

CRM User Forum

October 19, 2022

John Kuehn – Valerie Eaton



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Objectives

- Creating Appeals
- Creating Future Year (FY) Events
- Updating Reminder and Acknowledgements
- Year-end Revenue Checks
 - Mismatched Appeal tabs
 - Future Year (FY) Inbound Channel on Details Splits Tab
- Future Year (FY) – Inbound Channel
- New Data Lists available in CRM
 - Organization Donor List
 - Revenue data hygiene
- 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



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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



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

Description: Friends of Scouting 2022

Start date: 1/1/2022

Business unit:

End date: 12/31/2022

Category: Annual Giving (Friends of Scouting)

Goal: \$1,000,000.00

Report code: 2022

Status: Active

Site: ()

Membership:

Revenue Summary



Designations

Prior Appeal

Contributions

Payments

Bal

Designations (1)  Edit list of appeal designations  **More**▼

Designation
() 00001 Council Gener - Operating

Edit designations

Designation	Default designation
() 00001 Council Gener - Opera...	<input checked="" type="checkbox"/>
*	<input type="checkbox"/>


?

 Help

Save

Cancel



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

Description: Friends of Scouting 2022

Start date: 1/1/2022

Business unit:

End date: 12/31/2022

Category: Annual Giving (Friends of Scouting)

Goal: \$1,000,000.00

Report code: 2022

Status: Active

Site: () Council

Membership:



Revenue Summary

Designations


Prior Appeal

Contributions


Payments

Prior Appeal  **Edit** 


Prior Appeal: () S21-Friends of Scouting 2021

Prior Year Appeal History  **More**

PY1 Year	PY1 Appeal	PY1 Description	PY2 Year
2021	() S21-Friends ...	Friends of Scouting...	2020

Edit BSAFR appeal 

Previous year appeal:

() S21-Friends of Scouting 2021 

Save

Cancel



Creating Future Year Events



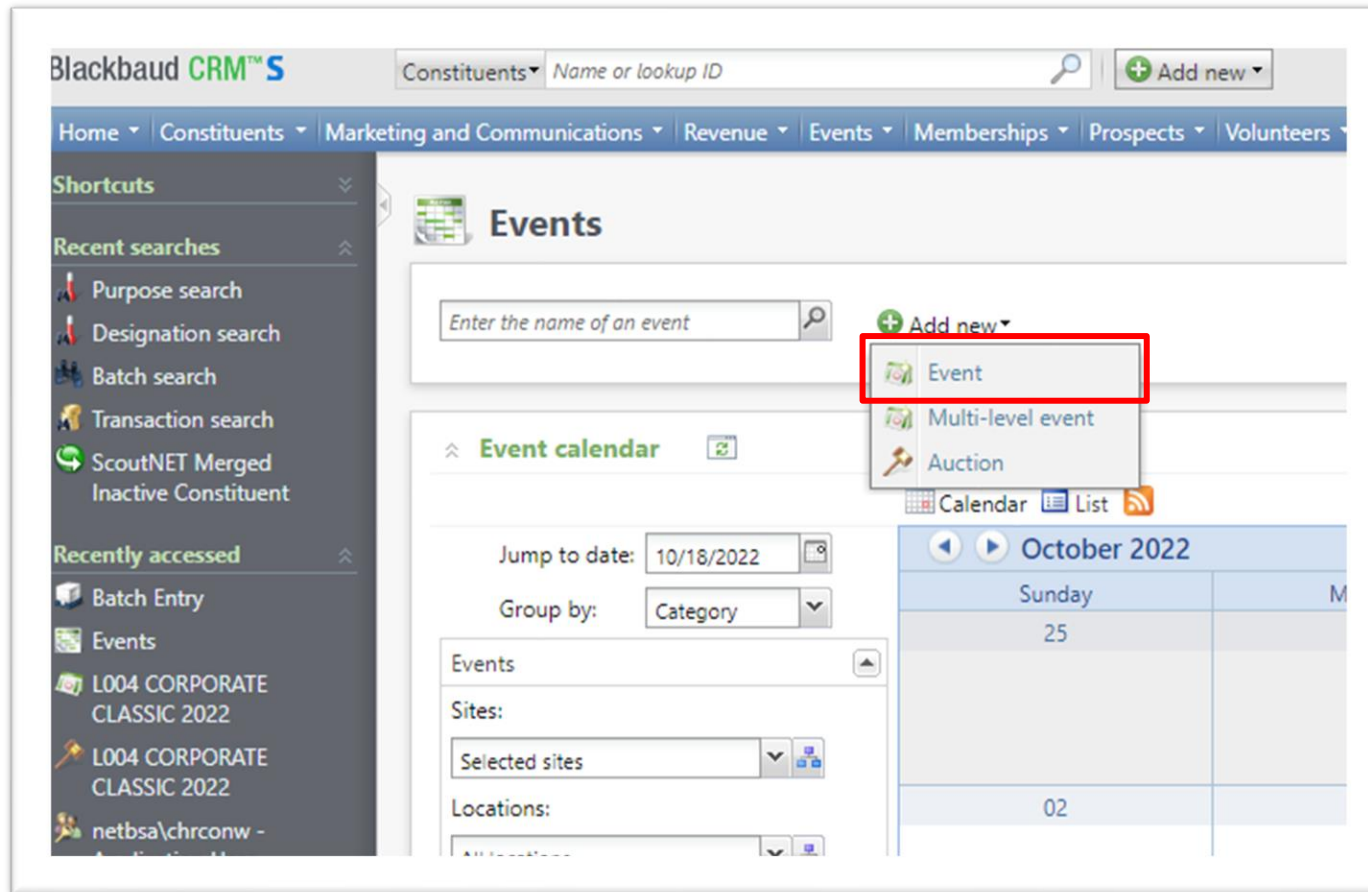
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Events – Creating for Future Year (FY)

