

CRM User Forum

February 21, 2024

John Kuehn ~ Valerie Eaton

Cornelia Ellis ~ Don Day



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Objectives

Finishing Up 2023

- Global write-off process
- Reports for Fiscal Audit and 990
- Beginning of year GL transactions

Tracking your 2024 Appeals

- Appeal progress report by Category
- Daily Revenue Transactions List
- Recurring Gift List
- Appeal Progress Data List

Batches

- Using Group ID to credit units in FOS appeal



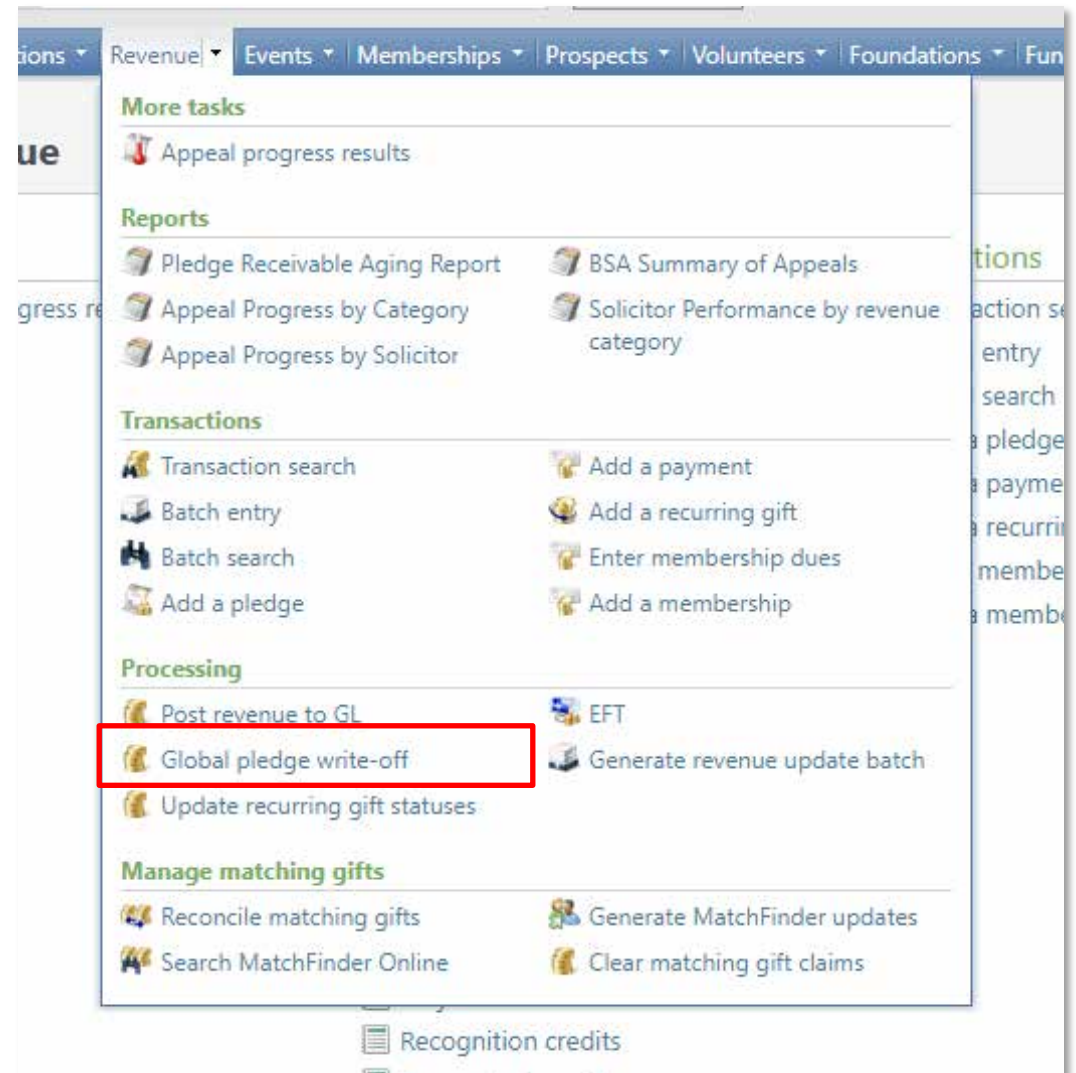
Global Write-off Process

- Should be ran yearly
- Run when you no longer want older pledges in overdue reminder
- Closes pledge in CRM
- Does not write to PeopleSoft
- Reduces data entry error with mismatched appeals
- Pledge payments want to fulfill oldest pledges first

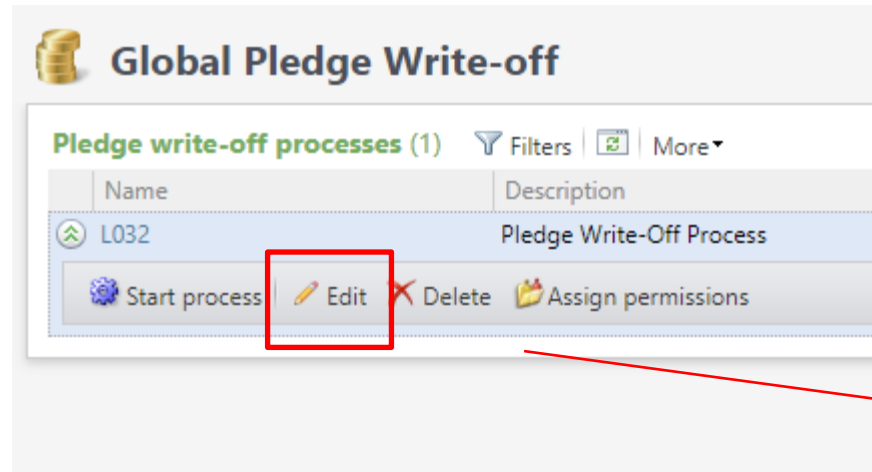


Global Write-off Process

Your Global Write-off routine can be found under the revenue functional area. Navigate to Processing and then click "Global Pledge Write-off" to access your business process.



Global Write-off Process



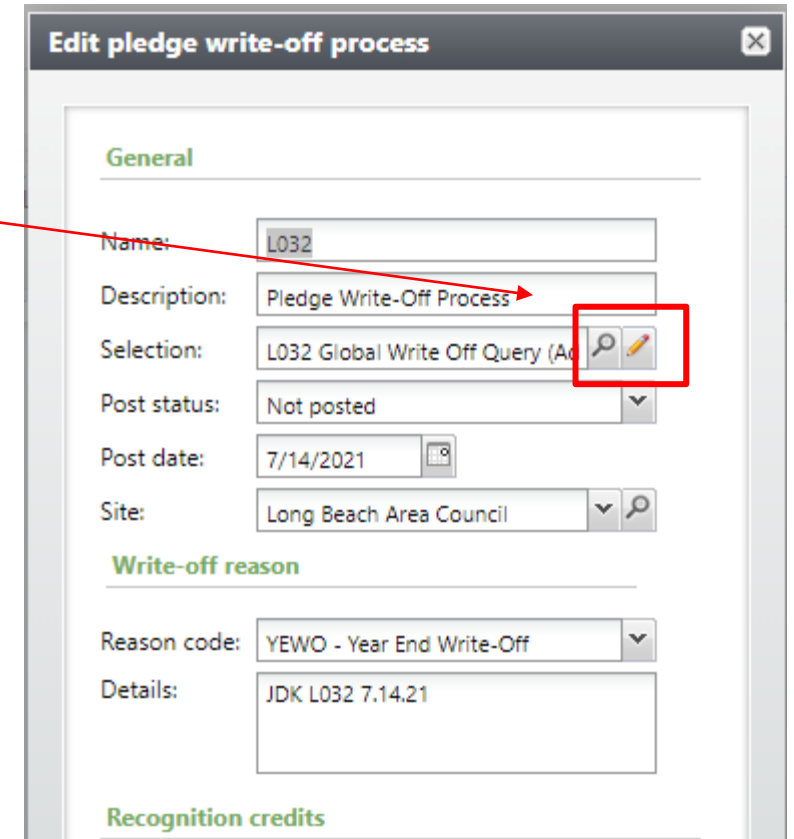
Global Pledge Write-off

Pledge write-off processes (1) Filters More

Name	Description
L032	Pledge Write-Off Process

Start process Edit Delete Assign permissions

When you find your business process, drop the chevron and click edit. The "Edit Pledge Write-off process" form will open. Proceed to the selection and click the pencil to open the query to adjust your filters of what should be written-off.



