

# CRM User Forum

November 16, 2022

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# Objectives

- Review – Creating Appeals
- Review – Creating Future Year (FY) Events
- New – Marking BSAFR Groups & constituents with appeals
- Updating Donor Relation Communications
- 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
- Questions – Answers



# Creating an appeal



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Blackbaud CRM™ P

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 Donor relations Pledge card

Appeal search Receipts Run pledge  
Add an appeal Acknowledgements

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

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:

Revenue Summary

Designations

Prior Appeal

Contributions

Payments

Prior Appeal

Edit

Prior Appeal: S21-Friends of Scouting 2021

Prior Year Appeal History

More

Edit BSAFR appeal

Previous year appeal:

S21-Friends of Scouting 2021

Save

Cancel



# Creating Future Year Events



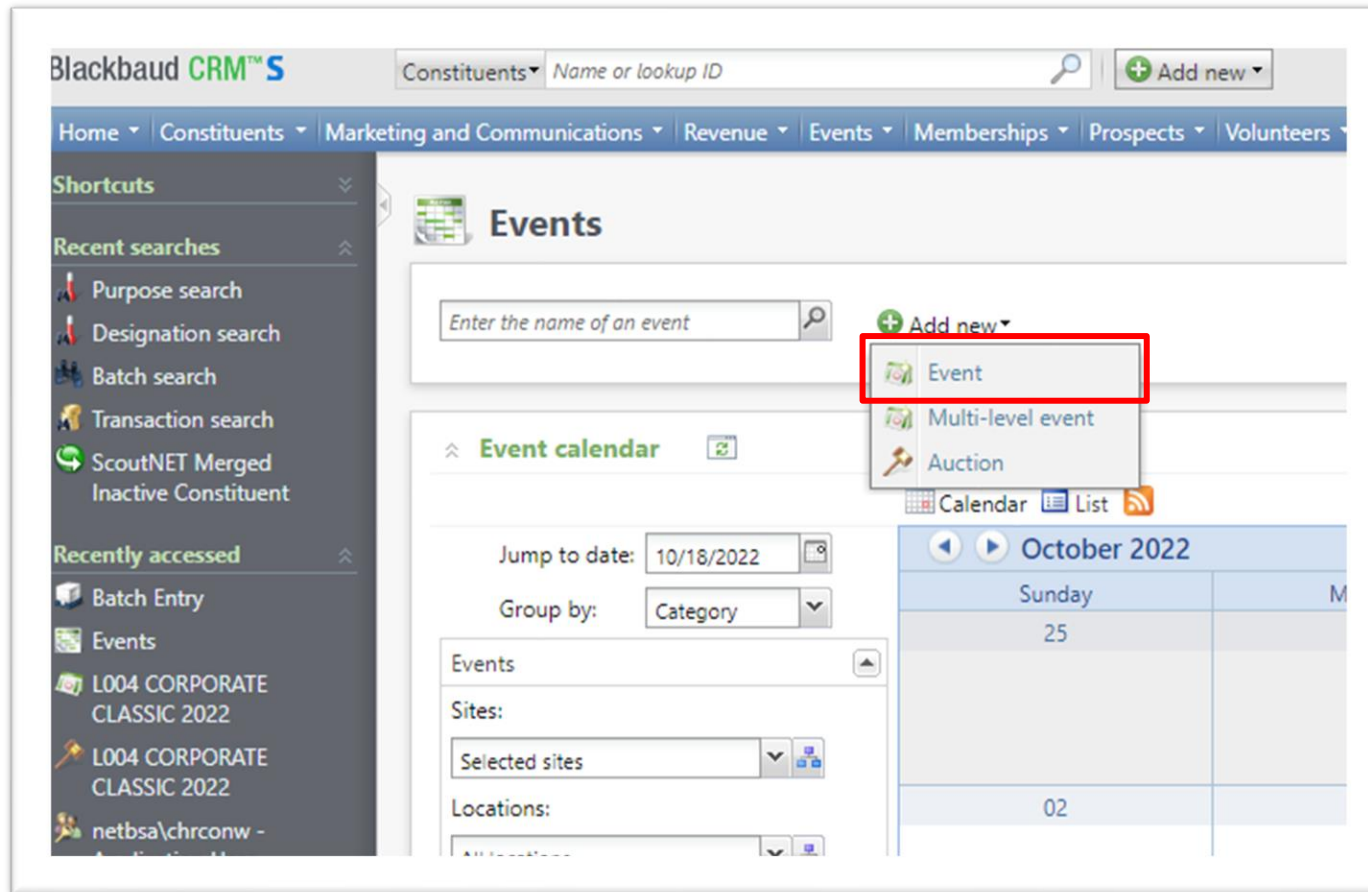
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# Events – Creating for Future Year (FY)

