

CRM User Forum

December 20, 2023

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Objectives

- 2023 Preparing for Year-End
 - Review Uncommitted Batches
 - Recording Future contribution
 - Year End Revenue Check
 - Printing the pledge receivable aging report
- 2024 Activities
 - Setting up 2024 Appeal & Creating 2024 Events
 - Billing and Acknowledgement Updates
 - Updating Recurring gifts
 - Contribution Statements
- Questions - Answers



Uncommitted Batches

- Uncommitted batches should be reviewed
- If batch has revenue that needs to be committed – Commit
- If batch has revenue that has been committed – Delete
- If batch is empty – use the batch or delete the batch
- Currently we have 611 uncommitted batches.
- 145 of these batches have added dates before 12/1/23

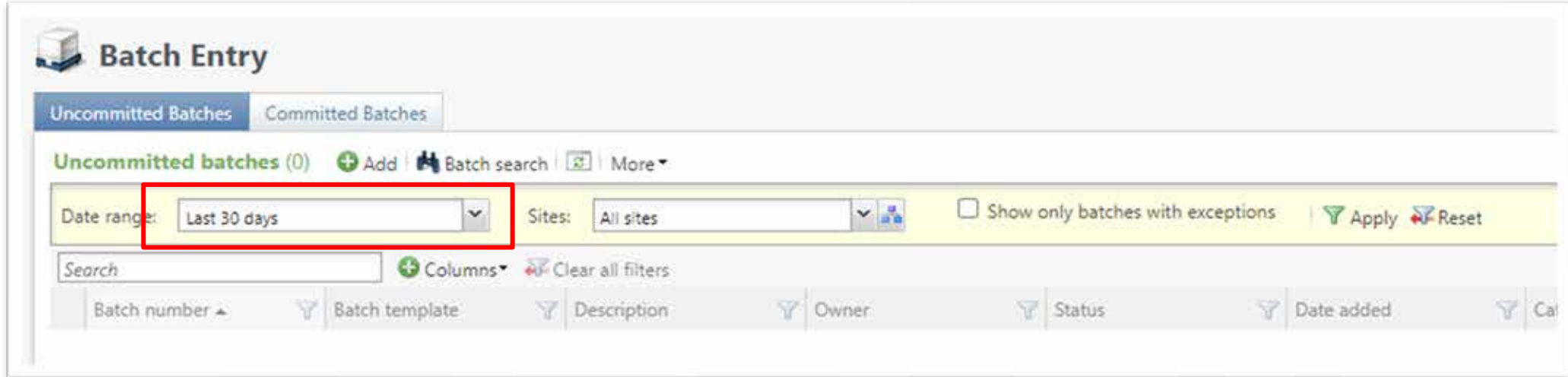


Check for Uncommitted batches

- Navigate to Revenue \ Batch Entry
- Click on the Uncommitted Batch Tab
- Change the Date Range filter to "blank"
- Ensure the Site filter is set to "All Sites"
- Click "Apply" to engage your new filters
- Recommendation: Keep your filters set like this on the Uncommitted Batch Tab.



