

CRM User Forum

January 17, 2024

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Objectives

- Contribution Statements
- Pledge Write-Offs
- PY – inbound Channel
- Event Mapping
- Reminders and Acknowledgements Selection review
- Uncommitted batches
- Questions – Answers



Creating the Annual Contribution Statements



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Contribution Statements

- Should be mailed to donors by the last day of January.
- Contribution statement template in CRM is ready for use.
- Before you start – download the Job Aid and read it.
- Job Aid can be found in the CRM User Guides under Marketing and communications.

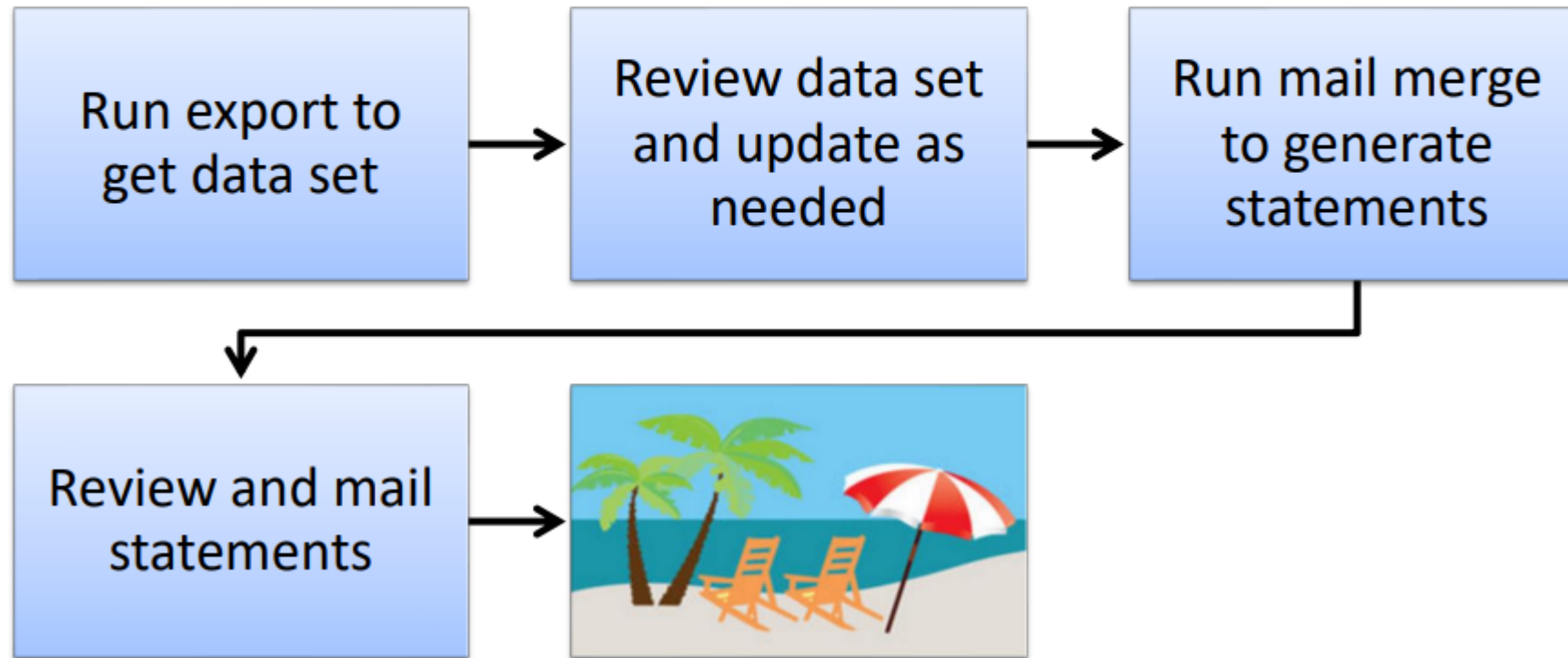


IRS Publication 1771, Charitable Contributions—Substantiation and Disclosure Requirements

- A donor must have a bank record or written communication from a charity for any monetary contribution before the donor can claim a charitable contribution on his/her federal income tax return
- A donor is responsible for obtaining a written acknowledgment from a charity for any single contribution of \$250 or more
- A charitable organization is required to provide a written disclosure to a donor who receives goods or services in exchange for a single payment in excess of \$75
- Recipient organizations typically send written acknowledgments to donors no later than January 31 of the year following the donation.

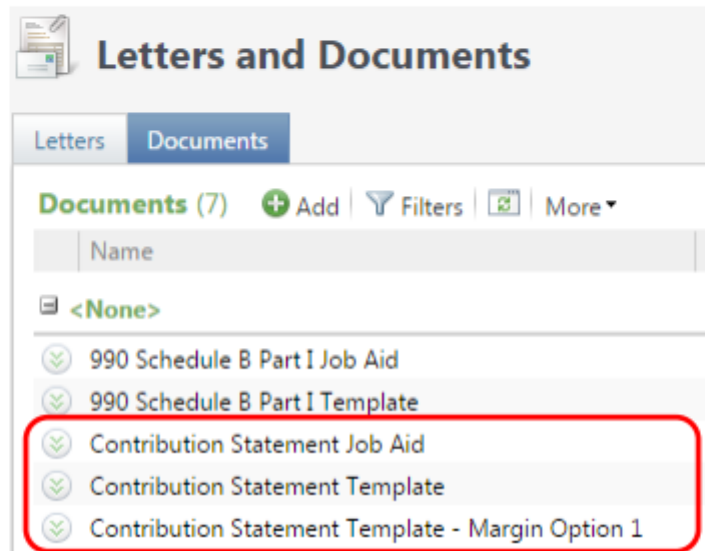


Process Overview



Process Overview

- Marketing and Communications>Packages>Letters and documents>View letters and documents>Documents tab
- **Job Aids** have detailed, step-by-step instructions



To Download Document

- Click the Chevron
- Either click “View document” or click the document hyperlink to download.
- **DO NOT edit and/or change the site from LC Global to your council.**

The screenshot shows a document management interface. At the top, there is a breadcrumb trail: <None>. Below this is a table of documents:

Document Name	Site
990 Schedule B Part I Job Aid	LC Global
990 Schedule B Part I Template	LC Global
Contribution Statement Job Aid	LC Global

Below the table, there are three buttons: "View document" (highlighted with a red box), "Edit", and "Delete".

Below the buttons, the details for the selected document "Contribution Statement Job Aid" are shown:

Name: Contribution Statement Job Aid
Site: LC Global
Type:
Attachment: [Blackbaud_CRM_4_Contribution_Statement_Job_Aid_1_9_17.pdf](#)

Below the details, there is another table of documents:

Document Name	Site
Contribution Statement Template	LC Global
Contribution Statement Template - Margin Option 1	LC Global



