

# CRM User Forum

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# Objectives

- Finishing up Year 2022
  - Global write-off process – timing and how-to
  - Write-Off Data List to retrieve write-offs list
  - Reports for the council's 990 & fiscal audit
- Annual Data Updates – data tune-ups
- Batch
  - Using Group ID to credit units in FOS appeal
- Using Appeal Progress to manage your appeals



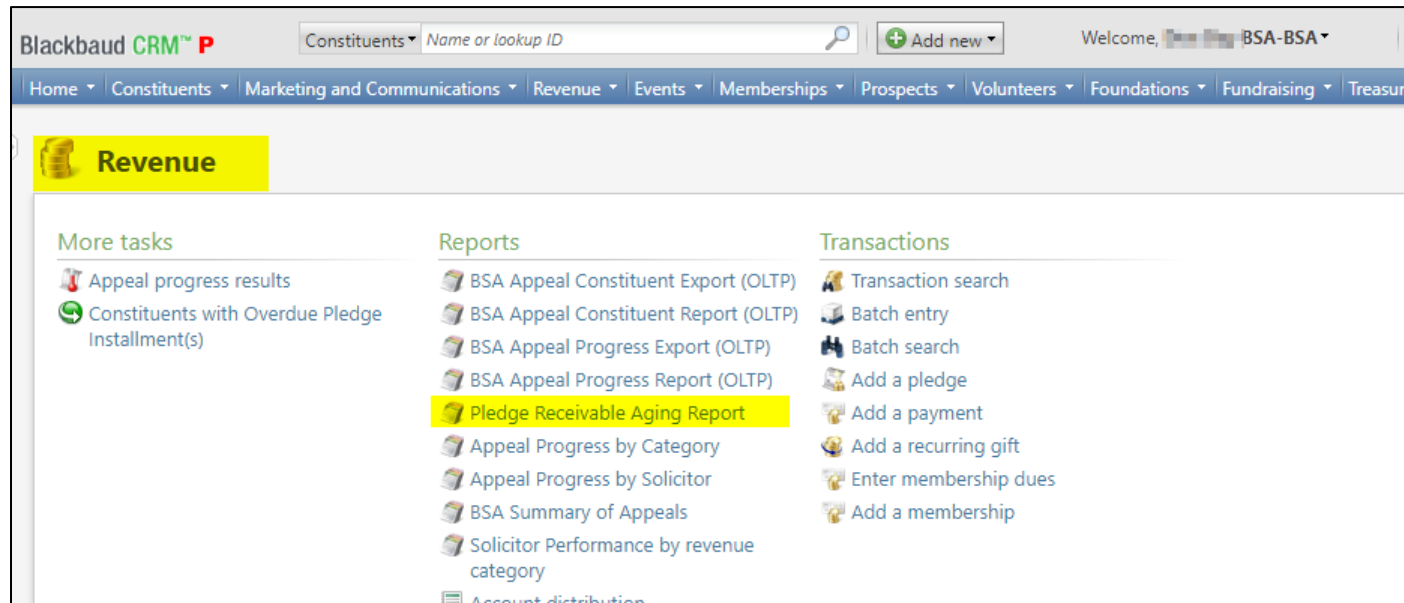
# Finishing Up 2022



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# Global Write Offs

- Determine collectible value
- Create the Pledges Receivable Aging Report
- Blackbaud CRM ~ Revenue ~



The screenshot displays the Blackbaud CRM interface, specifically the Revenue section. The top navigation bar includes 'Home', 'Constituents', 'Marketing and Communications', 'Revenue', 'Events', 'Memberships', 'Prospects', 'Volunteers', 'Foundations', 'Fundraising', and 'Treasury'. The 'Revenue' section is highlighted in yellow. Below this, there are three columns: 'More tasks', 'Reports', and 'Transactions'. The 'Reports' column contains several items, with 'Pledge Receivable Aging Report' highlighted in yellow. The 'Transactions' column lists various actions like 'Transaction search', 'Batch entry', 'Batch search', 'Add a pledge', 'Add a payment', 'Add a recurring gift', 'Enter membership dues', and 'Add a membership'.

