

CRM User Forum

January 18, 2023

John Kuehn ~ Valerie Eaton

Cornelia Ellis ~ Don Day



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Objectives

- Contribution Statements
- Batch Cleanup
- Data Lists
- Questions – Answers



Creating the Annual Contribution Statements



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Contribution Statements

- Should be mailed donors by the last day of January.
- Contribution statement template in CRM is ready for use.

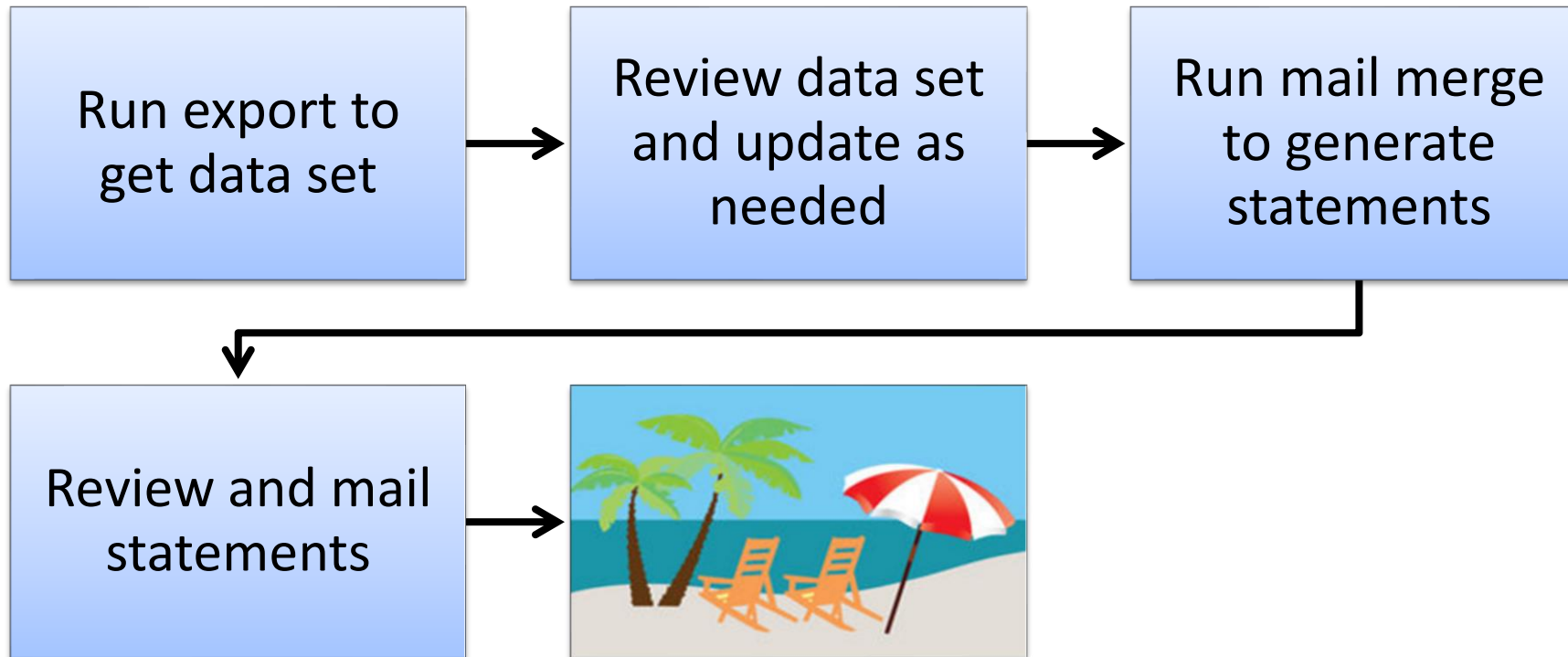


IRS Publication 1771, Charitable Contributions—Substantiation and Disclosure Requirements

- A donor must have a bank record or written communication from a charity for any monetary contribution before the donor can claim a charitable contribution on his/her federal income tax return
- A donor is responsible for obtaining a written acknowledgment from a charity for any single contribution of \$250 or more
- A charitable organization is required to provide a written disclosure to a donor who receives goods or services in exchange for a single payment in excess of \$75
- Recipient organizations typically send written acknowledgments to donors no later than January 31 of the year following the donation.