Edit pledge write-off process

General

Name: L032

Description: Pledge Write-Off Process

Selection: L032 Global Write Off Query (A) [Search] [Edit]

Post status: Not posted

Post date: 7/14/2021

Site: Long Beach Area Council

Write-off reason

Reason code: YEWO - Year End Write-Off

Details: JDK L032 7.14.21

Recognition credits



Global Write-off Process

Edit Ad-Hoc Query - L032 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
 - Auction Item Donation
 - BSAFR
 - BSAFR Snapshot
 - Constituent
 - Credit Card Refund
 - Credit Card Updates
 - Direct Debit Account
 - Donor Challenge Matched Revenue

Select Revenue fields:

- Fields
 - Account system
 - Amount
 - Batch description
 - Batch number
 - Benefits waived
 - Date
 - Designation list
 - Do not acknowledge
 - Do not receipt
 - Given anonymously
 - GL post date
 - GL post process
 - GL post status

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 032
- and Appeal\Appeal record is not one of (032) C21 - 2021 Capital, (032) F21 - 2021

The filter to adjust is in the upper right hand corner. The one highlighted in blue reads **Appeal Records Is Not One Of**. Double click the line to edit the filters. The appeals need to be adjusted to exclude the appeals you want left active (ignored).



Global Pledge Write-off

BEFORE

The 'Apply Criteria' dialog box shows the 'Appeal\Appeal record criteria' section. A dropdown menu is set to 'Not one of' and the 'Include blanks' checkbox is checked. The list of criteria includes:

- (032) C21 - 2021 Capital
- (032) F21 - 2021 Foundations
- (032) J21 - 2021 Endowment
- (032) S21 - 2021 Friends of Scouting
- (032) S20 - 2020 Friends of Scouting
- (032) C17 - 2017 Capital
- *

At the bottom, there is an unchecked checkbox labeled 'Only return records that do not match any of the selected values' and 'OK' and 'Cancel' buttons.

AFTER

The 'Apply Criteria' dialog box shows the 'Appeal\Appeal record criteria' section. A dropdown menu is set to 'Not one of' and the 'Include blanks' checkbox is checked. The list of criteria includes:

- (032) F24 - 2024 Foundations
- (032) J24 - 2024 Endowment
- (032) S24 - 2024 Friends of Scouting
- (032) C17 - 2017 Capital
- *

At the bottom, there is an unchecked checkbox labeled 'Only return records that do not match any of the selected values' and 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red rectangle.



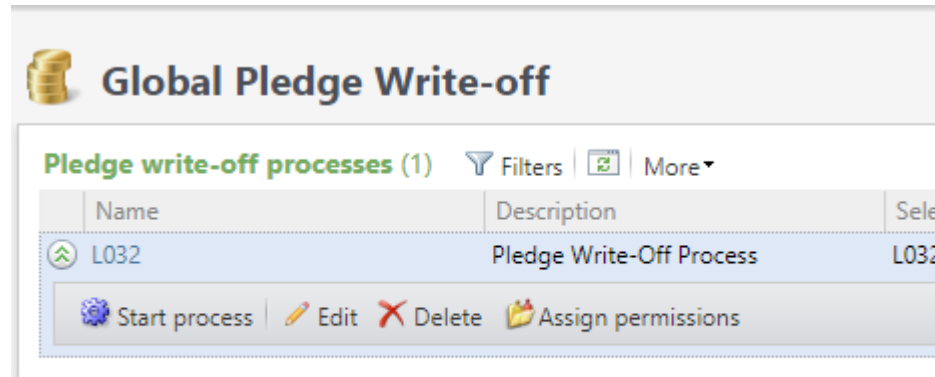
Global Pledge Write-off

After you adjust your filter click the "Preview results" tab. Review the appeals associated with each revenue line. If the appeals are one you do not want to write-off, then go back to the "Select filters" tab and adjust your filters to fix. If the appeals are clean of current year appeals, then save and close the selection and click save on the edit Global Pledge Write-off Screen to save edit.

Appeal\Name	Pledge/Grant award balance
(032) F21 - 2021 Foundations	\$41,990.00
(032) S18 - 2018 Friends of Scouti...	\$20.00
(032) S19 - 2019 Friends of Scouti...	\$40.00
(032) S20 - 2020 Friends of Scouti...	\$10.00
(032) S20 - 2020 Friends of Scouti...	\$10.00
(032) S20 - 2020 Friends of Scouti...	\$20.00
(032) S20 - 2020 Friends of Scouti...	\$20.00
(032) S20 - 2020 Friends of Scouti...	\$20.00
(032) S20 - 2020 Friends of Scouti...	\$20.00
(032) S20 - 2020 Friends of Scouti...	\$25.00
(032) S20 - 2020 Friends of Scouti...	\$30.00
(032) S20 - 2020 Friends of Scouti...	\$40.00
(032) S20 - 2020 Friends of Scouti...	\$40.00
(032) S20 - 2020 Friends of Scouti...	\$40.00
(032) S20 - 2020 Friends of Scouti...	\$50.00
(032) S20 - 2020 Friends of Scouti...	\$60.00
(032) S20 - 2020 Friends of Scouti...	\$70.00
(032) S20 - 2020 Friends of Scouti...	\$80.00
(032) S20 - 2020 Friends of Scouti...	\$90.00
(032) S20 - 2020 Friends of Scouti...	\$90.00
(032) S20 - 2020 Friends of Scouti...	\$105.00



