

CRM User Forum

May 17, 2023

John Kuehn

Cornelia Ellis

Don Day



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Objectives

- Understanding Payment Reminders (bills) & Acknowledgements (thank you's)
 - Best practices
 - When to send
 - How to customize
- Query vs OLTP Reports vs Data Lists
- Tracking Your Appeal Progress
- Questions – Answers


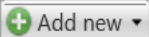




Location in CRM

- Marketing and Communications
 - Donor Relations
 - Acknowledgements
 - Reminders








Blackbaud CRM™ P

Constituents Name or lookup ID  






Welcome, John Kuehn BSA-BSA  

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Memberships ▾ Prospects ▾ Volunteers ▾ Foundations ▾ Fundraising ▾ Treasury ▾ Web ▾ >>









Shortcuts



-  Add this page to shortcuts
-  Manage my shortcuts
-  Query
-  GL Accounts
-  John D. Kuehn

Recent searches



-  Transaction search
-  Designation search
-  Appeal progress results
-  Appeal search
-  Batch search

Recently accessed


-  Acknowledgements
-  Reminders
-  Letters and Documents
-  Appeal Mailing Activation Status for L415 2016 Fall Cleanup Letter
-  Appeal Mailing: L415 2016 Fall Cleanup Letter
-  Giving Dynamics
-  Giving Detail
-  Appeal Mailings

Home  [Customize](#) 


Constituents

-  Constituent search
-  Organization search




Revenue

-  Batch entry


Events

-  Add an auction item

Prospects

-  Manage research lists
-  Add a prospect research request
-  My prospect research page

Administration

-  Application users

To find your reminder and acknowledgement routines proceed to the Marketing and Communications functional area. Your council had 4 reminder routines and 3 acknowledgement routines created for you during conversion. The number of business routines may be different now.





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John D. Kuehn

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Batch search

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Acknowledgements

Reminders

Letters and Documents

Appeal Mailing Activation Status for L415 2016 Fall Cleanup Letter

Appeal Mailing: L415 2016 Fall Cleanup Letter

Giving Dynamics

Giving Detail

Appeal Mailings

Credit Card Processing



Marketing and Communications

Planning and other tasks

Planning calendar

Constituent density map

Appeal

Appeal search

Add an appeal

Appeal mailings

Appeal progress results

Donor relations

Receipts

Acknowledgements

Reminders

Planned gift acknowledgements

Manage correspondence

Marketing efforts

Direct marketing efforts

Marketing acknowledgements

Marketing plans

Membership renewal efforts

Public media efforts

Source codes

Sponsorship efforts

Packages

Creatives

Export definitions

Letters and documents

Materials and exp

Email marketing

Packages

Acquisition and segmentation

Acquisition lists

Finder files

Segmented house files

Configuration

Address processing

Ask ladders

Communication name patterns

Communication templates

Finder number settings

Interaction categories and subcategories

Once in the Marketing and Communications functional area, proceed to Donor Relations. There you will find Acknowledgements and Reminders. We will begin with Reminders. Click the Reminders link.



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Constituents ▾ Name or lookup ID 🔍 ➕ Add new ▾

Welcome, John Kuehn BSA-BSA ▾

Home ▾

Constituents ▾

Marketing and Communications ▾

Revenue ▾

Events ▾

Memberships ▾

Prospects ▾

Volunteers ▾

Foundations ▾

Fundraising ▾

Treasury ▾

Web ▾

➔

Tasks

Generate header file

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Appeal search

Batch search

Recently accessed

Reminders

Acknowledgements

Letters and Documents

Appeal Mailing Activation Status for L415 2016 Fall Cleanup Letter

Appeal Mailing: L415 2016 Fall Cleanup Letter

Giving Dynamics

Reminders

Review Reminders Reminders

Reminder processes (4) ➕ Add 🔍 Filters 📄 More ▾

Sites: Selected sites ▾ 🔍 Apply 🔄 Reset

Name ▲	Description	Output format	Export definition	Calculate am
📌 L104 Pledge Payment Overdue	Last month or old...		Custom Pledge Reminder Fi...	9/20/2016
📌 L104 Pledge Payment Reminder Current Month	Current Month Pl...		Custom Pledge Reminder Fi...	9/20/2016
📌 L104 Pledge Payments Due Next Month	Next Month Pled...		Custom Pledge Reminder Fi...	9/20/2016
📌 L104 Pledge Payments New This Month	Used to bill new p...		Custom Pledge Reminder Fi...	9/20/2016

Reminders have two tabs. If you click the Reminders tab it will display the reminder routines that are set up for you. No need to filter by site. Your site security will only allow your reminder routines to display.



Routines and what they bill

- LXXX Pledge Payment Overdue
 - Bills those pledges that are overdue
 - Run on the 1st business day of the month and place the date of the **last day of the previous month** in the start process.
- LXXX Pledge Payment Current Month
 - Bills pledges that have an installment due during the current month.
 - Run on the 1st business day of the month and type in the **last day of the month** in the start process.



Routines and what they bill

- LXXX Pledge Payments Due Next Month
 - Provides bills for those who have installments next month
 - Can be ran at the end of a month using the last day of next month in the start process
- LXXX Pledge Payments New This Month
 - Provides bills for those pledges that you just entered. It looks for pledges never billed.
 - Run at the end of each week to send bills to those that want to be billed now.



Home ▾

Constituents ▾

Marketing and Communications ▾

Revenue ▾

Events ▾

Memberships ▾

Prospects ▾

Volunteers ▾

Foundations ▾

Fundraising ▾

Treasury ▾

Web ▾

»

Tasks

Generate header file

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Appeal Mailing Activation Status for L415 2016 Fall Cleanup Letter

Appeal Mailing: L415 2016 Fall Cleanup Letter

Giving Dynamics

Giving Detail

Reminders

Review Reminders

Reminders

Reminder processes (4)

Add

Filters

More ▾

Sites: Selected sites ▾

Apply

Reset

Name ▴	Description	Output format	Export definition	Calculate am
L104 Pledge Pay			Custom Pledge Reminder Fi...	9/20/2016
L104 Pledge Pay			Custom Pledge Reminder Fi...	9/20/2016
L104 Pledge Pay			Custom Pledge Reminder Fi...	9/20/2016
L104 Pledge Pay			Custom Pledge Reminder Fi...	9/20/2016

Generate header file

Output type: Export definition ▾

Export Definition: Custom Pledge Reminder Fields x 🔍

Help

OK

Cancel

If you plan to create your own billing statement in letter format, you can download the merge fields. It is an export definition header file with the name of **Custom Pledge Reminder Fields**. These are what places the data onto your established reminders. Click “Generate header file” and fill in the info and click “OK” to download.



IV	IV	U	P	Q	R	
RevApI_NAME	RevBSAStructureAttribute_VALUE	RevGivCatAttribute_VALUE	RevConstituent1_LOOKUPID	RevConstituent4_FORMATTEDNAME	RevCn_NAME	R
<RevApI_NAME>	<RevBSAStructureAttribute_VALUE>	<RevGivCatAttribute_VALUE>	<RevConstituent1_LOOKUPID>	<RevConstituent4_FORMATTEDNAME>	<RevCn_NAME>	<

The excel sheet will look like this.
You can save it on your desktop
for future use.

