Run Export

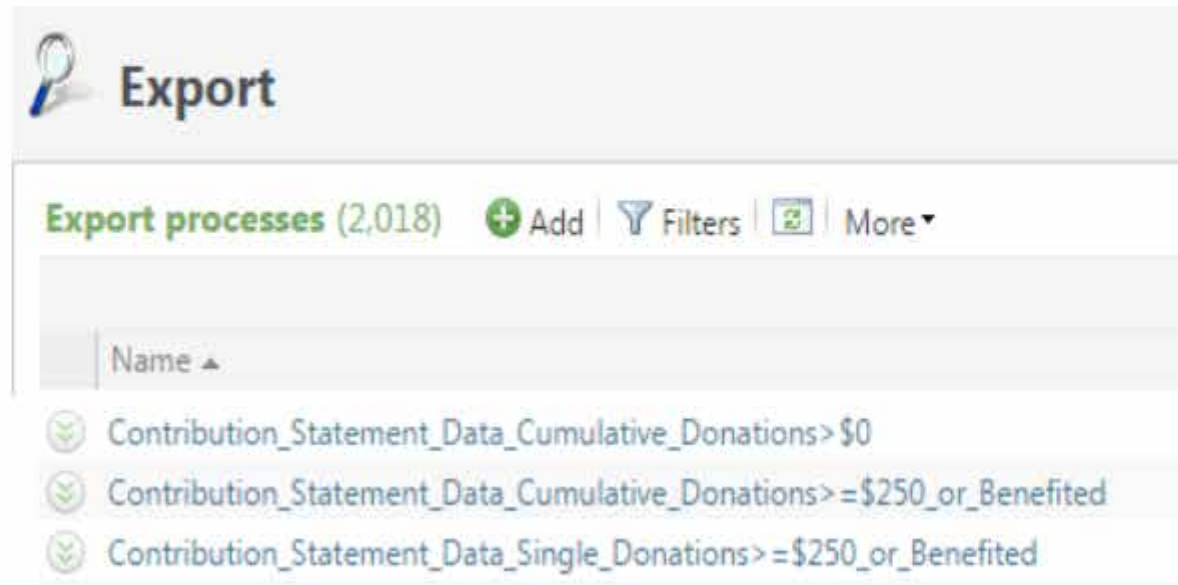
3 Choices

- Cumulative contributions > \$0
 - All donors get statements
- Cumulative contributions >= \$250 or Benefited
 - Donors that give \$250 or more, cumulatively, and any donors that received benefits get statements
- Single contribution >= \$250 or Benefited
 - Donors that give a single gift of \$250 or more and any donors that received benefits get statements



Run Export

- Administration>Tools>Export



The screenshot shows a web-based interface for exporting data. At the top, there is a header bar with a magnifying glass icon and the word "Export". Below this, a status bar indicates "Export processes (2,018)" and includes buttons for "Add", "Filters", and "More". A table below the status bar lists export processes. The table has a single column header "Name" with an upward-pointing triangle. The table contains three rows, each with a green checkmark icon in the first column and a text description in the second column.

	Name ▲
✓	Contribution_Statement_Data_Cumulative_Donations>\$0
✓	Contribution_Statement_Data_Cumulative_Donations>=\$250_or_Benefited
✓	Contribution_Statement_Data_Single_Donations>=\$250_or_Benefited



Run Export

- Because you are site secured only your records will be returned when you run this.

Tasks

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

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Post Revenue to GL
- netbsa\lhendric - Application User
- Query

Export list

Contribution_Statement_Data_Cumulative_Donations>\$0 - Export

Name: Contribution_Statement_Data_Cumulative_Donations>\$0 Query name\Export definition: Contribution Statement

Description: Contribution statement data for mail merge for all donors with cumulative contributions > \$0. Export type: Ad-hoc Query

Recent Status History Job Schedules

Recent status 3 Download output

Status: 2 Completed

Status message: Completed

Started by:	netbsa\rwhite	Server name:	D2PBBISEC10BV
Started:	1/8/2016 1:05:09 PM	Total records processed:	92438
Ended:	1/8/2016 1:20:32 PM	Number of exceptions:	0
Duration:	15 minutes 23 seconds	Records successfully processed:	92438



Review and Update

- Review your data and make updates as needed
- Add a dummy record at end of the file

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	BUSINESS	Site ID	ID	Last	First	Address	City	State	ZIP	Date	Transactio	Appeal	Amount	Receipt A	Benefit V	Benefit D	Revenue I
2	1	42	8-10						94080-491	#####	Payment	\$15	\$900.00	\$900.00			rev-14573
3	2	42	8-12						94602-185	#####	Payment	\$16	\$300.00	\$300.00			rev-14697
4	3	42	8-12						94611-392	#####	Payment	\$16	\$250.00	\$250.00			rev-14689
5	4	42	8-12						94602-120	#####	Payment	\$16	\$500.00	\$500.00			rev-14709
6	5	42	8-12						94611-331	#####	Payment	\$16	\$100.00	\$100.00			rev-14688
7	6	42	8-12						94611-362	#####	Payment	\$150	\$260.00	\$260.00			rev-14692
8	7	42	8-12						94611-362	#####	Payment	\$150	\$400.00	\$0.00			rev-14700
9	8	42	8-12						94611-362	#####	Payment	\$150	#####	#####			rev-14700
10	9	42	8-12						94611-362	#####	Payment	\$16	#####	#####			rev-14701
11	10	42	8-12						94602-243	4/6/2015	Payment	\$15	\$100.00	\$100.00			rev-14601
591	590	42	8-14						94611	#####	Payment	\$16	\$100.00	\$100.00			rev-14711
592			Dummy	Dummy	Discard												



Review and Update

- Review Columns W and X
 - Possible benefit issue
 - Possible receipt or benefit amount issue
 - These issues depend on how you have been using the system
 - Giving category column is on the sheet to help with benefits in column Y



Review and Update

(089) S17	\$250.00	\$250.00			rev-37512	440403	FALSE	FALSE	Sebring		
(089) S17	\$250.00	\$250.00			PAS-13985	61788	FALSE	FALSE	Sebring		
(089) S17	\$250.00	\$250.00			PAS-13975	60848	FALSE	FALSE	Family		
(089) S17	\$250.00	\$250.00			PAS-13965	60470	FALSE	FALSE	Community - DCA		
(089) A17	#####	\$0.00			rev-41589	491027	TRUE	TRUE	Mexico Trip		
(089) A17	\$120.00	\$0.00			rev-41598	497003	TRUE	TRUE	Kendra Scott Necklace a		
(089) A17	\$500.00	\$0.00			rev-41598	497682	TRUE	TRUE	Golf Clubs and Bag		
(089) A17	\$100.00	\$100.00			rev-41598	498645	FALSE	FALSE	Sponsor		
(089) A17	\$40.00	\$0.00			rev-41599	499007	TRUE	TRUE	Play and Music Lesson		
(089) S17	\$250.00	\$250.00			PAS-13985	61326	FALSE	FALSE	Community - DCA		
(089) S17	#####	#####			PAS-13985	61364	FALSE	FALSE	Citrus County		

(089) S1	\$50.00	\$50.00			rev-41706	585076	FALSE	FALSE	Community - DCA		
(89) X1	\$500.00	\$500.00			rev-34061	431701	FALSE	FALSE	1/2 PAGE AD		
(89) X1	\$1,300.00	\$980.00	\$320.00	Table Sponsor	rev-34061	431585	FALSE	FALSE	Table Sponsors		
(89) S1	\$500.00	\$500.00			rev-41640	533302	FALSE	FALSE	Family		
(89) S1	\$500.00	\$500.00			PAS-13955	59990	FALSE	FALSE	Board Division		
(089) S1	\$250.00	\$250.00			PAS-13965	60470	FALSE	FALSE	Community - DCA		

