

CRM User Forum

December 21, 2022

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Objectives

- Review – Creating Appeals
- Review – Creating Future Year (FY) Events
- Year-End Close “to do” list
- 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 ▾

Marketing and Communications

Appeal

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

Donor relations

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

Reports

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

Packages

- Creatives
- Letters and documents
- Packages

Pledge card re

- Run pledge c

Configuration

- Address proc
- Letter templa
- Name format

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



Marketing and Communications

Appeal Donor relations Pledge card

Appeal search Receipts Run pledg

Add an appeal Acknowledgements

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 **7**

8

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
- 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: [REDACTED] **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: [REDACTED] Membership:

Revenue Summary **Designations** Prior Appeal Contributions Payments Bal

Designations (1) Edit list of appeal designations More ▾

Designation
 [REDACTED] 00001 Council Gener - Operating

Edit designations [X]

Designation	Default designation
[REDACTED] 00001 Council Gener - Opera...	<input checked="" type="checkbox"/>
* [REDACTED]	<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 [X]

Prior Appeal: █████ S21-Friends of Scouting 2021

Prior Year Appeal History [X] More ▾

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

Edit BSAFR appeal [X]

Previous year appeal: █████ S21-Friends of Scouting 2021 [X]



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

The screenshot shows the Blackbaud CRM S interface. At the top, there is a search bar for 'Constituents' with a search icon and an 'Add new' button. Below this is a navigation menu with options: Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Prospects, and Volunteers. The 'Events' section is active, showing a search bar for 'Enter the name of an event' and an 'Add new' dropdown menu. The dropdown menu is open, showing three options: 'Event', 'Multi-level event', and 'Auction'. The 'Event' option is highlighted with a red box. Below the dropdown menu, there is an 'Event calendar' section with a 'Jump to date' field set to '10/18/2022' and a 'Group by' dropdown set to 'Category'. To the right of the calendar is a calendar view for 'October 2022' showing dates 25 and 02. The left sidebar contains 'Shortcuts', 'Recent searches', and 'Recently accessed' sections.

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: 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 an event. The main window is titled "Add an event" and has a "General" tab selected. The "Name" field contains "L004 Corporate Golf Classic 2023" and the "Description" field contains "2023 Corporate Golf Classic". The "Start date" is "6/16/2023" and the "Start time" is "11:00 AM". The "Category" is "FY - Golf". There are several checkboxes: "Event is an auction" (checked), "Do not show event" (unchecked), and "Event allows..." (checked). A "Copy options" button is visible at the bottom left of the main window.

A "Copy from event" dialog box is open in the foreground. It has a "Copy from:" field containing "L004 CORPORATE CLASSIC 2022". Below this field are several checkboxes for copying data from the selected event:

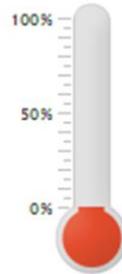
- Copy tasks
- Copy preferences
- Copy lodging options
- Copy designations
- Copy expenses
- Copy invitations
- Copy job occurrences
- Copy team structure
- Copy registration options
- Copy invitees
- Copy team members

The dialog box has "OK" and "Cancel" buttons at the bottom right. The main window has "Save" and "Cancel" buttons at the bottom right.



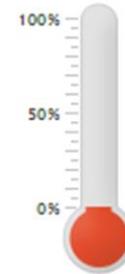
L004 Corporate Golf Classic 2023

Start date: 6/16/2023 - 11:00 AM Status: ✔ Active
End date: 6/16/2023 - 8:00 PM
Site: Mobile Area Council Lookup ID: 8-10002121
Location: Spring Hill Golf Course
4000 Dauphin St
Mobile, AL 36608
Room/Unit:
Contact:
Coordinator:
Category: FY - Golf



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 Occurre

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.



PREPARING FOR YEAR-END CLOSE



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CRM – Year-End Close

- Run the Pledges Aging Receivable report
 - Ask management to review

Global Pledge Write-off should be done at the beginning of next year.

Write off the Pledges from previous years.



