

CRM User Forum

April 19, 2023

John Kuehn - BSA



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Objectives

- CRM Batch to Peoplesoft GL Creation
- 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
 - Making appeals inactive
 - Making events inactive
- Annual Data Updates – data tune-ups



- Understanding CRM Designations
- How CRM Designations affects the Council's GL
- Do I need a new designation
- How do I request New Designation
- Events and GL



Batch Entry Creates GL Entries

Designation	Inbound channel	Revenue category
30708011 Invest in Charactor-Counci -...	Friends of Scouting	Unrestricted by donor

During batch entry the data entry clerk not only affects what shows in CRM but also send transactions to the council's General Ledger in PeopleSoft.

The three fields that create these entries are:

1. The Designation
2. The Inbound Channel
3. The Revenue Category



CRM Designation

The Designation does 3 items **30708011**

1. The red digits represent the council number. This tells PeopleSoft which council's GL should receive the transaction.
2. The green digits represent the Project Code in PeopleSoft the transaction should record against. CRM allows up to 4 digits for a project code.
3. The blue digit is the Fund. In the example above we have a “1”. This designation will send it to your operating fund. 2 = Capital, 3 = Endowment



Inbound Channel

- The Inbound Channel determine which contribution account the entry records against in PeopleSoft.
- In our example Friends of Scouting = 4001
- Current year inbound channels are used during the current PeopleSoft year. 2023 = Current Year. These transactions would have a 2023 postdate.
- FY Inbound Channels are used when putting in monies for Next year when you are still in current year. 2024 monies when you are still in 2023. These transactions would have a 2023 postdate
- PY inbound channels are used for payment that arrive after Peoplesoft has been closed. Payment received in 2024 for 2023. These transactions would have a 2024 postdate.



Associated Organizations - LFL Foundation	FY - Associated Organizations - LFL Foundation	PY - Associated Organizations - LFL Foundation
Associated Organizations - National Council	FY - Associated Organizations - National Council	PY - Associated Organizations - National Council
Associated Organizations - OA	FY - Associated Organizations - OA	PY - Associated Organizations - OA
Associated Organizations - Other	FY - Associated Organizations - Other	PY - Associated Organizations - Other
Capital Contributions	FY - Capital Contributions	PY - Capital Contributions
Direct Mail	FY - Direct Mail	PY - Direct Mail
Foundations and Trusts	FY - Foundations and Trusts	PY - Foundations and Trusts
Friends of Scouting	FY - Friends of Scouting	PY - Friends of Scouting
Government Grants	FY - Legacies and Bequests	PY - Legacies and Bequests
Legacies and Bequests	FY - Other Direct - Learn for Life	PY - Other Direct - Learn for Life
Other Direct - Learn for Life	FY - Other Direct - Purpose	PY - Other Direct - Purpose
Other Direct - Purpose	FY - Other Direct - Service Contributions	PY - Other Direct - Service Contributions
Other Direct - Service Contributions	FY - Other Direct Contributions	PY - Other Direct Contributions
Other Direct Contributions	FY - Other Indirect Contributions	PY - Other Indirect Contributions
Other Indirect Contributions	FY - Project Sales	PY - Project Sales
Project Sales	FY - Special Event Fundraising	PY - Special Event Fundraising
Special Event Fundraising	FY - Unassociated Organizations	PY - Unassociated Organizations
Unassociated Organizations	FY - United Way - Allocations	PY - United Way - Allocations
United Way - Allocations	FY - United Way - Donor Designations	PY - United Way - Donor Designations
United Way - Donor Designations		

Revenue Category - Restrictions

- Used to determine restriction – Time or Project
- Unrestricted = Contribution will be used this year
- Temp Restricted = Contribution will be released when the time for it use arrives. Capital Dollars for a building
- Permanently Restricted = Contribution can't be spent. Used when a donor placed monies in your endowment.