- Create event for 2023
- Remember to set Event Category to FY Category
- Do this if attaching 2023 event payments received in 2023 to registrations for next year.
- Jan 2 after all 2023 event registrations payments have been processed in with a post date of 2022, update event category to current year



Create New Event



Proceed to the Events functional area and click Add New and select Event.



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Create new – Copy Option

Add an event

General

Name: L004 Corporate Golf Classic 2023

Description: 2023 Corporate Golf Classic

Category: FY - Golf

Sites: Site
Mobile Area Council

☒ Event is an auction
☐ Do not show event on calendar
☒ Event allows designations on fees

Copy options

Details

Start date: 6/16/2023 Start time: 11:00 AM
End date: 6/16/2023 End time: 8:00 PM

Location information

Location: Spring Hill Golf Course
Room/Unit: Capacity: 0
Contact:

Help Save Cancel

FY - Golf

Distinguished Citizens Dinner

Friends of Scouting (no registration revenue)

Golf

Special Fundraising Event

Sporting Clays

FY - Auction

FY - Distinguished Citizens Dinner

FY - Golf

FY - Special Fundraising Event

FY - Sporting Clays

Cultivation/Recognition

Shooting Sports

Sporting Activities

Other Activities

Fill in the Name, Description, Dates, Times, Location, Room, Contact and check the boxes if it's an auction and you are planning to run payment through it.

Next select the proper FY Category. This ensure monies attached to the event in 2022 will be reclassified for 2023.



Copy options from prior event the update

The image shows a software interface for adding a new event. The main window is titled "Add an event" and has a "General" tab selected. The "Details" sub-tab is also visible. The "General" section contains fields for Name, Description, Category, and Sites. The "Details" section contains fields for Start date and Start time. A "Copy options" button is located at the bottom left of the main window. A sub-dialog box titled "Copy from event" is open in the foreground, showing a list of options to copy from a previous event. The "Copy from" field is set to "L004 CORPORATE CLASSIC 2022". The options are listed in a grid with checkboxes.