More tasks	Reports	Transactions
<ul style="list-style-type: none"><li>Appeal progress results</li><li>Constituents with Overdue Pledge Installment(s)</li></ul>	<ul style="list-style-type: none"><li>BSA Appeal Constituent Export (OLTP)</li><li>BSA Appeal Constituent Report (OLTP)</li><li>BSA Appeal Progress Export (OLTP)</li><li>BSA Appeal Progress Report (OLTP)</li><li><b>Pledge Receivable Aging Report</b></li><li>Appeal Progress by Category</li><li>Appeal Progress by Solicitor</li><li>BSA Summary of Appeals</li><li>Solicitor Performance by revenue category</li><li>Account distribution</li></ul>	<ul style="list-style-type: none"><li>Transaction search</li><li>Batch entry</li><li>Batch search</li><li>Add a pledge</li><li>Add a payment</li><li>Add a recurring gift</li><li>Enter membership dues</li><li>Add a membership</li></ul>



# Determine collectible value

## Create the Report

1. BSA Organization – your council
2. Report Code – year
3. Appeal – must be run for each open appeal with outstanding donor pledge values
4. Click “View Report”
5. Wait...



# Pledge Receivable Aging Report

The screenshot shows the Blackbaud CRM interface for generating a Pledge Receivable Aging Report. The top navigation bar includes 'Home', 'Constituents', 'Marketing and Communications', 'Revenue', 'Events', 'Memberships', 'Prospects', 'Volunteers', 'Foundations', 'Fundraising', and 'Treasury'. The 'Revenue' menu is currently selected. The main content area is titled 'Pledge Receivable Aging Report' and contains the following fields:

- BSA Organization:** A dropdown menu showing '000-BSA Council' with a red circle '1' next to it.
- Report Code:** A dropdown menu showing '2018' with a red circle '3' next to it.
- Appeal:** A dropdown menu showing '18SAF Legacy' with a red circle '2' next to it.
- View Report:** A button on the right side with a red circle '4' next to it.



# Pledge Aging Receivable Report

- Print report and give to management to review:
  - All open pledges
  - Determine who will still pay
  - Sign and date
- After management review, proceed to Pledge Write-Off process



# Pledge Write-off Procedure




- Determine when your council needs to write-off pledges.
- Pledges written off by appeal
- You will use your current Global Pledge Write-off business process
- You will edit the selection in your current business process





### Global Pledge Write-off

edge write-off processes (276) + Add


Name	Description
L144	Pledge Write-Off Proc
L144 Abraham Linco...	Just change the select
L003	Pledge Write-Off Proc
L022	Pledge Write-Off Proc
L583	Pledge Write-Off Proc
L382	Pledge Write-Off Proc
Start process	
	 Edit  Delete  As
L618	Pledge Write-Off Proc
L104	Pledge Write Off Proc
L303	Pledge Write-Off Proc
L157	Pledge Write-Off Proc
L468	Pledge Write-Off Proc
L092	Pledge Write-Off Proc
L368	Conversion Pledge W
L220	Pledge Write-Off Proc
L574	Pledge Write-Off Proc
L635	Pledge Write-Off Proc
L695	Global Write-Off
L449	Pledge Write-Off Proc
L006	Pledge Write-Off Proc

#### Edit pledge write-off process

**General**

Name: L382

Description: Pledge Write-Off Process

Selection: L382 Global Write Off Query (Ad) 

Post status: Do not post

Post date: mm/dd/yyyy

Site: Allegheny Highlands Council

**Write-off reason**

Reason code: UNC - Uncollectable

Details: 2017 Write Off

**Output**

Create output selection

Overwrite existing selection

Selection name:

Help Save Cancel

Go to the Global Pledge Write-off processes and edit your routine. No need to create a new routine. When the edit window opens click the pencil to edit the query attached as the selection.



Edit Ad-Hoc Query - L382 Global Write Off Query

Select filter and output fields | Set sort and group options | Preview results | Set save options

Find field: [X] [Q]

Browse for fields in: [Revenue, Adjustment, Appeal, Application Details, Appraisals, Attachments, Attributes]

Select Revenue fields: [Fields, Account system, Amount, Batch description, Batch number, Benefits waived]

Include records where:

- Transaction type is equal to Pledge
- and Pledge/Grant award balance is greater than 0
- and Appeal\Site\Site ID is equal to 382
- and Appeal\Appeal record is one of (382) F-18 - 2018 Friends of Scouting

**Apply Criteria**

Appeal\Appeal record criteria

One of [v]

(382) F-18 - 2018 Friends of Scouting

\* [ ]

Only return records that match all selected values

OK Cancel

The Query will open, and you will need to adjust the filters to only write-off those appeals you want to close. You do this by clicking on the Appeal record/Name filter and adding in the names of the appeals you need to write-off. This example show the council preparing to do more than one appeal at a time. They have changed the filter to “one of” and then can now list multiple appeals.