- Before Filter Change



Batch Entry

Uncommitted Batches | Committed Batches

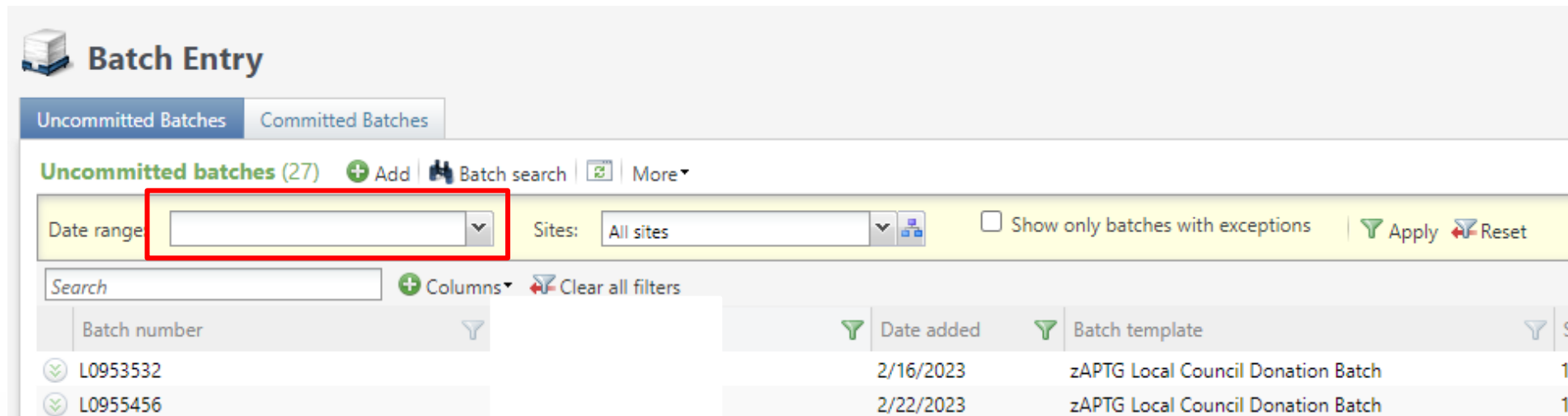
Uncommitted batches (0) + Add Batch search More

Date range: Last 30 days Sites: All sites ☐ Show only batches with exceptions Apply Reset

Search + Columns Clear all filters

Batch number	Batch template	Description	Owner	Status	Date added	Ca
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- After Filter Change – 27 uncommitted batch show



Batch Entry

Uncommitted Batches | Committed Batches

Uncommitted batches (27) + Add Batch search More

Date range: Sites: All sites ☐ Show only batches with exceptions Apply Reset

Search + Columns Clear all filters

Batch number	Date added	Batch template	S
L0953532	2/16/2023	zAPTG Local Council Donation Batch	1.
L0955456	2/22/2023	zAPTG Local Council Donation Batch	1.



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: 3033 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 d

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 Sumr

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


Constituent equal to: Transaction equal to: Application

GL Post	GL Post Date...	Deposit	R...	B...	Designation	Inbound Channel
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.



Revenue Data Hygiene

The screenshot shows the 'Revenue' application window. It has a sidebar with 'More tasks' and 'Reports' sections. The 'More tasks' section includes 'Appeal progress results', 'Daily Revenue Transactions List', 'Gift in kind List', 'Open Pledge List', 'Recurring Gift List', and 'Revenue Data Hygiene' (which is highlighted with a red underline). The 'Reports' section includes 'BSA Appeal Constituent Export (OLTP)', 'BSA Appeal Constituent Report (OLTP)', 'BSA Appeal Progress Export (OLTP)', 'BSA Appeal Progress Report (OLTP)', 'Pledge Receivable Aging Report', and 'Appeal Progress by Category'. The 'Transactions' section includes 'Transaction search', 'Batch entry', 'Batch search', 'Add a pledge', 'Add a payment', and 'Add a recurring gift'. Below the sidebar is a 'Site Search' dialog box. It has input fields for 'Site ID', 'Name', 'Short name', 'Acronym', and 'Site type'. There are 'Search' and 'Clear' buttons. Below the input fields is a table titled 'Results (1 record found)'. The table has columns: 'Site ID', 'Name', 'Short name', 'Acronym', 'Site type', and 'Site path'. The first row of the table is highlighted with a red background. At the bottom of the dialog box are 'Help', 'Select', and 'Cancel' buttons.

Revenue

More tasks

- Appeal progress results
- Daily Revenue Transactions List
- Gift in kind List
- Open Pledge List
- Recurring Gift List
- Revenue Data Hygiene

Reports

- BSA Appeal Constituent Export (OLTP)
- BSA Appeal Constituent Report (OLTP)
- BSA Appeal Progress Export (OLTP)
- BSA Appeal Progress Report (OLTP)
- Pledge Receivable Aging Report
- Appeal Progress by Category

Transactions

- Transaction search
- Batch entry
- Batch search
- Add a pledge
- Add a payment
- Add a recurring gift

Site Search

Site ID:

Name:

Short name:

Acronym:

Site type:

Search

Clear

Results (1 record found)

Site ID	Name	Short name	Acronym	Site type	Site path
				Local Council	Boy Scouts of A...