- 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.



# 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

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. Use Copy options if there is a prior event



# 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

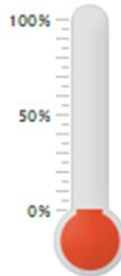
Help



## L004 Corporate Golf Classic 2023

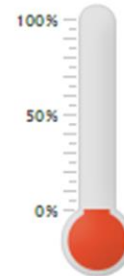
Start date: 6/16/2023 - 11:00 AM  
End date: 6/16/2023 - 8:00 PM  
Site: Mobile Area Council  
Location: Spring Hill Golf Course  
4000 Dauphin St  
Mobile, AL 36608  
Room/Unit:  
Contact:  
Coordinator:  
Category: FY - Golf

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. Designations 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.



# Marking Constituents with FOS Appeal



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# Marking Constituents with 2023 Appeal

- Used to get a complete list of unworked constituents
- List feeds to your BSA Appeal Constituent Export / Report (OLTP)
- If you don't do this your list is only comprised of those that have been attached to your appeal in the past three years
- Accomplished by using the Pledge Card Generator
- You will need your BSAFR Structure to accomplish this





# Step to Follow

- Create your 2023 appeal. (Connect Prior Year Appeals)
- Wait overnight then run your BSA Appeal Constituent Export  
Download to excel – This will give you those that have been connected to your prior appeals for the last three years.
- Next run the pledge card generator marking all groups with the 2023 Appeal
  - Use your top group and all subordinate groups to achieve this.
  - The process will need to then run overnight to add all to your OTLP report



# Run Constituent Export – Record count is 936

### BSA Appeal Constituent Export (OLTP)

Site: Tukabatchee Area Council

Report Code: 2023

Annual Appeal(s): (005) F23 Friends of Scouting

Multi-year Appeal(s):

☐ Only include multi-year appeal revenue for: 2023

Include Exclude Breakdown Filter

☒ Include All

☒ Include Prior Year 1 Giving

☒ Include Prior Year 2 Giving

☒ Include Prior Year 3 Giving

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

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

☒ Include Donor Status Stats

☒ Include Barcode Numbers

1 of 18

Find | Next

### BSA Appeal Constituent Export (OLTP)

CY Appeal: (005) F23 Friends of Scouting

PY1 Appeal: (005) F22 Friends of Scouting

PY2 Appeal: (005) F21 Friends of Scouting

PY3 Appeal: (005) F20 Friends of Scouting

As of 11/15/2022

LookupID	LastName	FirstName	Title	Suffix	IsOrg	IsGroup	IsInactive	IsDeceased	DoNotSolicit	Address	City	State	Zip
8-44457901	Alexander	Paul			False	False	False	False	False	74 Pardue Dr	Valley Grande	AL	367376

After the system refreshes overnight your 2023 appeal will show in the report drop down. I included all historical records attached to the prior appeals and broke it down by structure and giving category. Then I viewed the report. I then downloaded to get a record count which came to 936 records that are attached to the last three prior appeals.