Reminders

Reminders Review Reminders

Reminder processes (9)  Add  Filters  More

Sites:  Apply  Reset

Name ▲	Description	Output format	Export definition
 L104 Maui Pledge Payment Reminder Current Month	Current Month Reminders		Custom Pledge Reminder Fields
 L104 Maui Pledge Payments Due Next Month	Next Month Pledge Reminders		Custom Pledge Reminder Fields
 L104 Maui Pledge Payments New This Month	Used to bill new pledges put in this mo...		Custom Pledge Reminder Fields
 L104 Maui Pledge Payments Overdue	Last month or older pledge reminders		Custom Pledge Reminder Fields
 L104 Pledge Payment Overdue	Last month or older pledge reminders		Custom Pledge Reminder Fields
 Start process  Set format options  Edit  Delete  Assign permissions			
 L104 Pledge Payment Overdue Capital	Last month or older pledge reminders		Custom Pledge Reminder Fields
 L104 Pledge Payment Reminder Current Month	Current Month Pledge Reminder		Custom Pledge Reminder Fields
 L104 Pledge Payments Due Next Month	Next Month Pledge Reminders		Custom Pledge Reminder Fields
 L104 Pledge Payments New This Month	Used to bill new pledges put in this mo...		Custom Pledge Reminder Fields

We will review the LXXX Pledge Payment Overdue reminder. If you drop the chevron, you can start the process or edit the process. You can also click the reminder hyperlink and go to its home page. I would suggest clicking the hyperlink the first few times to go to the home page. **Appeals being billed should be reviewed annually to ensure you capture new appeals created.**



Tasks

- Start process
- Edit process**
- Set format options
- Generate WSF
- Create job schedule
- Delete process

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- netbsa\pbowman - Application User
- netbsa\ammccoy - Application User
- Data Tune-Up
- John D. Kuehn
- APTG Default
- netbsa\L127SvcAcct - Application User
- Application Users
- Query
- Business Processes
- BSA Structure Table Entries
- Giving Category Table Entries

Reminder process list

L104 Pledge Payment Overdue

Description:	Last month or older pledge reminders	Export definition:	Custom Pledge Reminder Fields
Include selection:	L104 Pledge Payments Due Last Month Or Older (Ad-hoc Query)	Create output selection:	No
Output selection type:		Overwrite existing selection:	No
Calculate amounts as of:	3/31/2023	Output selection name:	
Mark reminders sent:	No	Output grouping:	Commitment
Letter template:	L104 Reminders_ScoutNET_Like_Pledge_Overdue 5.7.19 - EDITED 7.13.22.docx		
Label template:			

Recent status History Job schedules

Recent status

Merge letter
 Merge label
 Delete
 Mark sent
 Clear results
 Download output

Status:	Completed		
Status message:	Completed		
Started by:	netbsa\ty76630	Server name:	AZSCUSBBCRMPD1
Started:	4/3/2023 8:12:58 PM	Total records processed:	26
Ended:	4/3/2023 8:13:37 PM	Number of exceptions:	0
Duration:	39 seconds	Records successfully processed:	26

To demonstrate how you might adjust the appeals connected let's edit the process. **You need to tell them which appeals to pull reminders for. This must be updated yearly. If you write pledges off on a regular basis you can let it run for all pledges. Click the edit process button.**



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From this page you can see the letter template that has been uploaded that will merge for printing. You can clear this file and replace it from your hard drive with one that you create.

You will need to head to the selection (query) that supplies the routine with the installments that are overdue. Click the pencil next to the selection to edit.

Edit reminder process

Name: L104 Pledge Payment Overdue

Description: Last month or older pledge reminders

Site: Aloha Council

Output grouping: Commitment

Letter template: L104 Reminders_ScoutNET_Like_Pledge_Overdue 5.7.19 - EDITED 7.13.22.docx

Label template: <File not specified>

Output type: Export definition

Export definition: Custom Pledge Reminder Fields

Criteria

Generate reminders for ☐ All pledges ☐ All recurring gifts ☒ Custom selection

Selection: L104 Pledge Payments Due La

Exclusions

Results

These options may be modified at run time.

Calculate amounts as of: <Specific date> 3/31/2023

☐ Mark reminders sent when process completes

Sent date: Today

☐ Create selection from results

Choose file Clear file

Choose file Clear file

Exclusions

Selection: L104 Pledge Payments Due La

Calculate amounts as of: <Specific date> 3/31/2023

Mark reminders sent when process completes

Sent date: Today

Create selection from results

You always need a selection in this process. Never run all pledges or all recurring gifts



Edit Ad-Hoc Query - L104 Pledge Payments Due Last Month Or Older

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

Find field:

Browse for fields in: Select Revenue fields:

Revenue

- Adjustment
- Appeal
- Application Details
- Appraisals
- Attachments
- Attributes
- Auction Item Donation
- BSAFR
- BSAFR Snapshot
- Constituent

Fields

- Account system
- Amount
- Batch description
- Batch number
- Benefits waived
- Date
- Designation list
- Do not acknowledge
- Do not receipt

Include records where:

- Appeal\Site\Site ID is equal to 104
- and Appeal\Report code is one of Multi-year, 2022**
- and transaction type is one of Pledge
- and Pledge/Grant award balance is greater than 0
- and Pledge/Grant award next installment date is on or before last month ...
- and BSA Structure Attribute\Value is not equal to Maui or is blank
- and Constituent\Address (Primary)\Do not mail is equal to No
- and Constituent\Inactive is equal to No

Results fields to display:

- Amount (Pledge Amount)
- Date (Pledge Date)
- Pledge/Grant award next installment date (Next Installment Due)
- Constituent\Name (Constituent)
- Constituent\Lookup ID (Lookup ID)
- Latest installment payment date (Last Payment Date)
- Latest installment payment amount (Last Payment Amount)
- Pledge/Grant award balance (Balance)

Create data list | Create smart query | Add to shortcuts

Help | Save as | Save | Save and close | Cancel

The query looks for your revenue that equals a pledge that has a balance and is marked to receive a reminder. The installment is last month or before. (overdue). All revenue has an appeal attached. Include all appeals you want billed to.



Edit Ad-Hoc Query - L104 Pledge Payments Due Last Month Or Older

Select filter and output fields

Set sort and group options

Preview results

Set save options

Find field:

Browse for fields in:

Revenue

- Adjustment
- Appeal
- Application Details
- Appraisals
- Attachments
- Attributes
- Auction Item Donations
- BSAFR
- BSAFR Snapshot
- Constituent
- Credit Card Refund
- Credit Card Updates
- Direct Debit Account
- Donor Challenge Mat
- Donor Challenge Pay

Select Revenue fields:

Fields

Account system



Include records where:

Appeal\Site\Site ID is equal to 104

and Appeal\Report code is one of Multi-year, 2022, 2023

Apply Criteria

Appeal\Report code criteria

One of

☒ Value ☐ Output field

2031

2030

2029

2028

2027

2026

2025

2024

2023

2022

2021

Multi-year

2022

2023

☐ Only return records that match all selected values

OK

Cancel

To add your appeals for year 2023, click the appeal report code line in the right filter box. Then add year 2023 to the right side and click OK. Now reminders will go to 2022, 2023 and Multi-Year appeals.