Reports To Run

- Pull year end reports the morning after entry for end of year.
 - Pledge Receivable Aging Report
 - Appeal Progress by Category
 - Appeal Progress by Solicitor
 - BSA Summary of Appeals



CRM – Year-End Close

- Getting ready for New Year in CRM
 - Appeals for 2023 set up for receiving funds Use FY inbound channels to ensure funds are going to Future Year

The screenshot displays the 'Details' tab of a CRM record. The record is a 'Pledge Receivable' with an original amount of \$500.00. The 'Inbound channel' is 'FY - Friends of Scouting' and the 'Appeal' is '(999) FS22 - Friends of Scouting'. The 'Revenue category' is 'Temporarily restricted by donor'. The 'Send reminders' field is set to 'Yes'. There is also a 'Designations (1)' section at the bottom.

Details	Installation/Write-off Activity	Benefits	Recognition	Solicitors	Letters	Attributes
Details						
Original amount:	\$500.00	Send reminders:	Yes			
Subtype:	Pledge Receivable	Revenue reference:				
Source code:		Effort:				
Inbound channel:	FY - Friends of Scouting	Appeal:	(999) FS22 - Friends of Scouting			
		Revenue category:	Temporarily restricted by donor			
Designations (1) More						
Designation						Amount



FY – Inbound Channels

Inbound channel

FY - Friends of Scouting

FY - Friends of Scouting

FY - Direct Mail

FY - Project Sales

FY - Capital Contributio...

FY - Special Event Fund...

FY - Legacies and Bequ...

FY - Foundations and T...

FY - Other Direct Contri...

FY - Other Direct - Serv...

FY - Other Direct - Lear...

FY - Associated Organi...

FY - Associated Organi...

FY - Associated Organi...

FY - Associated Organi...

Inbound channel

Friends of Scouting

FY - Foundations and I...

FY - Other Direct Contri...

FY - Other Direct - Serv...

FY - Other Direct - Lear...

FY - Associated Organi...

FY - Associated Organi...

FY - Associated Organi...

FY - Associated Organi...

FY - United Way - Alloc...

FY - United Way - Don...

FY - Unassociated Orga...

FY - Other Indirect Con...

FY - Government Fees

FY - Government Grants



Appeal Progress Results

Before closing December - Under “Appeal Progress Results” check transaction on future year appeals to verify FY inbound channels have been used



Revenue

[More tasks](#)

 [Appeal progress results](#)

Appeal: (999) FS22 - Friends of Scouting

Description: 2022 Friends of Scouting Start date: 11/30/2021
Business unit: End date: 12/31/2022
Category: Annual Giving (Friends of Scouting) Goal: \$0.00
Report code: 2022 Status: Active
Site: Boy Scouts of America Membership:

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

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (1)

