

CRM User Forum

August 16, 2023

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Objectives

- Registration-Blackbaud Sync Update
- Gift Level Programs
- Event Attendance data list
- Designation
- Pledge Receivable Aging Report
- Pledge Reminders

- Questions – Answers








Giving Level Program

- Provides Gift Chart by Giving Level for an appeal.
- Smart Field is needed for the process to work.
- Your council can determine the giving levels.
- Found under Constituents / Configuration / Giving Level Programs
- Permissioned to BSA Revenue Reports Role




Giving Level Programs

Giving level programs (0)   More ▾

Sites:   Apply  Reset

Program name Description Calculate revenue by

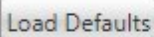
Add a giving level program 

Program name:

Description:


Smart field: ▾

Levels


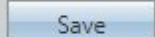
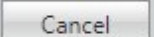


Level name	Minimum amount
Level 10	\$5,000.00
Level 11	\$10,000.00
Level 12	\$20,000.00

Site


▾ 

*

 Help  

- To Create
- Click the Add button
- Name your program
- Provide description
- Add your smart field
 - Smart Field will need to be created for you (Member Care Ticket)
- Define your giving levels
- Giving level programs are site secured.

Recent status

Status:  Completed
 Status message: Completed
 Started by: netbsajkuehn
 Started: 6/27/2023 11:55:13 AM
 Ended: 6/27/2023 11:59:48 AM
 Duration: 4 minutes 35 seconds

Edit constituent revenue application amounts smart field

General Parameters Site filtering

Values

Value to return: Total application amount

For: Constituent revenue

Revenue

Revenue types:

- ☐ Event registration
- ☐ Fee
- ☐ Grant
- ☒ Donation

Transaction type/Application:

- ☒ Auction donation
 - ☒ Donation
- ☐ Grant award
- ☐ Grant award
- ☐ Matching gift claim

Recognition credit types:

- ☐ Car Donation Credit
- ☐ Consolidated federal credit
- ☐ Day Giving Credit
- ☐ Donor Advised Fund

Application selection:

L564 FOS 2022 Smart Field (Ad-hoc)

Timeframe

Date range: Specific dates

Start date: mm/dd/yyyy

End date: mm/dd/yyyy

☒ Include historical data from current household members

☐ Include data only from current household

Sites





Site
Capitol Area Council
*

- Smart Query is shown on left
- You would need to be created each year
- Data shows on the smart field tab of the constituent
- Site secured to your council

Giving Level Programs

Giving level programs (1)  Add  More ▾

Sites:   Apply  Reset

	Program name	Description	Calculate revenue by
	L564 2022 Giving Levels	Giving Level Chart for 2022 FOS	L564 2022 FOS
	 View Report  Edit  Delete		

- Your Giving Level Program looks like this when saved
- Drop the chevron for actions
- You may edit, delete or view your giving level report
- Click View Report



Giving Level Programs
Giving Level Program

Selection: L564 2022 FOS const (Ad-hoc Q)

Giving level program: L564 2022 Giving Levels

Edit Ad-Hoc Query - L564 2022 FOS const

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

Find field:

Browse for fields in: **Constituents**

- Address (Primary)
- Address Processing Option
- Addressee and Salutation
- Addresses
- Aliases
- Alternate Lookup IDs
- Appeal Mailing
- Application User
- Assigned Security Groups
- Attachments
- Attributes
- Bank accounts
- Board Member
- BSAFR
- BSAFR Snapshot
- Business (Primary)
- Committee
- Communications
- Community Emails Received

Select Constituents fields:

- Age
- Birth date
- Blackbaud Internet Solution
- Deceased
- Deceased confirmation
- Deceased date
- Deceased is reviewed
- Deceased source
- Deceased years
- First name
- Formatted name
- Gender
- Gives anonymously
- Inactive
- Inactive details
- Inactive reason
- Industry
- Is group/household

Include records where:

Revenue\Appeal\Appeal record is equal to (564) F22-2022 Friends o...