Add an event

General

Name: L004 Corporate Golf Classic 2023

Description: 2023 Corporate Golf Classic

Category: FY - Golf

Sites: Site, Mobile Area, *

☒ Event is an auction
☐ Do not show event
☒ Event allows donations

Details

Start date: 6/16/2023 Start time: 11:00 AM

Copy from event

Copy from: L004 CORPORATE CLASSIC 2022

<input checked="" type="checkbox"/> Copy tasks	<input checked="" type="checkbox"/> Copy expenses	<input checked="" type="checkbox"/> Copy registration options
<input checked="" type="checkbox"/> Copy preferences	<input checked="" type="checkbox"/> Copy invitations	<input checked="" type="checkbox"/> Copy invitees
<input checked="" type="checkbox"/> Copy lodging options	<input checked="" type="checkbox"/> Copy job occurrences	
<input checked="" type="checkbox"/> Copy designations	<input type="checkbox"/> Copy team structure	<input type="checkbox"/> Copy team members

OK Cancel


Save Cancel

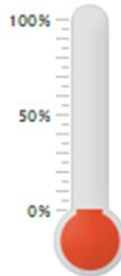
Help



L004 Corporate Golf Classic 2023

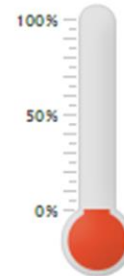
Start date: 6/16/2023 - 11:00 AM
End date: 6/16/2023 - 8:00 PM
Site: Mobile Area Council
Location: Spring Hill Golf Course
4000 Dauphin St
Mobile, AL 36608
Room/Unit:
Contact:
Coordinator:
Category: FY - Golf

Status:  Active
Lookup ID: 8-10002121



Event expenses

Expense budget: \$0.00
Agreed expenses: \$0.00
Amount paid: \$0.00
0% of budget



Event capacity

Event capacity: 0
Will attend: 0
Will not attend: 0
0% of capacity

Registrations Tasks/Coordinators Speakers Expenses Options Invitations Designations Appeals Documentation Job Occurrence

Registrations (0)  Add  More

Type: Registrant:
Status: Attended:

 Apply  Reset

<input checked="" type="checkbox"/>	Registrant	Type	Status	Atten...	Online registrant
-------------------------------------	------------	------	--------	----------	-------------------

Add your 2023 appeal to the appeal tab. Add your designations to the designation tab. Will copy from last event. Submit your event mapping worksheet to have the event mapped so you can process monies during batch entry.

If you copied options update the options to 2023 information.



Updating Donor Communications for 2023



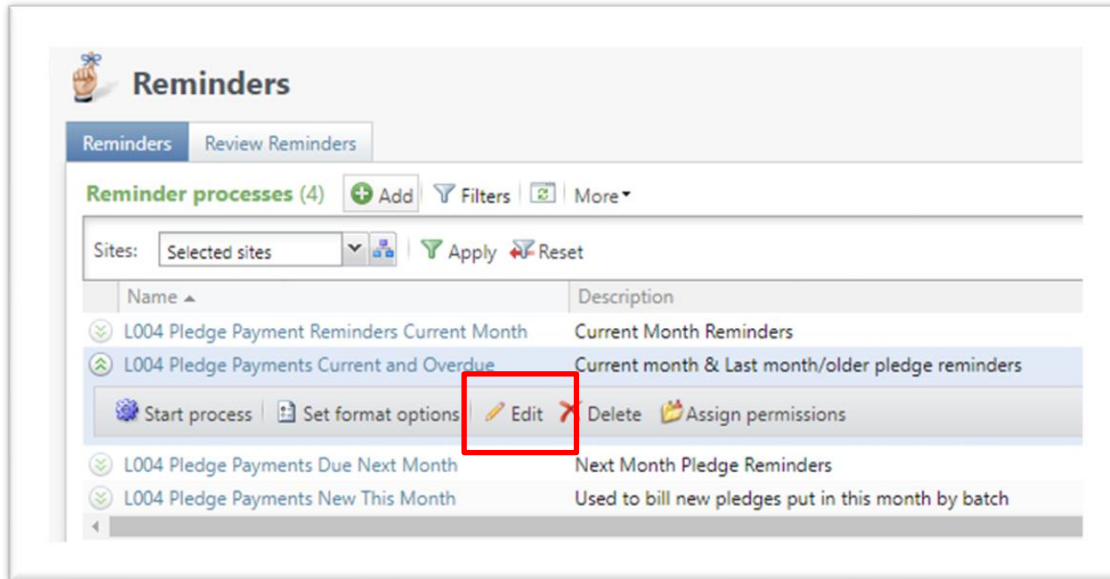
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Updating Reminders and Acknowledgements