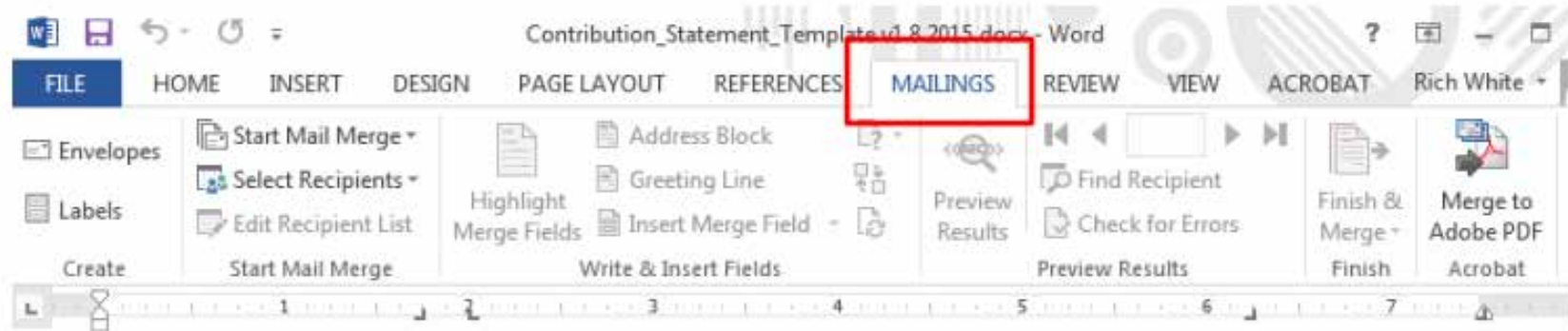


Run Mail Merge

- Download mail merge template
- Edit merge field values for your council
- Start a Directory mail merge
- Select the contribution statement data file
- Finish the merge



Run Mail Merge

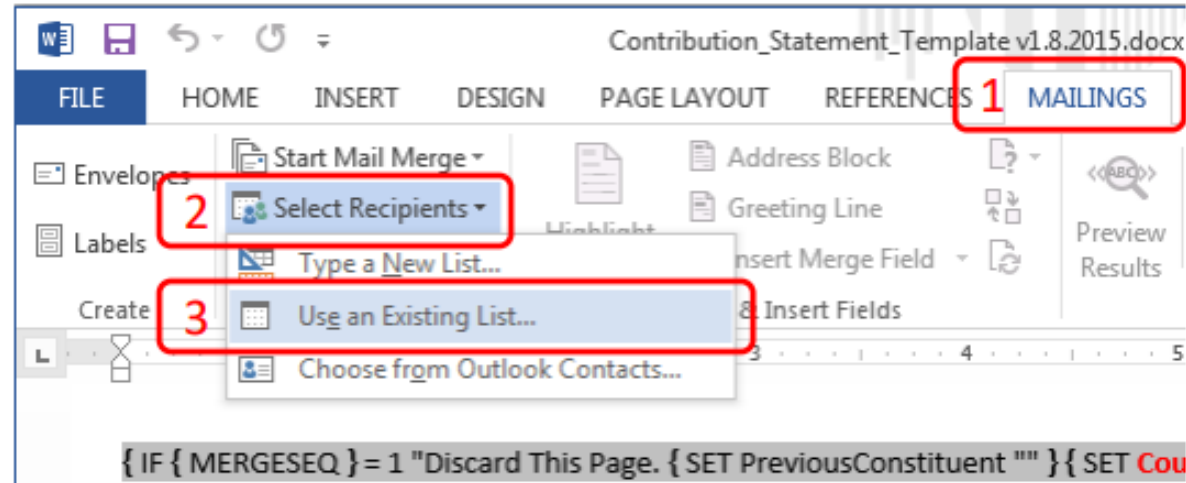


```
{ IF { MERGESEQ } = 1 "Discard This Page. { SET PreviousConstituent "" } { SET CouncilAddress "Example Council, 123
Main St., Anytown, TX 12345" } { SET CouncilContact "email First.Last@scouting.org" } { SET CouncilTaxID "[Federal Tax
ID#]" } { SET Year "2015" } "" } { SET CurrentConstituent { MERGEFIELD ID } } { IF { CurrentConstituent } = {
PreviousConstituent } "{ MERGEFIELD Date } { MERGEFIELD Amount \# "$#,###,###0.00 } { MERGEFIELD
Appeal } { IF { MERGEFIELD Benefit_Value } <> "" "{ SET BenefitValue { MERGEFIELD Benefit_Value \# "$#,###,###0.00 }
}" "{ SET BenefitValue 0 }" } BenefitValue \# "$#,###,###0.00 } { SET NetContribution { = { MERGEFIELD Amount } - {
BenefitValue } } } NetContribution \# "$#,###,###0.00 } { SET TotalPaid { = TotalPaid + { MERGEFIELD Amount } } } { SET
TotalContribution { = TotalContribution + { NetContribution } } } { SET TotalBenefitValue { = TotalBenefitValue + {
BenefitValue } } } "

Total:{ TotalPaid \# "$#,###,###0.00 } { TotalBenefitValue
\# "$#,###,###0.00 } { TotalContribution \# "$#,###,###0.00 } { SET TotalPaid 0 } { SET TotalContribution 0 } { SET
TotalBenefitValue 0 }
```