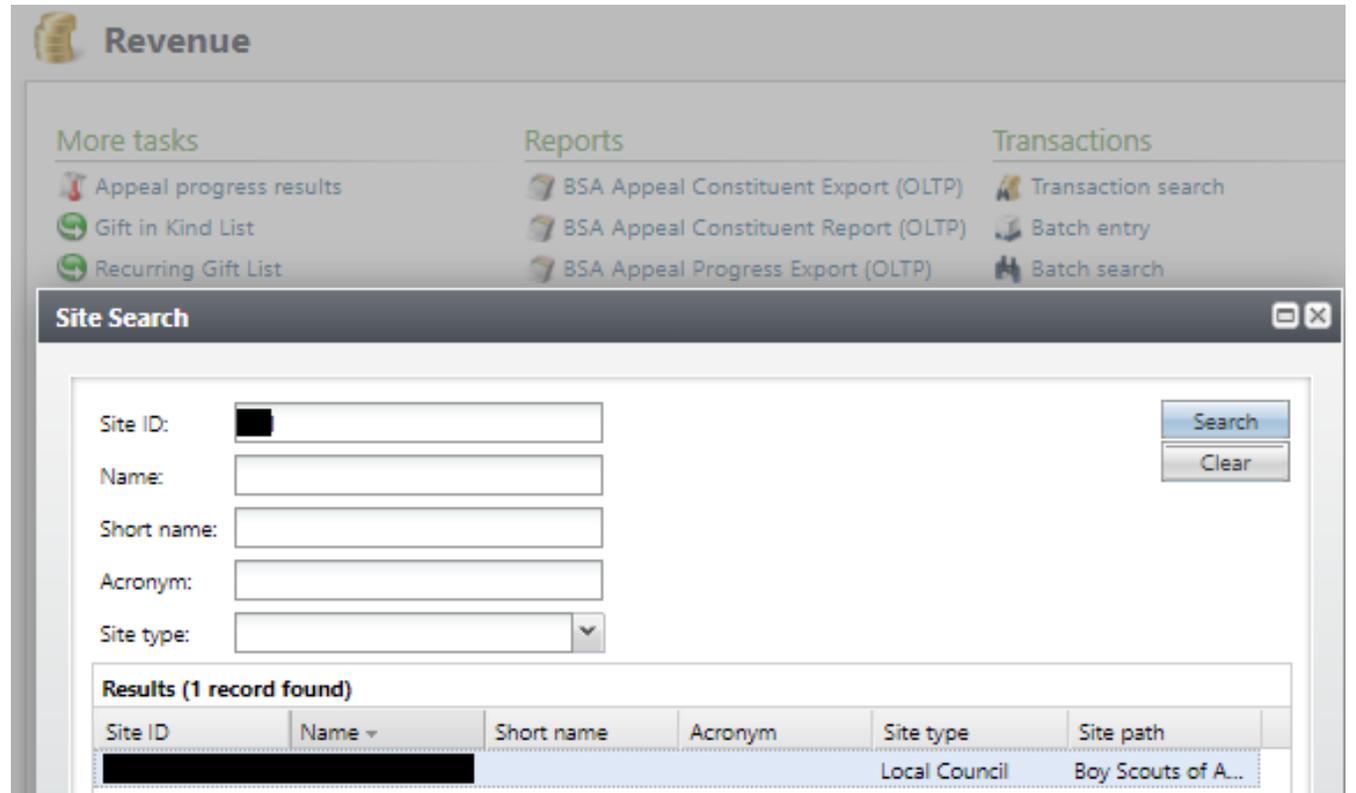
Constituent equal to: Transaction equal to: Application not equal to:

nount	Pay Meth...	GL Post ...	GL Post Da...	Deposit	Bal...	D...	Inbound Channel ▲	Revenue Category
\$500.00	None	Not Pos...	12/13/2021		\$500...	0...	FY - Friends of Scouting	Temporarily restricted by...



Update Recurring Gifts

Go to Revenue>Recurring Gift List, enter in your council #



The screenshot shows the 'Revenue' module interface. It features three main sections: 'More tasks', 'Reports', and 'Transactions'. Below these is a 'Site Search' window with the following fields: Site ID (with a blacked-out value), Name, Short name, Acronym, and Site type (a dropdown menu). To the right of the Site ID field are 'Search' and 'Clear' buttons. Below the search fields, a 'Results (1 record found)' section displays a table with the following data:

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



Update Recurring Gifts

You can review the list of recurring gifts here and navigate to them quickly.

Recurring Gifts List

Recurring list for your council (2)  More ▾

Recurring Status equal to: ▾ |  Apply  Reset

	Council #	Council	Appeal	Appeal Report ...	Constituent ID	Constituent Na...
			ENDOWME...	Multi-year	8-15749795	Jay F. Simancek

 Go to Constituent  Go to revenue  Edit Status



Update Recurring Gifts

You can update the appeal info by clicking on Edit Recurring Gift, then making the change and clicking Save. Because recurring gift commitments do not post to the GL, this is not done in a Revenue Update Batch.

Tasks

Jay F. Simancek

1/6/2017 Recurring gift: \$0.00

Transaction summary

Edit recurring gift

Constituent: Jay F. Simancek

Finder number:

Amount:

Source code:

Appeal:

Designations:

Revenue function:

Date:

Inbound channel:

Effort:

Reference:

Revenue category:

Make this recurring gift anonymous

Schedule

Installment frequency:

Installment schedule begins:

Next installment date:

End date (optional):

Send reminders

Do not acknowledge

Date	Amount
3/31/2017	\$0.00
6/30/2017	\$0.00
9/30/2017	\$0.00
12/31/2017	\$0.00
3/31/2018	\$0.00