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Edit Ad-Hoc Query - L104 Pledge Payments Due Last Month Or Older

Select filter and output fields

Set sort and group options

Preview results

Set save options

Find field:

Browse for fields in:

Revenue

- Adjustment
- Appeal
- Application Details
- Appraisals
- Attachments
- Attributes
- Auction Item Donations
- BSAFR
- BSAFR Snapshot
- Constituent
- Credit Card Refund
- Credit Card Updates
- Direct Debit Account
- Donor Challenge Mail
- Donor Challenge Payment
- Gift Fee Adjustments
- Gift Status

Select Revenue fields:

Fields

- Account system
- Amount
- Batch description
- Batch number
- Benefits waived
- Date
- Designation list
- Do not acknowledge
- Do not receipt
- Given anonymously
- GL post date
- GL post process
- GL post status
- Inbound channel
- Installment frequency
- Installments end date

Include records where:

- Appeal\Site\Site ID is equal to 104
- and Appeal\Report code is one of Multi-year, 2022, 2023
- and Transaction type is one of Pledge
- and Pledge/Grant award balance is greater than 0
- and Pledge/Grant award next installment date is on or before last month
- and BSA Structure Attribute\Value is not equal to Maui or is blank
- and Constituent\Address (Primary)\Do not mail is equal to No
- and Constituent\Inactive is equal to No

Results fields to display:

- Amount (Pledge Amount)
- Date (Pledge Date)
- Pledge/Grant award next installment date (Next Installment Due)
- Constituent\Name (Constituent)
- Constituent\Lookup ID (Lookup ID)
- Latest installment payment date (Last Payment Date)
- Latest installment payment amount (Last Payment Amount)
- Pledge/Grant award balance (Balance)

Once you have added your additional appeals, save and close the selection and then save the edit process.

Create data list Create smart query Add to shortcuts

Save as

Save

Save and close

Cancel



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Tasks

Start process

Edit process

Set format options

Generate WSF

Create job schedule

Delete process

Shortcuts

Add this page to shortcuts

Manage my shortcuts

netbsa\pbowman - Application User

netbsa\ammccoy - Application User

Data Tune-Up

John D. Kuehn

APTG Default

netbsa\L127SvcAcct - Application User

Application Users

Query

Business Processes

BSA Structure Table Entries

Reminder process list

L104 Pledge Payment Overdue

Description:Last month or older pledge reminders

Include selection:L104 Pledge Payments Due Last Month Or Older (Ad-hoc Query)

Output selection type:

Calculate amounts as of:3/31/2023

Mark reminders sent:No

Letter template:L104 Reminders_ScoutNET_Like_Pledge_Overdue 5.7.19 - EDITED 7.13.22.docx

Label template:

Export definition:Custom Pled

Create output selection:No

Overwrite existing selection:No

Output selection name:

Output grouping:Commitment

Recent statusHistoryJob schedules

Recent status

Merge letterMerge labelDeleteMark sentClear resultsDownload output

Status:Completed

Status message:Completed

Started by:netbsa\ty76630

Server name:AZSCUSBBCRMPD1

Started:4/3/2023 8:12:58 PM

Total records processed:26

Ended:4/3/2023 8:13:37 PM

Number of exceptions:0

Duration:39 seconds

Records successfully processed:26

Once you have updated the selection, you can click "Start process".





Reminder process list

L104 Pledge Payment Overdue

Description: Last month or older pledge reminders
Include selection: L104 Pledge Payments Due Last Month Or Older (Ad-hoc Query)
Output selection type:
Calculate amounts as of: 3/31/2023
Mark reminders sent: No
Letter template:
Label template:

Export definition: Custom Pledge Reminder Field
Create output selection: No
Overwrite existing selection: No
Output selection name:
Output grouping: Commitment

Run reminder process

Process name: L104 Pledge Payment Overdue

Calculate amounts as of: <Specific date> 4/30/2023

Exclusions

☐ Mark reminders sent when process completes

Sent date: Today

☐ Create selection from results

Selection type:

Selection name:

☐ Overwrite existing selection

Start

Cancel

When the reminder process box opens change it to specific date and type in the correct date for the reminder you are running. This is for overdue bills - use the last date of last month. Then click start.

Tasks

- Start process
- Edit process
- Set format options
- Generate WSF
- Create job schedule
- Delete process

Shortcuts

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- netbsa\ammccoy - Application User
- Data Tune-Up
- John D. Kuehn
- APTG Default
- netbsa\L127SvcAcct - Application User
- Application Users
- Query
- Business Processes
- BSA Structure Table Entries
- Giving Category Table Entries
- GL account system import - Import



Reminder process list

L104 Pledge Payment Overdue

Description: Last month or older pledge reminders
Include selection: L104 Pledge Payments Due Last Month Or Older (Ad-hoc Query)
Output selection type:
Calculate amounts as of: 4/30/2023
Mark reminders sent: No
Letter template: L104 Reminders_ScoutNET_Like_Pledge_Overdue 5.7.19 - EDITED 7.13.22.docx
Label template:
Export definition:
Create output selection:
Overwrite existing selection:
Output selection name:
Output grouping:

Recent status

History

Job schedules

Recent status

Merge letter

Merge label

Delete

Mark sent

Clear results

Download output

Status: Completed

Status message: Completed

Started by: netbsa\jkuehn

Server name:

AZSCUSBBCRMPD1

Started: 5/16/2023 8:29:54 PM

Total records processed:

Ended: 5/16/2023 8:30:21 PM

Number of exceptions:

Duration: 27 seconds

Records successfully processed:

This reminder took 27 seconds to run. You have the choice to merge your letter. After you merge, review and decide to mail you click **Mark Sent**. If you don't like what you see you **Clear Results**. You should review for address issues. If you find issues, clear results – fix issues on constituent record and then run reminders again. You can download the output for a quick review of contact information to identify who need edits.



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Aloha Council



Scott K. Yoshihara
1091
Honolulu, HI 96817

(104) C17

Aloha Council
MG Executive

Total Pledge Amount: \$5,000.00
Pledge Remaining: \$2,000.00
Amount Past Due: \$2,000.00

To pay online visit our Flipcause page: <https://bit.ly/ACBSA2022>

Scott K. Yoshihara
ID# 8-17440084

Acct No. _____ Exp _____ Signature _____
(MasterCard/Visa/AMEX/Discover)

If paying by credit card, please fill out the above area and return *this* portion of the statement. If you have any questions about this statement, please call 808-595-6366.

Aloha Council



Neal H. Atebara
2550 Malama Pl
Honolulu, HI 96817

Aloha Council, BSA
42 Puiwa Road
Honolulu, HI 96817

Scott K. Yoshihara
ID# 8-17440084

Aloha Council
MG Executive

Scott K. Yoshihara
ID# 8-17440084

(104) C17
Capital
Aloha Council
MG Executive

Amount Enclosed

Amount Enclosed
\$ _____

Please make your check payable to:
Aloha Council

**TO ENSURE PROPER CREDIT, RETURN
THIS PORTION WITH YOUR PAYMENT.**

Aloha Council, BSA
42 Puiwa Road
Honolulu, HI 96817

Neal H. Atebara
ID# 8-17363613

This is what the standard reminder looks like. It will print on BSA stock paper and fold for you to place in the normal envelope. If you review before mailing, you can fix the constituent records and then rerun. You can create your own reminder as mentioned before.