Global Pledge Write-off



Global Pledge Write-off

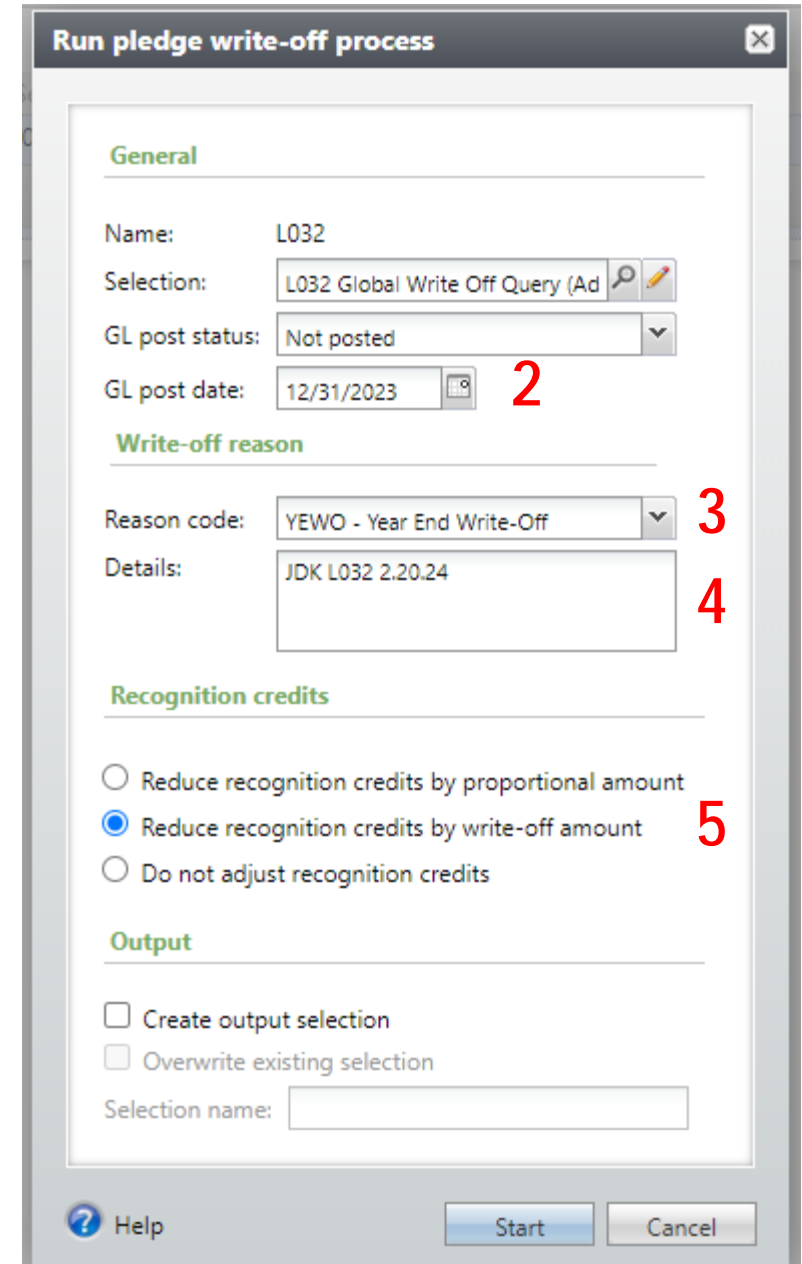
Pledge write-off processes (1) Filters More

Name	Description	Sele
L032	Pledge Write-Off Process	L032

Start process Edit Delete Assign permissions

1

1. Drop the chevron on the process and click start.
2. Adjust the GL Post Date to the last day of the prior year.
3. Select the YEWO reason Code
4. Update detail. Be specific. This can help fix a mistake.
5. Reduce recognition credits by write-off amount.
6. Click start.



Run pledge write-off process

General

Name: L032

Selection: L032 Global Write Off Query (Ad)

GL post status: Not posted

GL post date: 12/31/2023

Write-off reason

Reason code: YEWO - Year End Write-Off

Details: JDK L032 2.20.24

Recognition credits

Reduce recognition credits by proportional amount

Reduce recognition credits by write-off amount

Do not adjust recognition credits

Output

Create output selection

Overwrite existing selection

Selection name:

Help Start Cancel

2

3

4

5




Global Pledge Write-off


The Global Pledge Write-off will run. It should take under a minute to run. Once completed, you can hop out to the Write-Off Data List under revenue to get a listing of the pledges closed.

Global pledge write-off list
L032

Name: L032
Description: Pledge Write-Off Process
Reason code: YEWO - Year End Write-Off
Details: JDK L032 2.20.24
Selection: L032 Global Write Off Query (Ad-hoc Query) Create output selection: No
GL post status: Not posted Output selection name:
GL post date: 12/31/2023 Overwrite existing selection: No

Recent status History Job schedules

Recent status 

Status:  Completed
Status message: Completed

Started by:	netbsa\L032SvcAcct	Server name:	AZSCUSBBCRMSTG1
Started:	2/20/2024 11:33:53 AM	Total records processed:	60
Ended:	2/20/2024 11:34:28 AM	Number of exceptions:	0
Duration:	00hr 00min 35s	Records successfully processed:	60



Global Pledge Write-off

Proceed to the data list under revenue. Use your council number as the Site ID and click search and select your council. This opens the list. Next, place the date in that you ran the process and click apply. This will generate the write-off list for you to download using the "More" button.

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. (60) 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...	Details
032	(032) S23 - 2023 Friends of Scouting	8-41		1/12/2023	rev-45:	00	\$900.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-41	...	1/3/2023	rev-45:	00	\$100.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-41	ds	1/22/2023	rev-45:	00	\$150.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-44	ne	1/6/2023	rev-45:	00	\$500.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-44	ll...	1/12/2023	rev-45:	00	\$50.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-44	oy	1/29/2023	rev-45:	00	\$450.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-44		1/3/2023	rev-45:	00	\$240.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-44		1/28/2023	rev-45:	00	\$80.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-44	...	1/19/2023	rev-45:	00	\$20.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-45	...	1/5/2023	rev-45:	00	\$90.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-45		4/25/2023	rev-45:	00	\$40.00	JDK L032 2.20.24

Reports of Audit and 990



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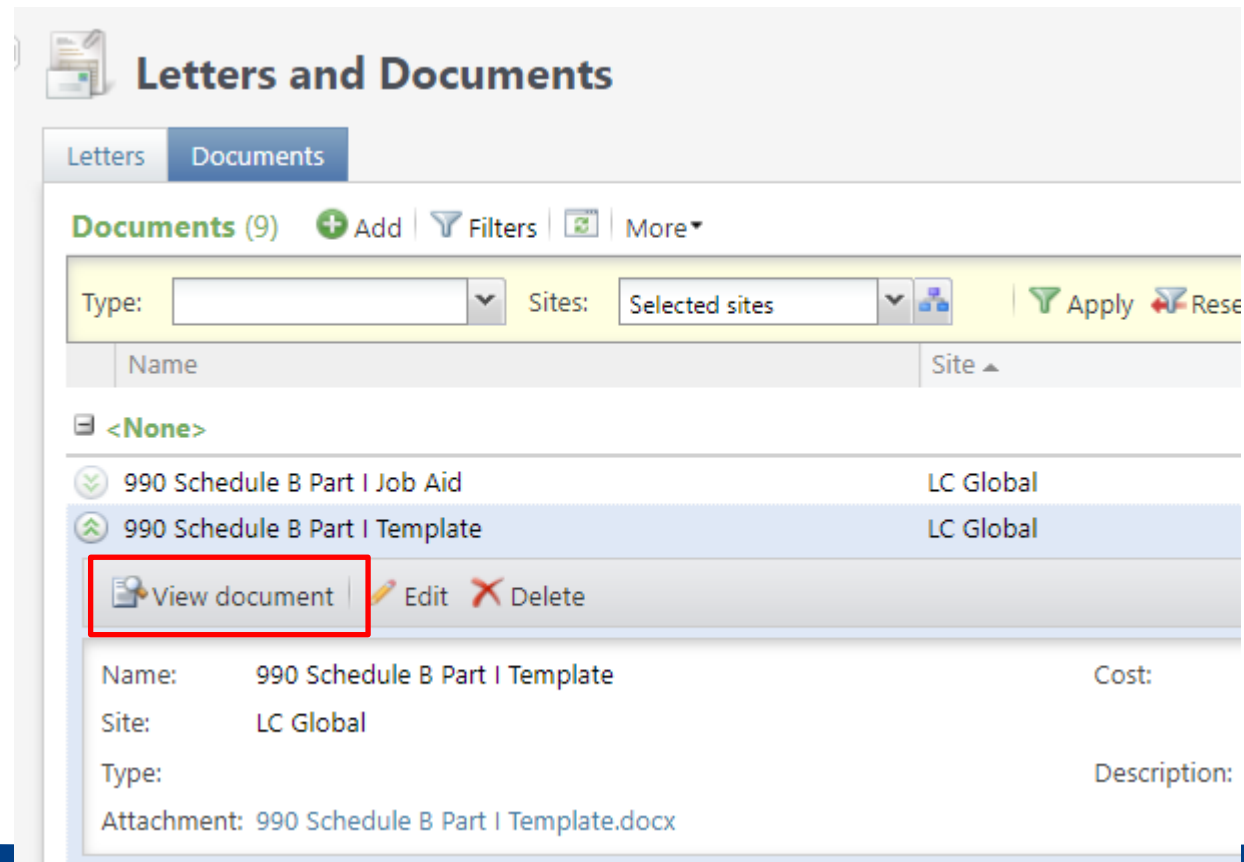
IRS 990

- Download Direction from User Guide under Reports
 - IRS 990 Schedule B
- Process is like running contribution statement.
- Provides a list of donor who have pledge or donated \$5,000 or more in in the previous tax year.
- No need to create a query.