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### Edit Ad-Hoc Query - L382 Global Write Off Query

Select filter and output fields   Set sort and group options   **Preview results**   Set save options

Results (78 records found)

Appeal\Name	Pledge/Grant award balance
(382) F-18 - 2018 Friends of Scout...	\$250.00
(382) F-18 - 2018 Friends of Scout...	\$600.00
(382) F-18 - 2018 Friends of Scout...	\$500.00
(382) F-18 - 2018 Friends of Scout...	\$40.00
(382) F-18 - 2018 Friends of Scout...	\$30.00
(382) F-18 - 2018 Friends of Scout...	\$20.00
(382) F-18 - 2018 Friends of Scout...	\$1,200.00
(382) F-18 - 2018 Friends of Scout...	\$1,000.00
(382) F-18 - 2018 Friends of Scout...	\$95.00
(382) F-18 - 2018 Friends of Scout...	\$30.00
(382) F-18 - 2018 Friends of Scout...	\$60.00
(382) F-18 - 2018 Friends of Scout...	\$100.00
(382) F-18 - 2018 Friends of Scout...	\$720.00
(382) F-18 - 2018 Friends of Scout...	\$45.45
(382) F-18 - 2018 Friends of Scout...	\$75.00
(382) F-18 - 2018 Friends of Scout...	\$20.00

Always preview your query before saving it and running your routine to make sure only your appeals are showing and that only the appeals you want to write-off are listed.



If you need to exclude specific constituents from the write-off process, you can add the line Constituent\Lookup ID to the Include records where window, then change the operator from 'Equal to' to 'Not one of', then list as many Lookup IDs as necessary. If you want to exclude specific pledges, you can do the same with the field 'Revenue ID is not one of'

The screenshot displays a software interface with two main sections. The top section, titled "Include records where:", contains a list of search criteria. The bottom section, titled "Results fields to display:", contains a list of fields to be shown in the results.

**Include records where:**

- Appeal\Site\Site ID is equal to 027
- and Appeal\Appeal record is one of (027) F19 - 2019 Friends of Scouting, (027) F20 - 2020 Friends of Scouting, (027) FG21 - 2021 Fresno Golf Tournament, (027) F21 - 2021 Friends of Scouting
- and Transaction type is equal to Pledge
- and Pledge/Grant award balance is greater than 0
- and Constituent\Lookup ID is not one of 8-12345678, 8-87654321 or is blank

**Results fields to display:**

- Appeal\Name
- Pledge/Grant award balance
- Constituent\Name
- Constituent\Lookup ID



If you need a list of what was written off after the process, go to Revenue/More Tasks/ Write-Offs Data list. Search for your site and then filter by the date the you ran your write-offs. It will provide a list of those written-off on or after the date that you used the write-off process.

### Revenue

More tasks

- Appeal progress results
- Daily Revenue Transactions List
- Gift in Kind List
- Open Pledge List
- Recurring Gift List
- Revenue Data Hygiene
- Write-Offs Data List

### List for Write-offs

Write-Offs for your council. This list includes write-offs on or after 1/1/2018. (65) More

Appeal equal to:  Constituent Name equal to:  Date Added on or after:  Apply Reset

Council #	Appeal	Constituent ID	Constituent Na...	Pledge Date	Pledge ID	Pledge Amount	Write-Off Am...
006	(006) F-21 2021 Friends of Scouting	8-322	ird	3/19/2021	rev-4	\$500.00	\$500.0
006	(006) F-21 2021 Friends of Scouting	8-322	ard	2/12/2021	rev-4	\$400.00	\$400.0
006	(006) F-21 2021 Friends of Scouting	8-322		2/19/2021	rev-4	\$250.00	\$250.0
006	(006) F-21 2021 Friends of Scouting	8-322		7/19/2021	rev-4	\$100.00	\$100.0
006	(006) F-21 2021 Friends of Scouting	8-322	r	12/30/2020	rev-4	\$2,000.00	\$2,000.0
006	(006) F-21 2021 Friends of Scouting	8-322	st	3/8/2021	rev-4	\$100.00	\$100.0



