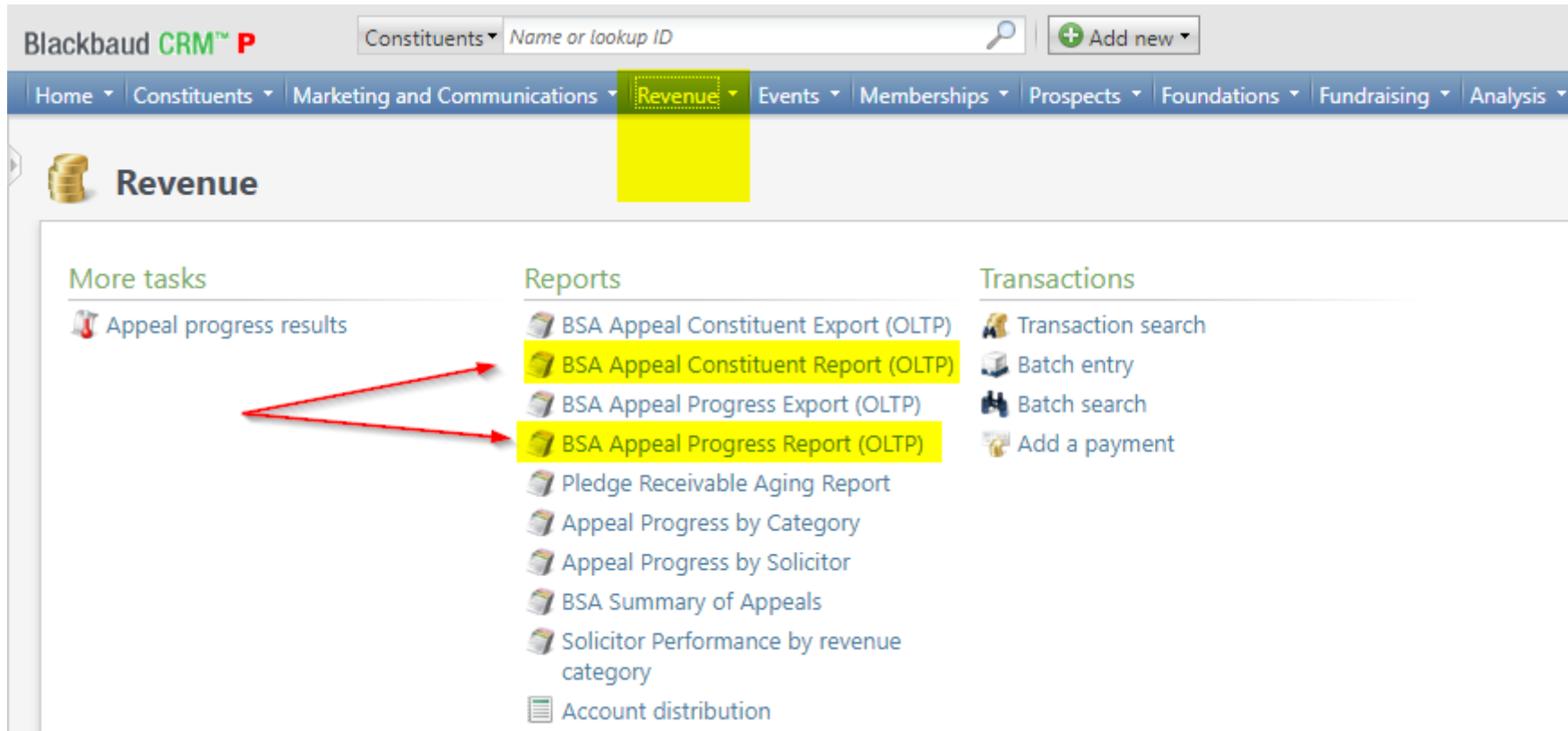


# “Easy Button” Reports

- Appeal Constituent Report
  - Unworked or worked report
  - Flat list report
  - Export to PDF or Excel
- Appeal Progress Report
  - How are we doing this year compared to prior year
  - Export to PDF or Excel




# “Easy Button” Reports




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Constituents











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

 **Revenue**





**More tasks**

-  Appeal progress results

**Reports**

-  BSA Appeal Constituent Export (OLTP)
-  **BSA Appeal Constituent Report (OLTP)**
-  BSA Appeal Progress Export (OLTP)
-  **BSA Appeal Progress Report (OLTP)**
-  Pledge Receivable Aging Report
-  Appeal Progress by Category
-  Appeal Progress by Solicitor
-  BSA Summary of Appeals
-  Solicitor Performance by revenue category
-  Account distribution