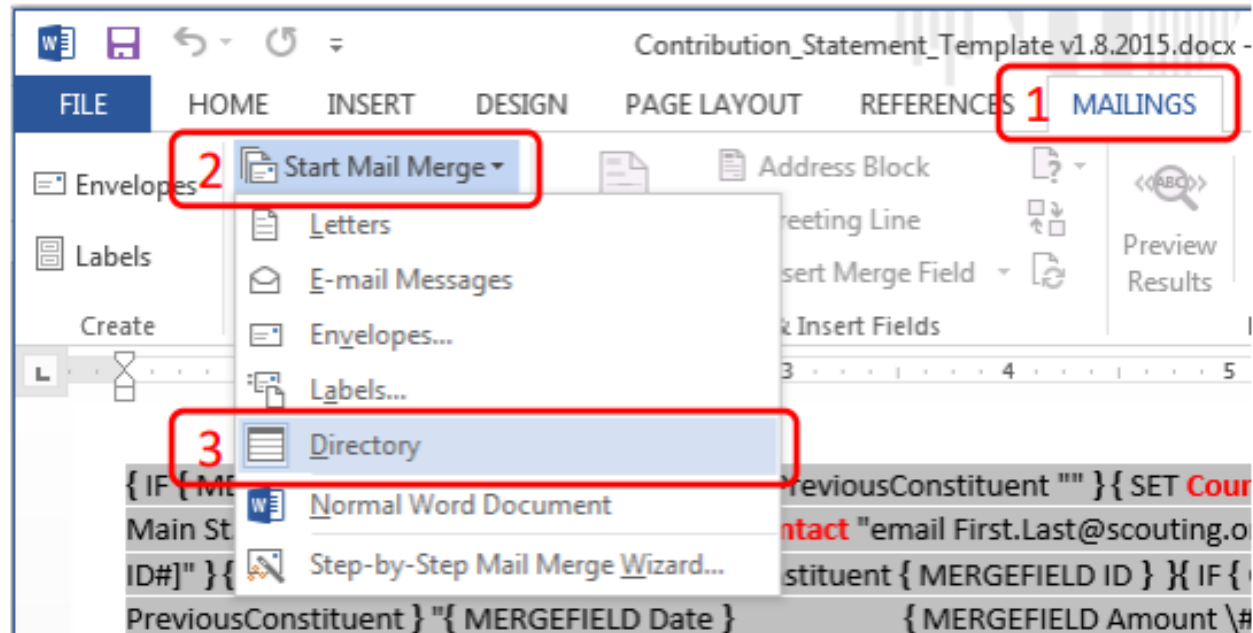
Run Mail Merge



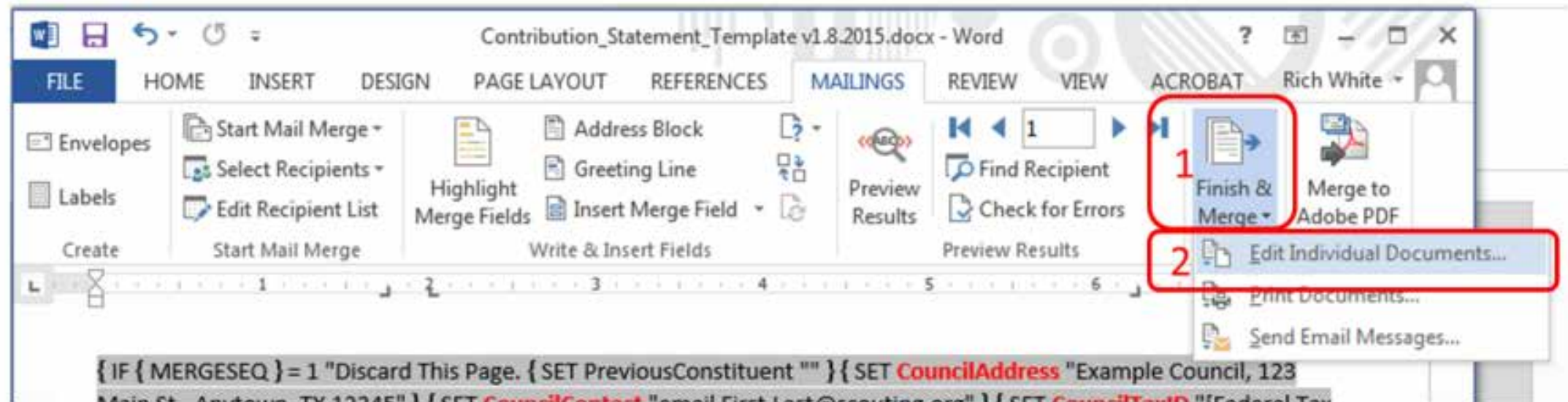
- Navigate to your downloaded data file and select it



Run Mail Merge



Run Mail Merge



Run Mail Merge

Directory6 - Word

FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ACROBAT Rich White

Paste Font Paragraph Styles Editing

Clipboard Font Paragraph Styles Editing

g
p
A 94611-3405

Dear Clifford Wang,

The following is a list of paid contributions for the calendar year 2015 recorded by Example Council, 123 Main St., Anytown, TX 12345 (Federal Tax ID [Federal Tax ID#]). Thank you for your generous support of Scouting! If you have any questions or concerns, please email First.Last@scouting.org.

Date	Amount Paid	Appeal Name	Benefit Value	Net Contribution
10/14/2015	150.00	2016 Friends of Scouting something cool!	100.00	50.00
12/21/2015	150.00	2016 Friends of Scouting	0.00	150.00
12/22/2015	150.00	2016 Friends of Scouting	0.00	150.00
12/23/2015	150.00	2016 Friends of Scouting something awesome!	100.00	50.00
12/24/2015	150.00	2016 Friends of Scouting	0.00	150.00
12/25/2015	150.00	2016 Friends of Scouting	0.00	150.00
12/26/2015	150.00	2016 Friends of Scouting	0.00	150.00
12/27/2015	150.00	2016 Friends of Scouting	0.00	150.00
12/28/2015	150.00	2016 Friends of Scouting	100.00	50.00
Benefit:				
Total:	\$ 1,350.00		\$ 300.00	\$ 1,050.00



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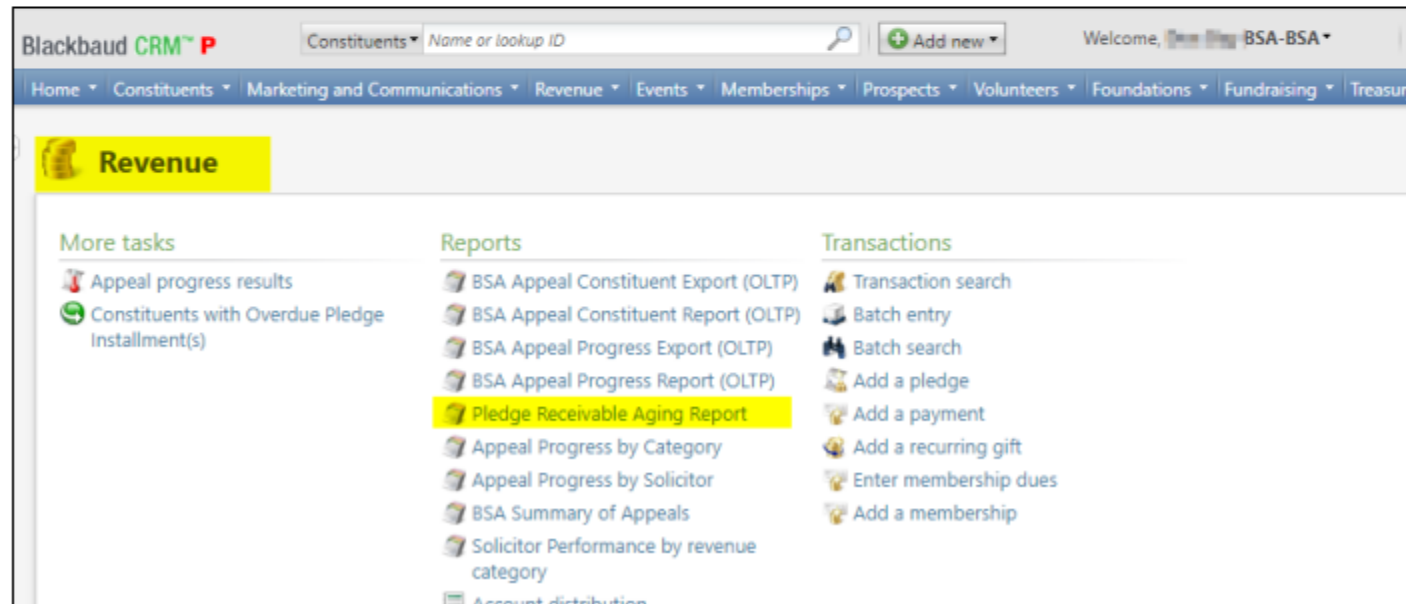
Review and Mail

- Print, fold, stuff and mail per your council's usual procedure
- Discard the first and last pages from the merge file



Global Write Offs

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



Determine collectible value

Create the Report

1. BSA Organization – your council
2. Report Code – year
3. Appeal – must be run for each open appeal with outstanding donor pledge values
4. Click “View Report”
5. Wait...



Pledge Receivable Aging Report

Blackbaud CRM P

Constituents

Welcome, BSA-BSA

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

Pledge Receivable Aging Report

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

Appeal **2** **4**



Pledge Aging Receivable Report

- Print report and give to management to review:
 - All open pledges
 - Determine who will still pay
 - Sign and date
- After management review, proceed to Pledge Write-Off process



Pledge Write-off Procedure

- Determine when your council needs to write-off pledges.
- Pledges written off by appeal
- You will use your current Global Pledge Write-off business process
- You will edit the selection in your current business process



Global Pledge Write-off

edge write-off processes (276) + Add


Name	Description
L144	Pledge Write-Off Proc
L144 Abraham Linco...	Just change the select
L003	Pledge Write-Off Proc
L022	Pledge Write-Off Proc
L583	Pledge Write-Off Proc
L382	Pledge Write-Off Proc
Start process Edit Delete As	
L618	Pledge Write-Off Proc
L104	Pledge Write Off Proc
L303	Pledge Write-Off Proc
L157	Pledge Write-Off Proc
L468	Pledge Write-Off Proc
L092	Pledge Write-Off Proc
L368	Conversion Pledge W
L220	Pledge Write-Off Proc
L574	Pledge Write-Off Proc
L635	Pledge Write-Off Proc
L695	Global Write-Off
L449	Pledge Write-Off Proc
L006	Pledge Write-Off Proc

Edit pledge write-off process


General

Name: L382

Description: Pledge Write-Off Process

Selection: L382 Global Write Off Query (Ad) 

Post status: Do not post

Post date: mm/dd/yyyy 

Site: Allegheny Highlands Council

Write-off reason

Reason code: UNC - Uncollectable

Details: 2017 Write Off

Output

☐ Create output selection

☐ Overwrite existing selection

Selection name:

Help Save Cancel

Go to the Global Pledge Write-off processes and edit your routine. No need to create a new routine. When the edit window opens click the pencil to edit the query attached as the selection.