# Find your BSAFR Group Query and find top Level Group



Information library

## Ad-hoc Query: L005 BSAFR Groups

Name: L005 BSAFR Groups Owner: Denise Miller BSA-005 OData: [Get OData link](#)  
Type: Constituent Source view: Constituents  
Category: Description: List of all BSAFR groups. Change the Site ID criteria to match your council.  
Site: Tukabatchee Area Council Others can modify: Yes

### Results (187 records found)

Page 1 of 4

Site	Lookup ID	Name	BSAFR\Solicit f...	BSAFR\BSA str...	BSAFR\Giving c...	BSAFR\BSAFR s...
005	8-57187634	Eagle Dinner	Yes	Tukabatchee Ar...	Council	
005	8-57866787	Scouting Clays	Yes	Tukabatchee Ar...	Council	
005	8-40728301	Tukabatchee Area Council 005	No	Tukabatchee Ar...	Council	
005	8-41791529	Crane 02	Yes	Crane	Community	
005	8-55192946	Crane District Community Chair	Yes	Crane	Community	
005	8-56704509	Crane Bob Myers	Yes	Crane	Community	Bob Myers
005	8-56736455	Crane community Alfred Morelock	Yes	Crane	Community	Alfred D. Morel...
005	8-46006633	Crane Community Allen Bearden	Yes	Crane	Community	Allen Bearden
005	8-46006637	Crane Community Carrie & Tom Glover	Yes	Crane	Community	Carrie & Tom G...
005	8-56755745	Crane Community Dalton Williamson	Yes	Crane	Community	Dalton Williams...

To add all members of your BSAFR groups to your 2023 FOS appeal you need to use the Pledge Card generator. You first need to review your BSAFR group query in your information library and figure out which group is your top group so you can mark all members from the top group through its subordinate groups. For this council the 3rd group on the list is the top group. The first two groups are event related groups.

# Mark Group Members with Appeal Analysis/More Tasks/ Pledge Card Export



## BSA Pledge Card Export

Main Sort Options Production Options

Appeal ID: (005) F23 Friends of Scouting

Constituent:

Constituent Selection:

Group: Tukabatchee Area Council 005

Group Selection:

☒ Include Subordinate Groups

### Inclusion Options

☒ Include current donor group members

☐ Include former donor group members as of mm/dd/yyyy

☐ Include donor group members that have given in the past years (0-3).

☐ Include donor group members that have given at least dollars.

Main Sort Options Production Options

☐ Mark constituent with appeal

☐ Reprint for already marked record

☒ Print unmarked records

☒ Include Barcode in report

☒ Include To the Parents of

Prior X gift amounts (0-3):

Card Comment:

Stub Comment:

Find the Pledge Card Export process. You don't need to use the pledge cards or export that it generates but you should mark you constituents with the new appeal so that they will show as unworked and potential donors on the OTLP report.