Results fields to display:

Name

Export to CSV | Export to Excel | Create report | Create data list | Create smart query | Add to shortcuts

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

- When the report opens you need to insert a constituent selection
- If you run it with all constituents for your council, it will distort the outcome of those that give \$0 – 100
- Create a select of constituents that are part of the appeal you are creating giving level data for
- This selection is pulling in constituent that are attached to appeal F22





Giving Level Program

Selection:

L564 2022 FOS const (Ad-hoc Q)

Giving level program:

L564 2022 Giving Levels

1 of 1 Find | Next



Giving Level Report

Program: L564 2022 Giving Levels

Level	Total Given	% Total	No. Donors
⊕ Level 1 (\$0.00 - \$99.99)	\$7,871.43	0.84%	261
⊕ Level 2 (\$100.00 - \$249.99)	\$33,594.18	3.57%	244
⊕ Level 3 (\$250.00 - \$499.99)	\$63,206.11	6.71%	211
⊕ Level 4 (\$500.00 - \$749.99)	\$76,906.89	8.16%	143
⊕ Level 5 (\$750.00 - \$999.99)	\$13,547.96	1.44%	17
⊕ Level 6 (\$1,000.00 - \$1,499.99)	\$81,699.93	8.67%	78
⊕ Level 7 (\$1,500.00 - \$1,999.99)	\$29,269.41	3.11%	19
⊕ Level 8 (\$2,000.00 - \$2,499.99)	\$49,307.55	5.23%	24
⊕ Level 9 (\$2,500.00 - \$4,999.99)	\$108,205.15	11.49%	37
⊕ Level 10 (\$5,000.00 - \$9,999.99)	\$159,406.46	16.92%	26
⊕ Level 11 (\$10,000.00 - \$19,999.99)	\$274,072.27	29.09%	25
⊕ Level 12 (\$20,000.00+)	\$45,000.00	4.78%	2
TOTAL	\$942,087.34		1087

- Click View Report to generate the report
- The report provides the amount given in each level
- It also provides the # of donors in each level
- If the + key is clicked in front of the level, it will provide of list of constituent in that level
- Gift range chart is used to evaluate individuals in a certain level to see what can be done to move them to the next level
- Please note that if pledges have been written off in the appeal, total given on the report will be less than the appeal total.

Designation

Designations has 3 set of numbers **06209812**

- The **red** digits represent the Council Number. This tells CRM which PeopleSoft Account the transaction should go to.
- The **green** digits represent the “Project Code” in PeopleSoft the transaction should record against.
- The black digit is the Fund. In the example above we have a “2”. This number will send it to your Capital fund.




Event Attendees

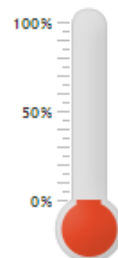
- New tab added to an event
- Creates a data list of attendees
- Provides quick downloadable access to attendee information
- Data lists can be added to other areas of the software



2022 - Lobsterfest

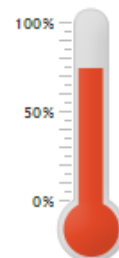
Event date: 9/16/2022
 Site: Seneca Waterways Council
 Location: Oak Hill Country Club
 145 Kilbourn Road
 Rochester, NY 14628
 Room/Unit:
 Contact:
 Coordinator: Anthony B. Vogl
 Category: Special Fundraising Event

Status:  Active
 Lookup ID: 8-10002463



Event expenses

Expense budget: \$0.00
 Agreed expenses: \$0.00
 Amount paid: \$0.00
 0% of budget



Event capacity

Event capacity: 450
 Will attend: 331
 Will not attend: 0
 Attended: 331
 74% of capacity

- New tab labeled Event Attendees
- Provides contact info for your attendees
- Can be downloaded by clicking the more button.

Event Attendees Options Registrations Tasks/Coordinators Speakers Expenses Invitations Appeals Documentation Job Occurrences Lodging Options Campaigns

Event Attendees contact information will show in Excel download. (331)  More ▾

Attendee ID	Attendee	Address ▲	City	State	Zip	Phone #	Email Address	Preference	Host Name
761	Mark F								Hoselton Automall
559	John L					(585) 31	hnsna...		Bob Johnson Chevr...
199	Thoma								Chase W. Braun
136	WROC					(585) 21			WROC News 8
526	Alyssa					(585) 31	mercer...		Marsh U.S.A. Inc.
107	Yang Z					(315) 61	ia.edu		Gary M. Smith
164	Micha								Bob Johnson Chevr...
527	James					(585) 74	@hotm...		Cooper Haims Advis...
731	John M						iaol.com		John Meisch
788	Ashley					(585) 94	mail.com		Hoselton Automall
594	James					(585) 81	eloitte.c...		Deloitte
595	Kristen					(585) 41	971@g...		Deloitte
742	Zack B					(714) 21			Chase W. Braun