# IRS 990 Schedule B



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# Preparing for your annual audit

- All councils are required to have an annual financial audit
- Auditors will review the financial practices to determine if the council is following accepted accounting standards
- Test financial transactions – contributions
  - Mail log
  - Bank deposit
  - Contribution documentation
  - Data entry details
  - General ledger details



# IRS 990 Schedule B

- Creation process like contribution statements
- Download and review data via export
- Merge Excel data to Word template provided
- User guide is under Administration with the CRM User Guides on MyBSA or in CRM in Marketing Communication under Letters and Documents.





# Location of CRM Tools

The screenshot shows the CRM navigation menu with 'Marketing and Communications' highlighted in a red box. Below it, the 'Letters and Documents' page is displayed. The 'Documents' tab is active, and a list of documents is shown. Two items are highlighted with a red box: '990 Schedule B Part I Job Aid' and '990 Schedule B Part I Template'.

Marketing and Communications | Revenue | Events | Memberships

## Letters and Documents

Letters | Documents

Documents (5) + Add | Filters | More

Type: [ ] Sites: Selected sites

Name
<None>
990 Schedule B Part I Job Aid
990 Schedule B Part I Template
Contribution Statement Job Aid
Contribution Statement Template
Contribution Statement Template - Margin Option 1

The screenshot shows the 'Exports' page in the CRM. The 'Administration' tab is highlighted in a red box. The page displays a list of exportable data sets. The first item, '990 Schedule B Part 1 Data', is highlighted with a red box.

## Exports

Administration

Exports (4) + Add | Filters | More

Sites: Selected sites | Apply | Reset

Search | Columns | Save list

Name
990 Schedule B Part 1 Data
Contribution Statement Data Cumulative >= \$250 or Benefited
Contribution Statement Data Cumulative Donations > \$0
Contribution Statement Data Single >= \$250 or Benefited



# Remember:

- 990 Schedule B are based on contributions (pledges/straight donations/etc.) a person has given during the year. Pledge Payments do not count towards this, so if a donor is missing from the results, they may not have made any new contributions during the year. We use an accrual basis instead of a cash basis, which means that if a donor pledged \$5,000 but only paid \$4,000, they will show up as a \$5,000 donor.
- Don't worry if businesses on your 990s show as 'individuals' in the spreadsheet. Column D of the 990 Schedule B Part 1 form shows the type of contribution, not the type of constituent. The 3 choices are Person, Payroll and Noncash. The mail merge assumes "Person" for all contribution types.



# CRM Data Tune Up(s)



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# CRM Data Tune-up Tools

- Subscription service from Blackbaud, paid for by National Council
- Address Validation
  - Provides CASS certification on new addresses
    - CASS, (the Coding Accuracy Support System) is a voluntary certification system provided by the United States Postal Service for mail services providers.
  - Ran for all primary address Jan. 2023
- Address Finder
  - Sends primary address to index against (NOCA) National Change of Address
  - Ran for all primary addresses March 2023
- Deceased Finder
  - Reviews individual against Social Security “deceased record” database
  - Current group members are excluded
  - Can be ran when requested by council
  - File (batch) needs to be reviewed by local council before being committed



# CASS Validation Example

## Address Validation

Changed:  ▾

1 of 2 Find | Next

### Address Validation Report

Addresses processed: 110966 Date processed: 11/8/2022 2:08:57 PM  
Addresses changed: 368

Name/Lookup ID ▾	Current Address	Updated Address	Type ▾	Changed ▾	Validation Message ▾
	643 W Antigua Ter Mountain House, California 95391	643 Antigua Ter Mountain House, California 95391-1284	Home	Yes	Directional changed
	872 Montpelier Rd Hickman, California 95323-9658	872 Montpelier Rd Hickman, California 95323-9658	Business	Yes	Street name changed
	149 Countryside Cir Park City, Utah 84098-6102	149 E Countryside Cir Park City, Utah 84098-6102	Home	Yes	Directional changed
	4091 Daffodil Dr Mariposa, California 95338-9483	4091 Silver Bar Rd Mariposa, California 95338-9416	Home	Yes	Address revised by LACS
	10588 North Airport Road Columbia, California 95370	10588 N Airport Rd Columbia, California 95310-9728	Home	Yes	ZIP changed
	712 Wiltshire Dr Patterson, California	712 Wiltshire Dr Patterson, California 95363-2492	Home	Yes	ZIP changed
	4342 middlefield Tracy, California 95377-5449	4342 Middlefield Dr Tracy, California 95377-8416	Home	Yes	Suffix changed
	2472 Montpelier Rd Hickman, California 95323-9611	2472 Montpelier Rd Hickman, California 95323-9611	Home	Yes	Street name changed