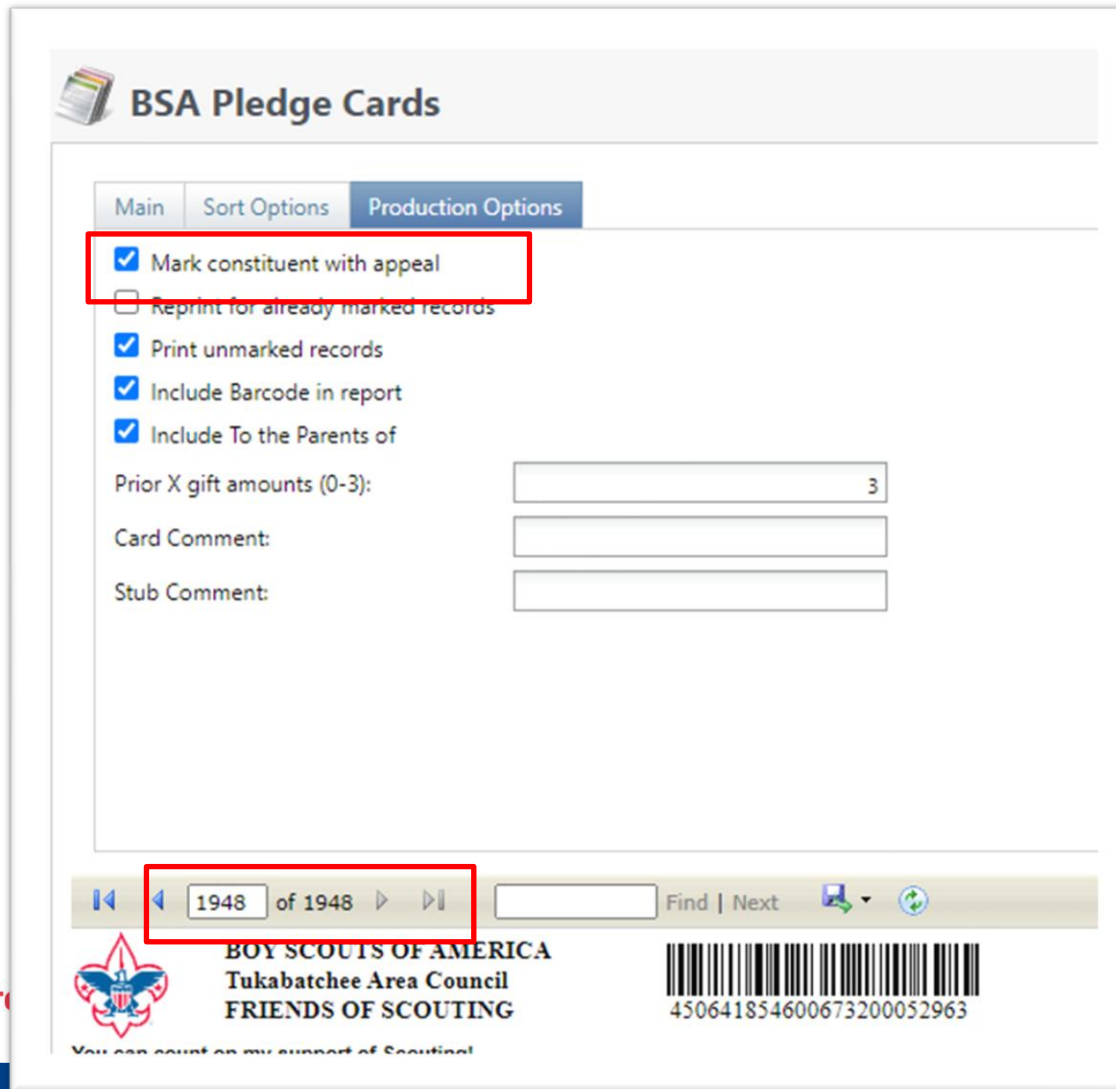
On the main tab, you place in your 2023 appeal and then your top BSAFR Group. Then check that you want to include all subordinate groups.

On the Production Options tab click the three boxes checked and view the results to get a count.



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# Final View Results is done with Mark Constituent Checked



The screenshot shows the 'BSA Pledge Cards' interface. At the top, there are three tabs: 'Main', 'Sort Options', and 'Production Options'. The 'Production Options' tab is selected. Below the tabs, there are several checkboxes and input fields. A red box highlights the 'Mark constituent with appeal' checkbox, which is checked. Other checkboxes include 'Reprint for already marked records' (unchecked), 'Print unmarked records' (checked), 'Include Barcode in report' (checked), and 'Include To the Parents of' (checked). Below these are three input fields: 'Prior X gift amounts (0-3):' with the value '3', 'Card Comment:', and 'Stub Comment:'. At the bottom of the screen, there is a navigation bar with a red box around the page number '1948 of 1948'. To the left of the navigation bar is the BSA logo and the text 'BOY SCOUTS OF AMERICA Tukabatchee Area Council FRIENDS OF SCOUTING'. To the right is a barcode and the number '450641854600673200052963'.

BSA Pledge Cards

Main Sort Options Production Options

☒ Mark constituent with appeal

☐ Reprint for already marked records

☒ Print unmarked records

☒ Include Barcode in report

☒ Include To the Parents of

Prior X gift amounts (0-3):

Card Comment:

Stub Comment:

1948 of 1948 Find | Next

BOY SCOUTS OF AMERICA  
Tukabatchee Area Council  
FRIENDS OF SCOUTING

450641854600673200052963

I ran the report instead of the export and it gave me 1948 pages of pledge cards. I multiplied this by 3 and I got 5,952 group members that will be marked by the appeal. These should all show on my appeal constituent export once marked. Remember current donor already show. To mark the constituents, check the Mark Constituent With Appeal Box and click view result.