Help

Select

Cancel

We have a set of data lists to help councils more quickly locate potential issues with their revenue.

Under Revenue>Revenue Data Hygiene, search for your council, then select it to load the data lists.



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Revenue Data Hygiene

- Revenue Data Hygiene

Revenue Missing Revenue Attributes

Revenue Missing Solicitor

Revenue Missing BSAFR Group

Mismatched Inbound Channels

Mismatched Appeals

Revenue Not Posting

For finding 2023 Report Code revenue with wrong Inbound Channels - Fund 1 (6)

More

Name equal to:

Appeal Name equal to:

Inbound channel equal to:

Apply

Reset

	Lookup ID	Name	Revenue ID	Amount	Transaction type	Application	GL post date	Repo...	Appeal Name	Inbound channel	Revenue Category
	8-5		rev-45308986	\$360.00	Pledge	Donation	1/10/2023	2023	2023 Friends of ...	FY - Friends of Scou...	Unrestricted by donor
	8-3		rev-45301474	\$5,000.00	Pledge	Donation	1/5/2023	2023	2023 Scoutmast...	FY - Special Event F...	Unrestricted by donor
	8-3		rev-45317284	\$2,500.00	Payment	Pledge	12/21/2022	2023	2023 Friends of ...	Friends of Scouting	Unrestricted by donor
	8-3		rev-45277602	\$200.00	Payment	Pledge	12/15/2022	2023	2023 Friends of ...	Friends of Scouting	Unrestricted by donor
	8-5		rev-45270348	\$2,500.00	Payment	Pledge	12/13/2022	2023	2023 Friends of ...	Friends of Scouting	Unrestricted by donor
	8-3		rev-45262313	\$250.00	Payment	Pledge	12/6/2022	2023	2023 Friends of ...	Friends of Scouting	Unrestricted by donor

The Mismatched Inbound Channels tab will find any revenue with report code 2023 in Fund 1 where revenue with a 2022 post date has a CY Inbound Channel or 2023 post date has a PY or FY Inbound Channel.

- Revenue Data Hygiene

Revenue Missing Revenue Attributes

Revenue Missing Solicitor

Revenue Missing BSAFR Group

Mismatched Inbound Channels

Mismatched Appeals

Revenue Not Posting

Mismatched Appeals - Report Code 2023 (2) More

Appeal Name equal to:

Payment's Appeal Name equal to:

Pledge's Appeal Name equal to:

Apply

	Transac...	Applicatio...	Amount	Date	Revenue ID	Appeal Name	Payment's Revenue ID	Payment's Appeal Name	Pledge's Revenue ID	Pledge's Appeal Name
	Pledge	Donation	\$250.00	12/6/2022	rev-45262756	(2023 Friends of ...	rev-45295344	2022 Friends of S...		
	Pledge	Donation	\$2,500.00	11/8/2022	rev-45233796	(2023 Friends of ...	rev-45248977	2022 Friends of S...		

The Mismatched Appeals tab will find any 2023 report code revenue where the appeal of the pledge doesn't match the payment



Revenue Data Hygiene

- Revenue Data Hygiene

Revenue Missing

Revenue Attributes

Revenue Missing Solicitor

Revenue Missing BSAFR Group

Mismatched Inbound Channels

Mismatched Appeals

Revenue Not Posting

Revenue added this or last calendar year that's not posting correctly (13)