IRS 990

Under Marketing & Communication you can navigate to Letters and Documents. On the document tab you will find the Job Aid and the 990 template you will need for mail merge. Drop the chevron and click "View document". Save to your desktop. There is no need to click the edit button



Letters and Documents

Letters Documents

Documents (9) + Add Filters More

Type: Sites: Selected sites Apply Rese

Name	Site
<None>	
990 Schedule B Part I Job Aid	LC Global
990 Schedule B Part I Template	LC Global

View document Edit Delete

Name: 990 Schedule B Part I Template Cost:

Site: LC Global

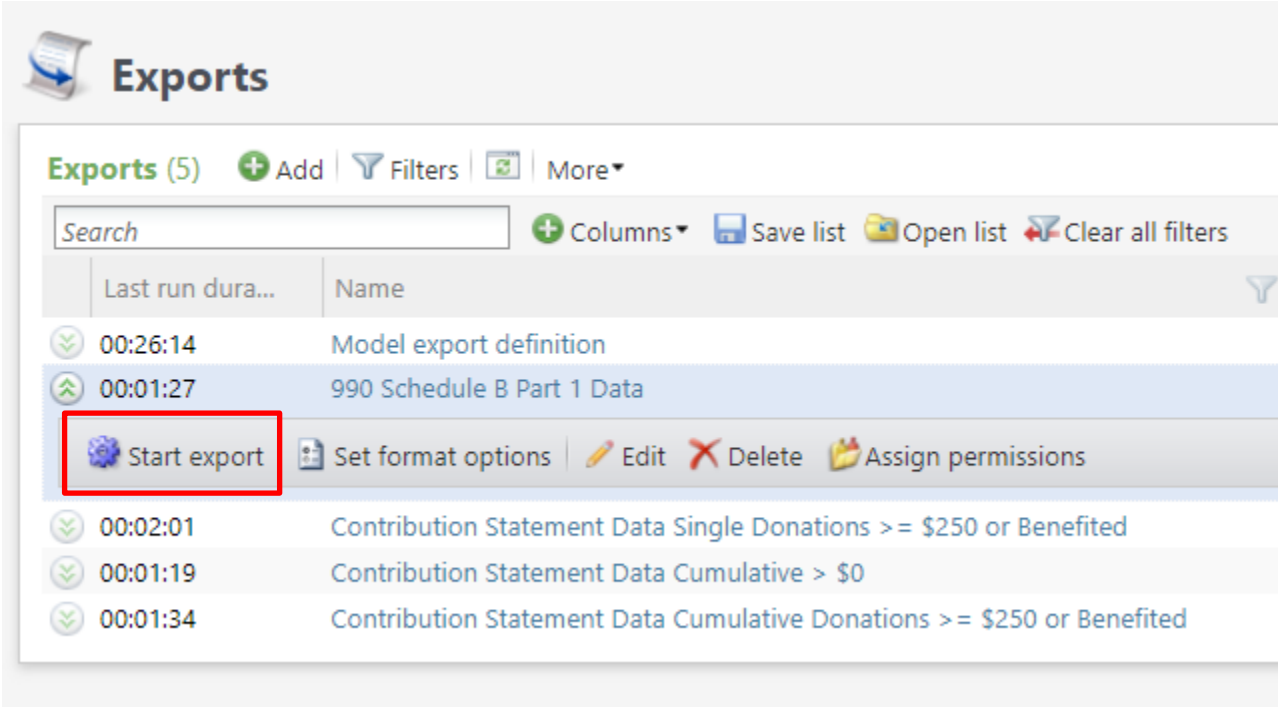
Type: Description:

Attachment: 990 Schedule B Part I Template.docx



IRS 990

Export is found under Administration / Exports. Drop the chevron and click start. There is no need to edit the process.



Exports

Exports (5) + Add | Filters | More ▾

Search Columns ▾ Save list Open list Clear all filters

Last run dura...	Name
00:26:14	Model export definition
00:01:27	990 Schedule B Part 1 Data
	Start export Set format options Edit Delete Assign permissions
00:02:01	Contribution Statement Data Single Donations >= \$250 or Benefited
00:01:19	Contribution Statement Data Cumulative > \$0
00:01:34	Contribution Statement Data Cumulative Donations >= \$250 or Benefited



IRS 990

When the process completes, use the "Download output" button to export to Excel. Save the file to your desktop so that you can connect your 990 template to it for the mail merge process.

The screenshot displays the '990 Schedule B Part 1 Data - Export' interface. At the top, there is a search icon and the word 'Export'. Below this, the title '990 Schedule B Part 1 Data - Export' is prominently displayed. The interface is divided into two main sections. The upper section contains metadata: 'Name: 990 Schedule B Part 1 Data', 'Description: DO NOT EDIT THIS PROCESS - JUST RUN IT', 'Query name\Export definition: 990 Schedule B Part 1 - New', and 'Export type: Ad-hoc Query'. The lower section features three tabs: 'Recent Status', 'History', and 'Job Schedules'. The 'Recent Status' tab is active, showing a 'Recent status' entry with a green checkmark and the text 'Completed'. A red rectangular box highlights the 'Download output' button, which includes a small Excel icon. Below the status, a 'Status message: Completed' is shown. The bottom section of the interface is a table with two columns of information: 'Started by: netbsa\chowens', 'Server name: AZSCUSBBCRMPD1', 'Started: 2/16/2024 2:06:16 PM', 'Total records processed: 23', 'Ended: 2/16/2024 2:07:44 PM', 'Number of exceptions: 0', and 'Duration: 00hr 01min 28s', 'Records successfully processed: 23'.

Name:	990 Schedule B Part 1 Data	Query name\Export definition:	990 Schedule B Part 1 - New
Description:	DO NOT EDIT THIS PROCESS - JUST RUN IT	Export type:	Ad-hoc Query

Recent Status | History | Job Schedules

Recent status Download output

Status: Completed

Status message: Completed

Started by:	netbsa\chowens	Server name:	AZSCUSBBCRMPD1
Started:	2/16/2024 2:06:16 PM	Total records processed:	23
Ended:	2/16/2024 2:07:44 PM	Number of exceptions:	0
Duration:	00hr 01min 28s	Records successfully processed:	23



IRS 990

Below is the template. You will need to double click the header and add your Council Name, Employer ID Number and update the year next to Contributors. Save your template then mail merge it to your export file. Remove <> and () when changing out information above.

Name of Organization		Employer identification number	
< Council Name >		<Employer ID Number>	
Part I Contributors (2019)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
Header	Mel 887 Lehi	\$ 25,000.00	Person



IRS 990 – Sample Output

Name of Organization	Employer identification number
XYZ Council	67-8923983829641

Part I Contributors 2023

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Sta PO Cor	\$ 00	Person
2	Mc PO Eug	\$ 00	Person
3	Wil PO Eug	\$ 1.00	Person
4	Bui 195 Eug	\$ 00	Person
5	Cha 302 Eug	\$ 00	Person
6	Lan 302 Eug	\$ 00	Person



PeopleSoft Transactions



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Accounts

- 1321 is your Contributions Receivable Prior year account. This is populated with pledges you expect to be paid late after you close your books (GJ from 1301). If you write-off all pledges this will have a zero balance.
- 4002 is your Contributions-FOS Prior Year account. Dollars are move to here if there is negative balance in 1321 as you reconcile monthly during current year.