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Constituents

Home ▾ Constituents ▾ **Marketing and Communications** ▾ Revenue ▾ Events ▾ Memberships ▾ Prospects ▾ Volunteers ▾ Foundations ▾ Fundraising ▾ Treasury ▾ Web ▾ Analysis ▾ Adm

Tasks

- Search for a letter
- Search for a document
- + Add a direct marketing letter
- + Add a marketing acknowledgement letter
- + Add a membership letter
- + Add a sponsorship letter
- + Add a document

Related tasks

- Creatives
- Export definitions
- Materials and expenses
- Packages

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- netbsa\pbowman - Application User
- netbsa\ammccoy - Application User
- Data Tune-Up
- John D. Kuehn
- APTG Default

Letters and Documents

Letters **Documents**

Documents (2)

Type: Sites:

Name ▲	Site	C...	D...	T...	Document
Reminders					
L104 Maui Current and Next Month Reminder	Aloha Council	\$...	P...	R...	L104 Maui Reminders_ScoutNET_Like_Pledge_Current_Month_Due LC 5.7.19....
L104 Maui OverDue Reminder	Aloha Council	\$...	P...	R...	L104 Maui Reminders_ScoutNET_Like_Pledge_Overdue 5.7.19.docx

If you need to edit your reminders because of a phone number or address change you go to Letters and Documents under Marketing and Communications and view your documents to download it.



Aloha Council



«RevCn_NAME»

«RevCnAdrPri_ADDRESSBLOCK»

«RevCnAdrPri_CITY», «RevCnAdrPri_STATEID_ABBREVIATION» «RevCnAdrPri_PC

«RevApl_NAME»

«RevBSAStructureAttribute_VALUE»

«RevGivCatAttribute_VALUE»

Remind Date: «Rev_PLEDGENEXTINSTALLMENTDATE»

Total Pledge Amount: «Rev_PLEDGEORIGINALAMOUNT»

Pledge Remaining: «Rev_PLEDGEBALANCE»

Current Amount Due: «AMOUNTDUE»

«RevCn_NAME»

ID# «RevConstituent1_LOOKUPID»

Acct No. _____ Exp _____ Signature _____

(MasterCard/Visa/AMEX/Discover)

If paying by credit card, please fill out the above area and
return this portion of the statement. If you have any
questions about this statement, please call 808-595-6366.

«Next Record»

Aloha Council



«RevCn_NAME»

«RevCnAdrPri_ADDRESSBLOCK»

«RevCnAdrPri_CITY» «RevCnAdrPri_STATEID_ABBREVIATION» «RevCnAdrPri_PC ID# «RevConstituent1_LOOKUPID»

Aloha Council, BSA
42 Puiwa Road
Honolulu, HI 96817

«RevCn_NAME»
ID# «RevConstituent1_LOOKUPID»

«RevBSAStructureAttribute_VALUE»
«RevGivCatAttribute_VALUE»

«RevCn_NAME»
ID# «RevConstituent1_LOOKUPID»

«RevApl_NAME»
«RevBSAStructureAttribute_VALUE»
«RevGivCatAttribute_VALUE»

Current Amount Due:
«AMOUNTDUE»

Amount Enclosed

\$ _____

Reminders are two to a page. If you plan to create a letter, this template shows you the merge fields used on the overdue bill. If you download the other reminder, it will show you the fields used on the current and next month reminders. Make changes and save the file to your hard drive. Clear the old reminder and upload the new one to your reminder routine by editing the process.



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Reminders

- Member Care can assist you with updating your reminder statements.
- If you want to create a new reminder process create an incident with member care for assistance.





Acknowledgement

- Three original processes created for you.
- Member Care can assist you to edit these.
- File a ticket with Member Care if you need to create new processes i.e. specific dollar ranges, different letters for different appeal.
- Councils can add new Acknowledgement letters but not Assign Letter Process or Acknowledgment Processes



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Constituents Name or lookup ID   Add new

Welcome, John Kuehn BSA-BSA

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

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query
- GL Accounts
- John D. Kuehn

Recent searches

- Transaction search
- Designation search
- Appeal progress results
- Appeal search
- Batch search

Recently accessed

- Letters and Documents
- L104 Pledge Payment Overdue
- Reminders
- Acknowledgements
- Appeal Mailing Activation Status for L415 2016 Fall Cleanup Letter
- Appeal Mailing: L415 2016 Fall Cleanup Letter
- Giving Dynamics
- Giving Detail
- Appeal Mailings

Marketing and Communications

Planning and other tasks

- Planning calendar
- Constituent density map

Marketing efforts

- Direct marketing efforts
- Marketing acknowledgements
- Marketing plans
- Membership renewal efforts
- Public media efforts
- Source codes
- Sponsorship efforts

Seeds and vendors

- Seeds
- Vendors

Appeal

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

Packages

- Creatives
- Export definitions
- Letters and documents
- Materials and expenses
- Email marketing
- Packages

Configuration

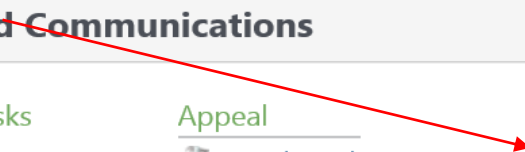
- Address processing options
- Ask ladders
- Communication name patterns
- Communication templates
- Finder number settings
- Interaction categories and subcategories

Donor relations

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

Acquisition and segmentation

- Acquisition lists
- Finder files
- Segmented house files
- Public media segments
- Segments



Acknowledgement (Thank You's) are found under Marketing and Communications – Donor Relations.



Acknowledgements

- Three Processes Created
- LXXX Non-Pledge Thank You Letter
 - Thanks for straight contributions – non pledge payments
- LXXX Pledge Thank You Letter
 - Thanks for new pledges
 - **If you plan to also thank the donor when the pledge is paid in full this one should not be marked as Acknowledged.**
- LXXX Pledges Paid in Full Thank You
 - Thanks, when pledges are paid in full



Acknowledgements

- Acknowledgements have three parts
 - Letter
 - Letter template and revenue selection
 - Assign Letter Process
 - Assigns the letter to the revenue in the selection
 - Acknowledgement process
 - This creates the merge letter file so you can review your letters and mail them and mark them as acknowledged. Letters must be assigned before this is ran.

Three parts named the same



Tasks

Generate revenue header file

Generate tribute header file

Shortcuts

Add this page to shortcuts

Manage my shortcuts

netbsa\pbowman - Application User

netbsa\ammccoy - Application User

Data Tune-Up

John D. Kuehn

APTG Default

netbsa\L127SvcAcct - Application User

Application Users

Query

Business Processes

BSA Structure Table Entries

Giving Category Table Entries

GL account system import - Import

GL Accounts Not On Revenue - Export

GL Accounts to delete - Import selection

American Welding Society

Acknowledgements

Letters

Acknowledgements

Review Acknowledgements

Letters (4)

+

Add

Filter

Filters

More

More

Include inactive letters

Sites: Selected sites

Apply

Reset

Type	Name	D...	Word template	Selection
Revenue	L104 Non Pledge Thank You Letter		2022 Acknowledgment Template - Non Ple...	L104 Thank Yous for donations, matching recurring event and o...
Revenue	L104 Pledge Paid in Full Thank You Letter		2022 Acknowledgment Template - Non Ple...	L104 Thank You Pledges Paid in Full (Ad-hoc Query)
Revenue	L104 Pledge Thank You Letter		2022 Pledge Thank You Letter FINAL.docx	L104 Thank Yous for Pledges (Ad-hoc Query)
Revenue	L104 TY Letter FOS 2019 Non-tax	A...	2019 Thank You Letter (Not Tax).docx	L104 TY for donations, matching recurring event and other (Ad-...