Edit Ad-Hoc Query - L382 Global Write Off Query

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

Find field:

Browse for fields in:

Revenue

- Adjustment
- Appeal
- Application Details
- Appraisals
- Attachments
- Attributes

Select Revenue fields:

Fields

- Account system
- Amount
- Batch description
- Batch number
- Benefits waived

Include records where;

- Transaction type is equal to Pledge
- and Pledge/Grant award balance is greater than 0
- and Appeal/Site/Site ID is equal to 382
- and Appeal/Appeal record is one of (382) F-18 - 2018 Friends of Scouting

Apply Criteria

Appeal/Appeal record criteria

One of

(382) F-18 - 2018 Friends of Scouting

☐ Only return records that match all selected values

OK Cancel

The Query will open, and you will need to adjust the filters to only write-off those appeals you want to close. You do this by clicking on the Appeal record/Name filter and adding in the names of the appeals you need to write-off. This example show the council preparing to do more than one appeal at a time. They have changed the filter to "one of" and then can now list multiple appeals.



Edit Ad-Hoc Query - L382 Global Write Off Query

[Select filter and output fields](#)[Set sort and group options](#)[Preview results](#)[Set save options](#)

Results (78 records found)

Appeal\Name	Pledge/Grant award balance
(382) F-18 - 2018 Friends of Scout...	\$250.00
(382) F-18 - 2018 Friends of Scout...	\$600.00
(382) F-18 - 2018 Friends of Scout...	\$500.00
(382) F-18 - 2018 Friends of Scout...	\$40.00
(382) F-18 - 2018 Friends of Scout...	\$30.00
(382) F-18 - 2018 Friends of Scout...	\$20.00
(382) F-18 - 2018 Friends of Scout...	\$1,200.00
(382) F-18 - 2018 Friends of Scout...	\$1,000.00
(382) F-18 - 2018 Friends of Scout...	\$95.00
(382) F-18 - 2018 Friends of Scout...	\$30.00
(382) F-18 - 2018 Friends of Scout...	\$60.00
(382) F-18 - 2018 Friends of Scout...	\$100.00
(382) F-18 - 2018 Friends of Scout...	\$720.00
(382) F-18 - 2018 Friends of Scout...	\$45.45
(382) F-18 - 2018 Friends of Scout...	\$75.00
(382) F-18 - 2018 Friends of Scout...	\$20.00

Always preview your query before saving it and running your routine to make sure only your appeals are showing and that only the appeals you want to write-off are listed.



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If you need to exclude specific constituents from the write-off process, you can add the line Constituent\Lookup ID to the Include records where window, then change the operator from 'Equal to' to 'Not one of', then list as many Lookup IDs as necessary. If you want to exclude specific pledges, you can do the same with the field 'Revenue ID is not one of'

The screenshot displays a software interface with two main sections. The top section, titled 'Include records where:', contains a list of search criteria. The bottom section, titled 'Results fields to display:', contains a list of fields to be shown in the results.

Include records where:

- Appeal\Site\Site ID is equal to 027
- and Appeal\Appeal record is one of (027) F19 - 2019 Friends of Scouting, (027) F20 - 2020 Friends of Scouting, (027) FG21 - 2021 Fresno Golf Tournament, (027) F21 - 2021 Friends of Scouting
- and Transaction type is equal to Pledge
- and Pledge/Grant award balance is greater than 0
- and Constituent\Lookup ID is not one of 8-12345678, 8-87654321 or is blank

Results fields to display:

- Appeal\Name
- Pledge/Grant award balance
- Constituent\Name
- Constituent\Lookup ID










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If you need a list of what was written off after the process, go to Revenue/More Tasks/ Write-Offs Data list. Search for your site and then filter by the date the you ran your write-offs. It will provide a list of those written-off on or after the date that you used the write-off process.

Revenue

More tasks

-  Appeal progress results
-  Daily Revenue Transactions List
-  Gift in Kind List
-  Open Pledge List
-  Recurring Gift List
-  Revenue Data Hygiene
-  Write-Offs Data List

List for Write-offs

Write-Offs for your council. This list includes write-offs on or after 1/1/2018. (65)  More

Appeal equal to: Constituent Name equal to: Date Added on or after:   Apply  Reset

Council #	Appeal	Constituent ID	Constituent Na...	Pledge Date	Pledge ID	Pledge Amount	Write-Off Am...
006	(006) F-21 2021 Friends of Scouting	8-322	ld	3/19/2021	rev-4	\$500.00	\$500.0
006	(006) F-21 2021 Friends of Scouting	8-322	ard	2/12/2021	rev-4	\$400.00	\$400.0
006	(006) F-21 2021 Friends of Scouting	8-322		2/19/2021	rev-4	\$250.00	\$250.0
006	(006) F-21 2021 Friends of Scouting	8-322		7/19/2021	rev-4	\$100.00	\$100.0
006	(006) F-21 2021 Friends of Scouting	8-322		12/30/2020	rev-4	\$2,000.00	\$2,000.0
006	(006) F-21 2021 Friends of Scouting	8-322	st	3/8/2021	rev-4	\$100.00	\$100.0



PY – Inbound Channel

- Used with Prior Year Pledge Payments
- Payment is connected to a Prior Appeal
- PY Payment clears the Prior Year Receivable Account
- There is no such thing as a prior year pledge or donation.



Event Revenue Mapping

- Create your event Appeal.
- Create your event – add event appeal and designation.
- Grab the "Event Revenue Setup Request" and complete.
- Submit "Event Revenue Setup Request" via a Member Care ticket to have your appeal and event GL mapped for event registrations.

Events

[Add an Event](#)

[Auction Setup](#)

[Event Revenue set up](#)

[Event Revenue Setup Request](#)

[Event Invitation and Registration](#)

[Event Registration Options](#)

[Bulk add Event Registrants](#)



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Look for Instructions - Read

Please follow the steps below on the "New_Events" tab of this spreadsheet tool.
Enter all relevant information, so BSA National staff can configure BCRM GL mapping for your event(s).
Then use "Save As..." and give this Excel file a new name that includes your Council number and the date.
Finally, submit a Support Ticket to Member Care, and make sure to attach this new file.

Note: You can only enter information on the [New Events](#) tab. Other tabs are locked for use by BSA National staff to complete your Council's Event GL mapping in Blackbaud CRM.