Need to be done PeopleSoft

Beginning of the year in PeopleSoft, after closing the prior year these GL transactions required:

- Journal entry to move balances to new accounts
- Run a Posted detail in PS and Pledge Receivable report in CRM

Contribution - Pledges

- 1301 (CR) to 1321 (DR) (move from current year to prior)
- 1331 (CR) to 1301 (DR) (move from future to current)
- Allowance
- 1371 (DR) to 1381 (CR) (move current to prior)
- 1391 (DR) to 1371 (CR) (move future to current)



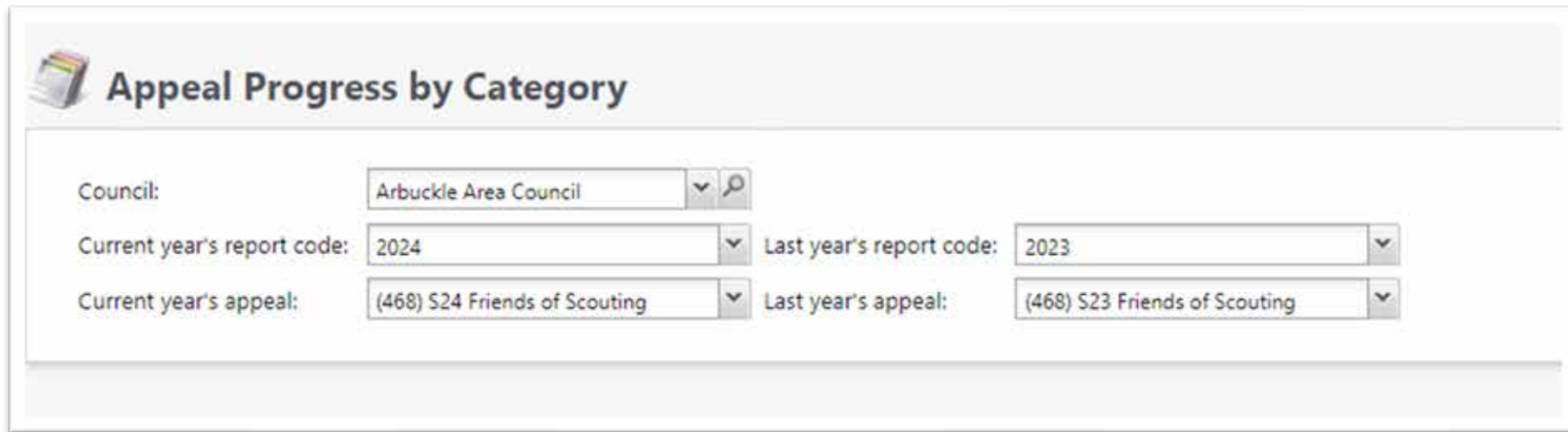
Tracking your 2024 Appeals

- Reports
- Data List



Appeal Progress By Category

- Found under Revenue \ Reports \ Appeal Progress by Category



The screenshot shows a web interface for generating a report. At the top left is a printer icon and the title "Appeal Progress by Category". Below this are four dropdown menus arranged in two rows. The first row contains "Council:" with "Arbuckle Area Council" selected and a search icon. The second row contains "Current year's report code:" with "2024" selected and "Last year's report code:" with "2023" selected. The third row contains "Current year's appeal:" with "(468) S24 Friends of Scouting" selected and "Last year's appeal:" with "(468) S23 Friends of Scouting" selected.

When you click the link, select your council. Then select the appeal years you want to compare. Then select the appeals from the appeal years and click view report on the right.



Appeal Progress by Category

This is a sample of the report. It can be downloaded as a PDF. Provides a comparison by Structure and category with summary at bottom of report.

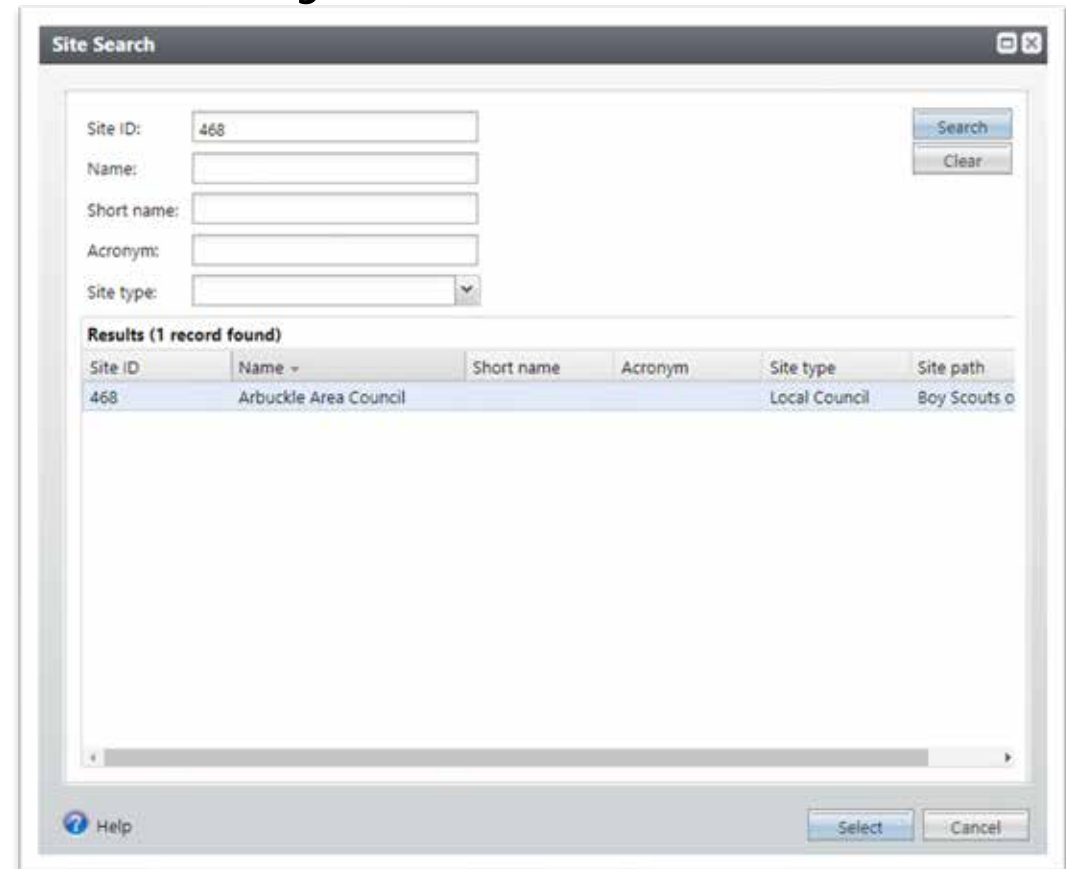
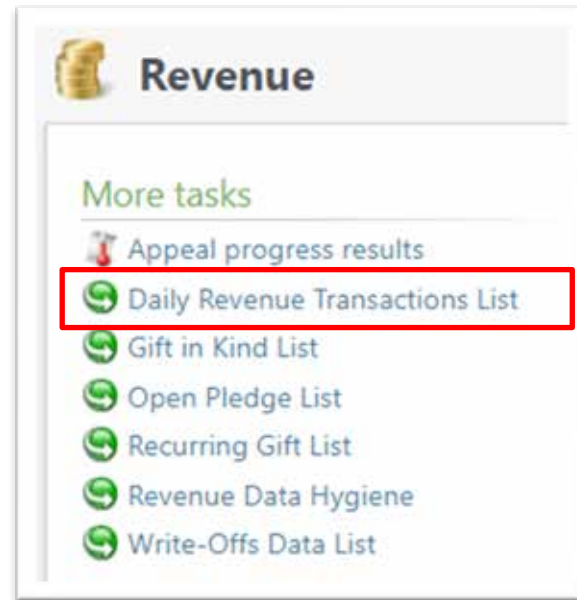
Report v0.05		Appeal Progress Report by Category					
Date:2/20/2024		(468) S24 Friends of Scouting (29.4% of \$131,000.00 goal)					
Time:6:24 PM		As compared to (468) S23 Friends of Scouting					
Arbuckle Area Council							
Chickasaw							
Giving Category	Previous Year		Current Year				
	Contributions	Donors	Contributions	Payments	Write-offs	Pledge Balances	Donors
Community Division	\$20,251	40	\$7,680	\$1,185	\$0	\$6,495	16
Family	\$450	2	\$0	\$0	\$0	\$0	0
Organization Totals:	\$20,701	42	\$7,680	\$1,185	\$0	\$6,495	16
Council							
Giving Category	Previous Year		Current Year				
	Contributions	Donors	Contributions	Payments	Write-offs	Pledge Balances	Donors
Community Division	\$1,600	4	\$0	\$0	\$0	\$0	0
Council Division	\$56,285	68	\$23,130	\$8,380	\$0	\$15,750	29
Organization Totals:	\$57,885	72	\$23,130	\$8,380	\$0	\$15,750	29