**Transactions**

-  Transaction search
-  Batch entry
-  Batch search
-  Add a payment



# BSA Appeal Constituent Report

**BSA Appeal Constituent Report (OLTP)**

Site:  1 Report Code:  2

Annual Appeal(s):  
All ☐  
(144) 2021 Eagle Recognition Event ☐  
(144) EN21 - 2021 Endowment Campaign ☐  
(144) R21 - 2021 Gifts-in-Kind ☐ 3

Multi-year Appeal(s):  
☐ Only include multi-year appeal revenue for:

4

**Include** Exclude Breakdown Filter

☐ Include All

☐ Include Prior Year 1 Giving ☐ Include Current Year Constituent Appeal/Response (Worked) Info

☐ Include Prior Year 2 Giving ☐ Include Current Year \$0 Pledge (Worked) Info

☐ Include Prior Year 3 Giving ☐ Include Donor Status Stats

[View report](#)



# BSA Appeal Constituent Report - Exclude

**BSA Appeal Constituent Report (OLTP)**

Site:  1 Report Code:  2

Annual Appeal(s):  3 Multi-year Appeal(s):

☐ Only include multi-year appeal revenue for:

4 [View report](#)

**Include Exclude Breakdown Filter**

☐ Exclude All

☐ Exclude Current Year Donors ☐ Exclude Current Year Solicitees ☒ Exclude Constituents Marked as Do Not Solicit

☐ Exclude Current Year Non-Donors ☐ Exclude Current Year Non-Solicitees ☒ Exclude Constituents Marked as Deceased

☐ Exclude Current Year Worked Constituents (via an Appeal Response) ☐ Exclude Current Year Non-Donor, Non-Solicitees ☒ Exclude Constituents Marked as Inactive

☐ Exclude Current Year Worked Constituents (via a \$0 Pledge)



# BSA Appeal Constituent Report - Breakdown

**BSA Appeal Constituent Report (OLTP)**

Site:  1

Report Code:  2

Annual Appeal(s):  3

Multi-year Appeal(s):

☐ Only include multi-year appeal revenue for:

4

☐ Breakdown by All

☐ Break Down by BSA Structure ☐ Anchor to Latest Revenue or Constituent Appeal

☐ Break Down by Giving Category ☐ Sort by Name (Last/First) Only

☐ Break Down by Solicitor

☐ Break Down by Revenue BSAFR Group

[View report](#)



# BSA Appeal Constituent Report – Filter - View

## BSA Appeal Constituent Report (OLTP)

Site: 

Council

Report Code: 

2021

Annual Appeal(s):

All

(144) 2021 Eagle Recognition Event

(144) EN21 - 2021 Endowment Campaign

(144) R21 - 2021 Gifts-in-Kind

Multi-year Appeal(s):

☐ Only include multi-year appeal revenue for: 

2021

IncludeExcludeBreakdownFilter

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

View report



## BSA Appeal Constituent Report (OLTP)

CY Appeal: S21 - 2021 Friends of Scouting  
 PY1 Appeal: S20 - 2020 Friends of Scouting  
 PY2 Appeal: S19 - 2019 Friends of Scouting  
 PY3 Appeal: S18 - 2018 Friends of Scouting

As of 8/18/2021

### Pack 0422 (Individual, Lapsed, Unworked)

Community Campaign, [No Solicitor],

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY2	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00
PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

### Crew 2727 (Individual, Lapsed, Unworked)

Family Campaign, C

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY2	\$185.00	\$185.00	\$0.00	\$0.00	\$185.00
PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

### Fabrication, LLC (Organization, Lapsed, Unworked)

Community Campaign, [No Solicitor],

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$100.00	\$0.00	\$100.00	\$0.00	\$0.00
PY2	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00
PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

### Deb (Individual, Lapsed, Unworked)

Family Campaign, F

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY2	\$50.00	\$50.00	\$0.00	\$0.00	\$50.00
PY3	\$50.00	\$50.00	\$0.00	\$0.00	\$50.00

Abid



# Report Cookbook

- Can be found on the 'Files' tab of the BBCRM Users Forum on Workplace
- Contains 'recipes' for several reports

## Unworked List for Annual Appeal by BSA Structure with 1 Year History

Description: This example shows how to generate a report listing unworked donors for a selected annual appeal by BSA Structure and including one year of giving history.