## BSA Appeal Constituent Export (OLTP)

Site: Tukabatchee Area Council

Report Code: 2023

Annual Appeal(s): (005) F23 Friends of Scouting

Multi-year Appeal(s):

☐ Only include multi-year appeal revenue for:

Include Exclude Breakdown Filter

- ☐ Breakdown by All
- ☒ Break Down by BSA Structure
- ☒ Break Down by Giving Category
- ☐ Break Down by Solicitor
- ☐ Break Down by Revenue BSAFR Group
- ☒ Anchor to Latest Revenue or Constituent Appeal
- ☐ Sort by Name (Last/First) Only

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## BSA Appeal Constituent Export (OLTP)

CY Appeal: (005) F23 Friends of Scouting  
PY1 Appeal: (005) F22 Friends of Scouting  
PY2 Appeal: (005) F21 Friends of Scouting  
PY3 Appeal: (005) F20 Friends of Scouting

After the system ran overnight to update reporting tables I then ran my constituent export. I now have 95 pages which equates to 5,147 constituents in my appeal report. This is lower than the number marked by the appeal but 936 were already on the report because they had giving history. The list contains my donors for the last three years and others that I could ask because they are part of my BSAFR groups, the history may be older than three years.



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# Updating Donor Communications for 2023



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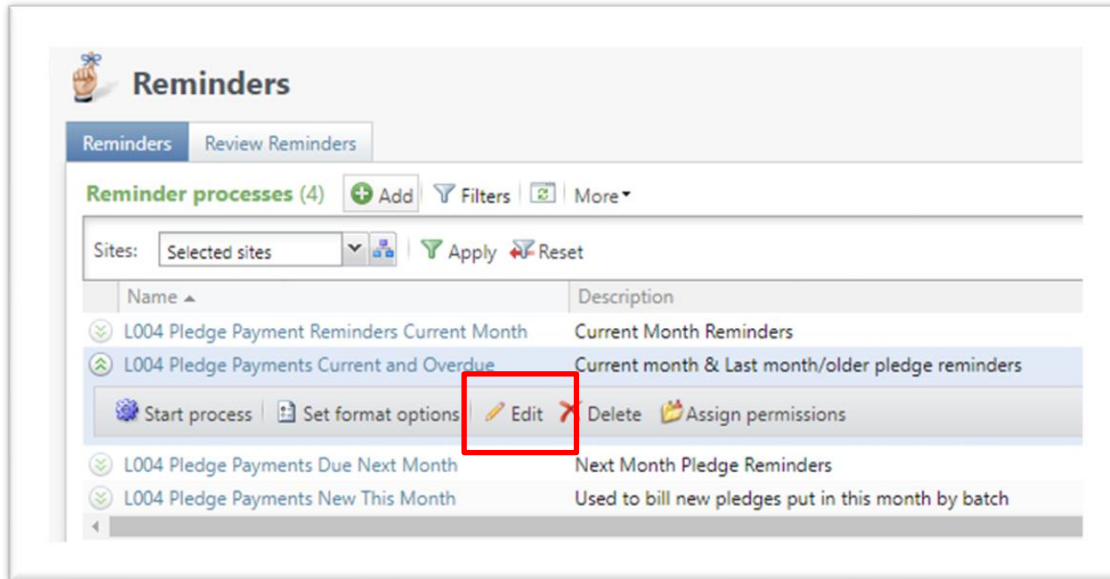
# Updating Reminders and Acknowledgements