Daily Revenue Transactions

- Found under Revenue \ More Tasks \ Daily Revenue Transactions

Click the link and then insert your Site ID (Council #) and then select your council.



Daily Revenue Transactions

Daily Revenue Transactions - PLACE A DATE IN THE FILTER

Daily revenue transaction list for your council. For donor contact information download the the list. (2)  More ▾

Date Committed is: Committed on or after: Appeal equal to:  Apply  Reset

Council #	Date Committed	Committed	Revenue ID	Batch number	Appeal	Gift Date	Amo...	Structure	Giving Category	Inbound Channel
468	2/20/2024 1:22:45 PM	2/20/2024 1:22:45 PM	rev-45	9482	(468) S24 Friends of Scouting	2/20/2024	\$	aw	Council Division	Friends of Scouting
468	2/20/2024 1:22:44 PM	2/20/2024 1:22:44 PM	rev-45	9482	(468) S24 Friends of Scouting	2/20/2024	\$2	tiller	Community Division	Friends of Scouting

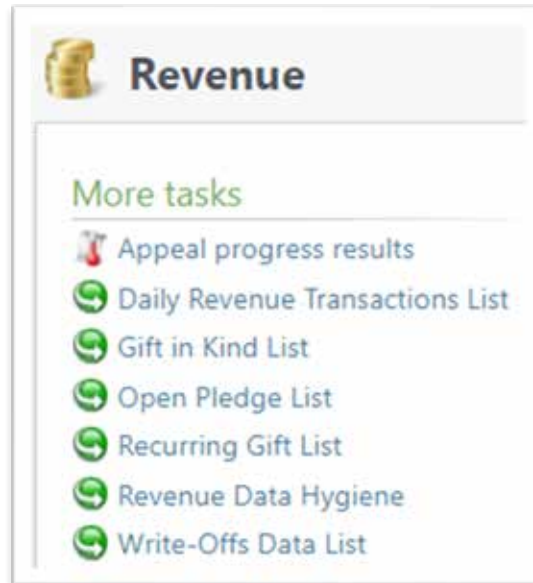
Place a date in a filter and click apply. If you need a report for a specific date, use the first filter. If you would the list for the week, use the "On or after" filter. More info is included in the download file.



Recurring Gift List

- Found under Revenue \ More Tasks \ Recurring Gift List
- Provides list of Recurrences you have in the CRM.

Click the link and then insert your Site ID (Council #) and then select your council.

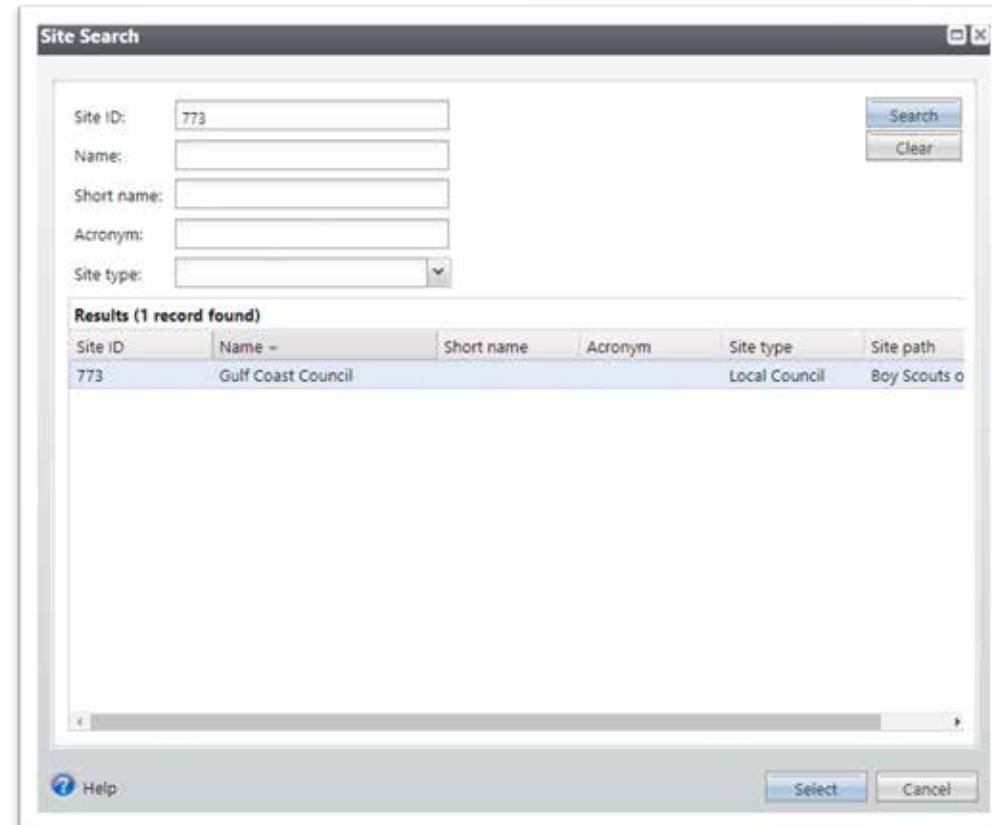


The screenshot shows the 'Revenue' section of the CRM interface. It features a 'More tasks' list with several options, each accompanied by a circular arrow icon. The 'Recurring Gift List' option is highlighted in blue.

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



The screenshot shows the 'Site Search' dialog box. It contains search criteria fields for Site ID, Name, Short name, Acronym, and Site type. The Site ID field is populated with '773'. Below the search fields, a table displays the search results, showing one record for Site ID 773, named 'Gulf Coast Council', which is a 'Local Council' with a site path of 'Boy Scouts o'. The dialog box includes 'Search' and 'Clear' buttons, and 'Select' and 'Cancel' buttons at the bottom.