More

	Lookup ID	Name	Revenue ID	Date added	GL post date	GL post status	Transaction type	Application	Application ...	Appeal	Designation
	8-28		rev-45317185	1/19/2023 10:3...	11/15/2023	Not Posted	Payment	Pledge	\$10.41	- G23 - Go...	-00551 S
	8-28		rev-45317144	1/19/2023 10:1...	11/15/2023	Not Posted	Payment	Pledge	\$10.41	- S23 - Sh...	-00941 S
	8-26		rev-45627807	9/7/2023 10:55...	11/30/2023	Not Posted	Payment	Pledge	\$50.00	) S223 - F...	-00401 F
	8-27		rev-45627801	9/7/2023 10:55...	11/30/2023	Not Posted	Payment	Pledge	\$15.43	) S223 - F...	-00401 F
	8-28		rev-45627962	9/7/2023 11:30...	11/30/2023	Not Posted	Payment	Pledge	\$8.69	) S223 - F...	-00401 F
	8-28		rev-45317186	1/19/2023 10:3...	11/30/2023	Not Posted	Payment	Pledge	\$10.41	- G23 - Go...	-00551 S
	8-28		rev-45317145	1/19/2023 10:1...	11/30/2023	Not Posted	Payment	Pledge	\$10.41	- S23 - Sh...	-00941 S
	8-28		rev-45627819	9/7/2023 10:55...	11/30/2023	Not Posted	Payment	Pledge	\$277.08	) S223 - F...	-00401 F
	8-54		rev-45627813	9/7/2023 10:55...	11/30/2023	Not Posted	Payment	Pledge	\$72.82	) S223 - F...	-00401 F
	8-28		rev-45317187	1/19/2023 10:3...	12/15/2023	Not Posted	Payment	Pledge	\$10.41	- G23 - Go...	-00551 S
	8-28		rev-45317146	1/19/2023 10:1...	12/15/2023	Not Posted	Payment	Pledge	\$10.41	- S23 - Sh...	-00941 S
	8-28		rev-45627820	9/7/2023 10:55...	12/30/2023	Not Posted	Payment	Pledge	\$10.57	- G23 - Go...	-00551 S
	8-28		rev-45627821	9/7/2023 10:55...	12/30/2023	Not Posted	Payment	Pledge	\$10.57	- S23 - Sh...	-00941 S

The Revenue Not Posting tab will show revenue with a GL Post Status of Not Posted, Date Added this or last calendar year, where the Date Added is before yesterday.

In this example, the revenue was added near the beginning/middle of 2023, with GL Post Dates towards the end of 2023. This may have been an error by the user entering the revenue, and the revenue will not post until those dates are past or corrected.



Pledge Receivable Aging Report



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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

Appeal

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+
31-Jul-23	1,000.00	1,000.00	0.00	0.00	0.00	0.00	
25-Jan-23	500.00	500.00	0.00	0.00	0.00	0.00	
31-Jan-23	1,200.00	400.00	0.00	0.00	0.00	0.00	
01-May-23	1,200.00	600.00	0.00	0.00	0.00	0.00	
01-May-23	250.00	250.00	0.00	0.00	0.00	250.00	
19-Jul-23	300.00	300.00	0.00	0.00	300.00	0.00	
31-Jul-23	1,500.00	1,500.00	0.00	1,500.00	0.00	0.00	
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

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Creating a New Appeal



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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
- Prior Appeal will sync to reports overnight

The screenshot shows the 'Prior Appeal' tab selected in a navigation bar. Below the tab, there is a section titled 'Prior Appeal' with an 'Edit' button and a green icon. The text below reads 'Prior Appeal: (092) A23 - 2023 Peach of an Athlete'. Below this is a section titled 'Prior Year Appeal History' with a 'More' button. A table is displayed with the following data:

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

The screenshot shows the 'Designations' tab selected in a navigation bar. Below the tab, there is a section titled 'Designations (1)' with an 'Edit list of appeal designations' button and a green icon. Below this is a table with two columns: 'Designation' and 'Default designation'. The first row shows '09200111 P - Operating' and a green checkmark. Below the table is a section titled 'Benefits (0)' with a 'View benefits catalog' button, an 'Add' button, and a 'More' button. Below this is a table with two columns: 'Level' and 'From'.

