

# CRM User Forum

October 18, 2023

John Kuehn

Valerie Eaton

Cornelia Ellis

Ashley Uehlinger



**Prepared. For Life.™**

# Objectives

- National Recognition Programs
  - Good Turn Society
  - Visionary Leader Distinction
- Preparing for Year-End
  - Printing the pledge receivable aging report
  - Creating the Unworked Constituent Listing
  - Setting up 2024 Appeal
  - Recording Future contribution
  - Year End Revenue Check
  - Updating Recurring gifts
- CRM Sync
- Questions – Answers



# Recognition Programs

- Good Turn Society
  - 11 recognition levels
  - Lifetime Giving – Auto calculates based on hard credits
  - Counts Hard Credits beginning on 1/1/2023
  - Recognition level can be seen on Revenue\Recognition tab in CRM
  - New tab has been added to the Recognition Programs List found under Constituents\Recognition

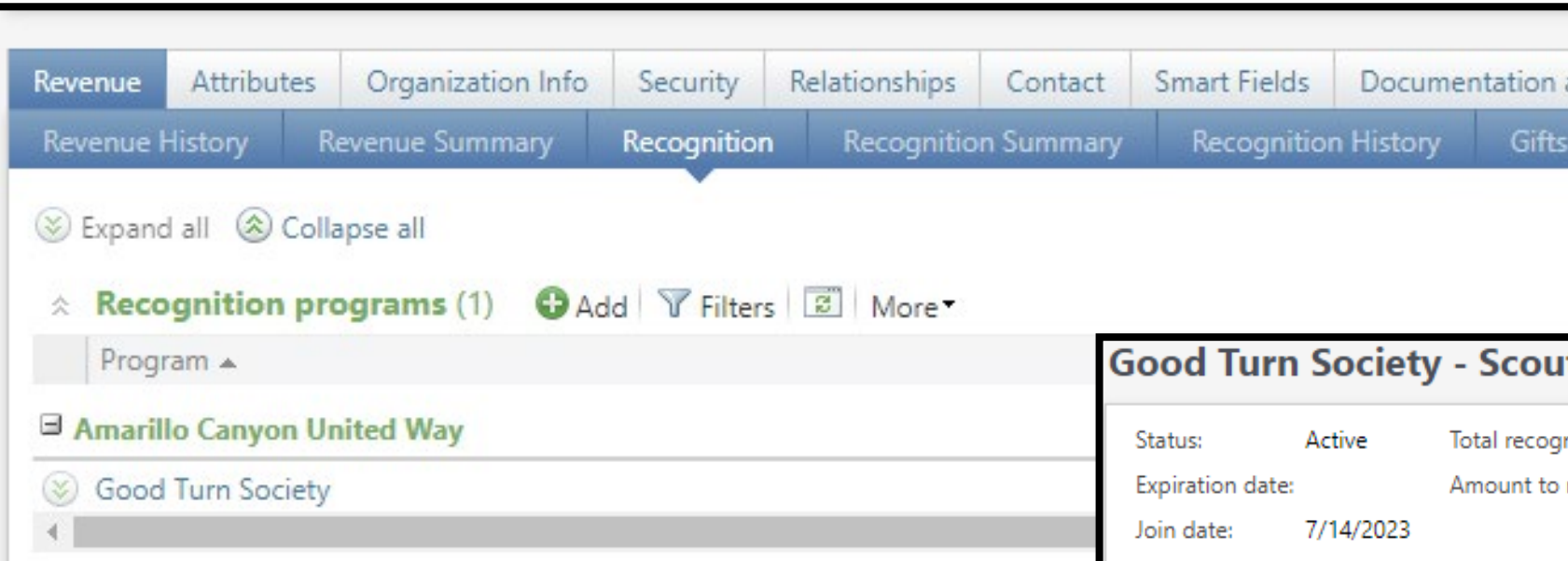


# Good Turn Society Levels

Name	Description	Tier	Minimum amount...
Trailhead Member	\$25,000-\$99,999	First	\$25,000.00
Scout Oath Member	\$100,000-\$499,999	Second	\$100,000.00
Scout Law Member	\$500,000-\$999,999	Third	\$500,000.00
Good Turn Member	\$1M-\$4,999,999	Fourth	\$1,000,000.00
On My Honor Member	\$5M-\$9,999,999	Fifth	\$5,000,000.00
Duty to Others Member	\$10M-\$14,999,999	Sixth	\$10,000,000.00
Good Citizen Member	\$15M-\$24,999,999	Seventh	\$15,000,000.00
WP Society Member	\$25M-\$49,999,999	Eighth	\$25,000,000.00
Heritage Society Member	\$50M - \$74,999,999	Ninth	\$50,000,000.00
Fleur-de-lis Society Member	\$75M and \$99,999,999	Tenth	\$75,000,000.00
True North Society member	\$100M and higher	Eleventh	\$100,000,000.00



# Good Turn Society Recognition Location



The screenshot shows the 'Revenue' tab selected in the top navigation bar. Below it, the 'Recognition' sub-tab is active. The interface includes expand/collapse controls and a list of recognition programs. The 'Good Turn Society' program is highlighted.

Revenue | Attributes | Organization Info | Security | Relationships | Contact | Smart Fields | Documentation a

Revenue History | Revenue Summary | **Recognition** | Recognition Summary | Recognition History | Gifts

Expand all Collapse all

Recognition programs (1) + Add Filters More

Program ▲

Amarillo Canyon United Way

Good Turn Society

Assigned program found on Revenue / Recognition Tab. James E. West recognition is also found here. If you click the recognition, you can edit it and add comments. Amount to the next level is present.