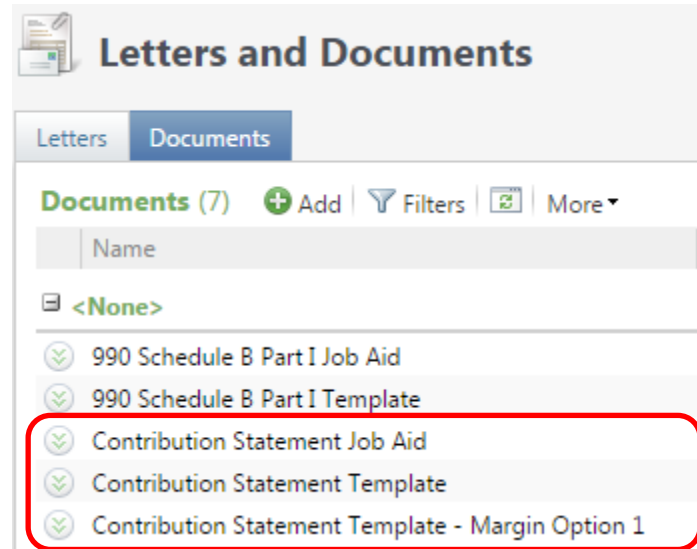


Process Overview



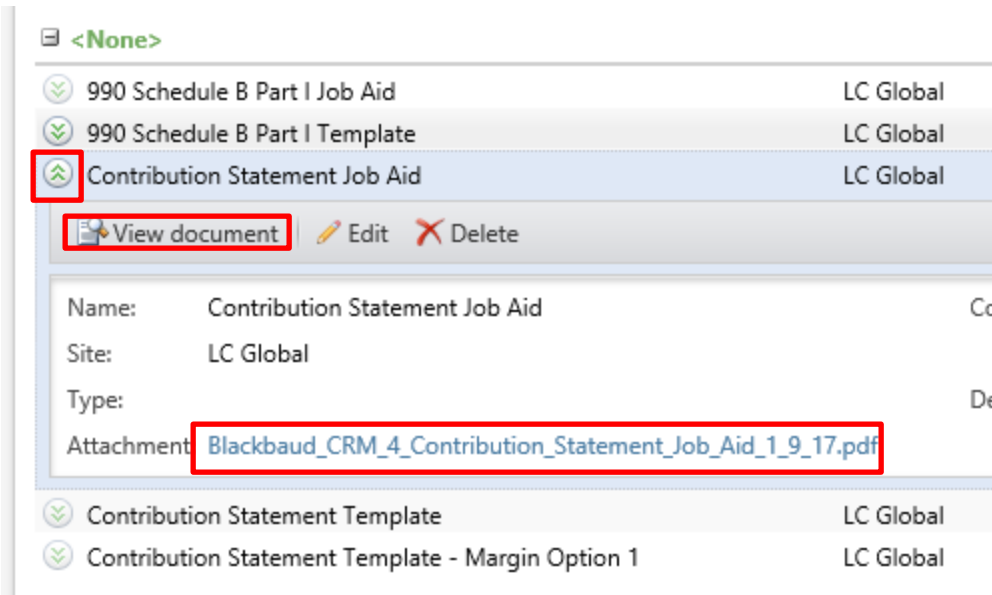
Process Overview

- Marketing and Communications>Packages>Letters and documents>View letters and documents>Documents tab
- **Job Aids** have detailed, step-by-step instructions



To Download Document

- Click the Chevron
- Either click “View document” or click the document hyperlink to download.
- **DO NOT** edit and/or change the site from LC Global to your council.