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





# Finding your Reminder Selections



**Reminders**

Reminders | Review Reminders

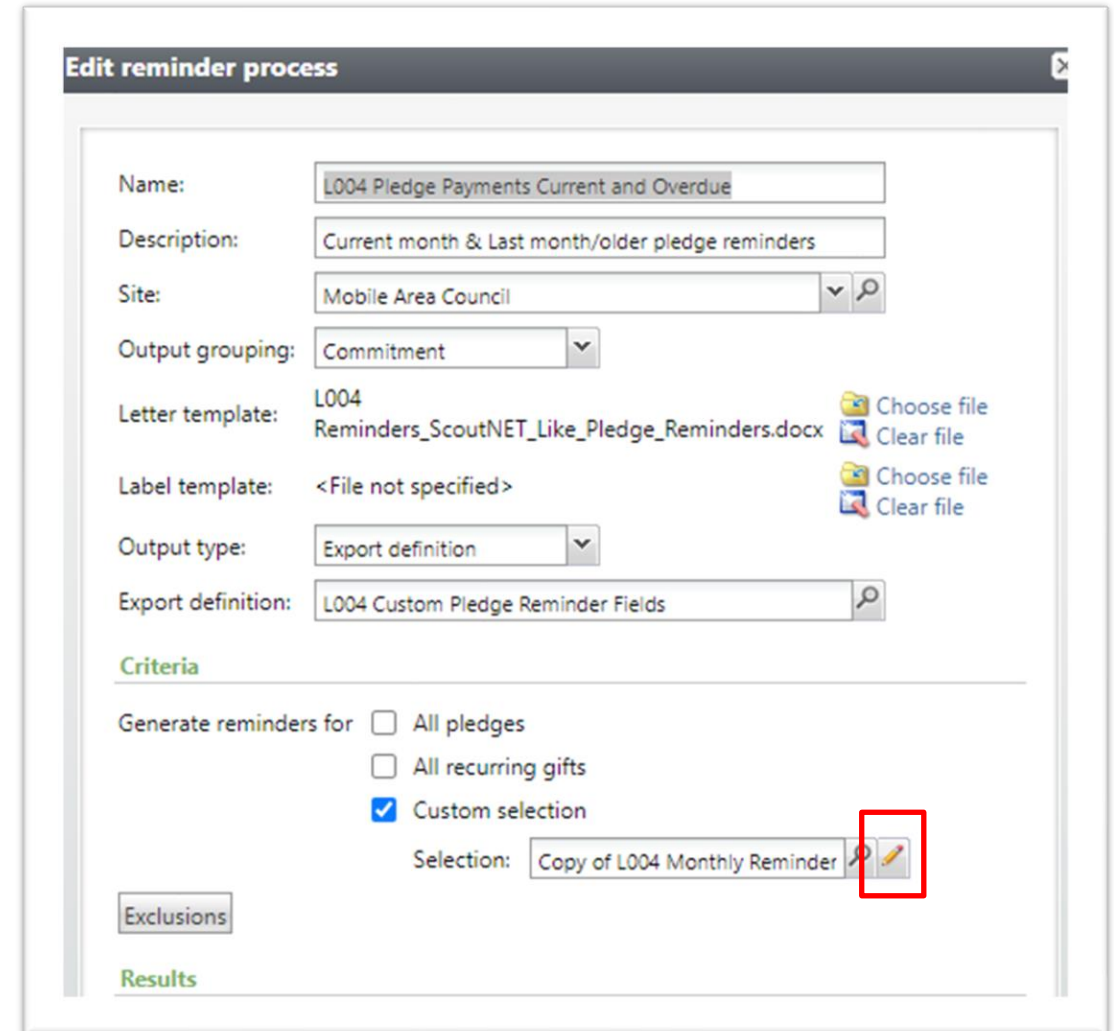
Reminder processes (4) [Add](#) [Filters](#) [More](#)

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:'. The first three criteria are highlighted with a red box: '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'. An 'Apply Criteria' dialog box is open, showing a list of appeal records under 'Appeal\Appeal record criteria'. The first two records are selected: '(004) S22 - 2022 FRIENDS OF SCOUTING' and '(004) S23 - 2023 FRIENDS OF SCOUTING'. The 'One of' radio button is selected. The right screenshot shows the same list of criteria with a red box around the first three items, but the 'Apply Criteria' dialog box is not present.