Help

Save

Cancel



Year-End Revenue Checks

Mismatched Appeal tabs

Appeal: [REDACTED] 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: [REDACTED] Membership:

Summary | Contributions | Payments | Balances | Revenue Details (Splits) | Revenue Details (Write-offs) | Household Donors | Designations | Matching Gift Claims | Mailings | Documentation | **Mismatch: Appeals?** | Solicitor Credits by Group | Prior Appeals

Expand all | Collapse all

⌵ **Pledge (with Payment having mismatched Appeal) (0)** Filters [0] More ▾

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
[REDACTED]													

⌵ **Payment with mismatched Appeal (on Pledge) (2)** Filters [0] More ▾

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)** Filters [0] More ▾

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
[REDACTED]														

⌵ **Auction Donation with blank Appeal (not yet purchased) (0)** Filters [0] More ▾

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
[REDACTED]														



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
d	6/16/2022	ZGive	\$0.00	██████ 00001 Counc - Operating	Friends of Scouting	Unrestricted by donor
d	2/10/2022		\$500.00	██████ 08301 Field Service - Operating	Friends of Scouting	Unrestricted by donor
d	10/4/2022		\$460.00	██████ 08301 Field Service - Operating	FY - Friends of Scouting	Unrestricted by donor
d	5/13/2022		\$1,000.00	██████ 00001 Counc - Operating	FY - Friends of Scouting	Unrestricted by donor



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 post dates.
- 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 post dates.



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: Report Code:

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

Only include multi-year appeal revenue for:

Include Exclude Breakdown Filter

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

1 of 18 Find | Next

BSA Appeal Constituent Export (OLTP) As of 11/15/2022

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

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

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 records
- 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.



Final View Results is done with Mark Constituent Checked

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

You can count on my support of Scouting!

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.



Pro

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

1 of 94 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

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.



Updating Donor Communications for 2023



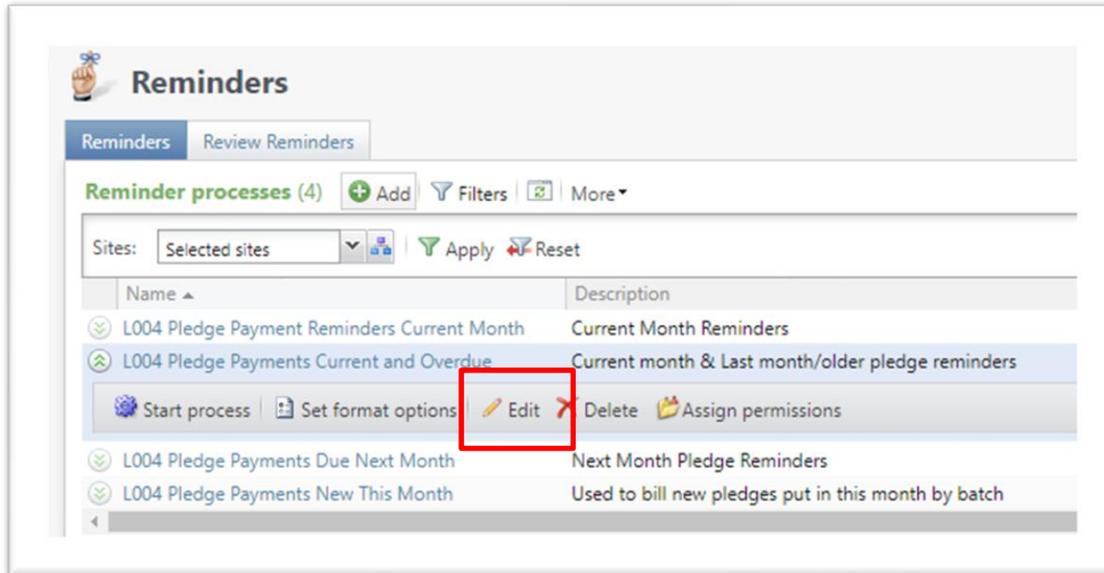
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Updating Reminders and Acknowledgements