Assign letters processes (4)

+

Add

Filter

Filters

More

More

Sites: Selected sites

Apply

Reset

Name	Description	Date last run	Selection	Sites
L104 Non Pledge Thank You Letter		5/14/2023	L104 Thank Yous for donations, matching recurring ...	Aloha Coun
L104 Pledge Paid in Full Thank You Letter		5/14/2023	L104 Thank You Pledges Paid in Full (Ad-hoc Query)	Aloha Coun
L104 Pledge Thank You Letter		5/14/2023	L104 Thank Yous for Pledges (Ad-hoc Query)	Aloha Coun
L104 TY Letter FOS 2019 (Non-tax)	Non-tax deductible donations	7/24/2019	L104 TY for donations, matching recurring event an...	Aloha Coun

There are three tabs. We will review the letters tab first. The letter is added here and the assign letter process is create here. We will review the Non Pledge Letter. If you look at tasks, you can also download your merge fields

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Blackbaud CRM™ P

Constituents Name or lookup ID

Welcome, John Kuehn BSA-BSA

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

Tasks

- Generate revenue header file
- Generate tribute header file

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query
- GL Accounts
- John D. Kuehn

Recent searches

- Transaction search
- Designation search
- Appeal progress results
- Appeal search
- Batch search

Recently accessed

- Acknowledgements
- Letters and Documents
- L104 Pledge Payment Overdue
- Reminders
- Appeal Mailing Activation Status for L415 2016 Fall

Acknowledgements

Review Acknowledgements Acknowledgements Letters

Letters (3)

☐ Include inactive letters Sites: Selected sites

Type	Name	D...	Word template	Selection	O...	Exp
Revenue	Revenue	L				
Revenue	Revenue	L				
Revenue	Revenue	L				

Assign letters pro

Sites: Selected sites

Output type: Export definition

Export Definition: Acknowledgement Headers

Help OK Cancel

Name	D...	D...	Selection	Sites
L104 Non Pledge Thank You Letter			L104 Thank Yous f	
L104 Pledge Paid in Full Thank You Letter			L104 Thank You Pl	
L104 Pledge Thank You Letter			L104 Thank Yous f	

This is like downloading your merge fields for reminders. The output is an export definition, and it is labeled Acknowledgement Headers. Some councils have unique export definitions. Once downloaded, you can save on hard drive for future use as you create your own letter.



Acknowledgement_Headers.csv [Read-Only] - Excel

John Kuehn

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW POWERPIVOT

Clipboard Font Alignment Number Styles Cells Editing

A1 BUSINESSPROCESSOUTPUT_PKID

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	BUSINESS	RevRecor	Lookup ID	Address	City	State	Zip	RevRecor	Giving Cat	Structure	Appeal	Receipt An	Pledge or	Constitu
2	<BUSINES	<RevRecor	<Lookup ID	<Address>	<City>	<State>	<Zip>	<RevRecor	<Giving Ca	<Structure	<Appeal>	<Receipt A	<Pledge or	<Constitu
3														
4														
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
16														

Acknowledgement_Headers

READY

This is the merge field file.
Save it to your hard drive so
that you can use these when
creating your letters to place
into the system





Acknowledgements

Letters

Acknowledgements

Review Acknowledgements

Letters (4) Add Filters More

☐ Include inactive letters Sites: Selected sites Apply Reset

Type	Name ▲	D...	Word template	Selection
Revenue	L104 Non Pledge Thank You Letter		2022 Acknowledgment Template - Non Ple...	L104 Thank Yous for donations, matching recurring event
View template Update template Edit Delete Mark inactive				
Revenue	L104 Pledge Paid in Full Thank You Letter		2022 Acknowledgment Template - Non Ple...	L104 Thank You Pledges Paid in Full (Ad-hoc Query)
Revenue	L104 Pledge Thank You Letter		2022 Pledge Thank You Letter FINAL.docx	L104 Thank Yous for Pledges (Ad-hoc Query)
Revenue	L104 TY Letter FOS 2019 Non-tax	A...	2019 Thank You Letter (Not Tax).docx	L104 TY for donations, matching recurring event and othe

Assign letters processes (4) Add Filters More

Sites: Selected sites Apply Reset

Name ▲	Description
L104 Non Pledge Thank You Letter	
L104 Pledge Paid in Full Thank You Letter	
L104 Pledge Thank You Letter	
L104 TY Letter FOS 2019 (Non-tax)	Non-tax deductible donations

If you click the chevron on the left, you can download your letter template to make changes or you can update the template and load your own into the system. You can also edit the process. We will go there now.



Prepared



Acknowledgements

Letters

Acknowledgements

Review Acknowledgements

Letters (4)

+ Add

Filters

More



Include inactive letters

Sites:

Selected sites



Apply



Reset

Type	Name
Revenue	L104 Non Pledge Thank You Letter
Revenue	L104 Pledge Paid in Full Thank You L
Revenue	L104 Pledge Thank You Letter
Revenue	L104 TY Letter FOS 2019 Non-tax

This shows the letter that is attached to the process. You can clear the letter and then choose a new one from your desktop by clicking choose file. **All your acknowledgements need the appeals you need to thank updated annually.** Click the pencil to go to the selection (query).

Blackbaud

Name:

L104 Non Pledge Thank You Letter

Description:

Word template:

2022 Acknowledgment Template - Non Pledge Thank You.docx

L104 Thank Yous for donations, matching recurring eve



type:

Export definition

definition:

Acknowledgement Headers

Site

Aloha Council

*

Choose file

Clear file

Save

Cancel



Prepa

Edit Ad-Hoc Query - L104 Thank You's for donations, matching recurring event and other

Select filter and output fields

Set sort and group options

Preview results

Set save options

Find field:

Browse for fields in:

Revenue

- Adjustment
- Appeal
- Application Details
- Appraisals
- Attachments
- Attributes
- Auction Item Donatic
- BSAFR
- BSAFR Snapshot

Select Revenue fields:

Fields

- Account system
- Amount
- Batch description
- Batch number
- Benefits waived
- Date
- Designation list
- Do not acknowledge

Include records where:

- Amount is greater than or equal to \$1.00
- and Do not acknowledge is equal to No
- and Given anonymously is equal to No
- and Transaction type is equal to Payment
- and Application Details\Application is one of Donation, Recurring gift, Matching gift, Eve...
- and Appeal\Appeal record is one of (104) S23 - Friends of Scouting 2023, (104) S22 - Frie...

Fields to display:

Name
uent\Lookup ID
uent\Name
uent\Last/Organization/Group/Household name
nonymously

Once a year you should review your acknowledgement selections to ensure they have the correct appeals and or appeal report codes. If we needed to add this year's FOS appeal to this line, we would double click it, search for the new appeal or appeal report code and added it to the selection.

