

# CRM User Forum

April 17, 2024

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# Objectives

Blackbaud Merchant Services  
Global Write-off & Write-off Data List  
The 990  
Blackbaud / PeopleSoft



# Blackbaud Merchant Service

- Credit Card Processor linked to CRM
- Active if you have used credit card processor in prior 13 months
- Access is through Blackbaud.com with a Blackbaud ID



# Blackbaud Merchant Service

- Batches used in your Credit Card Processor
  - LC Credit Card Payment Donation
  - LC Pledge Payment Credit Card
  - LC Combined Batch
  - LC Import of Pledge Payments Credit Card Scheduled Process
  - LC Import of Recurring Credit Card Scheduled Process



# Blackbaud Merchant Service

Batch L1068822

Main Revenue

Batch: Save, Save and close, Export

Constituent: Solicit codes

Constituent: Edit, Go to

Configuration: Properties, Customize fields

Processes: Validate, Update status, Validate addresses (all rows), Update projected totals

Messages: Set row message, Clear row message, Clear all, Show all, Select previous, Select next, Filter...

Properties

	Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type	Application	Payment method	Card type	Name on card	Card number
1	Batman	8-59862205	\$100.00	\$100.00	4/15/2024	4/15/2024	Payment	Donation	Credit card	Visa	Batman	*****1111
2	Wonder Woman	8-15220142	\$100.00	\$100.00	4/15/2024	4/15/2024	Payment	Donation	Credit card	Visa	Wonder Woman	*****1111
3	The Flash	8-59862210	\$100.00	\$100.00	4/15/2024	4/15/2024	Payment	Donation	Credit card	Visa	The Flash	*****1111
*												

Above is a sample LC Credit Card Donation Payment batch. The individuals are loaded in with their CC info and it is ready to be ran through a credit card processor. Save and close the batch and write down the batch number to process.



# Blackbaud Merchant Services

Revenue \ EFT \ Credit Card Processing. Drop the chevron and click start and type in the batch number needing processed. The screen on the right will open so that you can see the results when completed.

**Credit Card Processing**

Credit card processing (1) Add Filters

Sites: Selected sites Apply Reset

Name: L001 Credit Card Processing Process

Start process Edit Delete Assign permis

**Run credit card processing process**

Name: L001 Credit Card Processing Process  
Description: L001 Greater Alabama Council

**Where are the credit card transactions coming from?**

Batch: L1068822

Validate projected totals before processing transactions

Help Start Cancel

**Credit card processing process list**

**L001 Credit Card Processing Process**

Name: L001 Credit Card Processing Process  
Batch: L1068822  
Account: BSA Demo  
Description: L001 Greater Alabama Council

Recent status History Job schedules

**Recent status** Exception report Results report Download rejection file

Status: ✔ Completed  
Status message: Completed

Started by: netbsa\jkuehn Server name: AZSCUSBBCRMSTG2  
Started: 4/15/2024 10:24:17 AM Number of attempts for these transactions: Not applicable  
Ended: 4/15/2024 10:24:33 AM Maximum number of allowed attempts: Not applicable  
Duration: 00hr 00min 16s

**Transaction outcomes**

Payments processed:	3	<a href="#">View results report</a>
Authorizations:	3	Batch number L1068822
Rejections:	0	
Provisional rejections:	0	
Permanent rejections:	0	



# Blackbaud Merchant Service

Blackbaud.com

Sign In



If you are processing credit cards weekly, you will need to log into Blackbaud.com to pull your disbursement reports to balance your checking account

## Sign in



A new look is coming soon. Blackbaud is improving its sign-in page with a more modern look and feel. [Learn more](#)

to continue to Blackbaud ID

Email address

john.kuehn@Scouting.org

Password

\*\*\*\*\*

[Forgot password?](#)

Remember my email

Sign in

## Blackbaud ID Sign-in

Multi-factor authentication

We sent a verification code as a text message to your personal device.

To confirm your identity, enter the verification code (which, for security, expires within 5 minutes).

Verification code

Remember this browser

Your Blackbaud ID won't require a verification code on this browser for 30 days. Don't select if on a public device.



# Blackbaud Merchant Services

Welcome, John!