Designation	Default designation
09200111 P - Operating	✓

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



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



Updating Constituent Reminders and Thank Yous



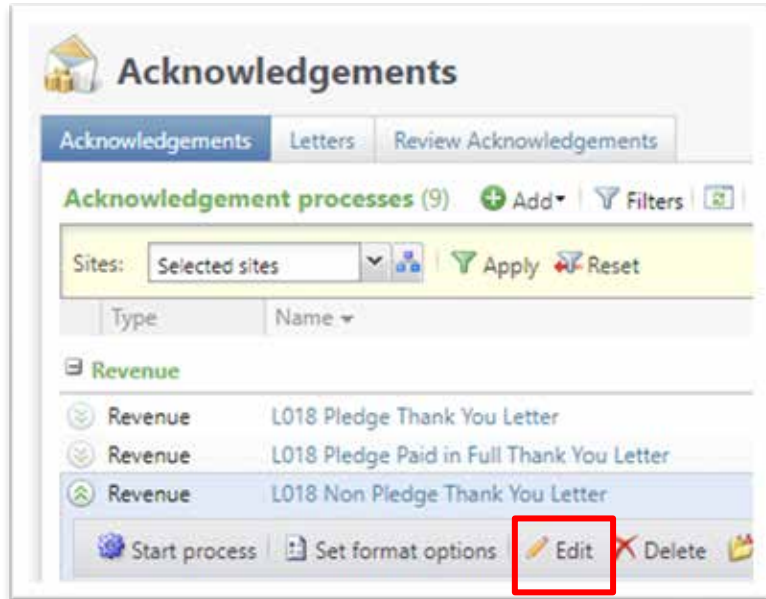
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Update Billing Reminders & Acknowledgements

- 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



Acknowledgements



Acknowledgements

Acknowledgements Letters Review Acknowledgements

Acknowledgement processes (9) + Add Filters

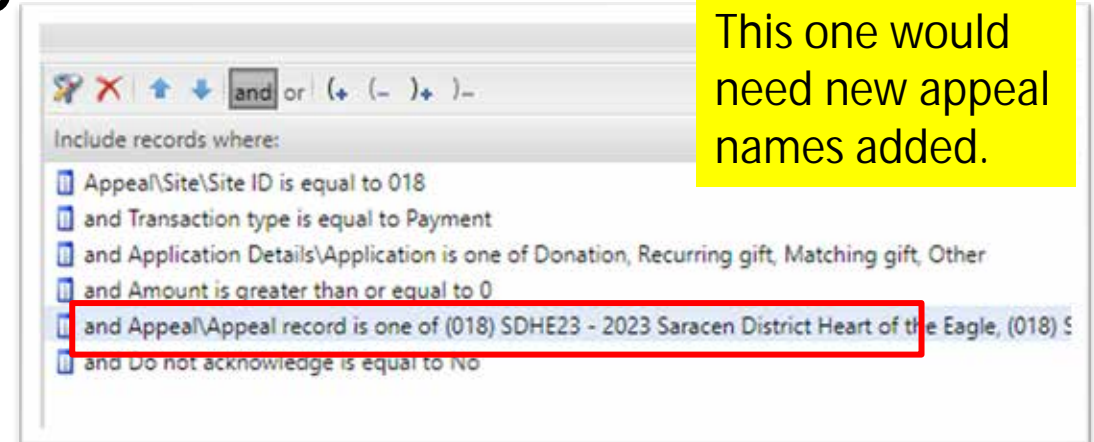
Sites: Selected sites Apply Reset

Type Name

Revenue

- Revenue L018 Pledge Thank You Letter
- Revenue L018 Pledge Paid in Full Thank You Letter
- Revenue L018 Non Pledge Thank You Letter