### BSA Appeal Constituent Report (OLTP)

Site: Alpha Council Report Code: 2020

Annual Appeal(s): All  
(102) F20 - 2020 Friends of Scouting  
(104) ADM20 - Maui Annual Recognition Dinne...  
(104) BEL20 - Big Island Eagle Luncheon

Multi-year Appeal(s): All  
(102) CC11 - Capital Campaign 2010  
(102) CCMY - Capital Campaign  
(102) CCMY - Capital Campaign

☐ Only include multi-year appeal revenue for 2020

Include Exclude Breakdown Filter

☐ Include All  
☒ Include Prior Year 1 Giving ☒ Include Current Year Constituent Appeal/Response (Worked) Info  
☐ Include Prior Year 2 Giving ☒ Include Current Year \$0 Pledge (Worked) Info  
☐ Include Prior Year 3 Giving ☐ Include Donor Status Stats

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





# Data Lists in CRM



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# 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

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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) <span>8</span>   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"/> <span>Apply</span> <span>Reset</span>															
< <span>1</span> 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: ( — ) F22 - 2022 Friends of Scouting**

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

Docume

Household Donors (4)





More

Household equal to: Guy

Member Name equal to:

Gave to 2022 FOS? equal to:

Response to 2022 FOS? equal to:

Household	Member Lookup ID	Member Name	Member Age	Member Gender	Gave to 2022 FOS?	Response to 2022 FOS?
 Guy F and Kelly F	8-	Guy W. F	55	Male	Yes	Yes
 Guy F and Kelly F	8-	Kelly A. F	52	Female	No	No
 Guy F and Kelly F	8-	Aidan F	19	Male	No	No
 Guy F and Kelly F	8-	Tyler F	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.

Blackbaud CRM™ P

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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# Where to find Data Lists

## Constituents Tab

- Interactions List
- Organization Donor List
- Employer-Employee Relationships
- BSA Eagles Listbuilder

## Revenue Tab

- Appeal progress results
- Gift in Kind List
- Recurring Gift list
- Revenue Data Hygiene



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

Blackbaud CRM™ P

Appeals  Add new

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

**Marketing and Communications**

**Appeal**

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

**Donor relations**

- Receipts
- Acknowledgements
- Reminders
- Planned gift acknowledgements
- Manage correspondence

**Pledge card report**

- Run pledge cards

**Reports**

- BSA Appeal Organization Structure Report
- Appeal profile
- Appeal performance

**Marketing efforts**

- Direct marketing efforts
- Marketing plans
- Public media efforts
- Source codes

**Packages**

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



# 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

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** 1  
Add this page to shortcuts  
Manage my shortcuts  
Batch entry  
Constituent search  
Transaction search  
Information library  
Reminders  
Appeal Progress by Category

## Appeal: (1111) S20 - 2020 Friends of Scouting

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

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

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

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





## 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](http://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





# Welcome to the National IT Service Catalog

We value your feedback. [Click Here](#)

[My Open Tickets](#) | [My Closed Tickets](#) | [Knowledge Base](#) | [Report Security Issue](#) | [Report Phishing Attempt](#) | [Password Reset](#) | [Office365](#) | [HR Gateway](#) | [MyBSA](#)

## Announcements & Updates



### Updates to My.Scouting and Registrar Tools (August 19th)

A list of updates can be found in Confluence. Click here!



### My.Scouting

My.Scouting and associated applications are still experiencing issues. It is recommended you work in smaller batches the next few days as the potential still exists that Registrar Tools and EMS could freeze up again. We will keep you updated.

## IT Online Service Catalog



I am a National Employee



I am a Council Employee



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## Service Categories



Accounts & Passwords



BSA Applications (Operations)



BSA Applications (Program)



Email, Communication &  
Collaboration



Network Services



Security Services



Hardware & Software



General Assistance

## Welcome to the National Online Support Center Service Catalog.

This service catalog is a detailed list of services provided by the Information Services Group.

Each service will have the following information:

- A brief description
- How to request support
- Links to additional knowledge or training
- Highlighted Frequently Asked Questions

To go directly to the knowledge base, [click here](#).

If there is something we can do to make this service catalog better, please let us know; [click here](#).

[All Council Services](#)



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## Service Categories



Accounts & Passwords



BSA Applications (Operations)



BSA Applications (Program)



Email, Communication &  
Collaboration



Network Services



Security Services



Hardware & Software



General Assistance

## General Assistance

The General Assistance option should be used when the issue or question isn't Catalog.

When possible, open a ticket by selecting the service from the Service Catalog Request link. Doing so will ensure all the necessary information is collected and quickly routed.

Tickets opened using the general assistance option go into the general queue the order received.

**Open A Request**



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<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



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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

October 19, 2022  
10:00 am & 2:00 pm CT



# Questions & Answers



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