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Tweaking BSAFR



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Tweaking BSAFR

- BSAFR Groups are a way to group like donors together
- Provides data to generate pledge cards
- Speeds data entry
- Provides better reporting



Tweaking BSAFR

- This is the best time of the year to review your BSAFR setup
- Run query – LXXX BSAFR Groups
 - Search your query folder for **BSAFR** before creating the query again
- Review Output
- Determine if group names need changes



Tweaking BSAFR

	B	C	D	E	F	G	H
	Lookup ID	Name	BSAFR\Solicit	BSAFR\BSA structure	BSAFR\Giving category	BSAFR\BSAFR Solicitor	BSAFR\BSAFR Solicitor Current\Name
	8-35347781	Pikes Peak-Rocky Mountain 060	No	Council			
	8-25768965	Cuerno Verde 05	No	Cuerno Verde			
	8-28547878	Cuerno Verde - Community Division	Yes	Cuerno Verde	Community Division		
	8-57390222	Cuerno Verde - Family Division	Yes	Cuerno Verde	Family Division		
	8-56744379	Club 0916 EC Trinidad - 063 (100301343)	Yes	Cuerno Verde	Family Division	8-56744379	Club 0916 EC Trinidad - 063 (100301343)
	8-56784035	Crew 0100 NA Pueblo - 063 (100302318)	Yes	Cuerno Verde	Family Division	8-56784035	Crew 0100 NA Pueblo - 063 (100302318)
	8-27967780	Crew 0121 NA Canon City - 063 (100237177)	Yes	Cuerno Verde	Family Division	8-27967780	Crew 0121 NA Canon City - 063 (100237177)
	8-28433036	Crew 0218 NA Lamar - 063 (100272856)	Yes	Cuerno Verde	Family Division	8-28433036	Crew 0218 NA Lamar - 063 (100272856)
	8-25769893	Crew 0232 NA La Junta - 063 (138481)	Yes	Cuerno Verde	Family Division	8-25769893	Crew 0232 NA La Junta - 063 (138481)
	8-56867269	Crew 2307 NA Monte Vista - 063 (100303547)	Yes	Cuerno Verde	Family Division	8-56867269	Crew 2307 NA Monte Vista - 063 (100303547)
	8-28285980	Pack 0009 FP Pueblo - 063 (100261742)	Yes	Cuerno Verde	Family Division	8-28285980	Pack 0009 FP Pueblo - 063 (100261742)
	8-56739428	Pack 0019 FP Pueblo - 063 (100301746)	Yes	Cuerno Verde	Family Division	8-56739428	Pack 0019 FP Pueblo - 063 (100301746)
	8-27552685	Pack 0027 BP Pueblo West - 063 (100191029)	Yes	Cuerno Verde	Family Division	8-27552685	Pack 0027 BP Pueblo West - 063 (100191029)
	8-27992487	Pack 0030 FP Pueblo - 063 (100240171)	Yes	Cuerno Verde	Family Division	8-27992487	Pack 0030 FP Pueblo - 063 (100240171)
	8-28086518	Pack 0060 FP Salida - 063 (100246924)	Yes	Cuerno Verde	Family Division	8-28086518	Pack 0060 FP Salida - 063 (100246924)
	8-28454248	Pack 0113 FP Pueblo West - 063 (100274813)	Yes	Cuerno Verde	Family Division	8-28454248	Pack 0113 FP Pueblo West - 063 (100274813)
	8-53187894	Pack 0114 BP Westcliffe - 063 (100283963)	Yes	Cuerno Verde	Family Division	8-53187894	Pack 0114 BP Westcliffe - 063 (100283963)
	8-26752496	Pack 0128 FP Canon City - 063 (100095593)	Yes	Cuerno Verde	Family Division	8-26752496	Pack 0128 FP Canon City - 063 (100095593)
	8-25769864	Pack 0223 BP Lamar - 063 (138440)	Yes	Cuerno Verde	Family Division	8-25769864	Pack 0223 BP Lamar - 063 (138440)
	8-57188728	Pack 0307 FP Alamosa - 063 (100305541)	Yes	Cuerno Verde	Family Division	8-57188728	Pack 0307 FP Alamosa - 063 (100305541)
	8-52249519	Pack 0400 FP Pueblo - 063 (100295129)	Yes	Cuerno Verde	Family Division	8-52249519	Pack 0400 FP Pueblo - 063 (100295129)