## Profile

Manage your Blackbaud ID, contact information, communication preferences, and access manage file transfer.



## Security

Manage user access for your organizations, including adding and removing users and roles, and viewing user action history.



## Account

View your organizations' account.



## Billing

View and manage your organizations' invoices and payment preferences.



## Training

Enroll in classes at BlackbaudU Campus, view training FAQs or chat with Training Help.



## Help & Support

Search the Knowledgebase, visit the Community or manage cases in the Support Portal.

## Solutions ?

### Blackbaud Grantmaking

Manage your entire grantmaking workflow, from online grant applications through payments, in one solution.

### Merchant Services

An end-to-end payment processing solution.

Once logged into Blackbaud.com, you will land on your profile page. To reach Merchant Services, you can click the link in the lower left corner or the link under the coin stack in the upper left-hand corner.



# Blackbaud Merchant Services

## Boy Scouts of America

### Welcome

The new **Blackbaud Merchant Services** Web Portal improves your day-to-day experience, streamlines processes, and applies the latest security standards. For an overview, visit our [in-product Help](#).

### What's new

New and enhanced features are added on a frequent basis.

- To learn about the newest features, visit [What's New](#).
- For a recap of recently released features, visit [What's Recent](#).

### Link additional accounts to Blackbaud ID

To manage multiple **Blackbaud Merchant Services** accounts from one login, link each account to your Blackbaud ID. For more information, see [Link accounts to Blackbaud ID](#).

**Note:** You can only link one account at a time.

[Link another account](#)

### Updates

#### 3/8/2024 -- ACH disbursement schedule changes for US accounts 📘

Effective April 2, 2024, ACH direct debit transactions will disburse in the next disbursement cycle after a waiting period of five business days. This adjustment aims to mitigate issues related to the reconciliation of ~~returned, disputed, or fraudulent~~ ACH transactions. The disbursement of funds from other payment methods, like credit cards, will remain unchanged. For more information, see Knowledgebase article [Where can I view the disbursement schedule?](#)

#### 12/8/2023 -- 2024 Disbursement Schedules 📘

You will land on you home page. You can pull your disbursement calendar for the year on this page. Alerts on your account will also be displayed on this page.