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# CASS Validation Example

### Edit address

Address **Details**

#### Detail information

County:	San Joaquin	Congressional district:	CA's 9th
Region:		State house district:	
DPC:	431	State senate district:	
CART:	R028	Local precinct:	
LOT:	A0043		

#### Validation information

Last attempt:	11/8/2022
Validation message:	Directional changed

#### Change of address information

Update details show on the details tab of the address. This example had the direction on the address adjusted. It also added the 10-digit zip-code and then filled in the detailed information on the left.



# Address Finder Changes

**AddressFinder**

Changed:

1 of 197 Find | Next

**AddressFinder Report**

Addresses processed: 69043 Date processed: 3/1/2023 1:44:51 PM

Addresses changed: 6461

Name/Lookup ID	Current address	Updated address	Footnote *	Changed	Type
	219 Downing Ct Lompoc, California 93437-1425	206 North Rd Apt A Lompoc, California 93436-2746	M	Yes	Old Address Via AddressFinder
	795 Alamo Pintado Rd Solvang, California 93463-2203	2028 Village Ln Ste 201 Solvang, California 93463-3223	M	Yes	Old Address Via AddressFinder
	364 Downing Ln Santa Maria, California 93455-2033	PO Box 408 Myrtle Creek, Oregon 97457-0040	M	Yes	Old Address Via AddressFinder
	904 W Date Ave Lompoc, California 93436-5209	4140 Constellation Rd Lompoc, California 93436-1231	M	Yes	Old Address Via AddressFinder
	7921 Robbie Cir Goleta, California 93117-1016	PO Box 80024 Goleta, California 93118-0024	M	Yes	Old Address Via AddressFinder
	9305 Musselman Dr Apt 1 Atascadero, California 93422-5843	5275 El Verano Ave Atascadero, California 93422-2828	M	Yes	Old Address Via AddressFinder
	PO Box 577 Santa Margarita, California 93453-0577	5083 Jake Ave Pocatello, Idaho 83202-5260	M	Yes	Old Address Via AddressFinder



# Address Finder Changes

Addresses (4) Add | Filters | More

Show former contact information | Apply | Reset

Contact information	Type	Primary	Do not contact	Start date	End date
206 North Rd Apt A Lompoc, CA 93436-2746	Home (Current)	Yes			
⚠ 219 Downing Ct Lompoc, CA 93437-1425	Old Address Via AddressFin...		Do not mail	8/4/2021	3/2/2023

Address Finder places an end date on the old address and make the new address primary. If the person moved and there is no new address or new address is bad, then the process will place “Do Not Mail” on the address.

⚠ 131 1/2 Girard St Abbeville, AL 36310-2532 Home (Current) Yes Do not mail

Edit | Delete | Write a letter

131 1/2 Girard St Abbeville, AL 36310-2532 United States	✔ 10/20/1999 - Present
	Information source: AddressFinder
	⚠ Do not mail (Change of address form filed, but new address not in USPS records)
	Seasonal: Not applicable





# Batches



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# Using Group ID in batch

- Why?
  - Improves solicitor reporting
  - Units
  - Groups



# Revenue Batch

When entering a Unit to a Revenue batch select the Constituent then in the Group ID enter the information of the Unit. (Troop 0003, etc)

The screenshot shows the 'Revenue Batch' software interface. The top menu bar includes 'Main' and 'Revenue'. Below the menu bar are several toolbars: 'Batch' (Save, Save and close, Export), 'Constituent' (Solicit codes), 'Constituent' (Edit, Go to), 'Configuration' (Properties, Customize fields), and 'Processes' (Validate, Update status, Validate addresses (all rows), Update projected totals, Set row message). Below the toolbars is the 'Properties' section, which displays: Owner: Cornelia Ellis BSA-BSA, Projected No.: 0, Current No.: 1, Projected total: 0.0000, and Current total: 0.0000. Below the properties is a table with the following columns: Barcode, Constituent, Lookup ID, Group ID, Amount, and Receipt a... The table contains one row with the following data: Barcode (empty), Constituent (redacted), Lookup ID (empty), Group ID (redacted), Amount: \$0.00, and Receipt a...: \$0.00. The 'Group ID' column header and the redacted cell are highlighted in yellow. At the bottom of the interface, there is a 'Constituent Window' and a page indicator showing 'Page 1 of 1'.