Create smart query Add to shortcuts

Help

Save as

Save

Save and close

Cancel



Prepa

Here is what the Assign Letters Process look like. It has your letter attached and a selection included. It is the same selection attached to the letter. **We do not run this or set it up to run for all revenue. We also never run it for all letters. We run it for a selected letter that belongs to us.**

Edit assign letters process

Name: L104 Non Pledge Thank You Letter

Description:

Site: Aloha Council

Include: ☐ Assign all letters ☒ Assign selected letters

Letter
L104 Non Pledge Thank You Letter
*

Acknowledgees: ☒ Include donor ☐ Include recognition recipients

Criteria

Assign letters to: ☐ All revenue ☒ Selected revenue

Selection: L104 Thank Yous for donations, I

☐ Only consider revenue or recognition created since last run

Results

These options may be modified at run time

☐ Create selection from results

Selection type:

Selection name:

☐ Overwrite existing Selection

Help Save Cancel

Always run this with a selection included. This makes it specific to your revenue.



entsMarketing and CommunicationsRevenueEventsMembershipsProspectsVolunteersFoundationsFundraisingTreasuryWeb

Acknowledgements

Review AcknowledgementsAcknowledgementsLetters

Letters (3)AddFiltersMore

Include inactive

Type	Na
Revenue	L10
Revenue	L10
Revenue	L10

Assign letters proc

Sites: Selected sites

Name
L104 Non Pledge
L104 Pledge Paid in Full Thank You Letter
L104 Pledge Thank You Letter

Run assign letters process

Process name: L104 Non Pledge Thank You Letter

☐ Only consider revenue or recognition credit added since:

Specific date: mm/dd/yyyy

☐ Create selection from results

Selection type:

Selection name:

☐ Overwrite existing selection

Help

Start

Cancel

Start process

Once you updated the selection, you can run the process to assign the letter to the revenue record. Drop the chevron and click start process. Don't edit any item in the process box. Just click start.





Acknowledge revenue list

L104 Non Pledge Thank You Letter

Description:

Selected accounts: L104 Thank Yous for donations, matching recurring event and
Date last run: 5/14/2023
Create output selection: No
Overwrite existing selection: No
Output selection name:
Output selection type:
Include donor: Yes
Include recognition recipients: No

Job schedules

Recent status

History

Recent status



Status: Completed

Status message: Completed

Started by: NETBSA\BBCRMPD-SVC

Server name: AZSCUSBBCRMPD

Started: 5/14/2023 10:47:45 PM

Total records processed: 18

Ended: 5/14/2023 10:47:48 PM

Number of exceptions: 0

Duration: 3 seconds

Records successfully processed: 18

The view will switch to the home page for the assign letter process. Notice that it is named the same as the letter. It took 3 second and assigned the letter to 18 revenue transactions. I would suggest automating this with a job schedule. **This must be run before you create your letters.** If you automate, then you need not click start.



Prepared. Fo

This process already has a job schedule on it that runs weekly. Sunday was picked. One could come into the office on Monday and run the Acknowledgements to generate the letters. If your process does not have a job schedule you can click the add button and create one. Pick a schedule for your office routine.

Job schedules (1) ➕ Add ⌵ More

Job name
L104 Non Pledge Thank You Letter (88Infinity)
✎ Edit ✖ Delete

Edit job ✕

Details

Schedule type: Weekly

☒ Enabled

One-time occurrence

Date: 5/16/2023 Time: 9:10:30 PM

Frequency

Every: 1 week(s) on

☐ Monday ☐ Wednesday ☐ Friday ☒ Sunday

☐ Tuesday ☐ Thursday ☐ Saturday

Daily frequency

☒ Occurs once at: 10:47:44 PM

☐ Occurs every: 1 Minutes

Starting at: 10:47:44 PM

Ending at: 11:59:59 PM

Duration

Starting at: 5/16/2023

☒ No end date

? Help Save Cancel

Frequency

Schedule

Time and Start Date



Acknowledgements

Letters Acknowledgements

Acknowledgement process

Sites: Selected sites

Type Name

Edit revenue acknowledgement process

Name: L104 Non Pledge Thank You Letter

Description:

Site: Aloha Council

Mailing label template: <File not specified> Choose file Clear file

Criteria

Acknowledge revenue with letter: L104 Non Pledge Thank You Letter

Acknowledge: ☐ All 'Not acknowledged' revenue ☒ Selected revenue

Selection: L104 Thank Yous for donations, matching recurring e

Exclusions

Results

These options may be modified at run time.

☒ Mark letters 'Acknowledged' when process completes

Acknowledge date: Today

☐ Create selection from results

Selection type:

Selection name:

☐ Overwrite existing selection

Help Save Cancel

This process is the third piece in creating acknowledgements. It is attached to your letter and the selection that is attached to your letter. **Never run this with All "not acknowledge" revenue.**

The acknowledgement process always is set up with the same selection and letter the assign letter process has on it. The process will not run if the selection is missing.



Blackbaud CRM™ P

Constituents Name or lookup ID

Welcome, John Kuehn BSA-BSA

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

Tasks

- Generate revenue header file
- Generate tribute header file

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Query
- GL Accounts
- John D. Kuehn

Recent searches

Acknowledgements

Review Acknowledgements Acknowledgements Letters

Acknowledgement processes (3) Add Filters More

Sites: Selected sites Apply Reset

Type	Name	D...	Letter	Acknowledge
Revenue	L104 Non Pledge Thank You Letter			
Revenue	L104 Pledge Paid in Full			
Revenue	L104 Pledge Thank You Letter			

Start process Set format options Edit

Run revenue acknowledgement process

Process name: L104 Non Pledge Thank You Letter

For gifts with letter: L104 Non Pledge Thank You Letter

Exclusions

Results

☐ Mark letters 'Acknowledged' when process completes

Acknowledge date: Today

☐ Create selection from results

Selection type:

Selection name:

☐ Overwrite existing selection

Start Cancel

Click the Acknowledgements tab to find the named process to run thank you letters. We are looking for the Non Pledge thank you. Drop the chevron and click start. This box appears. Don't alter what you see. We mark items as acknowledged after we review them and print them to mail. Click Start



Tasks

- Start process
- Edit process
- Set format options
- Generate WSF
- Create job schedule
- Delete process

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- netbsa\pbowman - Application User
- netbsa\ammccoy - Application User
- Data Tune-Up
- John D. Kuehn
- APTG Default
- netbsa\L127SvcAcct - Application User
- Application Users
- Query
- Business Processes
- BSA Structure Table Entries
- Giving Category Table Entries
- GL account system import - Import



Acknowledge revenue list

L104 Non Pledge Thank You Letter

Description:

Include selection: L104 Thank Yous for donations, matching recurring event and other (Ad-hoc Query) Create output selection: No
Mark letters 'Acknowledged': No Overwrite existing selection: No
Acknowledge date: Output selection name:
Letter: L104 Non Pledge Thank You Letter Output selection type:
Letter template: 2022 Acknowledgment Template - Non Pledge Thank You.docx Label template:

Recent Status

History

Job Schedules

Recent status

Download output Merge letter Merge label Delete Mark acknowledged Clear results

Status: Completed

Status message: Completed

Started by: netbsa\jkuehn

Server name: AZSCUSBBCRMPD1

Started: 5/16/2023 9:19:53 PM

Total records processed: 33

Ended: 5/16/2023 9:20:24 PM

Number of exceptions: 0

Duration: 31 seconds

Records successfully processed: 33

If you do not clear the results or delete this set of letter they will not regenerate. **The last step is to mark them as acknowledged.**

This took 31 seconds to run and generate the 33 letters. The next step would be to merge your letters and review them. If you are missing information clear the results, fix the information on the constituent record and then click start process again.