Run Export




- 3 Choices
 - Cumulative contributions > \$0
 - All donors get statements
 - Cumulative contributions >= \$250 or Benefited
 - Donors that give \$250 or more, cumulatively, and any donors that received benefits get statements
 - Single contribution >= \$250 or Benefited
 - Donors that give a single gift of \$250 or more and any donors that received benefits get statements






Run Export

- Administration>Tools>Export

 **Export**

Export processes (2,018)  Add |  Filters |  | More ▾

Name ▲
 Contribution_Statement_Data_Cumulative_Donations>\$0
 Contribution_Statement_Data_Cumulative_Donations>=\$250_or_Benefited
 Contribution_Statement_Data_Single_Donations>=\$250_or_Benefited



Run Export

- Because you are site secured only your records will be returned when you run this.

The screenshot displays the 'Export list' interface. On the left, a 'Tasks' sidebar contains a list of actions: 'Start process' (highlighted with a red box and the number 1), 'Edit process', 'Set format options', 'Generate WSF', 'Create job schedule', and 'Delete process'. Below this is a 'Shortcuts' section with links like 'Add this page to shortcuts', 'Manage my shortcuts', and 'Post Revenue to GL'. The main area shows the details for an export named 'Contribution_Statement_Data_Cumulative_Donations>\$0 - Export'. It includes fields for Name, Description, Query name, Export type, and Ad-hoc Query. Below this, there are tabs for 'Recent Status', 'History', and 'Job Schedules'. The 'Recent Status' tab is active, showing a 'Recent status' section with a green checkmark and the word 'Completed' (highlighted with a red box and the number 2). A 'Download output' button is also visible (highlighted with a red box and the number 3). At the bottom, a table provides details about the export job, including the user, server name, start/end times, duration, and the number of records processed.

Recent Status	
Status:	Completed
Status message:	Completed
Started by:	netbsa\rwhite
Started:	1/8/2016 1:05:09 PM
Ended:	1/8/2016 1:20:32 PM
Duration:	15 minutes 23 seconds
Server name:	D2PBBISEC10BV
Total records processed:	92438
Number of exceptions:	0
Records successfully processed:	92438



Review and Update

- Review your data and make updates as needed
- Add a dummy record at end of the file

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	BUSINESS	Site ID	ID	Last	First	Address	City	State	ZIP	Date	Transactio	Appeal	Amount	Receipt A	Benefit V	Benefit D	Revenue I
2		1	42 8-1009096	Genentech		1 Dna Way	South San	CA	94080-491	#####	Payment	(042) S15	\$900.00	\$900.00			rev-14573
3		2	42 8-1215544	Domingue	Francisco	3985 Lyma	Oakland	CA	94602-185	#####	Payment	(042) S16	\$300.00	\$300.00			rev-14697
4		3	42 8-1215650	Peterson	Andrew	103 Monti	Piedmont	CA	94611-392	#####	Payment	(042) S16	\$250.00	\$250.00			rev-14689
5		4	42 8-1217480	Kuesel	Christoph	3829 Rand	Oakland	CA	94602-120	#####	Payment	(042) S16	\$500.00	\$500.00			rev-14709
6		5	42 8-1217491	Kim	Kenneth	240 Estate	Piedmont	CA	94611-331	#####	Payment	(042) S16	\$100.00	\$100.00			rev-14688
7		6	42 8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	#####	Payment	(042) 150	\$260.00	\$260.00			rev-14692
8		7	42 8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	#####	Payment	(042) 150	\$400.00	\$0.00			rev-14700
9		8	42 8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	#####	Payment	(042) 150	#####	#####			rev-14700
10		9	42 8-1224086	Lymburn	Bruce	50 Wynga	Piedmont	CA	94611-362	#####	Payment	(042) S16	#####	#####			rev-14701
11		10	42 8-1228420	Pierce	Christoph	4085 Whit	Oakland	CA	94602-243	4/6/2015	Payment	(042) S15	\$100.00	\$100.00			rev-14601
591		590	42 8-1571911	Cheung	Daniel	125 Ronac	Piedmont	CA	94611	#####	Payment	(042) S16	\$100.00	\$100.00			rev-14711
592			Dummy	Dummy	Discard												