## Good Turn Society - Scout Oath Member

Status: Active Total recognized: \$105,633.04  
Expiration date: Amount to next level: \$394,366.96  
Join date: 7/14/2023  
Date achieved: 7/14/2023  
Site: LC Global

### Recognition History | Recognition Credit History | Benefits

#### Recognition history (1) + Add More

Year ▲	Level	Date achieved	Recognition Amount	Comments
2023	Scout Oath Member	7/14/2023	\$105,633.04	

#### Declined recognition levels (0) More

Recognition level	Date declined	Reason
-------------------	---------------	--------



Prepared. For Life.™

# Recognition Programs

- Visionary Leader Distinction
  - Planned gift recognition
  - \$25,000 and above to qualify
  - Looks for Hard Credit from the planned gift revenue
  - Planned Gift Job Aid demonstrates adding a planned gift
  - Planned gift will show on Planned Gift Detail report under Prospects



# Visionary Leader Recognition Location

Revenue	Attributes	Personal Info	Security	Relationships	Contact	Smart Fields	Documentation and Interactions
Revenue History	Revenue Summary	Recognition	Recognition Summary	Recognition History	Gifts	Tributes	
<div><div>Expand all</div><div>Collapse all</div></div>							
<div><div>Recognition programs (3)</div><div><div>+</div>Add</div><div><div>Filter</div></div><div><div>More</div></div></div>							
Program		Level	Member since	Status	Amount to next level		
Harold Stuart							
Good Turn Society		Trailhead Member	2/28/2023	Active	\$74,214.78		
Scoutmaster Society - Scoutmaster Gifts		\$25,000 Cornerstone Member	2/17/2023	Active	\$25,000.00		
Visionary Leader Distinction		Visionary Leader Distinction	1/31/2023	Active	Visionary Leader Distinction		

Assigned program found on Revenue / Recognition Tab. James E. West recognition is also found here. If you click the recognition, you can edit it and add comments.

## Visionary Leader Distinction - Visionary Leader Distinction

Status:	Active	Total recognized:	\$25,785.22
Expiration date:		Amount to next level:	\$0.00
Join date:	1/31/2023		
Date achieved:	1/31/2023		
Site:	LC Global		

Recognition History

Recognition Credit History

Benefits

Recognition history (1)

+ Add

More ▾

Year ▲	Level	Date achieved	Recognition Amount	Comments
2023	Visionary Leader Distinction	1/31/2023	\$25,785.22	



# Recognition Process

The screenshot shows a web application interface for managing recognition history. At the top, there are three tabs: 'Recognition History' (selected), 'Recognition Credit History', and 'Benefits'. Below the tabs, the 'Recognition history (1)' section displays a table with columns: Year, Level, Date achieved, Recognition Amount, and Comments. The table contains one entry for the year 2023, at the Scout Oath Member level, dated 7/14/2023, with a recognition amount of \$105,633.04. An 'Edit' button is visible next to this entry. An 'Edit constituent recognition history' dialog box is open in the foreground, allowing for editing the selected entry. The dialog box contains the following fields: 'Recognition program' (set to Good Turn Society), 'Recognition level' (set to Scout Oath Member), 'Date achieved' (set to 7/14/2023), and 'Comments' (set to Certificate Delivered on 10.3.23). There is also an 'Anonymous' checkbox which is currently unchecked. At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons, and a 'Help' link.

Year	Level	Date achieved	Recognition Amount	Comments
2023	Scout Oath Member	7/14/2023	\$105,633.04	

**Edit constituent recognition history**

Recognition program: Good Turn Society

Recognition level: Scout Oath Member

Date achieved: 7/14/2023

Comments: Certificate Delivered on 10.3.23

☐ Anonymous


Help Save Cancel



Once on the recognition program, drop the chevron and click edit. You can add comments to the recognition. This would be a great place to note when and where the recognition of the donor took place. This field will populate on the Recognition Program data list so that you can see if you have recognized the person or not.





# Planned Gift Detail Report

 **Planned Gift Detail**

Selected planned gifts: L230 Planned Gift Selection (Ad-hoc Query)  

Group by: Prospect



Gift status:

Gift vehicle:

Gift date: This year

From: 1/1/2023 To: 12/31/2023

☐ Include data for associated households  
☐ Show member data for each household  
☐ Show household data for each member

1 of 1 Find | Next  

**Planned Gift Detail**

Selected planned gifts: L230 Planned Gift Selection (Ad-hoc Query) Gift vehicle:

Group by: Prospect Gift date: This year

Gift status:

Prospect Gift Vehicle	Gift Date	Designation	Gift Status	Plan Type	Gift Amount	Remainder Value
					\$20,000.00	\$0.00
<u>Bequest</u>	5/26/2023	23008301 FOS - Operating	Accepted		\$20,000.00	\$0.00
					\$2,000.00	\$0.00
<u>Bequest</u>	2/10/2023	23008301 FOS - Operating	Accepted		\$2,000.00	\$0.00
					\$25,785.22	\$0.00
<u>Bequest</u>	1/31/2023	23000001 Council Gener - Operating	Accepted		\$25,785.22	\$0.00
<b>Total</b>					<b>\$47,785.22</b>	<b>\$0.00</b>


10/4/2023 Prepared by: NETBSA\jkuehn Page 1 of 1

This report is found under Prospect / Reports. It provides a listing of all individuals with planned gifts. You use your councils planned gifts selection to run the report. This council has 3 planned gifts for the year. Only one meets the qualification for recognition of => \$25,000.



# Recognition Programs Data List

- Found under Constituents\Recognitions
- Use your site ID to open the data list
- Navigate to the appropriate tab
- List provides you contact details and amount to next level if recognition program has multiple levels

Heart of New England Council (230) - Recognition Programs List											
← s E. West Fellowship   1910 Society Members   Founder Circle Members   Second Century Current Gift Members   Second Century Deferred Gift Members   Good Turn Society Members   Visionary Leaders Members											
Visionary Leaders in your council - New Planned Gifts on or after 1/1/23 => \$25,000 (1)  More ▾											
Phone Type	P...	Spouse Lookup...	Spouse First	Sp...	Visionary Le...	Visionary Leader Distinction ...	Visionary Lea...	Visionary Leader Distinctio...	Visionary Lead...	Deceased	Inactive
to...	Work	(...			1/31/2023	Visionary Leader Distinction	\$25,785.22	1/31/2023		No	No



# Recognition Brand Center

- Brand Center Link
  - <https://scouting.webdamdb.com/bp/#/folder/12725196/>
- Good Turn Society Guide
- Good Turn Society Q&A
- Recognition Items Order Form



# Pledge Receivable Aging Report

- Shows the detail and total amount of the council's outstanding pledges.
- The Pledge amount, Pledge balance, Current due and Past due
- Give constituents' information – name, phone number, constituent's ID
- Separated by Giving Categories and gives a total.
- Only posted transactions are included in this report.