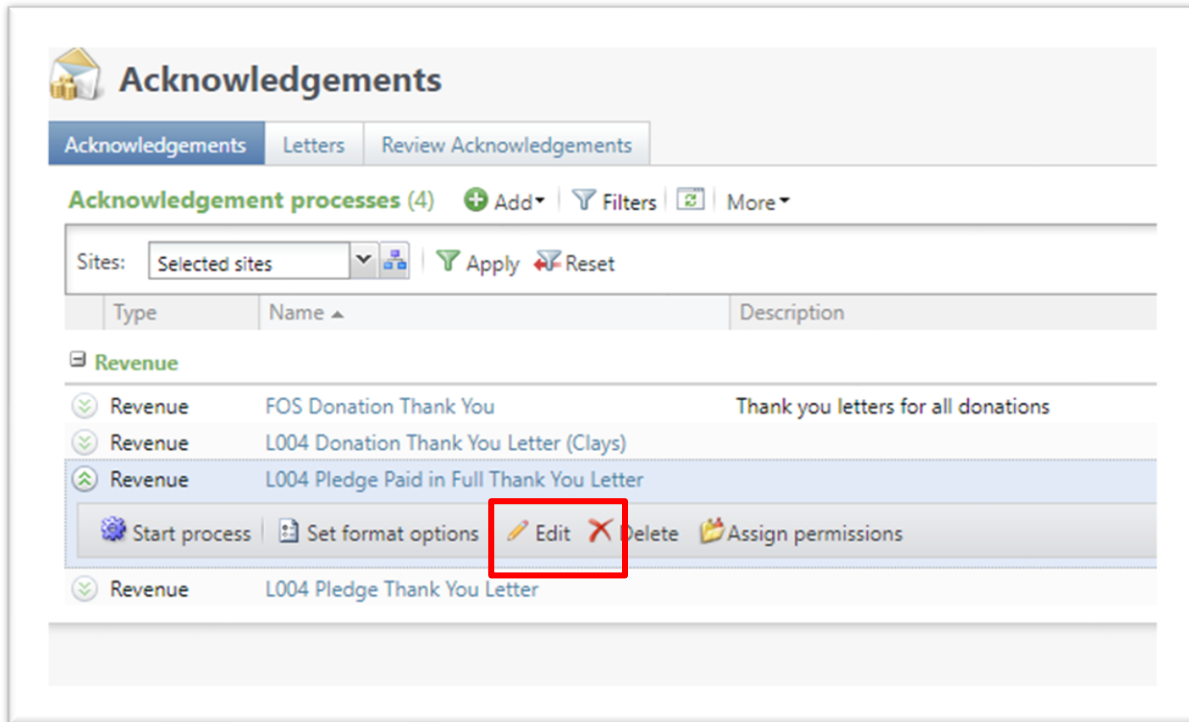
The right screenshot shows the same list of criteria with a red box around the first three items: 'Appeal\Site\Site ID is equal to 004', 'and Appeal\Appeal record is one of (004) S22 - 2022 FRIENDS OF SCOUTING, (004) S23 - 2023 FRIENDS OF SCOUTING', and 'and Pledge/Grant award next installment date is on or before this month or is blank'.