Review and Update

- Review Columns W and X
 - Possible benefit issue
 - Possible receipt or benefit amount issue
 - These issues depend on how you have been using the system
 - Giving category column is on the sheet to help with benefits in column Y



Review and Update

(089) S17	\$250.00	\$250.00			rev-37512	440403	FALSE	FALSE	Sebring		
(089) S17	\$250.00	\$250.00			PAS-13985	61788	FALSE	FALSE	Sebring		
(089) S17	\$250.00	\$250.00			PAS-13975	60848	FALSE	FALSE	Family		
(089) S17	\$250.00	\$250.00			PAS-13965	60470	FALSE	FALSE	Community - DCA		
(089) A17	#####	\$0.00			rev-41589	491027	TRUE	TRUE	Mexico Trip		
(089) A17	\$120.00	\$0.00			rev-41598	497003	TRUE	TRUE	Kendra Scott Necklace a		
(089) A17	\$500.00	\$0.00			rev-41598	497682	TRUE	TRUE	Golf Clubs and Bag		
(089) A17	\$100.00	\$100.00			rev-41598	498645	FALSE	FALSE	Sponsor		
(089) A17	\$40.00	\$0.00			rev-41599	499007	TRUE	TRUE	Play and Music Lesson		
(089) S17	\$250.00	\$250.00			PAS-13985	61326	FALSE	FALSE	Community - DCA		
(089) S17	#####	#####			PAS-13985	61364	FALSE	FALSE	Citrus County		

(089) S1	\$50.00	\$50.00			rev-41706	585076	FALSE	FALSE	Community - DCA		
(089) X1	\$500.00	\$500.00			rev-34061	431701	FALSE	FALSE	1/2 PAGE AD		
(089) X1	\$1,300.00	\$980.00	\$320.00	Table Sponsor	rev-34061	431585	FALSE	FALSE	Table Sponsors		
(089) S1	\$500.00	\$500.00			rev-41640	533302	FALSE	FALSE	Family		
(089) S1	\$500.00	\$500.00			PAS-13955	59990	FALSE	FALSE	Board Division		
(089) S1	\$250.00	\$250.00			PAS-13965	60470	FALSE	FALSE	Community - DCA		



Run Mail Merge

- Download mail merge template
- Edit merge field values for your council
- Start a Directory mail merge
- Select the contribution statement data file
- Finish the merge



Run Mail Merge

Contribution_Statement_Template v1.8 2015.docx - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT Rich White

Envelopes Labels Start Mail Merge Select Recipients Edit Recipient List Highlight Merge Fields Address Block Greeting Line Insert Merge Field Preview Results Find Recipient Check for Errors Finish Merge Merge to Adobe PDF

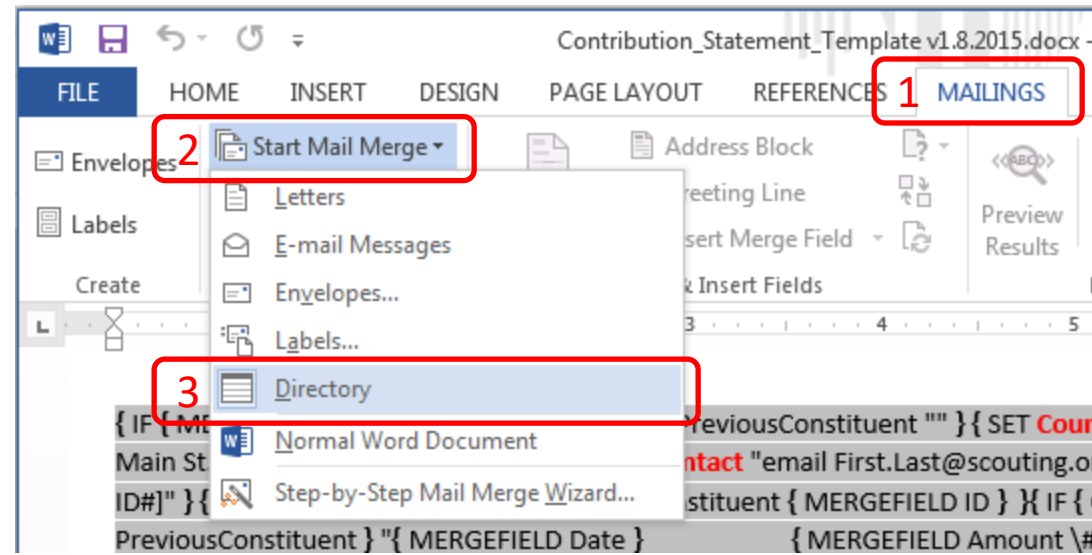
Create Start Mail Merge Write & Insert Fields Preview Results Finish Acrobat