# Pledge Receivable Aging Report

- Click on Revenue at top
- Under Reports click Pledge Receivable Aging Report
- Click in the BSA Organization
- Click Report Code: (Year)
- Click Appeal: (Appeal name)
- Click View Report



# Pledge Receivable Aging Report


**Pledge Receivable Aging Report**

BSA Organization Council
Report Code 2023

Appeal F23 2023 Friends of Scouting

1 of 7
Find | Next

Appeal: F23 2023 Friends of Scouting  
BSA Structure:   
Giving Category: Community

Constituent Name	Pledge Date	Pledge Amount	Pledge Balance	Current Due	Past Due		
					30+	60+	90+
Dr. [Name] [Address] [City, State, Zip]	31-Jul-23	1,000.00	1,000.00	0.00	0.00	0.00	0.00
[Name] [Address] [City, State, Zip]	25-Jan-23	500.00	500.00	0.00	0.00	0.00	0.00
[Name] [Address] [City, State, Zip]	31-Jan-23	1,200.00	400.00	0.00	0.00	0.00	0.00
[Name] [Address] [City, State, Zip]	01-May-23	1,200.00	600.00	0.00	0.00	0.00	0.00
[Name] [Address] [City, State, Zip]	01-May-23	250.00	250.00	0.00	0.00	0.00	250.00
[Name] [Address] [City, State, Zip]	19-Jul-23	300.00	300.00	0.00	0.00	300.00	0.00
[Name] [Address] [City, State, Zip]	31-Jul-23	1,500.00	1,500.00	0.00	1,500.00	0.00	0.00
[Name] [Address] [City, State, Zip]	31-Jul-23	1,000.00	1,000.00	0.00	1,000.00	0.00	0.00
Community Total:		6,950.00	5,550.00	0.00	2,500.00	300.00	250.00

The information contained in this report is the confidential property of Boy Scouts of America. Unauthorized use or distribution is prohibited.



# Unworked Constituent List



Prepared. For Life.™

# “Easy Button” Reports

- Appeal Constituent Report
  - Unworked or worked report
  - Flat list report
  - Export to PDF or Excel
- Appeal Progress Report
  - How are we doing this year compared to prior year
  - Export to PDF or Excel





# “Easy Button” Reports

The screenshot displays the Blackbaud CRM P interface. At the top, there is a navigation bar with the following tabs: Home, Constituents, Marketing and Communications, **Revenue** (highlighted in yellow), Events, Memberships, Prospects, Foundations, Fundraising, and Analysis. Below the navigation bar, the main content area is titled "Revenue" with a stack of coins icon. The content is organized into three columns: "More tasks", "Reports", and "Transactions".

- More tasks:** Includes "Appeal progress results".
- Reports:** Includes a list of reports. Two red arrows point from the "Appeal progress results" task to the "BSA Appeal Constituent Report (OLTP)" and "BSA Appeal Progress Report (OLTP)".
- Transactions:** Includes "Transaction search", "Batch entry", "Batch search", and "Add a payment".

The "Reports" list includes the following items:

- BSA Appeal Constituent Export (OLTP)
- BSA Appeal Constituent Report (OLTP)** (highlighted in yellow)
- BSA Appeal Progress Export (OLTP)
- BSA Appeal Progress Report (OLTP)** (highlighted in yellow)
- Pledge Receivable Aging Report
- Appeal Progress by Category
- Appeal Progress by Solicitor
- BSA Summary of Appeals
- Solicitor Performance by revenue category
- Account distribution



# BSA Appeal Constituent Report

**BSA Appeal Constituent Report (OLTP)**

Site:  1 Report Code:  2

Annual Appeal(s):  
All ☐  
(144) 2021 Eagle Recognition Event ☐  
(144) EN21 - 2021 Endowment Campaign ☐  
(144) R21 - 2021 Gifts-in-Kind ☐ 3

Multi-year Appeal(s):  
☐ Only include multi-year appeal revenue for:

4

**Include** Exclude Breakdown Filter

☐ Include All

☐ Include Prior Year 1 Giving ☐ Include Current Year Constituent Appeal/Response (Worked) Info

☐ Include Prior Year 2 Giving ☐ Include Current Year \$0 Pledge (Worked) Info

☐ Include Prior Year 3 Giving ☐ Include Donor Status Stats

[View report](#)



# BSA Appeal Constituent Report - Exclude

**BSA Appeal Constituent Report (OLTP)**

Site:  1 Report Code:  2

Annual Appeal(s): ☐ All ☐ 2021 Eagle Recognition Event ☐ EN21 - 2021 Endowment Campaign ☐ R21 - 2021 Gifts-in-Kind 3

Multi-year Appeal(s): ☐ Only include multi-year appeal revenue for:

4 ☐ Exclude All

☐ Exclude Current Year Donors ☐ Exclude Current Year Solicitees ☒ Exclude Constituents Marked as Do Not Solicit

☐ Exclude Current Year Non-Donors ☐ Exclude Current Year Non-Solicitees ☒ Exclude Constituents Marked as Deceased

☐ Exclude Current Year Worked Constituents (via an Appeal Response) ☐ Exclude Current Year Non-Donor, Non-Solicitees ☒ Exclude Constituents Marked as Inactive

☐ Exclude Current Year Worked Constituents (via a \$0 Pledge)



# BSA Appeal Constituent Report - Breakdown

**BSA Appeal Constituent Report (OLTP)**

Site:  1

Report Code:  2

Annual Appeal(s):  3

Multi-year Appeal(s):

☐ Only include multi-year appeal revenue for:

[View report](#)

**4**

☐ Breakdown by All

☐ Break Down by BSA Structure ☐ Anchor to Latest Revenue or Constituent Appeal

☐ Break Down by Giving Category ☐ Sort by Name (Last/First) Only

☐ Break Down by Solicitor

☐ Break Down by Revenue BSAFR Group



# BSA Appeal Constituent Report – Filter - View

## BSA Appeal Constituent Report (OLTP)

Site: 