STEP	DESCRIPTION
1	<p>IMPORTANT: Before completing the "New_Events" tab of this spreadsheet tool, please make sure that all of your Council's revenue events -- and any related Appeal records needed for the fiscal year -- already exist in Blackbaud CRM. (See screenshots on this tab.)</p> <p>You will need to copy the exact names of each of these records (Events, Appeals, Designations) from BCRM to the "New_Events" tab. If any of these Events, Appeals or Designations are missing from BCRM (or if any record names entered in this tool differ from actual BCRM record names), then revenue from those Event's Registrations will not commit in BCRM or post to GL/PeopleSoft.</p>
2	"New_Events" tab (Cell A1): Confirm the Default Event Contribution Account used by your Council. ("4201" is most common.)
3	Column B (Cell B4): Enter your Council's PeopleSoft Business Unit . This 4-character text (ex: L999) should auto-populate for all event rows.
4	Column C: Enter the Start Date for each Event.
5	<p>Column D: For each Event this fiscal year, copy-and-paste the Event Name from BCRM. See directions and screenshot on this tab for steps to add a new BCRM event. When adding a new event, make sure to check both "Event is an auction" and "Event allows designations on fees".</p>
6	<p>Column E: From BCRM, copy-and-paste the Appeal Name associated with this Event. Every Appeal in BCRM should include Appeal Category, Appeal Report Code, Site, and Start Date.</p>
7	<p>Column F: From BCRM, copy-and-paste the Designation Name needed for this Event.</p> <p><i>Note: If an Event will receive revenue for 2+ Designations (multiple Peoplesoft Projects/Fund Types)...</i></p>

HOW TO ADD AN EVENT in Blackbaud CRM (screenshot example, required fields highlighted in green)

These fields are the minimum necessary to create a "bare bones" event in BCRM, so BSA National can complete your Event GL. Later you can go back to the Event in BCRM and add details including Invitations, Expenses, Tasks, Registrants, etc.

IMPORTANT: Before adding any registrations for an Event, on the Event make sure you have (1) completely configured all Registration Options on that tab including Fee amounts and any zero-dollar benefit items, (2) linked all necessary Designations and sub-designations on the Designations tab, and (3) linked the related Appeal(s) on the Appeals tab.

HOW TO ADD AN APPEAL in Blackbaud CRM (screenshot example, required fields highlighted in yellow)



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Fill In Event Tab

4201 = Default Event Contribution Account First Create Records in Blackbaud CRM. Then Copy-&-Paste Record Names Below.					
<u>New Event Row</u>	<u>Business Unit</u>	<u>Event Start Date</u>	<u>Event Name</u> <i>First create each Event in BCRM. Then copy-&-paste each Event name here. Use 2 rows if an Event needs 2 Designations.</i>	<u>Appeal Name</u> <i>First create each Appeal record in BCRM. Then copy-&-paste each Appeal name here. An Appeal can only be linked to 1 Event.</i>	<u>Designation Name</u> <i>Designations should already exist in BCRM. Use the exact same Designations as last year. Request new Designations for any new Projects.</i>
Ex:	L999	10/10/2018	L999 Sporting Clays 2018 (example)	L999 R18 - Sporting Clays 2018 (example)	99907771 Sporting Clays - Operating (example)
4	I067	3/1/2024	L067 2024 Sporting Clay	(067) SC24 - Sporting Clay 2024	06707801 Sporting Clays - Operating
5	I067	4/15/2024	L067 2024 Eagles and Adult Recognition	(067) GOE24 - Gathering of Eagles Adult Recognition 2024	06705121 Gathering of Eagles and Adult - Operating
6	I067	7/15/2024	L067 2024 Golf	(067) G24 - 2024 Golf Tournament	06707551 Golf Tournamen - Operating
7	I067	3/15/2024	L067 2024 Pinewood Derby Social	(067) AP24 - Adult Pinewood Derby 2024	06707511 Adult Pinewood Derby - Operating

Copy and paste the appeal name, event name and designation into the form from the events you have create.

Revenue Contribution Account Codes Needed For Each Special Event (PeopleSoft Account							
<u>4201</u> <i>Sponsorship/ Donation</i>	<u>4202</u> <i>Participant/ Ticket</i>	<u>4203</u> <i>Program Items</i>	<u>4204</u> <i>Event Advertising</i>	<u>4205</u> <i>Event Concessions</i>	<u>4209</u> <i>Auction/ Resale Items</i>	<u>4231</u> <i>Other (raffle, mulligans, etc.)</i>	<u>4250</u> <i>Fees - Fair Market Value</i>
YES	no	no	maybe	no	Y	no	yes
YES	Yes	no	Yes	no	yes	no	Yes
YES	Yes	no	Yes	no	Yes	no	yes
YES	Yes	no	Yes	no	Yes	no	yes
YES	Yes	no	Yee	no	Yes	no	yes
no	no	no	no	no	no	no	no
no	no	no	no	no	no	no	no

Place a "Yes" into the accounts you plan to use with your event options



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Updating Donor Communications for 2024



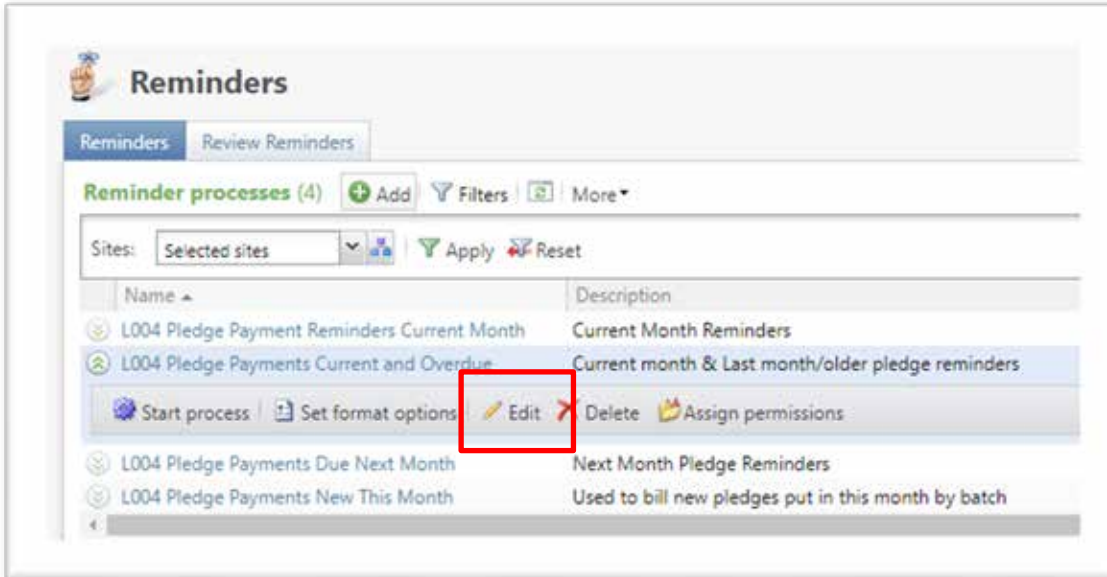
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Updating Reminders and Acknowledgements

- New appeals mean new revenue
- Selections that creates donor communication needs to be updated
- Add new appeals
- Add report code 2024