1 2 3 4 5 6 7

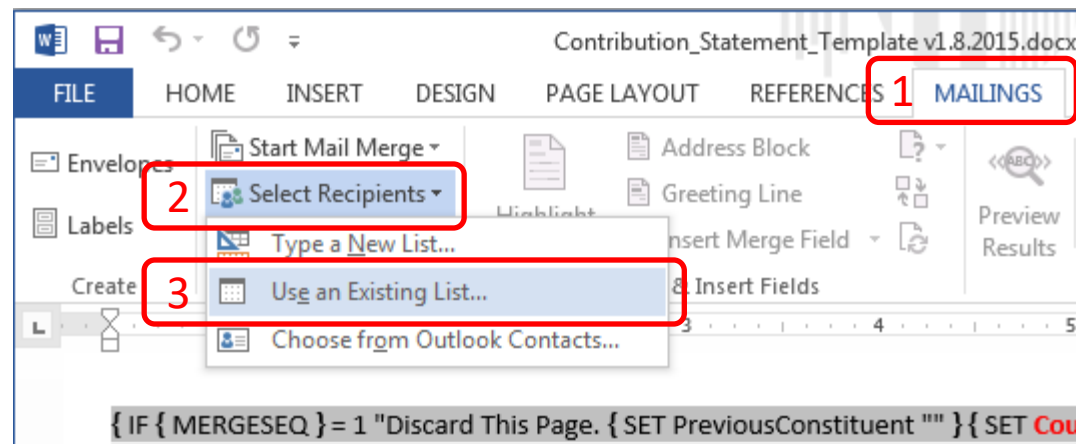
```
{ IF { MERGESEQ } = 1 "Discard This Page. { SET PreviousConstituent "" } { SET CouncilAddress "Example Council, 123
Main St., Anytown, TX 12345" } { SET CouncilContact "email First.Last@scouting.org" } { SET CouncilTaxID "[Federal Tax
ID#]" } { SET Year "2015" } "" } { SET CurrentConstituent { MERGEFIELD ID } } { IF { CurrentConstituent } = {
PreviousConstituent } "{ MERGEFIELD Date } { MERGEFIELD Amount \# "$#,###,###0.00 } { MERGEFIELD
Appeal } { IF { MERGEFIELD Benefit_Value } <> "" "{ SET BenefitValue { MERGEFIELD Benefit_Value \# "$#,###,###0.00 }
}" "{ SET BenefitValue 0 }" } { BenefitValue \# "$#,###,###0.00 } { SET NetContribution { = { MERGEFIELD Amount } - {
BenefitValue } } { NetContribution \# "$#,###,###0.00 } { SET TotalPaid { = TotalPaid + { MERGEFIELD Amount } } { SET
TotalContribution { = TotalContribution + { NetContribution } } { SET TotalBenefitValue { = TotalBenefitValue + {
BenefitValue } } }" "
Total:{ TotalPaid \# "$#,###,###0.00 } { TotalBenefitValue
\# "$#,###,###0.00 } { TotalContribution \# "$#,###,###0.00 } { SET TotalPaid 0 } { SET TotalContribution 0 } { SET
TotalBenefitValue 0 }
```