Site Search

Site ID: Search Clear

Name:

Short name:

Acronym:

Site type:

Results (1 record found)

Site ID	Name	Short name	Acronym	Site type	Site path
773	Gulf Coast Council			Local Council	Boy Scouts o

Help Select Cancel



Recurring Gift List

Recurring Gifts List

Recurring list for your council (42) [More](#)

Constituent Name equal to: Recurring Status equal to: [Apply](#) [Reset](#)

Council #	Council	Appeal	Appeal ...	Constituent ID	Constituent Name	Recurring Amount	Recurring Frequency	Recurring St...	Recurring End D...	Recurring N...
773	Gulf Coast Council	(773) S23 - Friends of Scouting 2023	2023	8-264	ld	\$2,500	Monthly	11/9/2023		2/9/2024
<div style="display: flex; gap: 10px;"> Go to Constituent Go to revenue Edit Status </div>										
773	Gulf Coast Council	(773) S23 - Friends of Scouting 2023	2023	8-271	ry	\$1,000	Monthly	7/31/2023		1/31/2024
773	Gulf Coast Council	(773) S23 - Friends of Scouting 2023	2023	8-271		\$1,000	Monthly	3/17/2023		3/17/2024
773	Gulf Coast Council	(773) S23 - Friends of Scouting 2023	2023	8-534	ld	\$500	Monthly	3/15/2023		2/15/2024
773	Gulf Coast Council	(773) S23 - Friends of Scouting 2023	2023	8-534		\$500	Monthly	9/18/2023		3/18/2024
773	Gulf Coast Council	(773) S23 - Friends of Scouting 2023	2023	8-551	er	\$1,000	Monthly	3/6/2023		3/6/2024
773	Gulf Coast Council	(773) S23 - Friends of Scouting 2023	2023	8-551	an	\$1,000	Monthly	3/6/2023		2/6/2024
773	Gulf Coast Council	(773) S23 - Friends of Scouting 2023	2023	8-601		\$1,000	Monthly	8/22/2023		1/22/2024
773	Gulf Coast Council	(773) S24 - Friends of Scouting 2024	2024	8-251		\$2,000	Quarterly	2/9/2023		5/9/2024
773	Gulf Coast Council	(773) S24 - Friends of Scouting 2024	2024	8-251		\$1,000	Monthly	4/28/2023		2/28/2024

This list provides a quick way to view all your active recurring gift. by clicking the go to revenue button, you can jump to the recurrence and make changes to the appeal, BSA structure, giving category or solicitor. You can also change the status to canceled or terminated.



Recurring Gift List

Edit the recurrence to update the appeal. Change the solicitor on the Solicitor tab. Update the Giving Category or BSA Structure on the Attribute tab. These changes will not affect the GL. You can also edit the status of the recurrence on this page.

Tasks

- Edit recurring gift
- Edit status
- Change constituent on recurring gift
- Edit revenue ID
- Delete recurring gift

More information

- History
- Revenue and recognition

Shortcuts

Recent searches

- Recurring Gift List
- Daily Revenue Transactions List
- Write-Offs Data List
- Designation search
- Gift in Kind List

Recently accessed

- 11/9/2023 Recurring gift: \$2,500.00 - Vincent W. Mayfield
- Recurring Gifts List
- Daily Revenue Transactions - PLACE A DATE IN THE FILTER
- Recurring Gifts List
- Daily Revenue Transactions - PLACE A DATE IN THE FILTER

Vincent W. Mayfield
11/9/2023 Recurring gift: \$2,500.00

Transaction summary

\$2,500.00
Monthly
Active
Edit status

Next installment: 2/9/2024 (#0)
Last paid installment: None
Date started: 11/9/2023
Total paid: \$0.00
Payment method: Cash Edit
Credit Card Updated:

Designations (1)

Designation
77300001 Council Gener - C

Other recurring gifts (3)

Status
Active
Active
Terminated

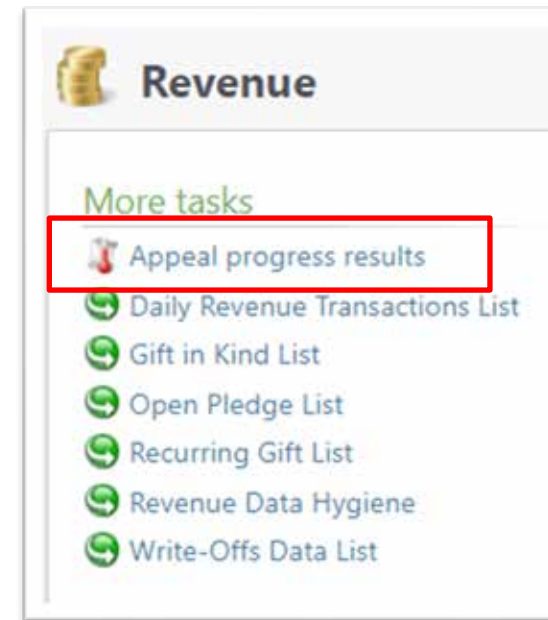
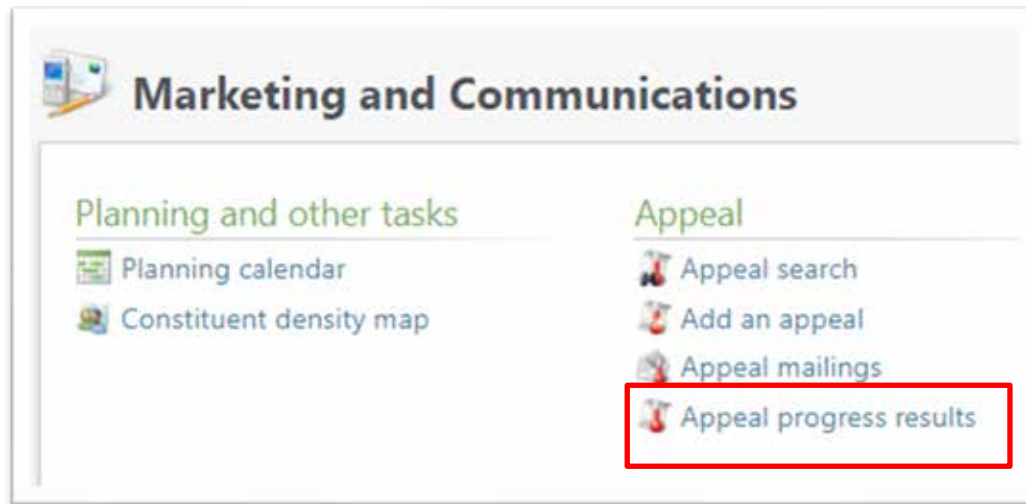
Details

Revenue ID:	rev-45686910	Acknowledgements:	Not acknowledged
Batch number:	L1046051	Source code:	
Revenue category:	Unrestricted by donor	Appeal:	(773) S23 - Friends of Scouting 2023
		Effort:	
		Inbound channel:	Friends of Scouting
Revenue reference:			



Appeal Progress Data List

- Found under Revenue \ More Tasks \ Appeal Progress Results
- Or Marketing & Communications \ Appeal \ Appeal Progress Results



Appeal Progress Results

Heart of America Council (307) - Appeal Progress Results

Contribution Summary | Payment Summary | Write-off & Balance Summary | Contributions by Segment | Payments by Segment | Write-offs & Balances by Segment | Appeal Designations | Appeal Data Integrity

Contribution Summary (posted 2/19/2024) ... note: View write-off and balance totals on 'Write-off & Balance Summary' tab (6) | More

Active equal to: Report Code equal to: 2024 Category equal to: Appeal equal to: Apply Reset

<input type="checkbox"/>	Site ID	Site Name	Report Code	Category	A...	Appeal	Total Contributions	Goal	Write-offs?	Balances?
<input type="checkbox"/>	307	Heart of America ...	2024	Annual Giving (Friends of Scou...	Y...	(307) A24- 2024 Annual Giving Campaign	14.55	\$0.00	No	Yes
<input type="checkbox"/>	307	Heart of America ...	2024	Endowment	Y...	(307) E24 - 2024 Endowment	18.46	\$0.00	No	Yes
<input type="checkbox"/>	307	Heart of America ...	2024	Other Support	Y...	(307) L24 Lone Bear Bricks	10.00	\$0.00	No	No
<input type="checkbox"/>	307	Heart of America ...	2024	Other Support	Y...	(307) S24 MOS Self Denial	12.00	\$0.00	No	Yes
<input type="checkbox"/>	307	Heart of America ...	2024	United Way - Allocations	Y...	(307) U24 United Way Campaign	19.01	\$0.00	No	No
<input type="checkbox"/>	307	Heart of America ...	2024	Special Events	Y...	(307) X24 Special Events	10.00	\$0.00	No	Yes

The "Contribution Summary" tab filtered to the appeal year gives you a quick snapshot of the progress of your appeals.