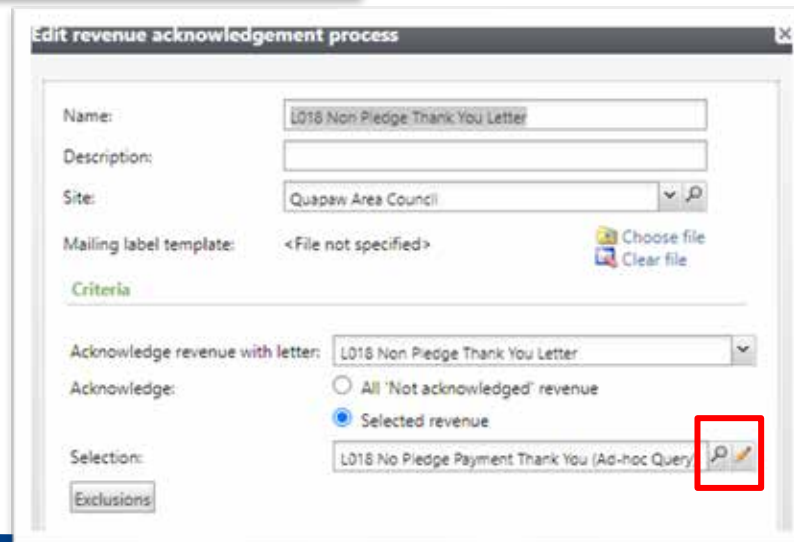
Start process Set format options **Edit** Delete



Include records where:

- 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 Do not acknowledge is equal to No

This one would need new appeal names added.



Edit revenue acknowledgement process

Name: L018 Non Pledge Thank You Letter

Description:

Site: Quappaw Area Council

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

Criteria

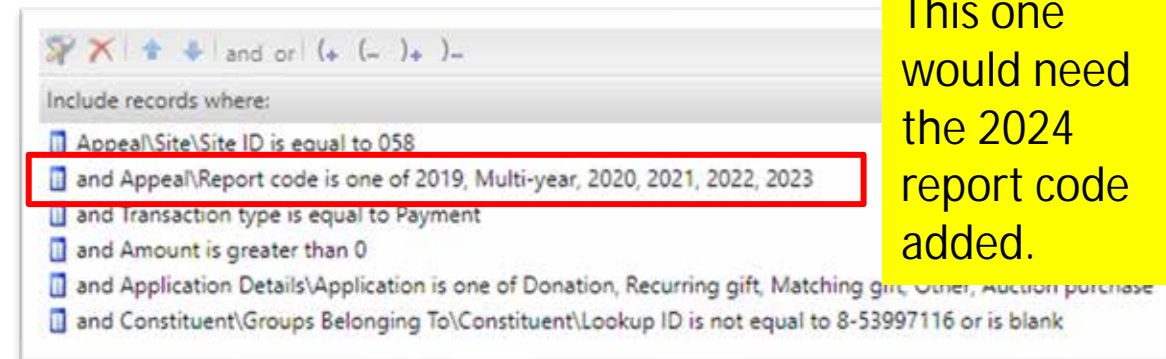
Acknowledge revenue with letter: L018 Non Pledge Thank You Letter

Acknowledge:

- All 'Not acknowledged' revenue
- ☒ Selected revenue

Selection: L018 No Pledge Payment Thank You (Ad-hoc Query) **Edit**

Exclusions



Include records where:

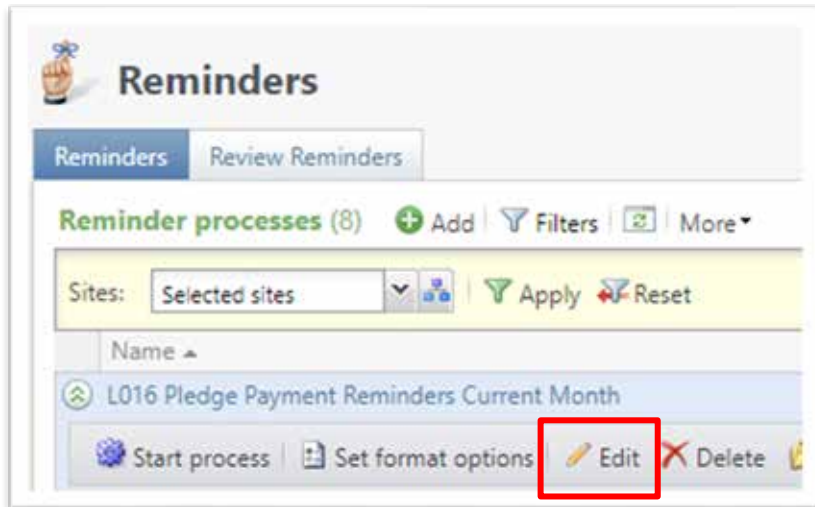
- Appeal\Site\Site ID is equal to 058
- and Appeal\Report code is one of 2019, Multi-year, 2020, 2021, 2022, 2023**
- and Transaction type is equal to Payment
- and Amount is greater than 0
- and Application Details\Application is one of Donation, Recurring gift, Matching gift, Other, Auction purchase
- and Constituent\Groups Belonging To\Constituent\Lookup ID is not equal to 8-53997116 or is blank