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May 16, 2023



Dear Daniel,

Thank you for your gift in support of character, citizenship, and physical fitness of Hawaii's and the Pacific's youth through the Aloha Council - Boy Scouts of America. Your gift [redacted] has received gratefully and will be stewarded wisely.

Together, we have faced extraordinary challenges these recent years. Despite these hardships, we as a community rallied to carry the flag of Scouting forward with resilience and pride. Thank you for your time, service, and support — YOU made a difference! The Aloha Council is proud and grateful to have a community of supporters like you who recognize that the true value of this program is not about awards and medals, but the willingness to *Do a Good Turn Daily* and to *Help Other People* at all times. Your support is critical to our continued ability to deliver Scouting programs to bolster character development; citizenship training; and growth in physical, mental, and spiritual fitness to the youth of Hawaii and the Pacific.

You join thousands of others in making an investment in the next generation by providing them with life and leadership skills, a strong moral and ethical compass, and awesome outdoor experiences. In the next few decades, it will be our Scouts who will lead the way to solve the world's toughest challenges—and they will be prepared because of you.

Your gift bolsters our community service efforts. Each year, Scouts and their leaders provide more than 100,000 hours of volunteer service to our community—ranging from simple one-day projects like can food drives to complex Eagle Scout projects. In fact, the estimated dollar value of the Scout's service is \$2.5 million annually meaning that your gift to Scouting goes beyond our doors and out into the community for an even greater impact.

Mahalo for your support of Scouting! Be safe.

Sincerely,

A handwritten signature in black ink, appearing to read 'JL'.

Jesse Lopez
Scout Executive/CEO

(104) S23 - Friends of Scouting 2023

No goods or services were provided to you in consideration for this generous gift. Restricted donations can only be used for their designated purpose. In addition, Friends of Scouting (FOS) and other annual donations made to the Aloha Council will continue to fund necessary day-to-day expenses that are critical to local Scouting programs. EIN is 99-0073482

I clicked Merge letter. This is the letter currently used. It generates with the current date. It provides the gift amount, address info and the greeting. You also see the appeal at the bottom. The amount merge field provides the dollar sign.



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Acknowledgements

Review Acknowledgements

Acknowledgements

Letters

Letters (3)

+ Add ▾

Filters

More ▾

☐ Include inactive letters

Sites:

Selected sites

▾



Apply

Reset

Type

Name

D...

Word template

Revenue

Revenue

L104 Non Pledge Thank You Letter

Donation Thank you

View template

Update template

Edit

Delete

Mark inactive

Revenue

L104 Pledge Paid in Full Thank You Letter

Pledges Paid in Full

Revenue

L104 Pledge Thank You Letter

Pledge Thank You Letter

Assign letters processes (3)

+ Add

Filters

More ▾

Sites:

Selected sites

▾



Apply

Reset

Name

D...

D...

Selection

L104 Non Pledge Thank You Letter

L104 Thank You for dona

Start process

Edit

Delete

Assign permissions

L104 Pledge Paid in Full Thank You Letter

L104 Thank You Pledges Paid in Full (Ad-hoc Query)

Aloha Council

L104 Pledge Thank You Letter

L104 Thank You for Pledges (Ad-hoc Query)

Aloha Council

If you want to change the letter. I suggest downloading the current letter to see the merge fields used. To do this click view template. Note that there is an update template button next to it.. This allow you to select your word document and load it into the reminder. You would clear your results upload your new letter and then run your letters again. Remember you need your excel header file to place your merge fields into your letter.



May 31, 2022

«Constituent_Name»
«Primary_Contact_Name»
«Address»
«City», «State» «Zip»

Dear «Acknowledge_Salutation»«Primary_Contact_Salutation»,

Thank you for your gift in support of character, citizenship, and physical fitness of Hawaii's and the Pacific's youth through the Aloha Council - Boy Scouts of America. Your gift of «Pledge_or_Donation» was received gratefully and will be stewarded wisely.

Together, we have faced extraordinary challenges these recent years. Despite these hardships, we as a community rallied to carry the flag of Scouting forward with resilience and pride. Thank you for your time, service, and support – YOU made a difference! The Aloha Council is proud and grateful to have a community of supporters like you who recognize that the true value of this program is not about awards and medals, but the willingness to *Do a Good Turn Daily* and to *Help Other People* at all times. Your support is critical to our continued ability to deliver Scouting programs to bolster character development; citizenship training; and growth in physical, mental, and spiritual fitness to the youth of Hawaii and the Pacific.

You join thousands of others in making an investment in the next generation by providing them with life and leadership skills, a strong moral and ethical compass, and awesome outdoor experiences. In the next few decades, it will be our Scouts who will lead the way to solve the world's toughest challenges—and they will be prepared because of you.


This is what the template looks like. You can see the merge fields used. The Primary Contact Name will only populate if the constituent is an organization. This is also true for the Primary Contact Salutation. The date is a document part that places the current date when you merge the letters. Letters should be update yearly.













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Revenue Summary Smart Fields Personal Info Attributes Relationships Security Contact Documentation and Interactions **Communications** History Memberships Volunteer Prospect

Communications Appeals Preferences Newsletters

Communications (49) + Add general correspondence + Add appeal mailing  More ▾

Communication: Acknowledgements ▾ Date range: All ▾
Channel: All ▾ Sites: All sites ▾  Apply  Reset

Date sent	Communication	Details	Has responses	Site
Last month				
 4/24/2023	Acknowledgement	L104 Non Pledge Thank You Letter - L104 Non Pledge Thank You Letter	No	Aloha Council
Two months ago				
 3/20/2023	Acknowledgement	L104 Non Pledge Thank You Letter - L104 Non Pledge Thank You Letter	No	Aloha Council
 3/14/2023	Acknowledgement	L104 Non Pledge Thank You Letter - L104 Non Pledge Thank You Letter	No	Aloha Council
 3/14/2023	Acknowledgement	L104 Non Pledge Thank You Letter - L104 Non Pledge Thank You Letter	No	Aloha Council
Older				
 1/4/2023	Acknowledgement	L104 Non Pledge Thank You Letter - L104 Non Pledge Thank You Letter		
 12/20/2022	Acknowledgement	L104 Non Pledge Thank You Letter - L104 Non Pledge Thank You Letter		
 12/20/2022	Acknowledgement	L104 Non Pledge Thank You Letter - L104 Non Pledge Thank You Letter		
 12/19/2022	Acknowledgement	L104 Non Pledge Thank You Letter - L104 Non Pledge Thank You Letter		

After you mark a reminder as sent or an acknowledgement as acknowledged, it shows on the constituent record under the communications tab.



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Transaction summary

Payment amount: \$85.00

Receipt amount: \$85.00

Date: 4/15/2023

Batch number:

Revenue ID:

Status

Acknowledgements: Acknowledged

Acknowledged date: 4/24/2023

Receipt preference: Per payment

Receipt status: Receipted

Receipt date: 4/18/2023

Receipt number: 3186918

Post status: Posted

Post date: 4/15/2023

Post process ID: gl-10009412

Payment method

Payment method: Credit card

Card type: MasterCard

Card number:

Name on card:

Expires on:

Authorization code: 056673

It is also on the revenue record on the letters tab.