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Tweaking BSAFR

- Cleanup which can be done by you if only a few changes needed.
 - Proceed to your group
 - Review the information on the BSAFR tab
 - Adjust the information that is incorrect
 - Review BSAFR Snapshot tab
 - If changing after group is marked with current appeal adjust Snapshot





Troop 1910 BT Keller - 662 (266857)

Group Lookup ID: 8-12219748

Constituencies: Committee

↓ Show more

BSAFR BSAFR Snapshot Details Revenue Smart Fields Attributes Relationships Security Contact Documentation and Interact

BSAFR Fields



Edit



Run pledge cards



Group public name:	Troop 1910
Is BSAFR group:	Yes
Solicit for BSAFR:	Yes
BSA structure for revenue:	Mustang
Giving category for revenue:	Family Division
BSAFR solicitor current:	Troop 1910 BT Keller - 662 (266857) (Lookup ID: 8-12219748)
BSAFR presenter current:	
BSAFR reporting parent group:	Mustang Family Chair (Lookup ID: 8-55272174)
BSAFR reporting level:	Unit
BSAFR reporting hierarchy by name:	Longhorn Council 662 Mustang 43 -- Mustang Family Chair Troop 1910 BT Keller - 662 (266857)
BSAFR reporting hierarchy by level:	Council District District Unit
Can solicit revenue and set fundraising goals:	Yes
Can set committee goals:	Yes
Can coordinate events:	Yes

- Find the BSAFR tab
- Review the items on the tab
- If wrong, click the Edit button an update the wrong item.
- If using group in the batch line this information will fill in the Structure, Giving Category and Solicitor for you
- This also populates your pledge card data



Troop 1910 BT Keller - 662 (266857)

Group Lookup ID: 8-12219748

Constituencies: Committee

↓ Show more

BSAFR BSAFR Snapshot Details Revenue Smart Fields Attributes Relationships Security Contact Documentation an

BSAFR Snapshot (7) More▼

Appeal	Group ID	BSA structure for revenue	Giving category...	BSAFR solicitor ...
⊟ (662) FOS Recurring	Troop 1910 BT Keller - 662 (2...	Mustang	Family Division	Troop 1910 BT K...
⊟ (662) S17 - 2017 Friends of Sc...	Troop 1910 BT Keller - 662 (2...	Mustang	Family Division	Troop 1910 BT K...
⊟ (662) S18 - 2018 Friends of Sc...	Troop 1910 BT Keller - 662 (2...	Mustang	Family Division	Troop 1910 BT K...
⊟ (662) S20 - 2020 Friends of Sc...	Troop 1910 BT Keller - 662 (2...	Mustang	Family Division	Troop 1910 BT K...
⊟ (662) S21 - 2021 Friends of Sc...	Troop 1910 BT Keller - 662 (2...	Mustang	Family Division	Troop 1910 BT K...
⊟ (662) S22 - 2022 Investment i...	Troop 1910 BT Keller - 662 (2...	Mustang	Family Division	Troop 1910 BT K...
⊟ (662) S23 - 2023 Investment i...	Troop 1910 BT Keller - 662 (2...	Mustang	Family Division	Troop 1910 BT K...

- This is the Snapshot tab
- If you make a change mid-year on the BSAFR tab you may need to review the current appeal Snapshot
- The group will continue to insert the information in the snapshot although you may have updated the BSAFR tab.

Tweaking BSAFR

- Cleanup which can be done by Member Care.
 - Switching group from one structure to another
 - Changing giving category of group
 - Change parent group
 - Change reporting level – unit, district, subdistrict, council
 - Changing revenue history



Consider using conventional BSA structure

- Council
 - Executive Board chair
 - Special Gifts chair
 - Leadership chair
- District
 - Family chair
 - Community chair





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

July 19, 2023

10:00 am & 2:00 pm CT



Questions & Answers



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