# Blackbaud Merchant Services

## Boy Scouts of America transactions

Default list



3 transactions \$300.00 gross amount \$9.27 fee amount \$290.73 net amount

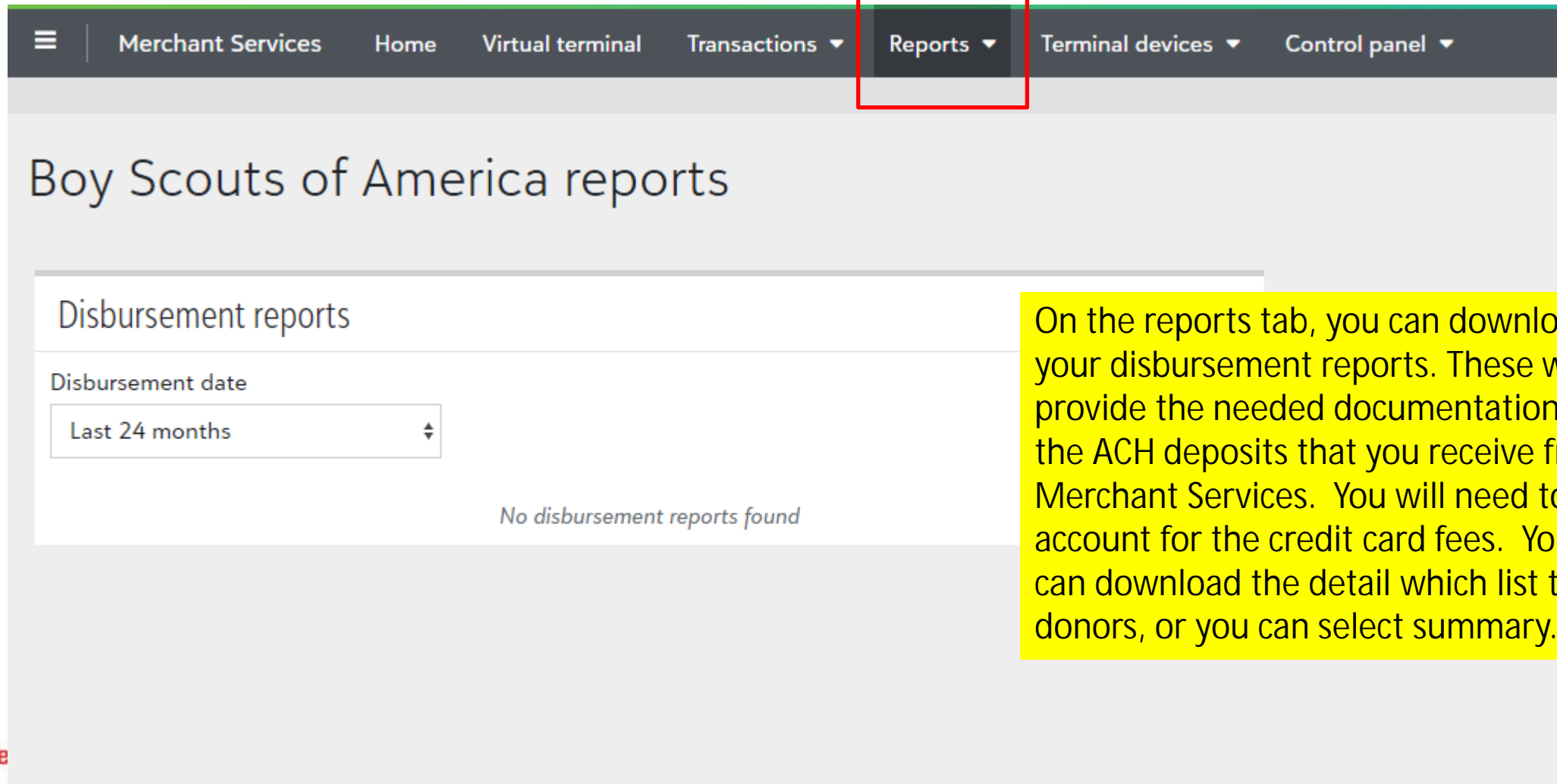
Save Filter Columns Export Delete Find account holder in this list

Result: Approved Test only Transaction date: Last 90 days

	Account holder	Transaction date	Email address	Gross amount	Net amount	Phone number	Result
...	Batman	4/15/2024, 11:24:28 AM		\$100.00	\$96.91		Approved
...	The Flash	4/15/2024, 11:24:28 AM		\$100.00	\$96.91		Approved
...	Wonder Woman	4/15/2024, 11:24:28 AM		\$100.00	\$96.91		Approved

On the transaction tab, navigate to the transaction list to review transaction processed in your batches. Or you can select suspect transactions or chargeback to address issue on transaction that are large and need a second level of approval or address a donor's concern on why they are being charge by your council.

# Blackbaud Merchant Services

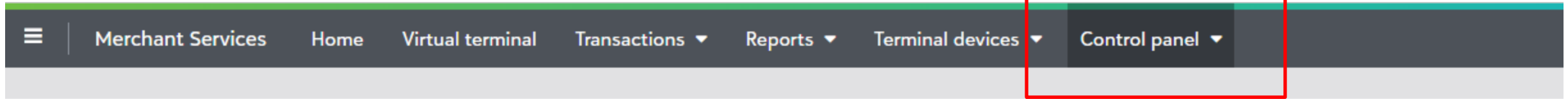


The screenshot shows the Blackbaud Merchant Services interface. At the top, there is a navigation bar with several menu items: a hamburger menu icon, "Merchant Services", "Home", "Virtual terminal", "Transactions", "Reports", "Terminal devices", and "Control panel". The "Reports" menu item is highlighted with a red rectangular box. Below the navigation bar, the page title is "Boy Scouts of America reports". Underneath, there is a section titled "Disbursement reports". Below this title, there is a label "Disbursement date" and a dropdown menu currently set to "Last 24 months". Below the dropdown menu, the text "No disbursement reports found" is displayed. In the bottom left corner, there is a logo for the Boy Scouts of America and the text "Pre".