- New appeals mean new revenue
- Selection that creates donor communication needs to be updated
- Add new appeals
- Add report code 2023



Finding your Reminder Selections



Reminders

Reminders | Review Reminders

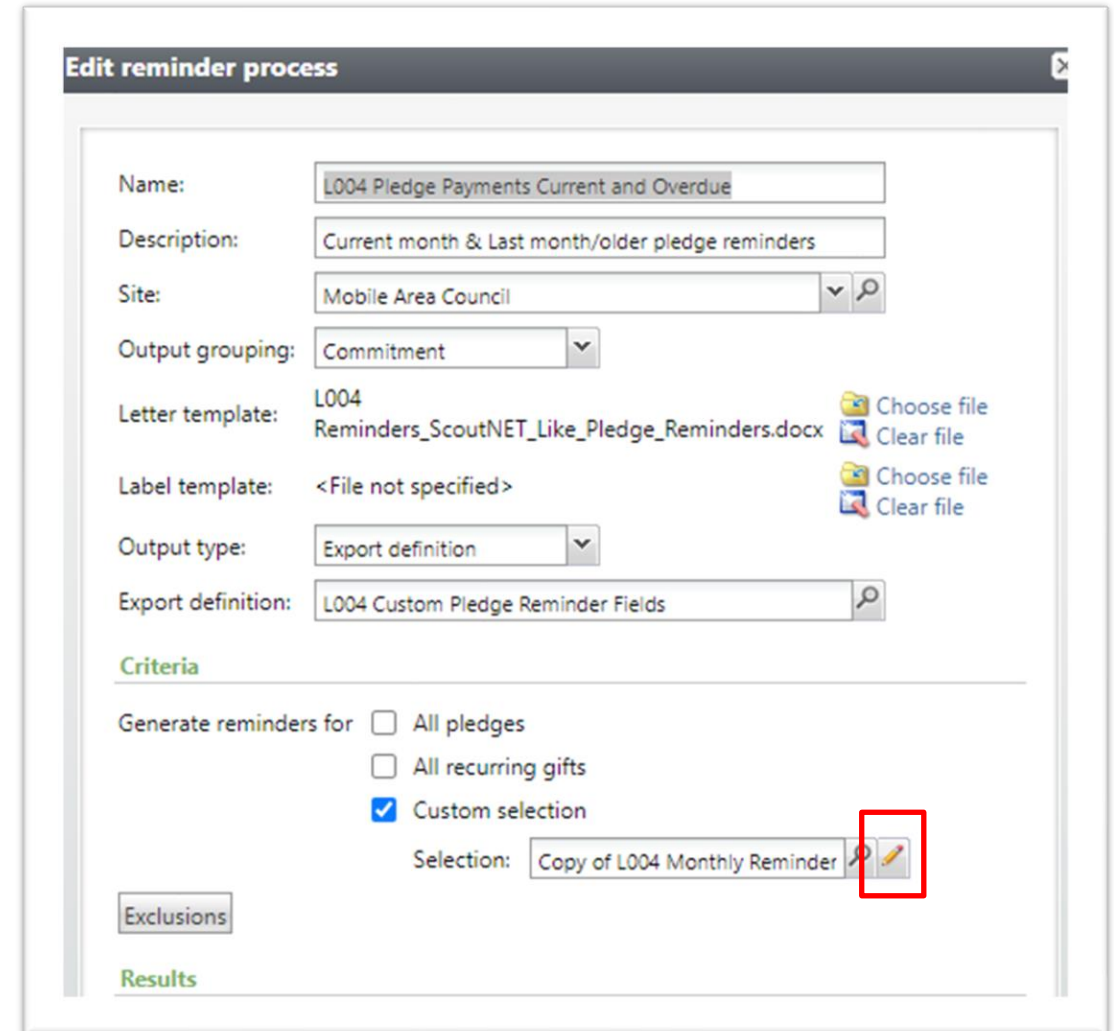
Reminder processes (4) [Add](#) [Filters](#) [More](#)

Sites: [Selected sites](#) [Apply](#) [Reset](#)

Name	Description
L004 Pledge Payment Reminders Current Month	Current Month Reminders
L004 Pledge Payments Current and Overdue	Current month & Last month/older pledge reminders
L004 Pledge Payments Due Next Month	Next Month Pledge Reminders
L004 Pledge Payments New This Month	Used to bill new pledges put in this month by batch

[Start process](#) [Set format options](#) [Edit](#) [Delete](#) [Assign permissions](#)

Reminders are found under Marketing & Communications / Donor Relations. You will need to edit each reminder process and update the selection for the next year.