The "Contributions by Segment" tab gives you a quick report sorted by BSA Structure and Giving Category. A District Executive could run this to see progress.

Heart of America Council (307) - Appeal Progress Results

Contribution Summary | Payment Summary | Write-off & Balance Summary | **Contributions by Segment** | Payments by Segment | Write-offs & Balances by Segment | Appeal Designations

Contributions by Segment (posted 2/19/2024) ... STEPS: (1) Download to Excel, (2) Use Data:Subtotal, and (3) SUM by Appeal (39) | More ▾

Report Code equal to: 2024 | Category equal to: Annual Giving (Friends of) | Appeal equal to: | BSA Structure equal to: |

Site ID	Site Name	Report Code	Category	Acti...	Appeal ▲	BSA Structure	Giving Category	To
(307) A24- 2024 Annual Giving Campaign								
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Blue Elk	Community	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Blue Elk	Patron	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters	P-Camp Staff Scholarships	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Finance Division	Camp Staff Scholarships - General	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Finance Division	Cncl. Community	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Finance Division	Community	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Finance Division	Fdn - Bartle Scout Reservation	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Finance Division	Fdn - Community	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Finance Division	Fdn - Scoutreach	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Finance Division	Patron	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Finance Division	P-Bartle Scout Reservation	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Finance Division	P-Camp Staff Scholarships	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Finance Division	P-Camperships	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Support Division	Patron	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Support Division	P-Bartle Scout Reservation	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Support Division	P-Camp Staff Scholarships	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Support Division	P-Camperships	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Council Scouters - Support Division	P-Naish Scout Reservation	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Frontier	Community	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Frontier	Patron	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Frontier	P-Scoutreach	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Heart of America Council	Default Campaign	
307	Heart of Ameri...	2024	Annual Giving (...)	Yes	(307) A24- 2024 Annual Giving C...	Heart of America Council	Pvmt on Prior Year	



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Batches



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Using Group ID in batch

- Why?
 - Improves solicitor reporting
 - Units
 - Groups
 - Aligns pledge card history



Revenue Batch

When entering a Unit to a Revenue batch select the Constituent then in the Group ID enter the information of the Unit. (Troop 0003, etc)

The screenshot shows the 'Revenue Batch' software interface. The 'Main' menu is open, displaying various options like 'Batch', 'Constituent', 'Configuration', and 'Processes'. The 'Properties' section shows 'Owner: Cornelia Ellis BSA-BSA', 'Projected No.: 0', 'Current No.: 1', 'Projected total: 0.0000', and 'Current total: 0.0000'. Below this is a table with the following columns: Barcode, Constituent, Lookup ID, Group ID, Amount, and Receipt a... The 'Group ID' column is highlighted in yellow. The table contains one row with the following data: Barcode (empty), Constituent (empty), Lookup ID (empty), Group ID (empty), Amount (\$0.00), and Receipt a... (\$0.00). The 'Constituent Window' is visible at the bottom of the interface.

	Barcode	Constituent	Lookup ID	Group ID	Amount	Receipt a...
1					\$0.00	\$0.00



Search for the BSAFR Group

The screenshot shows a dialog box titled "BSAFR Group Search". It contains the following fields and controls:

- Name:** A text input field containing "Troop 0003".
- Lookup ID:** An empty text input field.
- Group type:** A dropdown menu.
- Site:** A dropdown menu with a search icon.
- Search:** A yellow button.
- Clear:** A button.
- Results:** A table with the following header:

Lookup ID	Name	Group type
-----------	------	------------
- Select:** A button.
- Cancel:** A button.



Populate in the BSAFR Group

The Group ID will populate with the Unit information. This will attach to the pledge or payment and will show on the Unit and Constituent's profile.

The Giving Category and BSA Structure columns will also fill in from the group.

The screenshot shows a software interface with a toolbar at the top containing buttons for 'Close', 'Export', 'Constituent Solicit codes', 'Constituent Edit', 'Constituent Go to', 'Configuration Properties', 'Configuration Customize fields', 'Processes Validate', 'Processes Update status', 'Processes Update projected totals', and 'Set row message'. Below the toolbar, there is a summary section for 'a Ellis BSA-BSA' with 'Projected No.: 0', 'Current No.: 1', 'Projected total: 0.0000', and 'Current total: 0.0000'. A table below this section has the following data:

Constituent	Lookup ID	Group ID	Amount	Receipt a...
John Warters	[REDACTED]	Troop 0003 BT Ann Arbor	\$0.00	\$0.00



BSAFR Group Fields



Troop 0003 BT Ann Arbor - 780 (8816)

Group Lookup ID: 8-18490494

Constituencies: Committee

Show more

- Summary
- Members
- Contact
- Details
- Relationships
- Revenue
- Memberships
- Committee
- Documentation and Interactions
- Communications
- History
- Attributes
- Smart Fields
- Security
- BSAFR**

BSAFR Fields Edit Run pledge cards

Group public name:

Is BSAFR group: Yes

Solicit for BSAFR: Yes

BSA structure for revenue:

Giving category for revenue: Family Campaign

BSAFR solicitor current: Troop 0003 BT Ann Arbor - 780 (8816) (Lookup ID: 8-18490494)

BSAFR presenter current:

BSAFR reporting parent group:

BSAFR reporting level: Unit

BSAFR reporting hierarchy by name: Troop 0003 BT Ann Arbor - 780 (8816)

BSAFR reporting hierarchy by level: Unit

Can solicit revenue and set fundraising goals: Yes

Can set committee goals: Yes

Can coordinate events: Yes



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Blackbaud Merchant Services

- Required Signatory Check.
- If not completed, account will stop disbursements April 1.
- Log into BBMS and see if you have an orange banner on home page
- Click the link and complete the information

The screenshot displays the Blackbaud Merchant Services interface. At the top, there is a navigation bar with a hamburger menu icon on the left and several menu items: "Merchant Services", "Home", "Virtual terminal", "Transactions", "Reports", "Terminal devices", and "Control panel". Below the navigation bar, the main content area shows the text "Boy Scouts - Arbuckle Area Council" on the left and a red-bordered rectangular box on the right. At the bottom of the page, there is a yellow banner with a warning icon and the text: "To avoid interruption in payment processing, please update your account's signatory information as required by federal law and card brand rules. [Update now.](#)"

PAUSE and breathe...



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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

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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

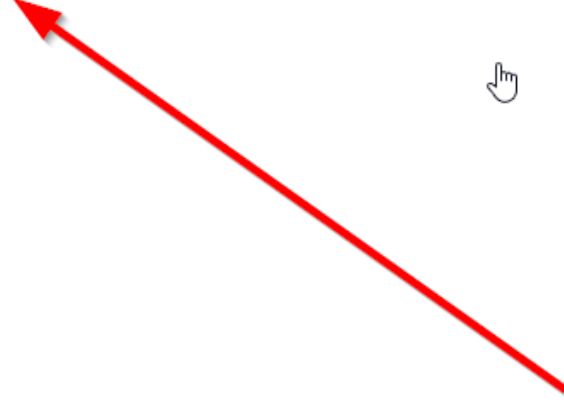
General Assistance

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



<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

March 20, 2024

10:00 am & 2:00 pm CT



Questions & Answers



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