On the reports tab, you can download your disbursement reports. These will provide the needed documentation on the ACH deposits that you receive from Merchant Services. You will need to account for the credit card fees. You can download the detail which list the donors, or you can select summary.



# Blackbaud Merchant Services



## Boy Scouts of America settings

Contact details	▼	⊞
Email acknowledgement	▼	⊞
Notifications	▼	⊞
Signatory authorities	▼	⊞

Disbursement information
Account configurations
PayPal commerce platform

Control Panel \ Setting provides you the ability to review your contact details, set notifications, update your bank account and change signatories.



# Blackbaud Merchant Services

- Review Contact Details – Update and remove John Kuehn
- Review Notifications – Remove those no longer employed
- Review Signatory – When the person moves or changes replace
- Disbursement Information – Update deposit bank changes
- Account Configuration – Leave Default
- Email acknowledgements – Don't enable
- PayPal Commerce – BBMS not connected to online platform



# 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 errors with mismatched appeals
- Pledge payments want to fulfill oldest pledges first



# Write-off Overview

- Revenue Tab – Global Pledge Write-off
  - Click chevron next to council – Edit Process
  - Edit appeal(s) to write-off
  - Preview results
  - When ready – click Start to run process
  - The process runs – see results in “Write-Offs Data List”
  - See detailed presentation on February recording



# 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 for IRS-990



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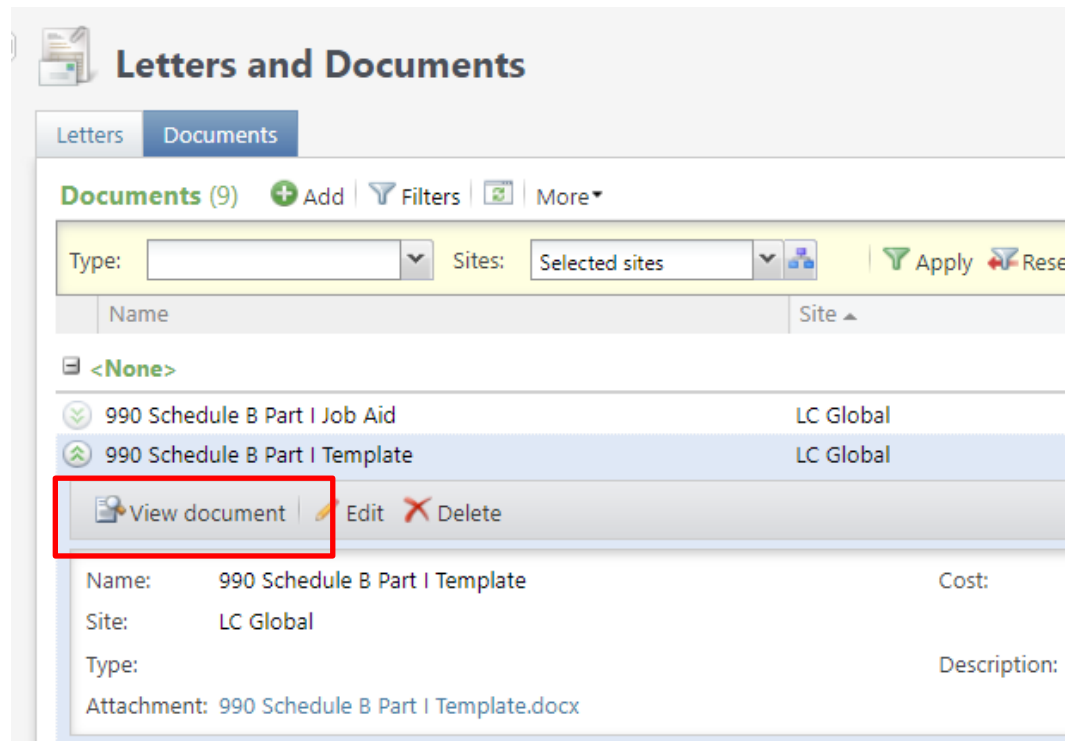
# IRS 990

- Download Direction from User Guide under Reports
  - IRS 990 Schedule B
- Process is like running contribution statements.
- Provides a list of donor(s) who have pledged or donated \$5,000 or more 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