Barcode	Constituent	Lookup ID	Group ID	Amount	Receipt a...
				\$0.00	\$0.00



# Search for the BSAFR Group

**BSAFR Group Search**

Name:

Lookup ID:

Group type:  ▾

Site:  ▾ 🔍

**Results**

Lookup ID	Name	Group type
-----------	------	------------



# Populate in the BSAFR Group

The Group ID will populate with the Unit information. This will attach to the pledge or payment and will show on the Unit and Constituent's profile.

The Giving Category and BSA Structure columns will also fill in from the group.

The screenshot shows a software interface with a toolbar at the top containing buttons for 'Export', 'Solicit codes', 'Edit', 'Go to', 'Properties', 'Customize fields', 'Validate', 'Update projected totals', 'Update status', and 'Set row message'. Below the toolbar, there are summary statistics: 'a Ellis BSA-BSA', 'Projected No.: 0', 'Current No.: 1', 'Projected total: 0.0000', and 'Current total: 0.0000'. A table below these statistics has the following data:

Constituent	Lookup ID	Group ID	Amount	Receipt a...
John Warters	[REDACTED]	Troop 0003 BT Ann Arbor -	\$0.00	\$0.00



# Tracking Your Appeal Progress



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# Using Appeal Progress

The screenshot displays the Blackbaud CRM P interface. At the top, the logo "Blackbaud CRM™ P" is visible. A search bar contains "Appeals" and "Appeal name" with a magnifying glass icon, and a "+ Add new" button. A navigation bar includes "Home", "Constituents", "Marketing and Communications" (highlighted), "Revenue", "Events", "Prospects", "Foundations", "Fundraising", "Analysis", and "Administration".

The main content area is titled "Marketing and Communications" and is divided into several sections:

- Appeal** (highlighted in yellow):
  - Appeal search
  - Add an appeal
  - Appeal mailings
  - Appeal progress results
- Donor relations**:
  - Receipts
  - Acknowledgements
  - Reminders
  - Planned gift acknowledgements
  - Manage correspondence
- Pledge card report**:
  - Run pledge cards
- Reports**:
  - BSA Appeal Organization Structure Report
  - Appeal profile
  - Appeal performance
- Marketing efforts**:
  - Direct marketing efforts
  - Marketing plans
  - Public media efforts
  - Source codes
- Packages**:
  - Creatives
  - Export definitions
  - Letters and documents
  - Materials and expenses
  - Packages





# Scout Council (400) - Appeal Progress Results

Contribution Summary

Payment Summary

Write-off & Balance Summary

Write-off Summary

Payments by Region

Write-off by Region

Appeal Progress

Contribution Summary (posted 3/15/2022) ... note: View write-off and balance totals on 'Write-off & Balance Summary' tab (263) More

Active equal to:  Report Code equal to:  Category equal to:  Appeal equal to:

<input type="checkbox"/>	Site ID	Site Name	Report Cod...	Category	Active?	Appeal	Total Contr...	Goal
<b>Multi-year</b>								
<input type="checkbox"/>		Scout Council	Multi-year	Capital Campaign	Yes	C18 - 2018 Capital Campaign	\$27,122.00	\$0.00
<input type="checkbox"/>		Scout Council	Multi-year	Capital Campaign	Yes	CC18 - 2018 Capital Campaign	\$1,391,005.08	\$0.00
<b>2022</b>								
<input type="checkbox"/>		Scout Council	2022	Special Events	Yes	BG22 - Canton Brookside Golf	\$4,300.00	\$64,000.00
<input type="checkbox"/>		Scout Council	2022	Other Support	Yes	CA22 - 2022 Camperships	\$500.00	\$10,000.00
<input type="checkbox"/>		Scout Council	2022	Endowment	Yes	EN22 - 2022 Endowment	\$4,497.06	\$0.00
<input type="checkbox"/>		Scout Council	2022	Foundations & Trusts	Yes	FN22 - 2022 Foundations & Grants	\$46,000.00	\$155,000.00
<input type="checkbox"/>		Scout Council	2022	Annual Giving (Friends of Scoutin...	Yes	FS22 - 2022 Friends of Scouting	\$239,708.40	\$559,000.00
<input type="checkbox"/>		Scout Council	2022	Special Events	Yes	HD22 - 2022 Hill N Dale Sporting Clays	\$10,000.00	\$76,000.00
<input type="checkbox"/>		Scout Council	2022	Special Events	Yes	LA22 - 2022 Lawrence Sporting Clays	\$11,750.00	\$27,000.00
<input type="checkbox"/>		Scout Council	2022	Special Events	Yes	OE22 - 2022 Over the Edge	\$15,973.75	\$70,000.00
<input type="checkbox"/>		Scout Council	2022	Special Events	Yes	PG22 - 2022 Portage Golf	\$10,000.00	\$45,000.00
<input type="checkbox"/>		Scout Council	2022	Special Events	Yes	SA22 - 2022 Summit Adventure Weekend	\$3,468.40	\$18,100.00
<input type="checkbox"/>		Scout Council	2022	United Way - Allocations	Yes	UW22 - 2022 United Way	\$3,056.28	\$15,000.00
<b>2021</b>								
<input type="checkbox"/>		Scout Council	2021	Special Events	Yes	AU21 - 2021 Annual Auction	\$35,801.81	\$77,000.00
<input type="checkbox"/>		Scout Council	2021	Special Events	Yes	BG21 - 2021 Brookside Golf Outing	\$66,422.00	\$61,300.00
<input type="checkbox"/>		Scout Council	2021	Other Support	Yes	CA21 - 2021 Campership	\$675.00	\$0.00
<input type="checkbox"/>		Scout Council	2021	Other Support	Yes	CC21 - 2021 Capital Campaign	\$17,012.00	\$0.00





# Multiple tabs available

Blackbaud CRM™ P Appeals  + Add new Welcome, Jenni

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

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

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

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

**Contributions - posted 2/18/2020**  More

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
\$87,940.01	277	\$317.47	2/18/2020	10/7/2019

**Payments Received - posted 2/18/2020**  More

Payments Received	# of Payments	Average Payment	Most Recent Payment	Mismatch: Appeal?	Mismatch: Inbound Channel?
\$39,141.11	189	\$207.10	2/18/2020	No	Yes

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



# Contributions



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

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

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

### Contributions: Summary - posted 2/18/2020 More ▾

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
<b>\$87,940.01</b>	<b>277</b>	<b>\$317.47</b>	<b>2/18/2020</b>	<b>10/7/2019</b>

Expand all     Collapse all

▾ Contributions: Not posted (pending)

▾ Contributions: BSA Structure - posted (6)

▾ Contributions: Giving Category - posted (3)

▾ Contributions: Both BSA Structure & Giving Category - posted (12)



# By Giving Category or by Structure

Revenue Summary	Contributions	Payments	Balances	Revenue Details (Splits)	Matching Gift Claims	Designations	Mailings	Documentation
<b>Contributions: Summary - posted 2/18/2020</b> More ▾								
Total Contributions		# of Contributions		Average Contribution		Recent Contribution		Earliest Contrib
\$87,940.01		277		\$317.47		2/18/2020		10/7/2019
⌵ Expand all ⌶ Collapse all								
⌵ <b>Contributions: Not posted (pending)</b>								
⌵ <b>Contributions: BSA Structure - posted (6)</b>								
⌵ <b>Contributions: Giving Category - posted (3)</b> More ▾								
Giving Category ▲		Total Contributions		# of Contributions		Average Contribution		
Board		\$25,750.00		21		\$1,226.19		
Community		\$13,520.01		55		\$245.82		
Family		\$48,670.00		201		\$242.14		
⌵ <b>Contributions: Both BSA Structure &amp; Giving Category - posted (12)</b>								