Unrestricted by donor

Temporarily restricted by donor

Permanently restricted by donor



Revenue Category – Special Events

- Used in conjunction with the Inbound Channel "Special Event Fundraising"
- Special Event Fundraising with Unrestricted by donor will send the transaction to your default special event account – Sponsorships (4201) or Ticket Sales (4202).
- You can alter the Revenue Category to pick a specific Special Event Contribution account other than your default.



Inbound Channel + Revenue Category Specific Special Event Revenue Account

Designation	Inbound channel	Revenue category
30708011 Invest in Charactor-Counci -...	Special Event Fundraising	Event - Advertising

Designations can be permissioned to allow specific GL Account to be used. The Revenue Categories to the right will drive special event revenue to specific accounts when the Special Event Fundraising Inbound Channel is selected.

Event - Advertising

- Event - Auction item donation
- Event - Participant/Ticket
- Event - Program item
- Event - Concessions
- Event - Sponsorship
- Event - Other revenue
- Event - Fees
- Sales/Non-Fundraising Revenue
- Tax - State Sales Tax



PeopleSoft Account

- Designation – 30708011
- Inbound Channel – Friends of Scouting – 4001
- Revenue Category – Unrestricted
- Account created for Peoplesoft – L307-1-4001-801-90

Council #	Fund	Contribution Account	Project Code	Restriction
Designation	Designation	Inbound Channel	Designation	Revenue Category
L307	1	4001	801	90



Designation Creation

- See if your designation is in CRM before requesting it.
- Use a new designation worksheet to request a new designation.
- The designation worksheet will have you determine which Inbound Channels should work with your project code
- Hint – If you want to know which contribution accounts in PeopleSoft are connected to an Inbound Channel look at the new designation worksheet.



Blackbaud CRM Resources

- MyBSA / Fundraising / Blackbaud CRM Resources
- When screen opens slide to the bottom to find:
 - Designation Request Sheet
 - Event Revenue Setup Request
 - Read direction tab on worksheet, fill in information tab
 - Submit via Member Care ticket for service

Fundraising



- Blackbaud CRM
- Blackbaud CRM Resources
- Blackbaud CRM User Guide
- Learn Blackbaud CRM (self-study)
- Scouting Gives Log-in
- Scouting Gives User Guide
- MatchFinder Matching Gifts Search

Blackbaud Setup Documents

- Barcode Scanner Specifications
- Blackbaud Merchant Services Checklist
- Designation Request sheet
- Event Revenue Setup Request



BUSINESS UNIT	
Council/Business Unit ID	L358
Name	Patriots' Path Council

PEOPLESOFT PROJECT ID AND NAME	
Project ID (3-8 Digits)	834
PeopleSoft Project Description/Name	Stem Awards Dinner

FUND TYPE(S) NEEDED FOR THIS PROJECT		
FUND 1	OPERATING	YES
FUND 2	CAPITAL	no
FUND 3	ENDOWMENT	no

SPECIAL INSTRUCTIONS/REQUESTS
Type any special instructions here. For example: 1. Different names your Council may want for the separate Operating, Capital and Endowment designations that could be created for this Project. 2. Any additional PeopleSoft Accounts (from Chart of Accounts) that are needed to process fundraising revenue for this Project.

PAY METHODS ACCEPTED		
Used?	Account	Description
DEFAULT	1001	Checking Account Bank 1
no	1002	Checking Account Bank 2
no	1003	Checking Account Bank 3
no	1004	Checking Account Bank 4
no	1005	Checking Account Bank 5
no	1006	Checking Account Bank 6
no	1007	Checking Account Bank 7
no	1008	Checking Account Bank 8
no	1009	Checking Account Bank 9
no	1010	Checking Account Bank 10
no	1011	Checking Account Bank 11
no	1012	Checking Account Bank 12
no	1013	Checking Account Bank 13
no	1014	Checking Account Bank 14
no	1030	Depository Account Bank 1
no	1031	Depository Account Bank 2
no	1032	Depository Account Bank 3
no	1049	Transfer between Bank Accounts
no	1051	Savings Account Bank 1
no	1052	Savings Account Bank 2
no	1101	Short Term Investments Bank 1
no	1751	Other Current Assets (for Auction Items)
no	1800	Camp Fixed Assets
no	1800	Service Center Fixed Assets
no	1841	Camp Construction-in-Progress
no	1841	Service Center Construction-in-Progress
no	1841	Service Center Construction-in-Progress
no	1901	Long Term Invest Bank 1
no	1902	Long Term Invest Bank 2
no	2237	Payroll Deduction**
no	9430	Gift-in-Kind**
no	9430	Service Contribution**