Finding your Reminder Selections



Reminders

Reminders | Review Reminders

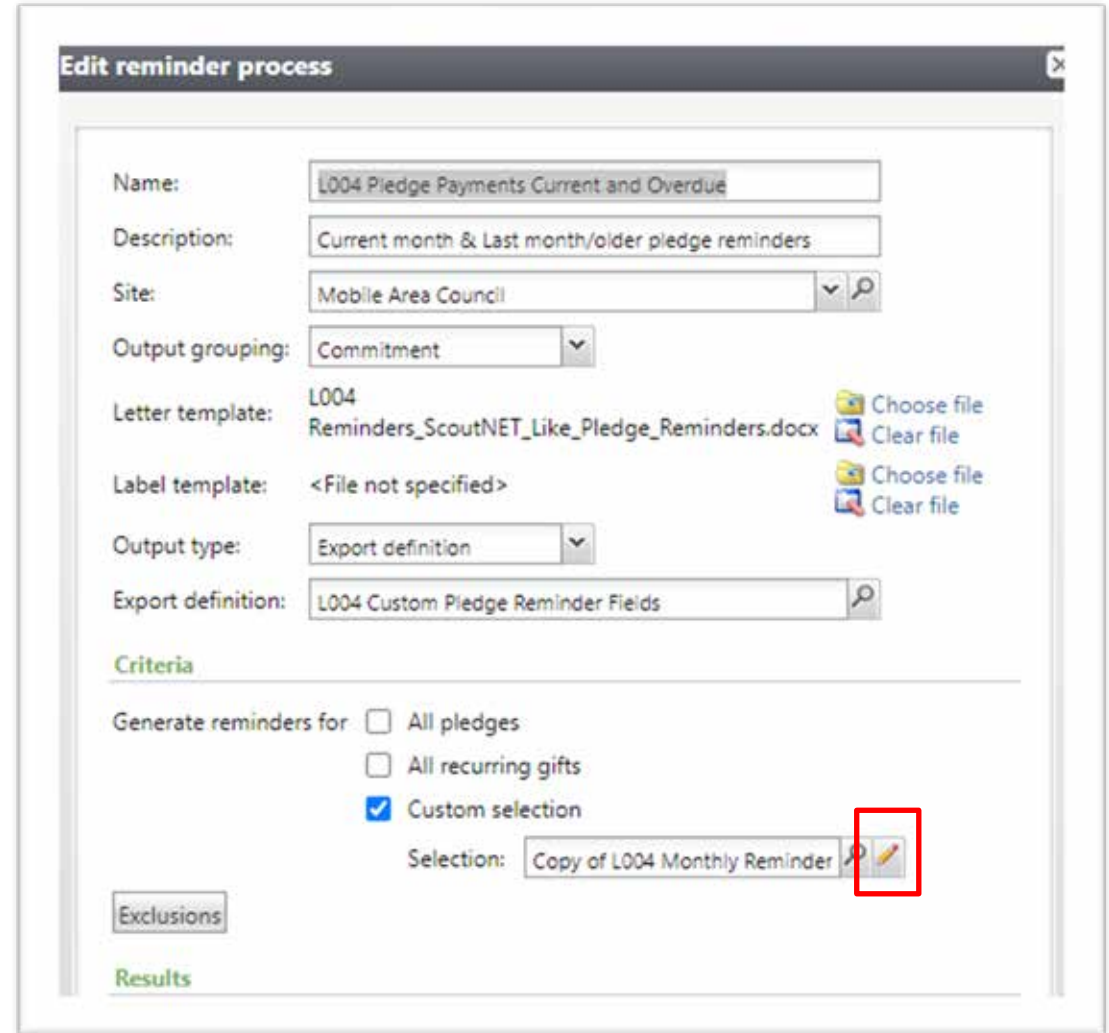
Reminder processes (4) [Add](#) [Filters](#) [More](#)

Sites: [Selected sites](#) [Apply](#) [Reset](#)

Name	Description
L004 Pledge Payment Reminders Current Month	Current Month Reminders
L004 Pledge Payments Current and Overdue	Current month & Last month/older pledge reminders
L004 Pledge Payments Due Next Month	Next Month Pledge Reminders
L004 Pledge Payments New This Month	Used to bill new pledges put in this month by batch

[Start process](#) [Set format options](#) [Edit](#) [Delete](#) [Assign permissions](#)

Reminders are found under Marketing & Communications / Donor Relations. You will need to edit each reminder process and update the selection for the next year.



Edit reminder process

Name: L004 Pledge Payments Current and Overdue

Description: Current month & Last month/older pledge reminders

Site: Mobile Area Council

Output grouping: Commitment

Letter template: L004 Reminders_ScoutNET_Like_Pledge_Reminders.docx [Choose file](#) [Clear file](#)

Label template: <File not specified> [Choose file](#) [Clear file](#)

Output type: Export definition

Export definition: L004 Custom Pledge Reminder Fields

Criteria

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

Selection: Copy of L004 Monthly Reminder [Edit](#)

Exclusions

Results



Updating your Appeal selections

The left screenshot shows a search criteria list with the following items:

- Appeal\Site\Site ID is equal to 004
- and Appeal\Appeal record is equal to (004) S22 - 2022 FRIENDS OF SCOUTING
- and Pledge/Grant award next installment date is on or before this month or is blank
- and Transaction type is one of Pledge
- and Pledge/Grant award balance is greater than 0
- and Send pledge reminder is equal to Yes

The 'Apply Criteria' dialog box is open, showing the 'Appeal\Appeal record criteria' section. The 'One of' dropdown is selected, and the 'Value' radio button is checked. The list of criteria includes:

- (004) S22 - 2022 FRIENDS OF SCOUTING
- (004) S23 - 2023 FRIENDS OF SCOUTING

The right screenshot shows the same search criteria list, but the 'Apply Criteria' dialog box is closed. The criteria list is now:

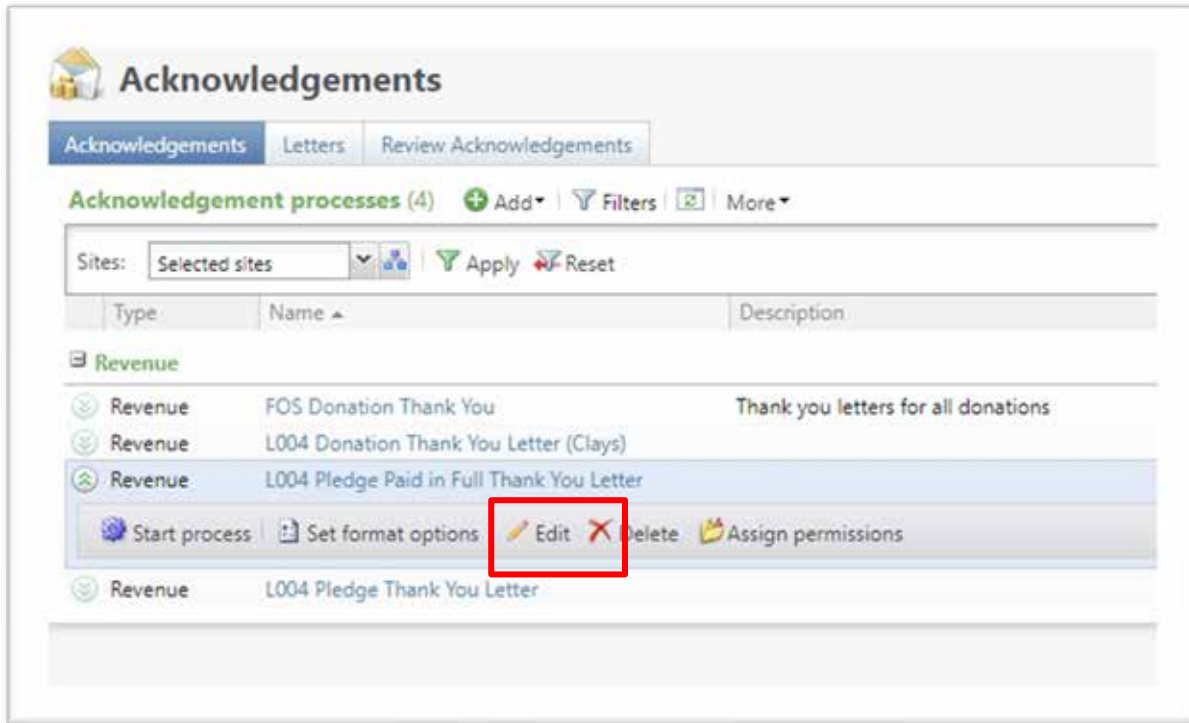
- Appeal\Site\Site ID is equal to 004
- and Appeal\Appeal record is one of (004) S22 - 2022 FRIENDS OF SCOUTING, (004) S23 - 2023 FRIENDS OF SCOUTING
- and Pledge/Grant award next installment date is on or before this month or is blank
- and Transaction type is one of Pledge
- and Pledge/Grant award balance is greater than 0
- and Send pledge reminder is equal to Yes

We still need to remind current appeal but also need to start reminding those that pledge for 2023. Double click your appeal record box and add the 2023 appeal and save. You may need to change it to "One Of" to add multiple appeals.