Council

Report Code: 

2021

Annual Appeal(s):

All

(144) 2021 Eagle Recognition Event

(144) EN21 - 2021 Endowment Campaign

(144) R21 - 2021 Gifts-in-Kind

Multi-year Appeal(s):

☐ Only include multi-year appeal revenue for: 

2021

IncludeExcludeBreakdownFilter

As of Date:

Filter on BSA Structure:

Current Year Minimum Giving:

Filter on Giving Category:

Prior Year(s) Minimum Giving:

Filter on Solicitor:

☒ Prior Year Minimum is Cumulative

View report



## BSA Appeal Constituent Report (OLTP)

As of 8/18/2021

CY Appeal: S21 - 2021 Friends of Scouting  
 PY1 Appeal: S20 - 2020 Friends of Scouting  
 PY2 Appeal: S19 - 2019 Friends of Scouting  
 PY3 Appeal: S18 - 2018 Friends of Scouting

### Pack 0422 (Individual, Lapsed, Unworked)

Community Campaign, [No Solicitor],

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY2	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00
PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

### Crew 2727 (Individual, Lapsed, Unworked)

Family Campaign, C

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY2	\$185.00	\$185.00	\$0.00	\$0.00	\$185.00
PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

### Fabrication, LLC (Organization, Lapsed, Unworked)

Community Campaign, [No Solicitor],

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$100.00	\$0.00	\$100.00	\$0.00	\$0.00
PY2	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00
PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

### Deb (Individual, Lapsed, Unworked)

Family Campaign, F

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY2	\$50.00	\$50.00	\$0.00	\$0.00	\$50.00
PY3	\$50.00	\$50.00	\$0.00	\$0.00	\$50.00

Abid



Prepared. For Life.™

# Creating 2024 Appeal

- Create all FY appeals at the same time
- Mirror the Appeal name from this year when creating 2024 appeals
- (XXX) (Council number in title)
- Marketing & Communications > Add an Appeal
- Remember to use FY inbound channels with monies applied to 2024 appeals with 2023 postdates.



# Add an Appeal

**Add an appeal** ✕

Name: (092) A24 - 2024 Peach of an Athlete

Description: 2024 Peach of an Athlete

Split evenly

Split fully

Category: Special Events ▼

Report code: 2024 ▼

Site: Atlanta Area Council ▼ 🔍

Start date: 1/1/2024 📅

End date: 12/31/2024 📅

Goal: \$0.00

? Help

Save

Cancel

Name	Description
(092) A23 - 2023 Peach of an Athlete	2023 Peach of an Athlete
(092) M23 - 2023 Metro Classic Golf	2023 Metro Classic Golf
(092) OOD23 - Operating Other Direct	Operating Other Direct
(092) R23 - 2023 Eagle Scout Recognition	2023 Eagle Scout Recognition
(092) S23 - 2023 Friends of Scouting	2023 Friends of Scouting
(092) Y23 - 2023 Whitney M Young	2023 Whitney M Young



1. Add Name
2. Add Description
3. Add Category
4. Add Report Code (Appeal Year)
5. Site will default to your site
6. Add Start date - Logic
7. End date is last day of next year




# Add an Appeal

- Add Prior Appeal and Designation
- On the Designations tab set a default

← Revenue Details (Splits) Contributions **Prior Appeal** Revenue S



**Prior Appeal**  Edit 


Prior Appeal: (092) A23 - 2023 Peach of an Athlete




**Prior Year Appeal History**  More ▾

PY1 Year	PY1 Appeal	PY1 Description	PY2 Year
2023	(092) A23 - 20...	2023 Peach of ...	2022

← Revenue Details (Splits) Contributions Prior Appeal **Designations**

**Designations (1)**  Edit list of appeal designations  More ▾

Designation	Default designation ▾
09200111 P - Operating	

**Benefits (0)**  View benefits catalog  Add  More ▾

	Level	From
--	-------	------

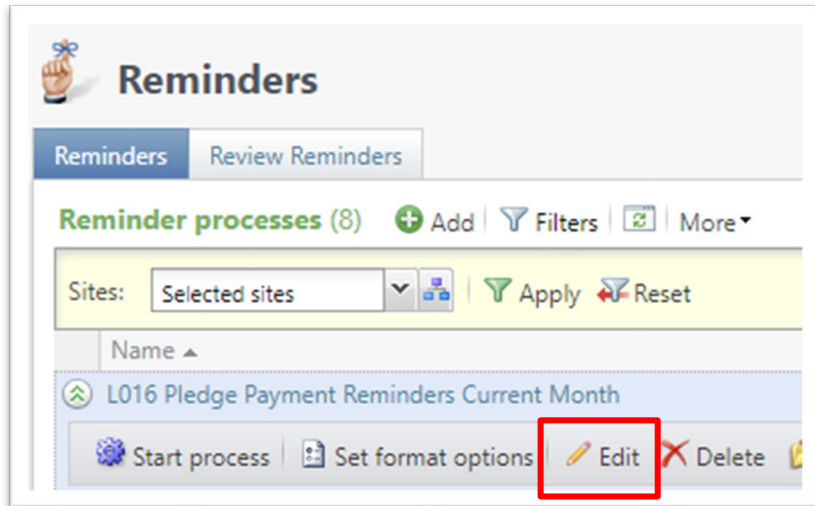


# Update Billing Reminders & Acknowledgements

- Drop Chevron
- Click Edit
- Find Selection and click the pencil next to it
- Edit the Selection if needed
  - Add 2024 Appeal report Code
  - Add name of new appeal