# Solicitor Credits

Revenue Summary	Contributions	Payments	Balances	Revenue Details (Splits)	Matching Gift Claims	Designations	Mailings	Documentation
<b>Appeal Solicitor Credits by Solicitor Group ...note: solicitor's row is bold when fundraising goal is achieved (44)</b> <span>🔍</span>   More ▾								
BSA Structure	Giving Category	Inactive?	Group Name	Group Public Name	Solicitor Cre...			
<b>Hoover</b>								
⌵ Hoover	Family	No	Pack 3151 BP Wilton - 133 (163962)	Pack 3151	\$25.00			
⌵ Hoover	Family	No	Pack 3153 FP Durant - 133 (163963)	Pack 3153	\$195.00			
⌵ Hoover	Family	No	Troop 0127 BT Muscatine - 133 (164...	Troop 0127	\$780.00			
⌵ Hoover	Family	No	Troop 0151 BT Wilton - 133 (164235)	Troop 0151	\$25.00			
⌵ Hoover	Family	No	Troop 0426 BT Muscatine - 133 (100...	Troop 0426	\$850.00			
⌵ Hoover	Family	No	Troop 1127 GT Muscatine - 133 (100...		\$250.00			
<b>Council</b>								
<b>Inali</b>								
<b>Kittan</b>								
<b>Mesquakie</b>								
<b>Saukenuk</b>								



# Revenue Details (Splits)



## Appeal: ██████ FS21-2021 Friends of Scouting

Description: 2021 Friends of Scouting      Start date: 1/1/2021  
Business unit:      End date: 12/31/2021  
Category: Annual Giving (Friends of Scouting)      Goal: \$200,000.00  
Report code: 2021      Status: Active  
Site: ██████ Council      Membership:

Revenue Summary   Contributions   Payments   Balances   **Revenue Details (Splits)**   Matching Gift Claims   Designations   Mailings   Documentation   Mismatch: Appeals?   Solicitor Credits

### Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (536)

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

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

Verified	Constituent	Date	Transaction	Application	Split Amount	Total Amount	Check	Status	GL Post Date
✓	██████████	12/31/2021	Payment	Donation	\$34.94	\$34.94	Check	Posted	12/31/2021
✓	██████████	12/31/2021	Payment	Donation	\$17.50	\$17.50	Check	Posted	12/31/2021
✓	██████████	12/28/2021	Payment	Donation	\$150.00	\$150.00	Check	Posted	12/28/2021
✓	██████████	12/15/2021	Payment	Donation	\$61.20	\$61.20	Check	Posted	12/15/2021
✓	██████████	12/10/2021	Payment	Donation	\$34.94	\$34.94	Check	Posted	12/10/2021
✓	██████████	12/6/2021	Payment	Donation	\$17.50	\$17.50	Check	Posted	12/6/2021
✓	██████████	11/9/2021	Payment	Donation	\$111.69	\$111.69	Check	Posted	11/9/2021
✓	██████████	11/2/2021	Payment	Donation	\$43.67	\$43.67	Check	Posted	11/2/2021



# Add to Shortcuts

Blackbaud CRM™ P

Appeals

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

Tasks

Reports

**Shortcuts**

**1**

Manage my shortcuts

Batch entry

Constituent search

Transaction search

Information library

Reminders

Appeal Progress by Category

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

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

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

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

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



# Where to find Data Lists

## Constituents Tab

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

## Revenue Tab

- Appeal progress results
- Daily Revenue Transactions List
- Gift in Kind List
- Recurring Gift list
- Revenue Data Hygiene
- Write-Offs List

## Constituents Tab

- Recognition Programs List
- Volunteer Award List





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

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[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.

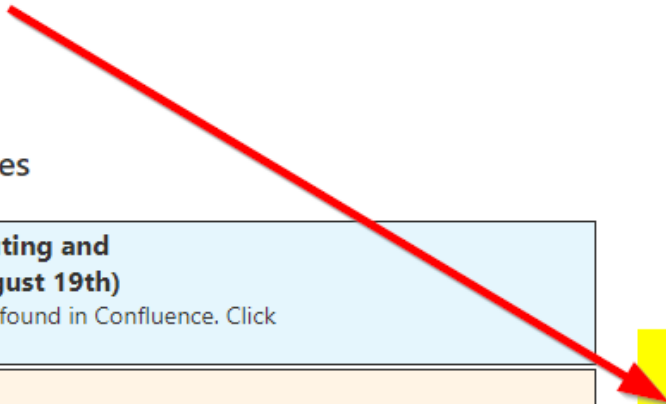
## IT Online Service Catalog



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**



# <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

April 19, 2023

10:00 am & 2:00 pm CT



# Questions & Answers



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