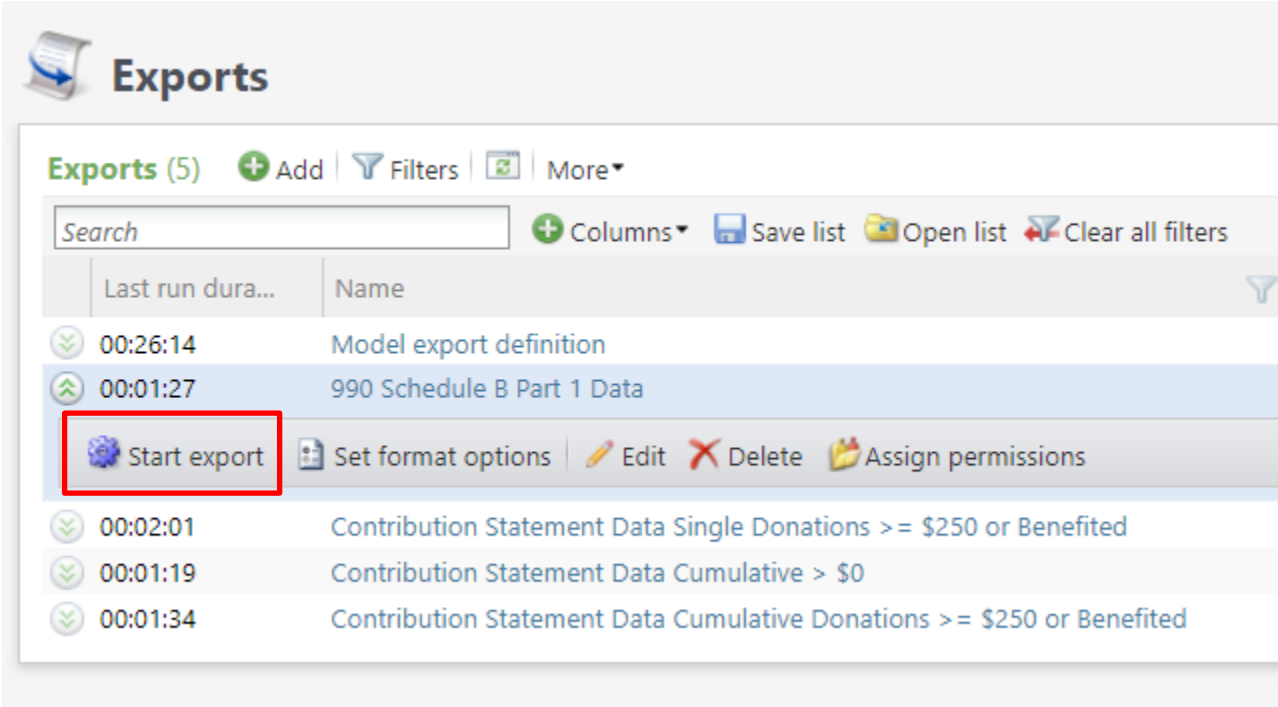


The screenshot shows a web interface titled "Letters and Documents". It has two tabs: "Letters" and "Documents", with "Documents" selected. Below the tabs, there are filters for "Documents (9)", "Add", "Filters", and "More". There are also dropdown menus for "Type:" and "Sites:" (set to "Selected sites"), along with "Apply" and "Reset" buttons. A table lists documents with columns for "Name" and "Site". Two documents are listed: "990 Schedule B Part I Job Aid" and "990 Schedule B Part I Template", both associated with "LC Global". Below the table, there are action buttons: "View document" (highlighted with a red box), "Edit", and "Delete". Below the buttons, there is a detailed view for the selected document "990 Schedule B Part I Template", showing fields for "Name", "Site", "Type", "Attachment" (990 Schedule B Part I Template.docx), "Cost", and "Description".



# 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 'Exports' section of a software interface. The main heading is '990 Schedule B Part 1 Data - Export'. Below this, there are fields for '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'. A navigation bar includes 'Recent Status', 'History', and 'Job Schedules'. The 'Recent status' tab is active, showing a 'Download output' button with a dropdown arrow, which is highlighted with a red box. Below the button, the status is 'Completed' with a green checkmark icon. Further down, there are details for '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', and '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.