This one would need the 2024 report code added.



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Reminders



Reminders

Reminders | Review Reminders

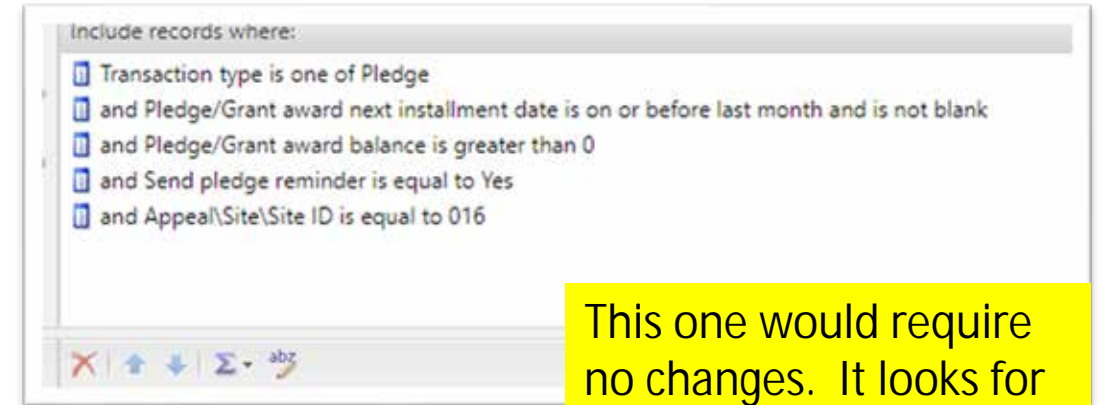
Reminder processes (8) + Add | Filters | More ▾

Sites: Selected sites | Apply | Reset

Name ▴

L016 Pledge Payment Reminders Current Month

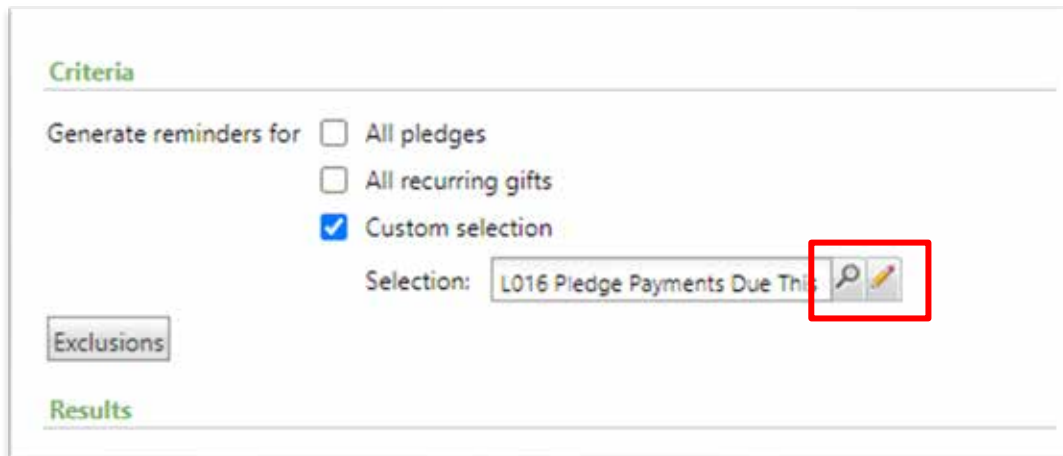
Start process | Set format options | **Edit** | Delete