Run Mail Merge



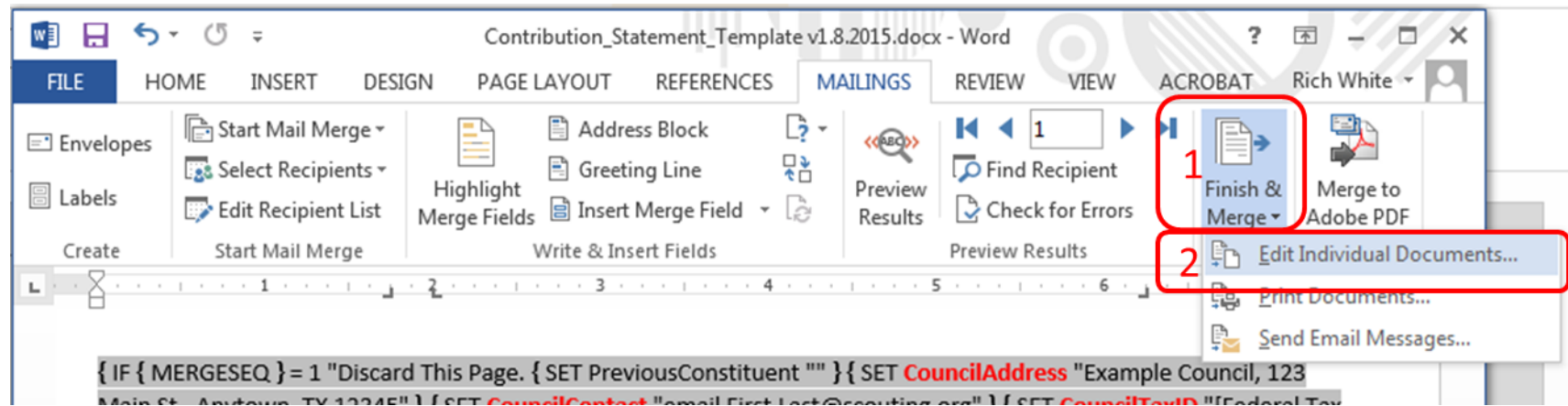
Run Mail Merge



- Navigate to your downloaded data file and select it



Run Mail Merge



Run Mail Merge

Directory6 - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT Rich White

Calibri (Body) 11 A A Aa

B I U abc x₂ x² A a b A

AaBbCcDc AaBbCcDc AaBbCcDc

Normal No Spac... Heading 1

Editing

Clipboard

Font Paragraph Styles

Clifford Wang
603 Blair Ave
Piedmont, CA 94611-3405

Dear Clifford Wang,

The following is a list of paid contributions for the calendar year 2015 recorded by Example Council, 123 Main St., Anytown, TX 12345 (Federal Tax ID [Federal Tax ID#]). Thank you for your generous support of Scouting! If you have any questions or concerns, please email First.Last@scouting.org.

Date	Amount Paid	Appeal Name	Benefit Value	Net Contribution
10/14/2015	150.00	(042) S16 - 2016 Friends of Scouting <i>Benefit: Something cool!</i>	100.00	50.00
12/21/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/22/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/23/2015	150.00	(042) S16 - 2016 Friends of Scouting <i>Benefit: Something awesome!</i>	100.00	50.00
12/24/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/25/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/26/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/27/2015	150.00	(042) S16 - 2016 Friends of Scouting	0.00	150.00
12/28/2015	150.00	(042) S16 - 2016 Friends of Scouting <i>Benefit:</i>	100.00	50.00
Total:	\$ 1,350.00		\$ 300.00	\$ 1,050.00




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Review and Mail

- Print, fold, stuff and mail per your council's usual procedure
- Discard the first and last pages from the merge file






Batch Cleanup

 **Batch Entry**



Uncommitted Batches



Committed Batches

Uncommitted batches (922)  Add  Batch search  More ▾

Date range:

Sites:

 Columns ▾  Clear all filters

	Batch number	Batch template
	L0858764	zAPTG Local Council Recurring Gift Commitment Batch
	L0862445	zAPTG Local Council Donation Batch



Data Lists in CRM



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Where to find Data Lists

Constituents Tab

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

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 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

February 15, 2023
10:00 am & 2:00 pm CT



Questions & Answers



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