INBOUND CHANNELS NEEDED		
Needed?	Account	Chart of Accounts Category
no	4001	Friends of Scouting
no	4010	Direct Mail
no	4071	Project Sales
no	4101	Capital Contributions
SPE default:	4201	Special Event Fundraising
n	4201	Sponsorship/Donation [S]
n	4202	Participant/ Ticket [T]
n	4203	Program Item [P]
n	4204	Advertising [A]
n	4205	Concessions [C]
n	4209	Auction Item Donation [I]
n	4231	Other Revenue [O]
n	4250	Fees (Fair Market Value) [F]
n	2761	State Sales Tax [X]
no	4301	Legacies and Bequests
no	4401	Foundations and Trusts
no	4501	Other Direct Contributions
no	4531	Other Direct - Service Contributions
no	4551	Other Direct - Learn for Life
no	4601	Associated Organizations - OA
no	4602	Associated Organizations - National Council
no	4603	Associated Organizations - Other
no	4604	Associated Organizations - LFL Foundation
no	4701	United Way - Allocations
no	4702	United Way - Donor Designations
no	4801	Unassociated Organizations
no	4901	Other Indirect Contributions
no	5001	Government Fees



Pre

New Designation Request

Instructions



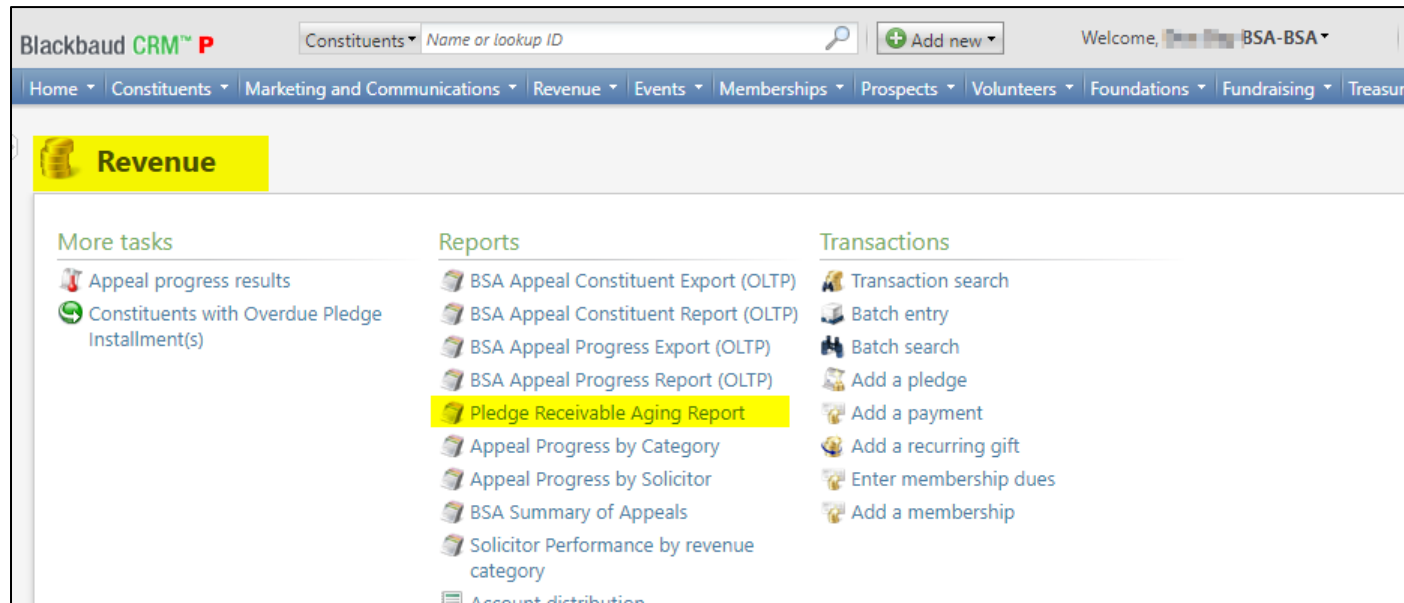
Seasonal Items



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Global Write Offs

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



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

Blackbaud CRM™ P

Constituents

Welcome, BSA-BSA

Home | Constituents | Marketing and Communications | **Revenue** | Events | Memberships | Prospects | Volunteers | Foundations | Fundraising | Treasury