Edit reminder process

Name: L004 Pledge Payments Current and Overdue

Description: Current month & Last month/older pledge reminders

Site: Mobile Area Council

Output grouping: Commitment

Letter template: L004 Reminders_ScoutNET_Like_Pledge_Reminders.docx [Choose file](#) [Clear file](#)

Label template: <File not specified> [Choose file](#) [Clear file](#)

Output type: Export definition

Export definition: L004 Custom Pledge Reminder Fields

Criteria

Generate reminders for ☐ All pledges ☐ All recurring gifts ☒ Custom selection

Selection: Copy of L004 Monthly Reminder [Edit](#)

Exclusions

Results



Updating your Appeal selections

The left screenshot shows a software interface with a list of criteria under 'Include records where:'. A red box highlights the first three criteria: 'Appeal\Site\Site ID is equal to 004', 'and Appeal\Appeal record is equal to (004) S22 - 2022 FRIENDS OF SCOUTING', and 'and Pledge/Grant award next installment date is on or before this month or is blank'. Below this list is a list of 'Results fields to display:'. An 'Apply Criteria' dialog box is open, showing 'Appeal\Appeal record criteria' with a dropdown set to 'One of'. Below the dropdown is a list of appeal records: '(004) S22 - 2022 FRIENDS OF SCOUTING' and '(004) S23 - 2023 FRIENDS OF SCOUTING'. The 'Value' radio button is selected. At the bottom of the dialog is a checkbox 'Only return records that match all selected values' and 'OK' and 'Cancel' buttons.

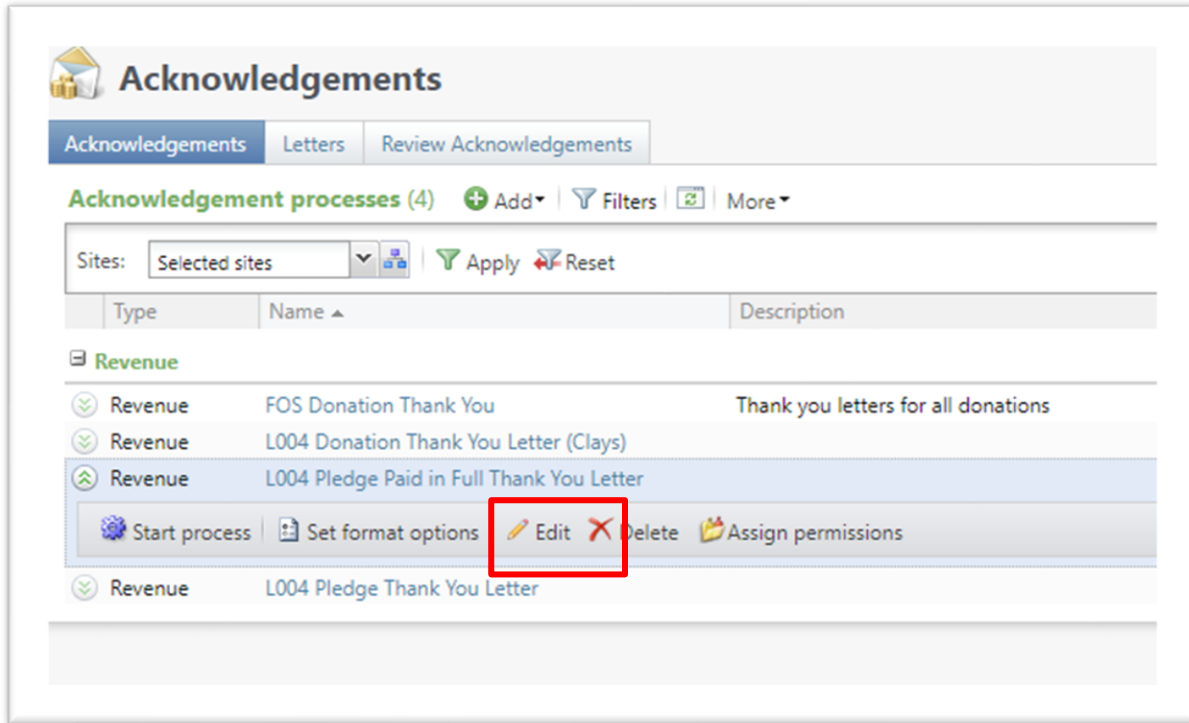
The right screenshot shows the same software interface with the same list of criteria and 'Results fields to display:'. A red box highlights the first three criteria: 'Appeal\Site\Site ID is equal to 004', 'and Appeal\Appeal record is one of (004) S22 - 2022 FRIENDS OF SCOUTING, (004) S23 - 2023 FRIENDS OF SCOUTING', and 'and Pledge/Grant award next installment date is on or before this month or is blank'. The 'Apply Criteria' dialog box is not present.