# Reminders



**Reminders**

Reminders | Review Reminders

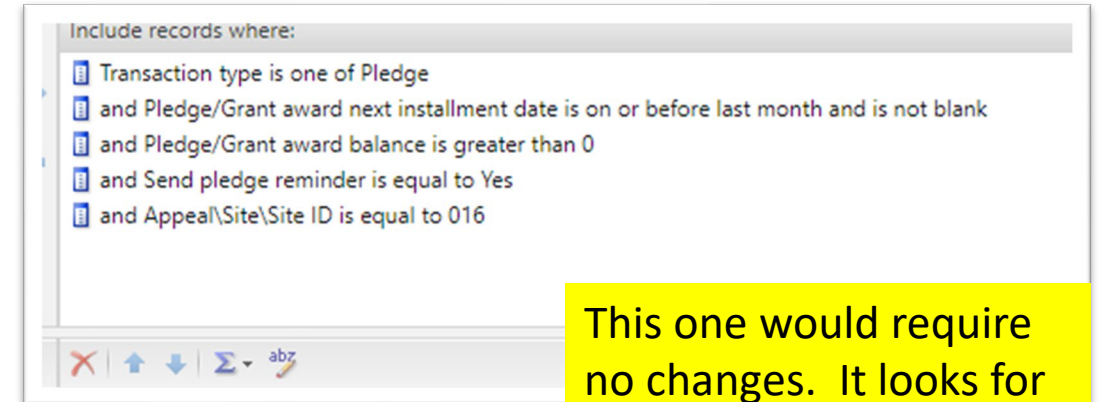
Reminder processes (8) + Add | Filters | More ▾

Sites: Selected sites | Apply | Reset

Name ▲

L016 Pledge Payment Reminders Current Month

Start process | Set format options | **Edit** | Delete

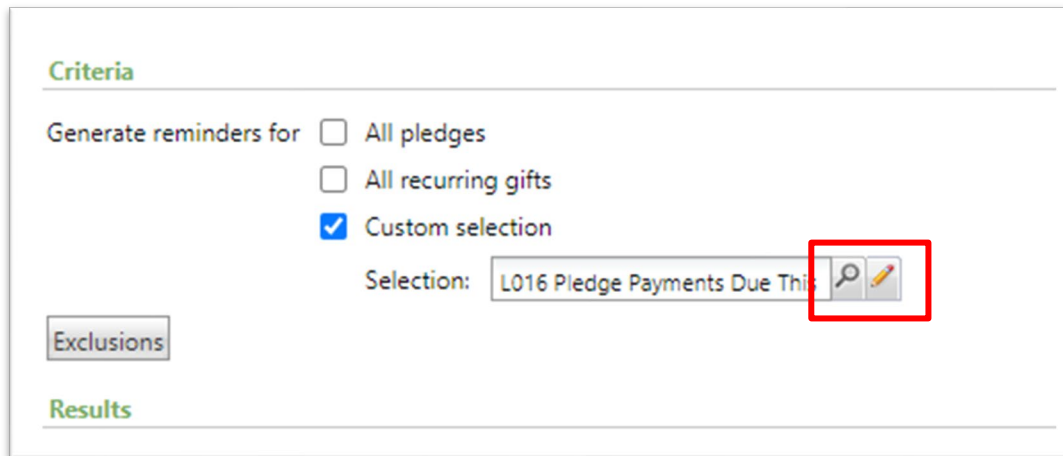


Include records where:

- Transaction type is one of Pledge
- and Pledge/Grant award next installment date is on or before last month and is not blank
- and Pledge/Grant award balance is greater than 0
- and Send pledge reminder is equal to Yes
- and Appeal\Site\Site ID is equal to 016

X | ↑ | ↓ | Σ | abz

This one would require no changes. It looks for all overdue pledges.



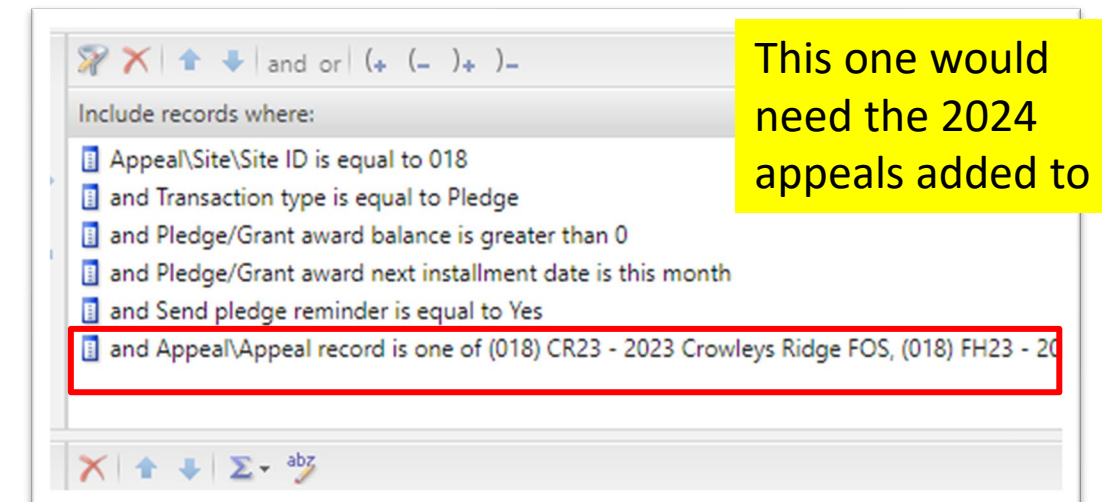
**Criteria**

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

Selection: L016 Pledge Payments Due This Month | **Edit**

Exclusions

**Results**



Include records where:

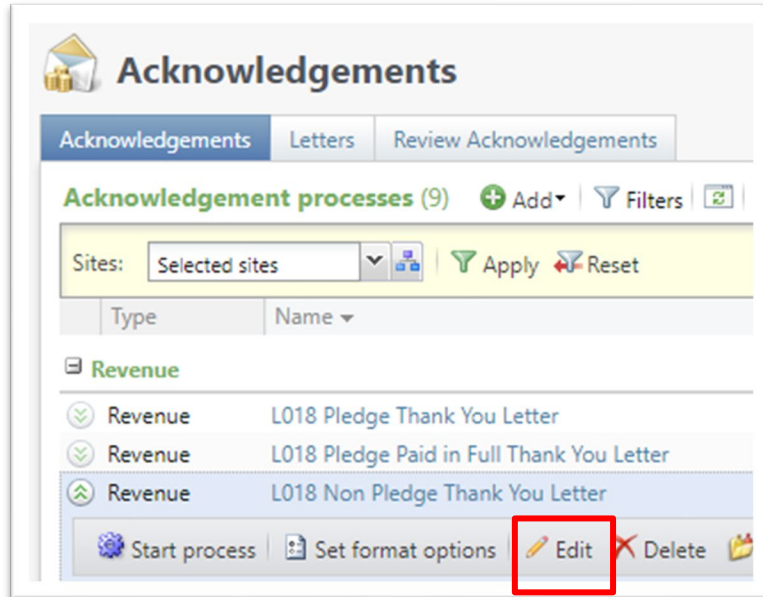
- Appeal\Site\Site ID is equal to 018
- and Transaction type is equal to Pledge
- and Pledge/Grant award balance is greater than 0
- and Pledge/Grant award next installment date is this month
- and Send pledge reminder is equal to Yes
- and Appeal\Appeal record is one of (018) CR23 - 2023 Crowleys Ridge FOS, (018) FH23 - 2023**