Pledge Receivable Aging Report

BSA Organization **1** Report Code **3**

Appeal **2** **4**



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

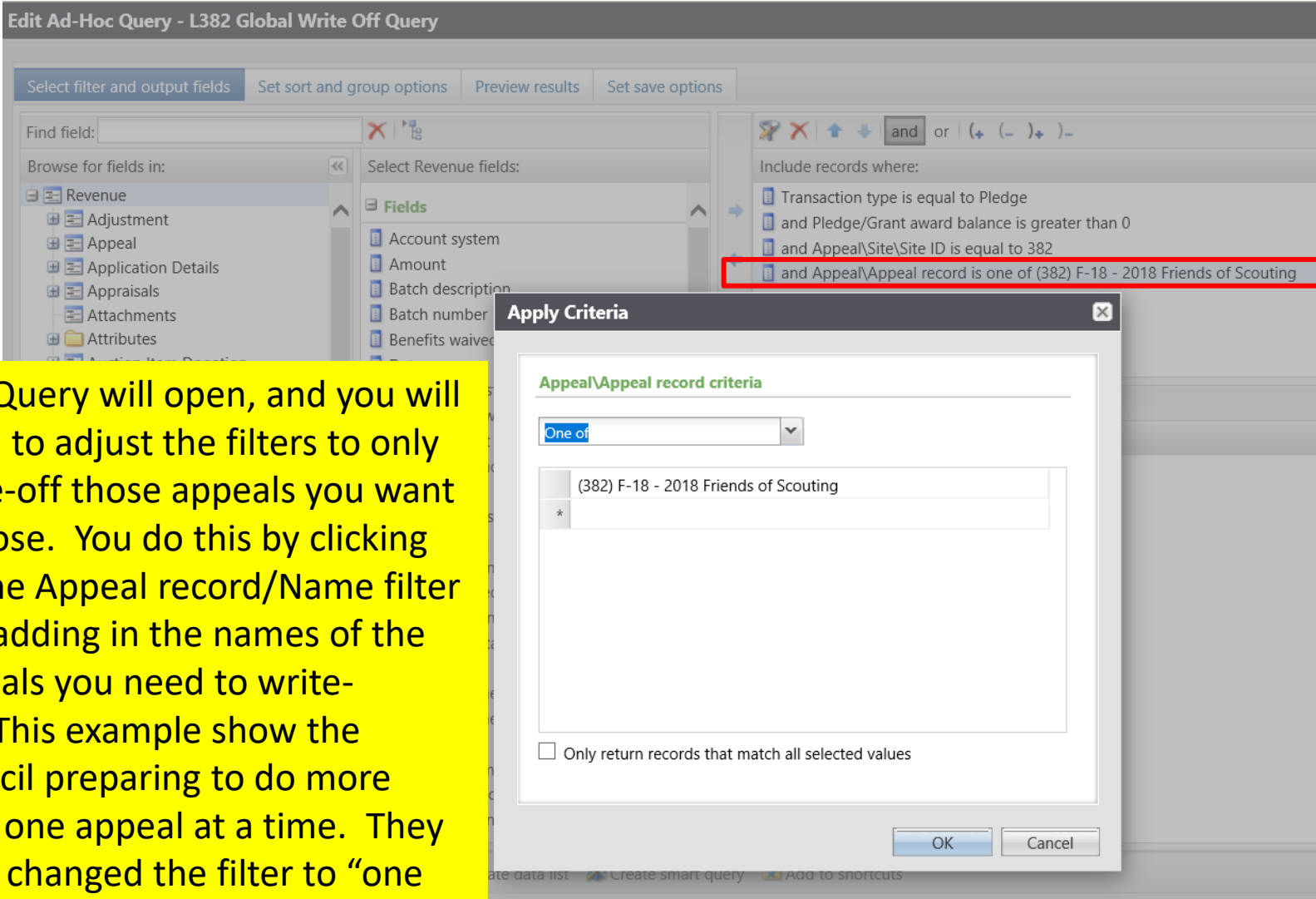
☐ Create output selection

☐ 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.



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.



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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 you ran your write-offs. It will provide a list of those written-off on or after the date that you ran 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		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

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

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.