We still need to remind current appeal but also need to start reminding those that pledge for 2023. Double click your appeal record box and add the 2023 appeal and save. You may need to change it to "One Of" to add multiple appeals.



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Finding your Acknowledgement Selections



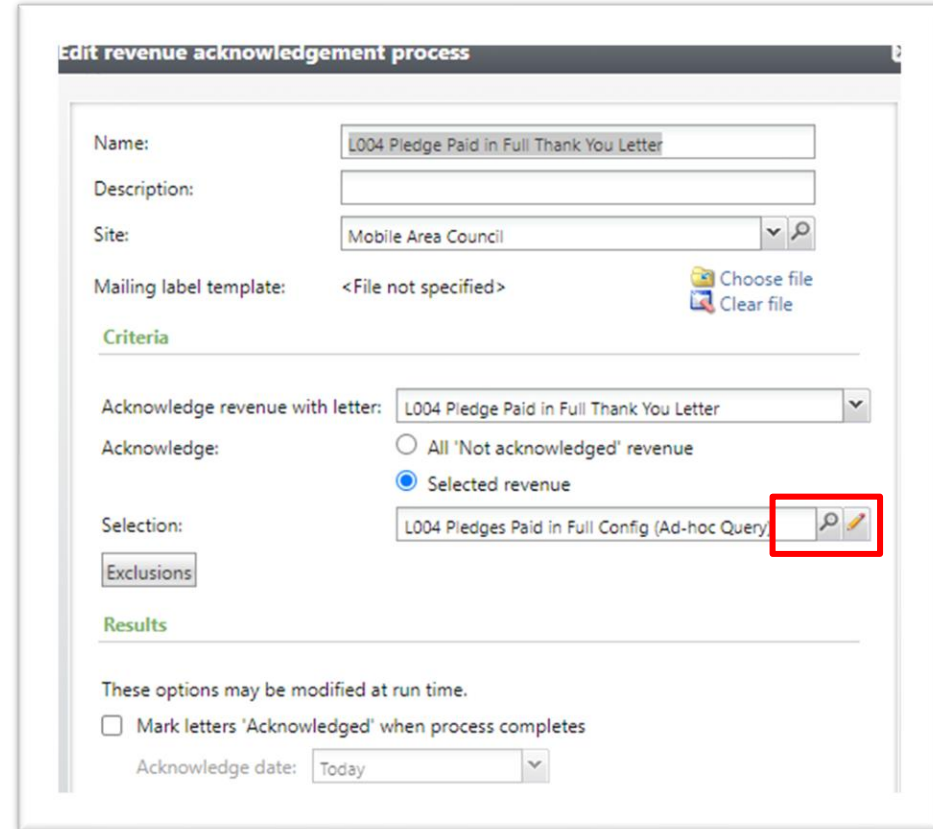
Acknowledgements

Acknowledgements Letters Review Acknowledgements

Acknowledgement processes (4) + Add Filters More

Sites: Selected sites Apply Reset

Type	Name	Description
Revenue		
Revenue	FOS Donation Thank You	Thank you letters for all donations
Revenue	L004 Donation Thank You Letter (Clays)	
Revenue	L004 Pledge Paid in Full Thank You Letter	
Start process Set format options Edit Delete Assign permissions		
Revenue	L004 Pledge Thank You Letter	