Details Attributes **Letters** BSAFR Documentation VNE TEST Benefits GL Distributions Tributes Adjustment History Matching Gifts Lockbox

Letters (1) + Add Filters More

Sites: All sites Apply Reset

Type	Letter	Process date	Acknowledge date	Acknowledgee	Out
Revenue	L104 Non Pledge Thank You Letter	4/24/2023	4/24/2023		



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Need data – what to do

- Query – Information Library
- OLTP constituent reports
- Data Lists



Creating Queries

- Two distinct types of queries (Analysis Tab)
 - Constituent
 - Revenue
- Lots of fields to choose from
- Many variables
- A library of “template” queries in LXXX Folder
- Can be difficult to create based on data needs



Running OLTP reports

- Two “stock” reports (Revenue Tab)
 - Appeal Constituent Report – constituent listing
 - Appeal Progress Report – results by structure
- Report design is set – parameters can be adjusted
- Report “Cookbook” available on Finance Impact website and MyBSA - CRM User Guides.



Using a data list

- Currently 12+ data lists available
- Easy to use – just indicate your Site ID
- Is essentially a “stock” query with easy to obtain results
- Limited to 10,000 or less records



Tracking Your Appeal Progress



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Using Appeal Progress

The screenshot displays the Blackbaud CRM P web application interface. At the top, the header includes the Blackbaud CRM P logo, a search bar with 'Appeals' and 'Appeal name' filters, and a '+ Add new' button. Below the header is a navigation bar with tabs for Home, Constituents, Marketing and Communications (highlighted), Revenue, Events, Prospects, Foundations, Fundraising, Analysis, and Administration. The main content area is titled 'Marketing and Communications' and features a grid of functional links. The 'Appeal' section is highlighted in yellow and includes 'Appeal search', 'Add an appeal', 'Appeal mailings', and 'Appeal progress results'. Other sections include '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), and 'Packages' (Creatives, Export definitions, Letters and documents, Materials and expenses, Packages).

Blackbaud CRM™ P

Appeals + Add new

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

Marketing and Communications

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





Council (400) - Appeal Progress Results

[Contribution Summary](#)
[Payment Summary](#)
[Write-off & Balance Summary](#)
[Contributions by Region](#)
[Regions by Region](#)
[All Councils by Region](#)
[Appeal Progress Results](#)

Contribution Summary (posted 3/15/2022) ... note: View write-off and balance totals on 'Write-off & Balance Summary' tab (263) [2](#) [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
Multi-year								
<input type="checkbox"/>			Multi-year	Capital Campaign	Yes	C18 - 2018 Capital Campaign	\$27,122.00	\$0.00
<input type="checkbox"/>			Multi-year	Capital Campaign	Yes	CC18 - 2018 Capital Campaign	\$1,391,005.08	\$0.00
2022								
<input type="checkbox"/>			2022	Special Events	Yes	BG22 - Canton Brookside Golf	\$4,300.00	\$64,000.00
<input type="checkbox"/>			2022	Other Support	Yes	CA22 - 2022 Camperships	\$500.00	\$10,000.00
<input type="checkbox"/>			2022	Endowment	Yes	EN22 - 2022 Endowment	\$4,497.06	\$0.00
<input type="checkbox"/>			2022	Foundations & Trusts	Yes	FN22 - 2022 Foundations & Grants	\$46,000.00	\$155,000.00
<input type="checkbox"/>			2022	Annual Giving (Friends of Scoutin...	Yes	FS22 - 2022 Friends of Scouting	\$239,708.40	\$559,000.00
<input type="checkbox"/>			2022	Special Events	Yes	HD22 - 2022 Hill N Dale Sporting Clays	\$10,000.00	\$76,000.00
<input type="checkbox"/>			2022	Special Events	Yes	LA22 - 2022 Lawrence Sporting Clays	\$11,750.00	\$27,000.00
<input type="checkbox"/>			2022	Special Events	Yes	OE22 - 2022 Over the Edge	\$15,973.75	\$70,000.00
<input type="checkbox"/>			2022	Special Events	Yes	PG22 - 2022 Portage Golf	\$10,000.00	\$45,000.00
<input type="checkbox"/>			2022	Special Events	Yes	SA22 - 2022 Summit Adventure Weekend	\$3,468.40	\$18,100.00
<input type="checkbox"/>			2022	United Way - Allocations	Yes	UW22 - 2022 United Way	\$3,056.28	\$15,000.00
2021								
<input type="checkbox"/>			2021	Special Events	Yes	AU21 - 2021 Annual Auction	\$35,801.81	\$77,000.00
<input type="checkbox"/>			2021	Special Events	Yes	BG21 - 2021 Brookside Golf Outing	\$66,422.00	\$61,300.00
<input type="checkbox"/>			2021	Other Support	Yes	CA21 - 2021 Campership	\$675.00	\$0.00
<input type="checkbox"/>			2021	Other Support	Yes	CA21 - 2021 Campership	\$675.00	\$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](#)



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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
\$87,940.01	277	\$317.47	2/18/2020	10/7/2019

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)



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By Giving Category or by Structure

Revenue Summary

Contributions

Payments

Balances

Revenue Details (Splits)

Matching Gift Claims

Designations

Mailings

Documentation

Contributions: Summary - posted 2/18/2020

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

Contributions: Not posted (pending)

Contributions: BSA Structure - posted (6)

Contributions: Giving Category - posted (3)


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

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




Solicitor Credits

Revenue Summary	Contributions	Payments	Balances	Revenue Details (Splits)	Matching Gift Claims	Designations	Mailings	Documentation
Appeal Solicitor Credits by Solicitor Group ...note: solicitor's row is bold when fundraising goal is achieved (44)  More ▾								
BSA Structure	Giving Category	Inactive?	Group Name	Group Public Name	Solicitor Cre...			
[-] Hoover								
[-] 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			
[-] Council								
[-] Inali								
[-] Kittan								
[-] Mesquakie								
[-] Saukenuk								




Revenue Details (Splits)





 **Appeal:** [REDACTED] **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: [REDACTED] 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)  More ▾

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	Status	GL Post Date
	[REDACTED]	12/31/2021	Payment	Donation	\$34.94	\$34.94	Check Posted	12/31/2021
	[REDACTED]	12/31/2021	Payment	Donation	\$17.50	\$17.50	Check Posted	12/31/2021
	[REDACTED]	12/28/2021	Payment	Donation	\$150.00	\$150.00	Check Posted	12/28/2021
	[REDACTED]	12/15/2021	Payment	Donation	\$61.20	\$61.20	Check Posted	12/15/2021
	[REDACTED]	12/10/2021	Payment	Donation	\$34.94	\$34.94	Check Posted	12/10/2021
	[REDACTED]	12/6/2021	Payment	Donation	\$17.50	\$17.50	Check Posted	12/6/2021
	[REDACTED]	11/9/2021	Payment	Donation	\$111.69	\$111.69	Check Posted	11/9/2021
	[REDACTED]	11/2/2021	Payment	Donation	\$43.67	\$43.67	Check Posted	11/2/2021



Add to Shortcuts

Blackbaud CRM™ P

Appeals [+ Add new](#)

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

Tasks ▾
Reports ▾

Shortcuts

Add this page to 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



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

June 21, 2023

10:00 am & 2:00 pm CT



Questions & Answers



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