X | ↑ | ↓ | Σ | abz

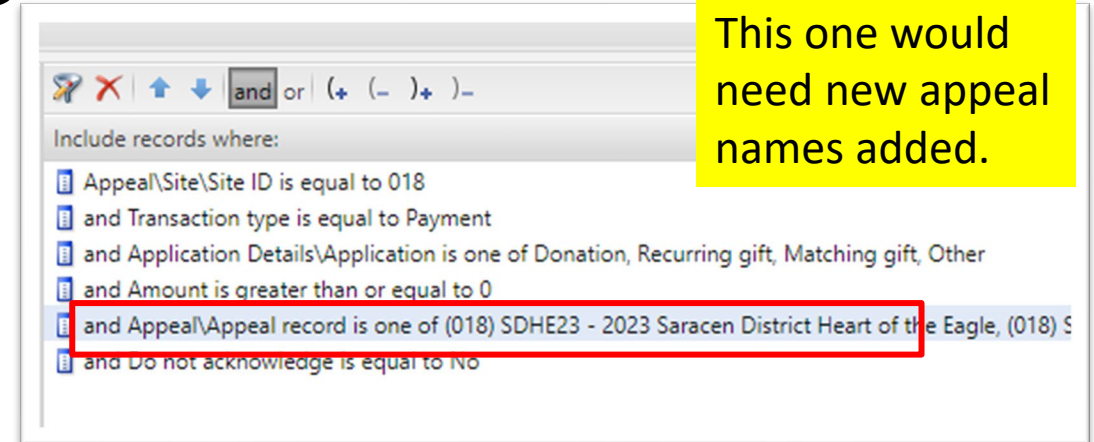
This one would need the 2024 appeals added to it.



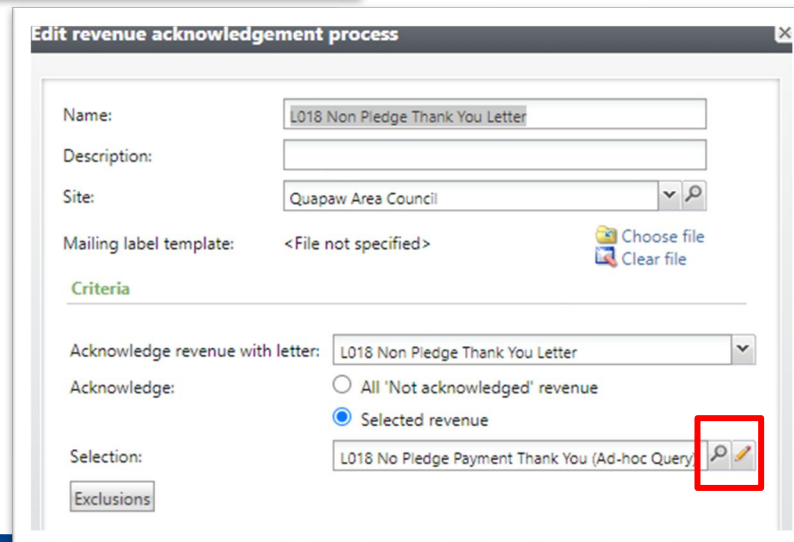
# Acknowledgements



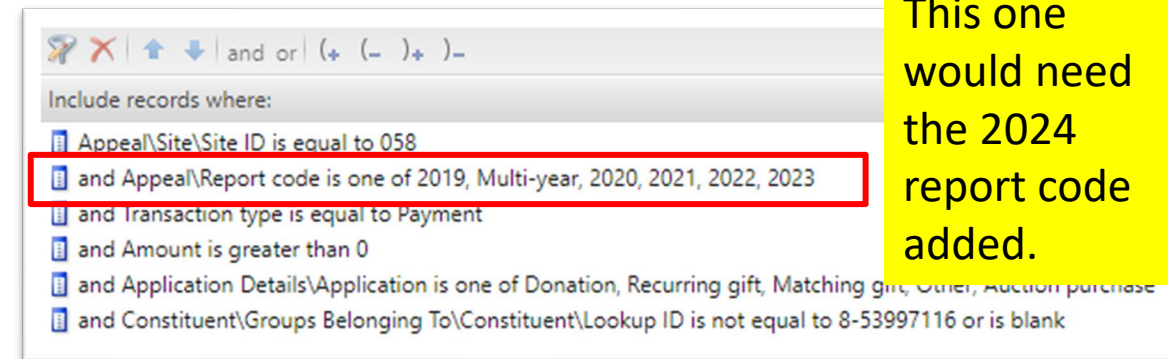
The screenshot shows the 'Acknowledgements' main screen. At the top, there are tabs for 'Acknowledgements', 'Letters', and 'Review Acknowledgements'. Below the tabs, there's a section for 'Acknowledgement processes (9)' with an 'Add' button and a 'Filters' icon. A 'Sites' dropdown menu is set to 'Selected sites', with 'Apply' and 'Reset' buttons. Below this, there's a table of processes. The first three are under the 'Revenue' category: 'L018 Pledge Thank You Letter', 'L018 Pledge Paid in Full Thank You Letter', and 'L018 Non Pledge Thank You Letter'. The 'L018 Non Pledge Thank You Letter' is selected. At the bottom, there are buttons for 'Start process', 'Set format options', 'Edit' (highlighted with a red box), and 'Delete'.