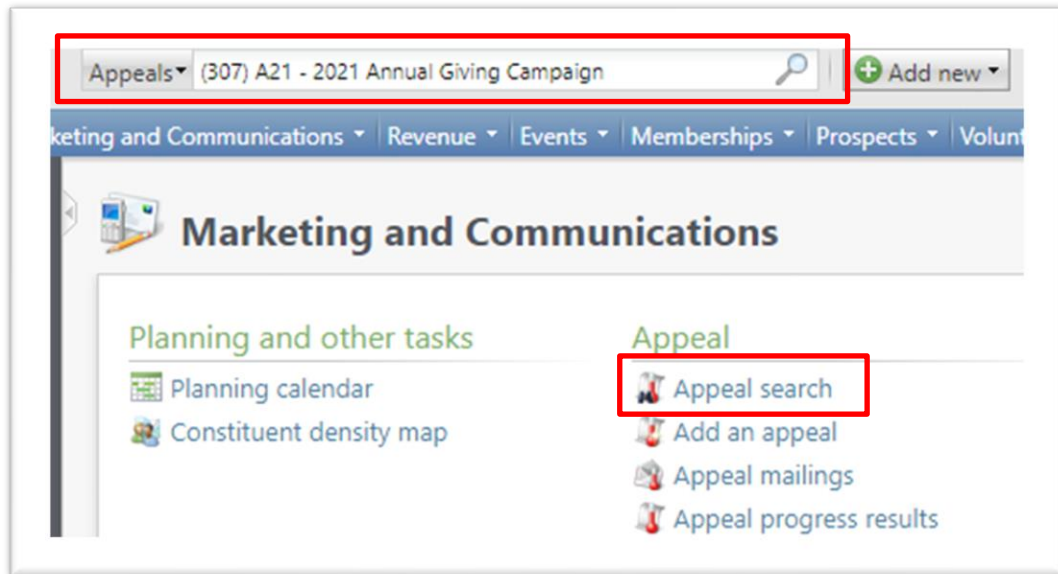
Appeal and Event Inactive



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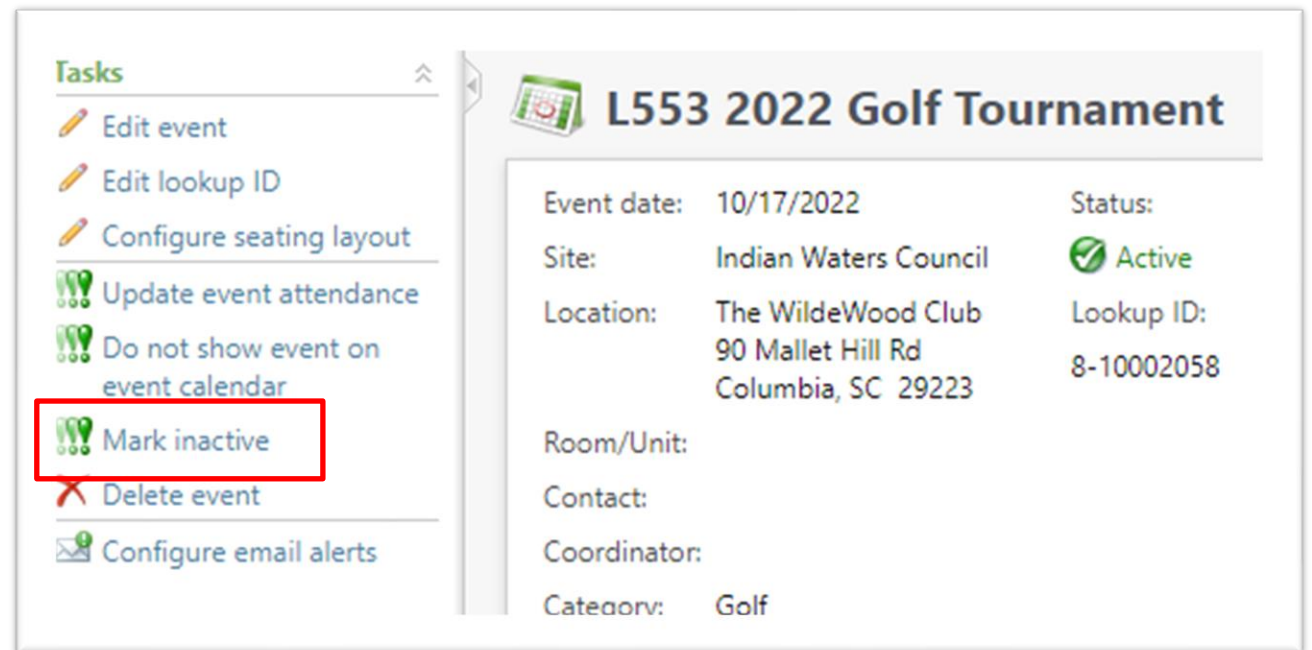
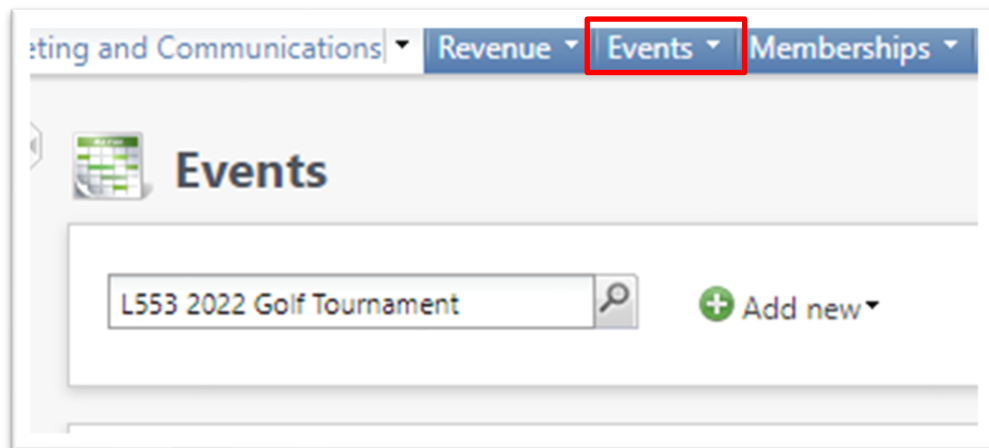
Make Appeals Inactive

- Reduces appeals returned when doing a batch search.
- Recommend keeping prior year active.
- Search for appeal – then mark it inactive/



Make Event Inactive

- Reduces events returned when doing an event search.
- Recommend keeping prior year event active.
- Search for event – then mark it inactive



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

Region:

DPC: 431

CART: R028

LOT: A0043

Congressional district: CA's 9th

State house district:

State senate district:

Local precinct:

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: Yes					
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 (2) Add Filters More						
<input checked="" type="checkbox"/> 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	



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



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





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[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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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

May 17, 2023

10:00 am & 2:00 pm CT



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Questions & Answers



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