- 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

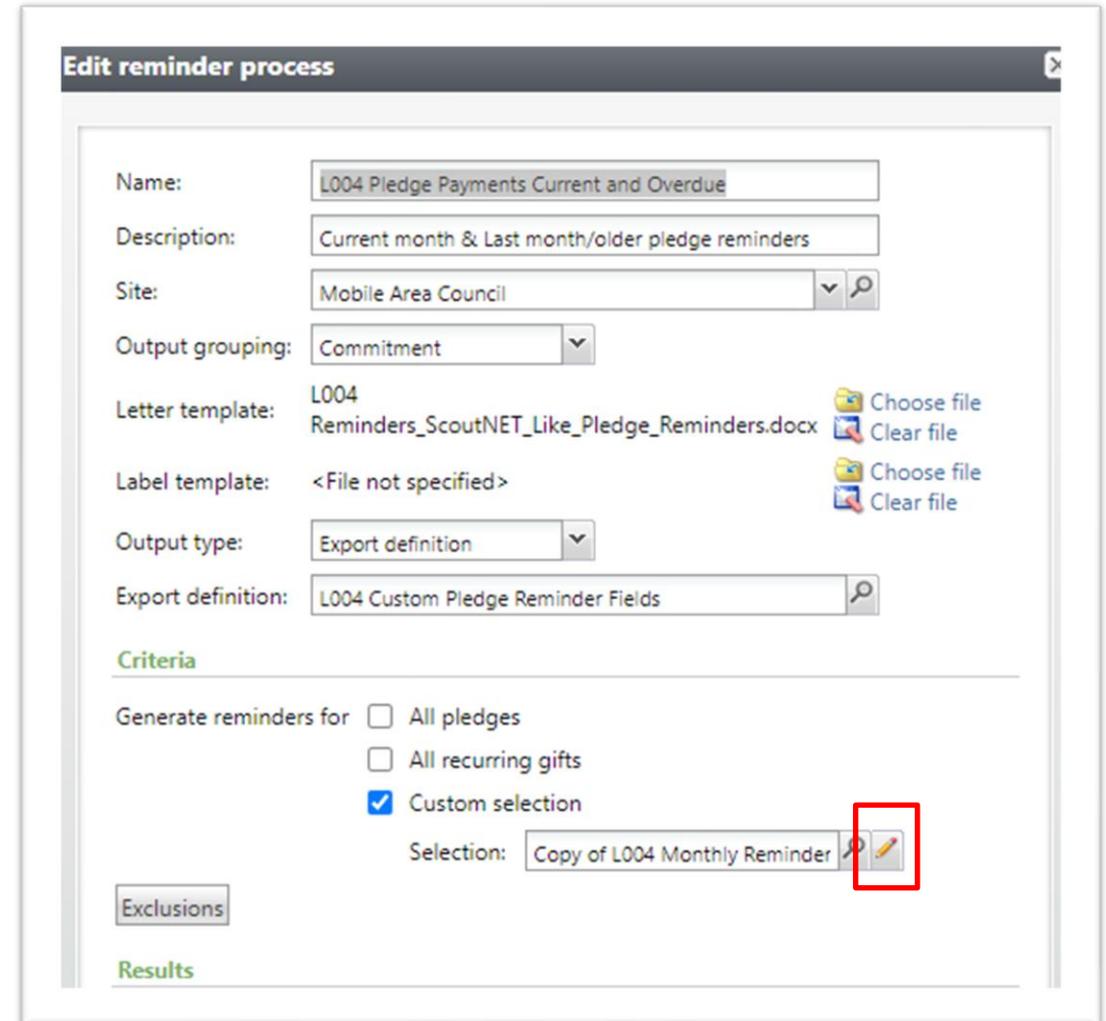
Reminder processes (4) + Add Filters More

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 Selection

Exclusions

Results



Updating your Appeal selections

Include records where:

- Appeal\Site\Site ID is equal to 004
- and Appeal\Appeal record is equal to (004) S22 - 2022 FRIENDS OF SCOUTING
- and Pledge/Grant award next installment date is on or before this month or is blank
- and Transaction type is one of Pledge
- and Pledge/Grant award balance is greater than 0
- and Send pledge reminder is equal to Yes

Results fields to display:

- Appeal\Name
- BSA Structure Attribute\Value
- Giving Category Attribute\Value
- Amount (Pledge Amount)
- Date (Pledge Date)
- Pledge/Grant award next installment date (Next Installment Due)
- Constituent\Name (Constituent)
- Constituent\Lookup ID (Lookup ID)
- Pledge/Grant award balance (Balance)
- Latest installment payment date
- Latest installment payment amount
- Revenue record

Apply Criteria

Appeal\Appeal record criteria

One of

Value Output field

(004) S22 - 2022 FRIENDS OF SCOUTING
(004) S23 - 2023 FRIENDS OF SCOUTING
*

Only return records that match all selected values

OK Cancel

include records where:

- 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 Pledge/Grant award next installment date is on or before this month or is blank
- and Transaction type is one of Pledge
- and Pledge/Grant award balance is greater than 0
- and Send pledge reminder is equal to Yes

Results fields to display:

- Appeal\Name
- BSA Structure Attribute\Value
- Giving Category Attribute\Value
- Amount (Pledge Amount)
- Date (Pledge Date)
- Pledge/Grant award next installment date (Next Installment Due)
- Constituent\Name (Constituent)
- Constituent\Lookup ID (Lookup ID)
- Pledge/Grant award balance (Balance)
- Latest installment payment date

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.



Finding your Acknowledgement Selections

The screenshot shows the 'Acknowledgements' section of a software interface. At the top, there are tabs for 'Acknowledgements', 'Letters', and 'Review Acknowledgements'. Below this, there's a section for 'Acknowledgement processes (4)' with options to 'Add', 'Filters', and 'More'. A 'Sites' dropdown is set to 'Selected sites'. A table lists several processes, with the one 'L004 Pledge Paid in Full Thank You Letter' highlighted. Below the table, there are action buttons: 'Start process', 'Set format options', 'Edit', 'Delete', and 'Assign permissions'. The 'Edit' button is highlighted with a red box.

Type	Name	Description
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	
Revenue	L004 Pledge Thank You Letter	

The screenshot shows the 'edit revenue acknowledgement process' form. Fields include 'Name' (L004 Pledge Paid in Full Thank You Letter), 'Description', 'Site' (Mobile Area Council), and 'Mailing label template'. Under the 'Criteria' section, 'Acknowledge revenue with letter' is set to 'L004 Pledge Paid in Full Thank You Letter'. The 'Acknowledge' section has radio buttons for 'All 'Not acknowledged' revenue' and 'Selected revenue', with 'Selected revenue' selected. The 'Selection' dropdown is set to 'L004 Pledges Paid in Full Config (Ad-hoc Query)', and its search and edit icons are highlighted with a red box. There are also 'Exclusions' and 'Results' sections, and a checkbox for 'Mark letters 'Acknowledged' when process completes'.

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

The screenshot shows a search criteria dialog box with the following criteria listed:

- 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

The 'Apply Criteria' dialog box is open, showing the 'Appeal\Report code criteria' section. The 'One of' dropdown is selected, and the 'Value' radio button is checked. The list of years on the left includes 2027, 2026, 2025, 2024, 2021, 2020, 2019, 2018, and 2017. The list of years on the right includes 2022 and 2023. The 'Only return records that match all selected values' checkbox is unchecked. The 'OK' and 'Cancel' buttons are at the bottom.

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.

The screenshot shows the search criteria list with the following criteria:

- 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

The 'Results fields to display' section lists the following fields:

- 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



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, the navigation bar includes 'Home', 'Constituents', 'Marketing and Communications', 'Revenue', 'Events', 'Memberships', 'Prospects', and 'Volunteers'. The 'Revenue' menu item is highlighted with a red underline. Below the navigation bar, the main content area is titled 'Revenue' and contains two sections: 'More tasks' and 'Reports'. The 'More tasks' section lists several tasks, with 'Revenue Data Hygiene' highlighted by a red underline. The 'Reports' section lists several reports, including 'BSA Appeal Constituent Export (OLTP)', 'BSA Appeal Constituent Report (OLTP)', 'BSA Appeal Progress Export (OLTP)', and 'BSA Appeal Progress Report (OLTP)'. A 'Site Search' dialog box is open at the bottom, featuring a 'Site ID:' label, a text input field containing the number '123', and a 'Search' button. The 'Search' button is also highlighted with a red underline.