This screenshot shows the criteria editor for the 'L018 Non Pledge Thank You Letter' process. It lists several criteria: 'Appeal\Site\Site ID is equal to 018', 'and Transaction type is equal to Payment', 'and Application Details\Application is one of Donation, Recurring gift, Matching gift, Other', 'and Amount is greater than or equal to 0', 'and Appeal\Appeal record is one of (018) SDHE23 - 2023 Saracen District Heart of the Eagle, (018) S', and 'and Do not acknowledge is equal to No'. The last two criteria are highlighted with a red box. To the right of the screenshot, a yellow box contains the text: 'This one would need new appeal names added.'



This screenshot shows the 'Edit revenue acknowledgement process' dialog. It contains fields for 'Name' (L018 Non Pledge Thank You Letter), 'Description', 'Site' (Quapaw Area Council), and 'Mailing label template' (<File not specified>). Below these is the 'Criteria' section, which includes 'Acknowledge revenue with letter' (L018 Non Pledge Thank You Letter), 'Acknowledge' (Selected revenue), and 'Selection' (L018 No Pledge Payment Thank You (Ad-hoc Query)). The 'Selection' field is highlighted with a red box. At the bottom, there is an 'Exclusions' button.



This screenshot shows the criteria editor for the 'L018 No Pledge Payment Thank You (Ad-hoc Query)' process. It lists several criteria: 'Appeal\Site\Site ID is equal to 058', 'and Appeal\Report code is one of 2019, Multi-year, 2020, 2021, 2022, 2023', 'and Transaction type is equal to Payment', 'and Amount is greater than 0', 'and Application Details\Application is one of Donation, Recurring gift, Matching gift, Other, Auction purchase', and 'and Constituent\Groups Belonging To\Constituent\Lookup ID is not equal to 8-53997116 or is blank'. The second criterion is highlighted with a red box. To the right of the screenshot, a yellow box contains the text: 'This one would need the 2024 report code added.'



# Adding a FY Event

- Create all repeat events at the same time
- Follow naming conventions from 2023 to 2024
- Use the copy feature when creating
- Update appeals and registration option
- Submit your Event Revenue mapping sheet
- Events > Add New



1. Mirror naming and description from previous year
2. Add dates and location
3. Copy items from last year
4. Pick correct category
  1. If processing monies in 2023, pick "FY" Category
  2. If not processing monies in 2023 pick non-FY Category
5. Update options and dates with correct information when known

# Add an Event

### Add an event

General

Name: L004 Corporate Golf Classic 2024  
Description: Corporate Golf Classic 2024  
Category:   
Sites: 

Site

Mobile Area Council

\*

☐ Event is an auction  
☐ Do not show event on calendar  
☒ Event allows designations on fees

Copy options

Help

Details

Start date: 7/1/2024 Start time: hh:mm AM  
End date: 7/1/2024 End time: hh:mm AM

Location information

Location: The Athelstan Club  
Room/Unit: Capacity: 150  
Contact:

Save

Cancel

Copy from event

Copy from: L004 Corporate Golf Classic 2023

☒ Copy tasks ☒ Copy expenses ☒ Copy registration options  
☒ Copy preferences ☒ Copy invitations ☒ Copy invitees  
☐ Copy lodging options ☐ Copy job occurrences  
☒ Copy designations ☐ Copy team structure ☐ Copy team members

OK

Cancel

Auction  
Cultivation/Recognition (no revenue)  
Distinguished Citizens Dinner  
Friends of Scouting (no registration revenue)  
Golf  
Special Fundraising Event  
Sporting Clays  
FY - Auction  
FY - Distinguished Citizens Dinner  
FY - Golf  
FY - Special Fundraising Event  
FY - Sporting Clays



# Year End Revenue Check

- 2023 Appeals
  - FY-Inbound Channel with 2022 Postdate
  - CY-Inbound Channel with 2023 Postdate
  - PY-Inbound Channel with 2024 Postdate
- 2024 Appeals
  - FY-Inbound Channel with 2023 Postdate

**Use your Revenue Details (Splits) tab to check your data on the Appeal**





# Revenue Details Splits Tab

**Appeal:** **- 2023 Friends of Scouting**

Description: 2023 Friends of Scouting Start date: 9/7/2022  
Business unit: End date: 12/31/2023  
Category: Annual Giving (Friends of Scouting) Goal: \$190,000.00  
Report code: 2023 Status: Active  
Site: Membership:

Contributions Prior Appeal **Revenue Details (Splits)** Mismatch: Appeals? Designations Revenue Summary

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

Constituent equal to: Transaction equal to: Application not

GL Post...	GL Post Date...	Deposit	R...	B...	Designation	Inbound Channel	Reve
Posted	9/29/2023		\$...	01106201	FOS - Operating	Friends of Scouting	Unre:
Posted	9/26/2023		\$...	01106201	FOS - Operating	Friends of Scouting	Unre:
Posted	9/26/2023		\$...	01106201	FOS - Operating	Friends of Scouting	Unre:
Posted	9/26/2023		\$...	01106201	FOS - Operating	Friends of Scouting	Unre:

2023 appeal. Post Dates of 2023 with Current Year inbound channel as we approach year-end

**Appeal:** **2024 Friends of Scouting**

Description: 2024 Friends of Scouting Start date: 5/1/2023  
Business unit: End date: 12/31/2024  
Category: Annual Giving (Friends of Scouting) Goal: \$0.00  
Report code: 2024 Status: Active  
Site: Membership:

Contributions Prior Appeal **Revenue Details (Splits)** Mismatch: Appeals? Designations Revenue Summary

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

Constituent equal to: Transaction equal to: Application not


GL Post...	GL Post Date...	Deposit	R...	B...	Designation	Inbound Channel	Reve
Posted	8/7/2023	0143729	\$...	00100001	General Use - Operating	FY - Friends of Scouting	
Posted	3/2/2023	0142110	\$...	00100001	General Use - Operating	FY - Friends of Scouting	

2024 Appeal. Postdates of 2023 with Future Year inbound channel.





# Mismatched Appeals

 **Appeal:** **A23 - 2023 Annual Giving Campaign**

Description: 2023 Annual Giving Campaign

Start date: 1/1/2023

Business unit:

End date: 12/31/2023

Category: Annual Giving (Friends of Scouting)

Goal: \$0.00

Report code: 2023

Status: Active

Site:

Membership:

Contributions

Prior Appeal

Revenue Details (Splits)

**Mismatch: Appeals?**

Designations

Revenue Summary

Matching Gift Claims

Solicitor Credits by Group

Payments

Balances

Reven

Expand all


Collapse all

^

**Pledge (with Payment having mismatched Appeal) (3)**

Filters

More

Pledge: Appeal	Payment: Appeal	Constituent Name	Transaction	Date	GL Post Date	Start: GL Post	End: GL Post
 A23 - 2023 Annual Givi...	A22 - 2022 Annual Giving Campaign		Pledge	12/14/2022	12/14/2022	12/14/2022	12/14/2022

Go to pledge

(No refresh) Mark: Verified as Correct

(Refresh) Mark: Verified as Correct

Go to payment

Pledge amount: \$110.00

Date: 12/14/2022

Batch number: L0931319

Revenue ID: rev-45275951

Summary

Balance: \$10.00

Total paid: \$100.00

Past due: \$10.00



Status

Acknowledgements: Not acknowledged

Post status: Posted

Post date: 12/14/2022

Post process ID: gl-10008972

 A23 - 2023 Annual Givi...	A22 - 2022 Annual Giving Campaign		Pledge	12/12/2022	12/12/2022	12/12/2022	12/12/2022
 A23 - 2023 Annual Givi...	A22 - 2022 Annual Giving Campaign		Pledge	11/28/2022	11/28/2022	11/28/2022	11/28/2022

Review each 2023 appeal and visit the Mismatch: Appeals tab. If data populates, review and fix in an update batch. This example shows 3 2023 pledges that have payments attached. The payments have a 2022 appeal on them. This throws your reports off. Dropping the chevron allows you to see the Revenue ID's need for your update batch.



# Recurring Gifts



- Review Recurring Gifts Data List under Revenue
- Update Appeal on Recurring gift to next year's appeal
- Do this on January 1






# Maintaining Recurring Gifts

## Recurring Gifts List

Recurring list for your council (10)  More ▾

Constituent Name equal to:  Recurring Status equal to:  ▾  Apply  Reset

	Council #	Council	Appeal	Appe...	Constituent ID	Constituent Name	Recurring Amo...	Recurring Frequency	Recurring Start Date	Recurring End Date	Recurring Next Transaction Date
⌵		Council	S23 FOS 2023	2023			\$625.00	Quarterly	4/21/2022	1/21/2024	4/21/2022
⌴		Council	S23 FOS 2023	2023			\$30.00	Monthly	11/19/2022	10/19/2023	10/19/2023
 Go to Constituent  Go to revenue  Edit Status											
⌵		Council	S23 FOS 2023	2023			\$10.00	Monthly	5/8/2023		11/8/2023
⌵		Council	S23 FOS 2023	2023			\$25.00	Monthly	3/15/2023		10/15/2023
⌵		Council	S23 FOS 2023	2023			\$30.00	Monthly	2/25/2023		10/25/2023
⌵		Council	S23 FOS 2023	2023			\$100.00	Monthly	1/30/2023	12/1/2023	9/30/2023
⌵		Council	S23 FOS 2023	2023			\$15.00	Monthly	4/2/2023		11/2/2023
⌵		Council	S23 FOS 2023	2023			\$15.00	Monthly	4/17/2023		10/17/2023
⌵		Council	S23 FOS 2023	2023			\$51.50	Quarterly	12/2/2022		12/2/2023
⌵		Council	S23 FOS 2023	2023			\$50.00	Monthly	5/2/2023		11/2/2023

This council will need to click **Go to Revenue** and then edit the recurrence and change it to the 2024 Appeal. If the recurrence needs to be adjusted from active to terminated or lapsed, you can do this by clicking **Edit Status**.



Prepared. For Life.™

# CRM Sync



**Prepared. For Life.™**



## Council Support

[Council Management Support](#)[Contact Council Management Support](#)[Council Assessments](#)[Council Board Resources](#)[Council Business Practices](#)[Council Fiscal Management and Training](#)[Journey to Excellence](#)[Council Funding and Finance](#)[Financial Planning](#)[Funding The Council](#)[Council Administration](#)[Local Council Financial Audits](#)[Back Office Business Solutions](#)[Home](#) > [Council Support](#) > [Council Funding and Finance](#) > [Council Administration](#)

## Council Administration

The sections below provide tools for Council staff to assist them in the proper management of their Council. This is designed for staff use but may provide detailed information to volunteers interested in the particular topics.

[Accountable Plan Template](#)[Council Office Procedures](#)[Council Stewardship Policies](#)[FASB Accounting Changes and the BSA](#) – new for 2018[Fiscal Management Procedures for Stewardship](#)[Fiscal Policies and Procedures for BSA Units](#) – Revised April 2022[– BSA Units PayPal and Venmo Reporting Update](#)[Interpreting Financial Statements](#)[Life Insurance Imputed Calculation](#)[Local Council Accounting Manual](#)[Local Council Financial Audit Tools](#)[New York Conflict of Interest Policy](#)—Updated March 2014[New York Conflict of Interest Policy](#)—March 2014[Records Retention Policy](#)— Updated January 2019[Presentation: Fringe Benefits: Employer-Provided Vehicles and Group-Term Life Insurance](#) – Uploaded April 2014[Record Camp Card Transactions—PeopleSoft](#)[Record Product Sales](#) in General Ledger[Time Study Forms](#)[Blackbaud CRM Resources](#)[BSA Fiscals Forum](#)[PeopleSoft Support](#)

- [Accounts Payable](#)

[www.scouting.org/financeimpact](http://www.scouting.org/financeimpact)



## Council Support

Council Management  
Support

Contact Council  
Management Support

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



Prepared. For Life.™



## 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](#)



Prepared. For Life.™

## 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**



**Prepared. For Life.™**

# 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



**Prepared. For Life.™**

# 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



Prepared. For Life.™

# Next Forum

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



# Questions & Answers



**Prepared. For Life.™**