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

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



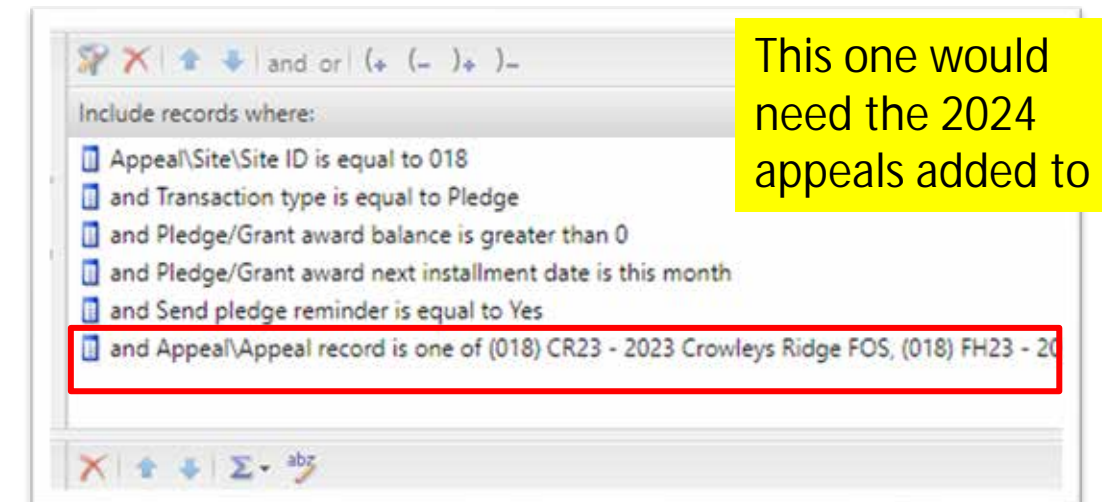
Criteria

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**

This one would need the 2024 appeals added to it.




Recurring Gifts




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



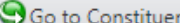
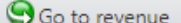
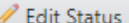










Maintaining Recurring Gifts

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**.




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Contribution Statements

- Sent to donors in January
- Export files will be ready to run January 2, 2024.
- All payments for 2023 need to be entered before file generation
- Print and read Job Aid (Updated 2023).
 - Located MyBSA \ CRM User Guides \ Marketing and Communication \ Contribution Statements.
 - CRM \ Marketing & Communications \ Packages \ Letters & Documents \ Documents
 - January 2024 CRM Forum will detail process



CRM and MyBSA

 **Letters and Documents**

Letters Documents

Documents (9) [Add](#) [Filters](#) [More](#)

Type: Sites: [Apply](#) [Reset](#)

Name	Site
<None>	
990 Schedule B Part I Job Aid	LC Global
990 Schedule B Part I Template	LC Global
Pledge Card Brief BSAFR	LC Global
Preparing to Print Pledge Cards	LC Global
Update Group BSAFR Values	LC Global
Update Revenue Values BSAFR Template	LC Global
Acknowledgement	
Contribution Statement Job Aid	LC Global
Contribution Statement Template	LC Global
Contribution Statement Template - Margin Option 1	LC Global

Marketing and Communications

[Acknowledgements & Reminders](#)

[Add an Appeal - Detailed Steps](#)

[Add an Appeal - Quick Reference](#)

[Billing Statements](#)

[Mail Merge](#)

[BSAFR Group Set Up](#)

[BSAFR Heirarchy Review and Edit](#)

[BSAFR Event Committee Group](#)

[BSAFR Printing Pledge Cards](#)

[Print Individual Pledge Cards](#)

[Print Parent Group level Pledge Cards](#)

[Print Pledge Cards from a Query](#)

[Print Top Level Pledge Cards](#)

[Print Unit Pledge Cards](#)

[Billing Reminders](#)

[Contribution Statements](#)

[Running Acknowledgements](#)



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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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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

January 17, 2024
10:00 am & 2:00 pm CT



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Questions & Answers



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