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Revenue Data Hygiene

FY Revenue with Wrong Inbound Channel

[Redacted] - 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
8-5 [Redacted]	Richard [Redacted]	rev-44 [Redacted]	\$333.00	Pledge	Donation	[Redacted] FS23 - Friends ...	2023	2/11/2022	Friends of Scouting
8-5 [Redacted]	Kelly [Redacted]	rev-49 [Redacted]	\$333.00	Pledge	Donation	[Redacted] FS23 - Friends ...	2023	4/27/2022	Friends of Scouting
8-5 [Redacted]	Willia [Redacted]	rev-44 [Redacted]	\$333.00	Pledge	Donation	[Redacted] FS23 - Friends ...	2023	3/16/2022	Friends of Scouting
8-5 [Redacted]	There [Redacted]	rev-44 [Redacted]	\$333.00	Pledge	Donation	[Redacted] FS23 - Friends ...	2023	3/9/2022	Friends of Scouting
8-5 [Redacted]	Erin T [Redacted]	rev-44 [Redacted]	\$0.00	Pledge	Donation	[Redacted] FS23 - Friends ...	2023	2/15/2022	Friends of Scouting



Revenue Data Hygiene

Mismatched Appeals

[Redacted] - 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:

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
Payment	Pledge	\$2,107.30	10/31/2022	rev-452 [Redacted]	[Redacted] S23 - 2023 Friend...			rev-449 [Redacted]	[Redacted] S22 - 2022 Friend...
Payment	Pledge	\$500.00	8/10/2022	rev-451 [Redacted]	[Redacted] S23 - 2023 Friend...			rev-448 [Redacted]	[Redacted] S22 - 2022 Friend...
Pledge	Donation	\$1,500.00	9/20/2022	rev-451 [Redacted]	[Redacted] S23 - 2023 Friend...	rev-451 [Redacted]	[Redacted] 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





Council Support

Council Management Support

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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](#)

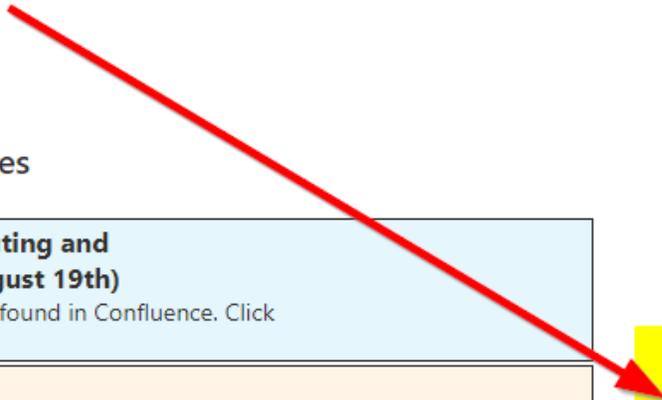
[My Open Tickets](#) | [My Closed Tickets](#) | [Knowledge Base](#) | [Report Security Issue](#) | [Report Phishing Attempt](#) | [Password Reset](#) | [Office365](#) | [HR Gateway](#) | [MyBSA](#)

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



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

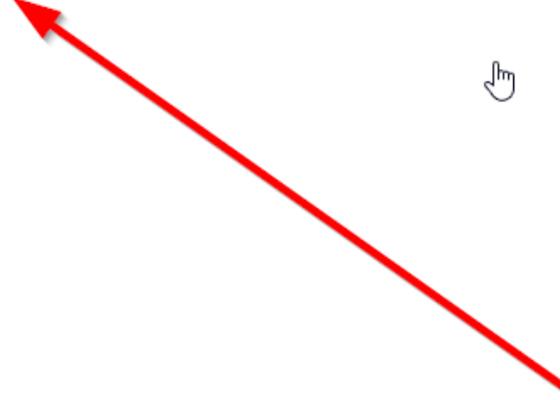
General Assistance

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



<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

January 18, 2023
10:00 am & 2:00 pm CT



Questions & Answers



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