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



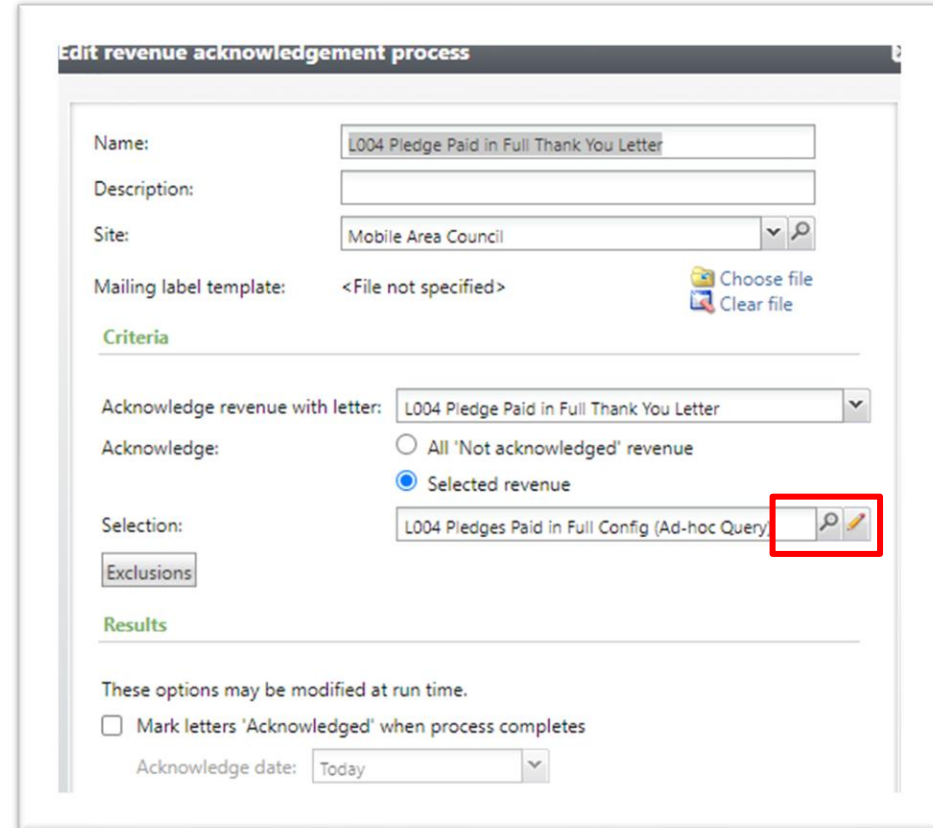
**Acknowledgements**

Acknowledgements Letters Review Acknowledgements

**Acknowledgement processes (4)** + Add Filters More

Sites: Selected sites Apply Reset

Type	Name	Description
<b>Revenue</b>		
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 <b>Edit</b> 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  
2023  
2022  
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 Coun - 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 Coun - 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

## Revenue Data Hygiene



# 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 latter 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

## FY Revenue with Wrong Inbound Channel

- Revenue Data Hygiene

Revenue Missing Revenue Attributes

Revenue Missing BSAFR Group

FY Revenue with Wrong Inbound Channel

Mismatched Appeals

For finding revenue with 2022 GI Post Dates, but attached to 2023 Report Codes with wrong Inbound Channels (12)

More

Name equal to:

Appeal Name equal to:

Inbound channel equal to:

Apply

Reset

Lookup ID	Name	Revenue ID	Amount	Transaction type	Application	Appeal Name	Report Code	GL post date	Inbound channel	
<div></div> 8-5	Richard	rev-44	\$333.00	Pledge	Donation		FS23 - Friends ...	2023	2/11/2022	Friends of Scouting
<div><div></div>Go to Revenue</div>										
<div></div> 8-5	Kelly	rev-45	\$333.00	Pledge	Donation		FS23 - Friends ...	2023	4/27/2022	Friends of Scouting
<div></div> 8-5	William	rev-44	\$333.00	Pledge	Donation		FS23 - Friends ...	2023	3/16/2022	Friends of Scouting
<div></div> 8-5	Theresa	rev-44	\$333.00	Pledge	Donation		FS23 - Friends ...	2023	3/9/2022	Friends of Scouting
<div></div> 8-5	Erin T	rev-44	\$0.00	Pledge	Donation		FS23 - Friends ...	2023	2/15/2022	Friends of Scouting



# Revenue Data Hygiene

## Mismatched Appeals

- Revenue Data Hygiene

Revenue Missing Revenue Attributes

Revenue Missing BSAFR Group

FY Revenue with Wrong Inbound Channel

Mismatched Appeals

Mismatched Appeals - Report Code 2023 (3)  | More ▾

Appeal Name equal to:

Payment's Appeal Name equal to:

Pledge's Appeal Name equal to:

Apply

Reset

	Transaction type	Application Details\App...	Amount	Date	Revenue ID	Appeal Name	Payment's Revenue ID	Payment's Appeal Name	Pledge's Revenue ID	Pledge's Appeal Name
<div></div>	Payment	Pledge	\$2,107.30	10/31/2022	rev-452 <div></div>	<div></div> S23 - 2023 Friend...			rev-449 <div></div>	<div></div> S22 - 2022 Friend...
<div></div>	Payment	Pledge	\$500.00	8/10/2022	rev-451 <div></div>	<div></div> S23 - 2023 Friend...			rev-448 <div></div>	<div></div> S22 - 2022 Friend...
<div></div>	Pledge	Donation	\$1,500.00	9/20/2022	rev-451 <div></div>	<div></div> S23 - 2023 Friend...	rev-451 <div></div>	<div></div> S22 - 2022 Friend...		



# 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





## 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

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



# Questions & Answers



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