Edit revenue acknowledgement process

Name: L004 Pledge Paid in Full Thank You Letter

Description:

Site: Mobile Area Council

Mailing label template: <File not specified> Choose file Clear file

Criteria

Acknowledge revenue with letter: L004 Pledge Paid in Full Thank You Letter

Acknowledge: ☐ All 'Not acknowledged' revenue ☒ Selected revenue

Selection: L004 Pledges Paid in Full Config (Ad-hoc Query) **Edit**

Exclusions

Results

These options may be modified at run time.

☐ Mark letters 'Acknowledged' when process completes

Acknowledge date: Today

Acknowledgements are found under Marketing & Communications / Donor Relations. You will need to edit each acknowledgement process and update the selection for the next year.



Updating Report Codes

Include records where:

- Appeal\Site\Site ID is equal to 004
- and Appeal\Report code is equal to 2022
- and Transaction type is one of Pledge
- and Pledge/Grant award balance is equal to 0
- and Original pledge amount is greater than 0
- and Latest installment payment date is not blank

Apply Criteria

Appeal\Report code criteria

One of

☒ Value ☐ Output field

2027
2026
2025
2024
2021
2020
2019
2018
2017

2022
2023

☐ Only return records that match all selected values

OK Cancel

We still need to thank current appeals with report code of 2022 but you also need to start reminding those that pledge for 2023. Double click your Report Code line add the 2023 Report Code and save. You may need to change it to "One Of" to add multiple Report Codes.

Include records where:

- Appeal\Site\Site ID is equal to 004
- and Appeal\Report code is one of 2022, 2023
- and Transaction type is one of Pledge
- and Pledge/Grant award balance is equal to 0
- and Original pledge amount is greater than 0
- and Latest installment payment date is not blank


Results fields to display:

- Appeal\Name
- Original pledge amount
- Pledge/Grant award balance
- BSA Structure Attribute\Attribute group
- Giving Category Attribute\Attribute group
- Constituent\Last/Organization/Group/Household name
- Constituent\First name
- Constituent\Lookup ID



Year-End Revenue Checks

Mismatched Appeal tabs

 **Appeal: [REDACTED] S2022 Friends of Scouting 2022**

Description: Friends of Scouting 2022Start date: 1/1/2022Business unit:End date: 12/31/2022Category: Annual Giving (Friends of Scouting)Goal: \$1,000,000.00Report code: 2022Status: ActiveSite: [REDACTED]Membership:

Revenue SummaryContributionsPaymentsBalancesRevenue Details (Splits)Revenue Details (Write-offs)Household DonorsDesignationsMatching Gift ClaimsMailingsDocumentationMismatch: Appeals?Solicitor Credits by GroupPrior Appeals

Expand allCollapse all

⌵ Pledge (with Payment having mismatched Appeal) (0)FiltersMore

Pledge: Appeal	Payment: Appeal	Constituent Name	Transaction	Date	GL Post Date	Start: GL Post	End: GL Post	Deposit	Adjustment Po...	Total Amount	Added by	Batch number	Payment
----------------	-----------------	------------------	-------------	------	--------------	----------------	--------------	---------	------------------	--------------	----------	--------------	---------

⌵ Payment with mismatched Appeal (on Pledge) (2)FiltersMore

Payment: Appeal	Pledge: Appeal	Constituent Na...	Transaction	Date	GL Post Date	Deposit	Adjustment Po...	Split Amount	Total Amount	Designation N...	Added by	Batch number	Pledge	Pledg
⌵ [REDACTED] S2022 Friends ...	[REDACTED] S17 - Frien...	Bit-Wizards	Payment	9/21/2022	9/21/2022			\$2,500.00	\$2,500.00	[REDACTED] 00001 Cou...	[REDACTED]	L0905345	Pledge	5/18/20
⌵ [REDACTED] S2022 Friends ...	[REDACTED] S20 - Frien...	Ronald R. Brad...	Payment	8/23/2022	8/23/2022			\$20.00	\$20.00	[REDACTED] 00001 Cou...	[REDACTED]	L0897913	Pledge	6/23/20