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Finding your Acknowledgement Selections



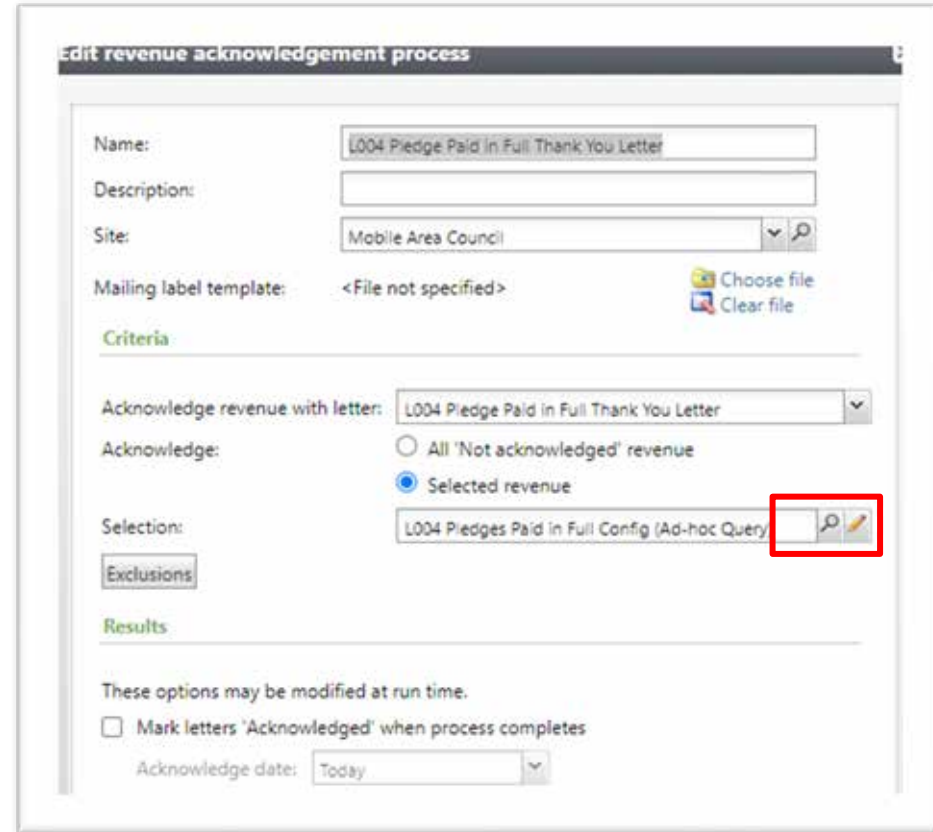
Acknowledgements

Acknowledgements Letters Review Acknowledgements

Acknowledgement processes (4) Add Filters More

Sites: Selected sites Apply Reset

Type	Name	Description
Revenue		
Revenue	FOS Donation Thank You	Thank you letters for all donations
Revenue	L004 Donation Thank You Letter (Clays)	
Revenue	L004 Pledge Paid in Full Thank You Letter	
Start process Set format options Edit Delete Assign permissions		
Revenue	L004 Pledge Thank You Letter	



edit revenue acknowledgement process

Name: L004 Pledge Paid in Full Thank You Letter

Description:

Site: Mobile Area Council

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

Criteria

Acknowledge revenue with letter: L004 Pledge Paid in Full Thank You Letter

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

Selection: L004 Pledges Paid in Full Config (Ad-hoc Query) Edit

Exclusions

Results

These options may be modified at run time.

☐ Mark letters 'Acknowledged' when process completes

Acknowledge date: Today

Acknowledgements are found under Marketing & Communications / Donor Relations. You will need to edit each acknowledgement process and update the selection for the next year.



Updating Report Codes

Include records where:

- Appeal\Site\Site ID is equal to 004
- and Appeal\Report code is equal to 2022
- and Transaction type is one of Pledge
- and Pledge/Grant award balance is equal to 0
- and Original pledge amount is greater than 0
- and Latest installment payment date is not blank

Apply Criteria

Appeal\Report code criteria

One of

Value Output field

2027
2026
2025
2024
2021
2020
2019
2018
2017

2022
2023

☐ Only return records that match all selected values

OK Cancel

We still need to thank current appeals with report code of 2023 but you also need to start reminding those that pledge for 2024. Double click your Report Code line add the 2024 Report Code and save. You may need to change it to "One Of" to add multiple Report Codes.

Include records where:

- Appeal\Site\Site ID is equal to 004
- and Appeal\Report code is one of 2022, 2023
- and Transaction type is one of Pledge
- and Pledge/Grant award balance is equal to 0
- and Original pledge amount is greater than 0
- and Latest installment payment date is not blank

Results fields to display:

- Appeal\Name
- Original pledge amount
- Pledge/Grant award balance
- BSA Structure Attribute\Attribute group
- Giving Category Attribute\Attribute group
- Constituent\Last/Organization/Group/Household name
- Constituent\First name
- Constituent\Lookup ID



Uncommitted Batches

- Review batch entry for uncommitted batches.
- All batches created before 12/31/23 should either be committed or deleted before you close your 2023 books in PeopleSoft.
- Clear the **Date Range** filter and leave **Sites** filter to "All Sites".





Batch Entry

Uncommitted Batches

Committed Batches

Uncommitted batches (12)

+ Add

Batch search



More

Date range: Last 30 days

Sites: All sites

☐ Show only batches with exceptions

Search

+ Columns

Clear all filters

Batch number	Owner	Date added	Batch template	Status
L1062562	Megan	1/1/2024	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry
L1062915	Megan	1/2/2024	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry
L1063597	Megan	1/3/2024	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry
L1064171	Megan	1/4/2024	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry
L1064661	Megan	1/5/2024	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry

Before the filter is cleared there are 12 batches. Once the Date Range is cleared there are 15 batches. Nov. Dec. Batches appeared.

Uncommitted batches (15)

+ Add

Batch search



More

Date range:

Sites: All sites

☐ Show only batches with exceptions

Apply

Reset

Search

+ Columns

Clear all filters

Batch number	Owner	Date added	Batch template	Status
L1046647	Megan	11/13/2023	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry
L1054534	Megan	12/8/2023	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry
L1054555	Megan	12/8/2023	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry
L1062562	Megan	1/1/2024	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry
L1062915	Megan	1/2/2024	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry
L1063597	Megan	1/3/2024	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry
L1064171	Megan	1/4/2024	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry
L1064661	Megan	1/5/2024	LC Import of Pledge Payments Credit Card Scheduled...	1. Data Entry



Preparation for Entry



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

February 21, 2024
10:00 am & 2:00 pm CT



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Questions & Answers



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