⌵ Payment with blank Appeal (on Event Registration) (0)FiltersMore

Payment: Appeal	Event: Appeal	Constituent Na...	Transaction	Date	GL Post Date	Adjustment Po...	Split Amount	Total Amount	Designation N...	Added by	Batch number	Registration O...	Event: Name	Event: Regist
-----------------	---------------	-------------------	-------------	------	--------------	------------------	--------------	--------------	------------------	----------	--------------	-------------------	-------------	---------------

⌵ Auction Donation with blank Appeal (not yet purchased) (0)FiltersMore


Auction Donati...	Auction: Appeal	Constituent Na...	Transaction	Date	GL Post Date	Adjustment Po...	Total Amount	Designation N...	Added by	Batch number	Auction Item	Donation Date	Item Value	Auction Even
-------------------	-----------------	-------------------	-------------	------	--------------	------------------	--------------	------------------	----------	--------------	--------------	---------------	------------	--------------



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Year-End Revenue Checks

Future Year (FY) Inbound Channel on Details Splits Tab

 **Appeal: () FS23 - Friends of Scouting 2023**

Description: 2023 Friends of Scouting

Start date: 1/1/2023

Business unit:

End date:

Category: Annual Giving (Friends of Scouting)

Goal: \$0.00

Report code: 2023

Status: Active

Site: Council

Membership:

Revenue Summary

Contributions

Payments

Balances


Revenue Details (Splits)

Revenue Details (Write-offs)

Household Donors

Designations

Matching Gift

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (53)  More ▾

Constituent equal to: Transaction equal to: Application not equal to: GL Post Status e

Post Status	GL Post Date	Deposit	Balance	Designation	Inbound Channel ▲	Revenue Category
1	6/16/2022	ZGive	\$0.00	00001 Counc - Operating	Friends of Scouting	Unrestricted by donor
1	2/10/2022		\$500.00	08301 Field Service - Operating	Friends of Scouting	Unrestricted by donor
1	10/4/2022		\$460.00	08301 Field Service - Operating	FY - Friends of Scouting	Unrestricted by donor
1	5/13/2022		\$1,000.00	00001 Counc - Operating	FY - Friends of Scouting	Unrestricted by donor



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Future Year – Inbound Channel

- FY – Inbound channel is used to place dollars raised into the reclass account in PeopleSoft.
- This is used when we are raising monies to be used next year.
- Normally used during the last quarter of current year with 2023 appeals with revenue having 2022 postdates.
- If you fail to do this, next year's monies will show as current year contributions thus overstating your council financial.
- Stop using FY – Inbound Channel once you have completed 2022 entries into your 2023 appeal using 2022 postdates.



Data Lists in CRM



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New Data Lists Available in CRM

Organization Donor List
Revenue Data Hygiene



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

e Giving greater than or equal to: Apply Reset

	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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Revenue Data Hygiene

Revenue>Revenue Data Hygiene, search for Council Site

The screenshot displays the Blackbaud CRM P interface. At the top, the 'Blackbaud CRM P' logo is on the left, and a search bar with 'Constituents' and 'Name or lookup ID' is on the right. Below the logo, a navigation bar includes 'Home', 'Constituents', 'Marketing and Communications', 'Revenue', 'Events', 'Memberships', 'Prospects', and 'Volunteers'. The 'Revenue' tab is selected and underlined. On the left side, a 'Shortcuts' panel lists various tools. The main content area is titled 'Revenue' and contains two sections: 'More tasks' and 'Reports'. In the 'More tasks' section, 'Revenue Data Hygiene' is listed and underlined. At the bottom, a 'Site Search' dialog box is open, featuring a 'Site ID:' label, a text input field containing '123', and a 'Search' button.

Blackbaud CRM P

Constituents Name or lookup ID

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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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

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:

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

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



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 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

[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

November 16, 2022
10:00 am & 2:00 pm CT



Questions & Answers



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