**Note:** Remove <> and () when changing out information above.

Name of Organization		Employer identification number	
< Council Name >		< Employer ID Number >	
<b>Part I Contributors (2019)</b>			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
Header	Mel 887 W 100 E ST E 1 Lehi UT 84043-1675	\$ 25,000.00	Person



# IRS 990 – Sample Output

<b>Name of Organization</b>	<b>Employer identification number</b>
XYZ Council	67-8923983829641

**Part I** Contributors 2023

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Stark PO Bx Corva	\$ 00	Person
2	McDc PO Bx Eugei	\$ 00	Person
3	Wildi PO Bx Eugei	\$ 1.00	Person
4	Build 195 M Eugei	\$ 00	Person
5	Charr 3028 Eugei	\$ 00	Person
6	Lanz   3025 Eugei	\$ 00	Person



# Blackbaud/PeopleSoft



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# Batch Entry Creates GL Entries

Designation	Inbound channel	Revenue category
30708011 Invest in Charactor-Counci -...	Friends of Scouting	Unrestricted by donor

During batch entry the data entry clerk not only affects what shows in CRM but also send transactions to the council's General Ledger in PeopleSoft.

The three fields that create these entries are:

1. The Designation
2. The Inbound Channel
3. The Revenue Category



# CRM Designation

The Designation does 3 items **30708011**

1. The red digits represent the council number. This tells PeopleSoft which council's GL should receive the transaction.
2. The green digits represent the Project Code in PeopleSoft the transaction should record against. CRM allows up to 4 digits for a project code.
3. The blue digit is the Fund. In the example above we have a "1". This designation will send it to your operating fund. 2 = Capital, 3 = Endowment



# Inbound Channel

- The Inbound Channel determine which contribution account the entry records against in PeopleSoft.
- In our example Friends of Scouting = 4001
- Current year inbound channels are used during the current PeopleSoft year. 2023 = Current Year. These transactions would have a 2023 postdate.
- FY Inbound Channels are used when putting in monies for Next year when you are still in current year. 2024 monies when you are still in 2023. These transactions would have a 2023 postdate
- PY inbound channels are used for payment that arrive after Peoplesoft has been closed. Payment received in 2024 for 2023. These transactions would have a 2024 postdate.



Associated Organizations - LFL Foundation	FY - Associated Organizations - LFL Foundation	PY - Associated Organizations - LFL Foundation
Associated Organizations - National Council	FY - Associated Organizations - National Council	PY - Associated Organizations - National Council
Associated Organizations - OA	FY - Associated Organizations - OA	PY - Associated Organizations - OA
Associated Organizations - Other	FY - Associated Organizations - Other	PY - Associated Organizations - Other
Capital Contributions	FY - Capital Contributions	PY - Capital Contributions
Direct Mail	FY - Direct Mail	PY - Direct Mail
Foundations and Trusts	FY - Foundations and Trusts	PY - Foundations and Trusts
Friends of Scouting	FY - Friends of Scouting	PY - Friends of Scouting
Government Grants	FY - Legacies and Bequests	PY - Legacies and Bequests
Legacies and Bequests	FY - Other Direct - Learn for Life	PY - Other Direct - Learn for Life
Other Direct - Learn for Life	FY - Other Direct - Purpose	PY - Other Direct - Purpose
Other Direct - Purpose	FY - Other Direct - Service Contributions	PY - Other Direct - Service Contributions
Other Direct - Service Contributions	FY - Other Direct Contributions	PY - Other Direct Contributions
Other Direct Contributions	FY - Other Indirect Contributions	PY - Other Indirect Contributions
Other Indirect Contributions	FY - Project Sales	PY - Project Sales
Project Sales	FY - Special Event Fundraising	PY - Special Event Fundraising
Special Event Fundraising	FY - Unassociated Organizations	PY - Unassociated Organizations
Unassociated Organizations	FY - United Way - Allocations	PY - United Way - Allocations
United Way - Allocations	FY - United Way - Donor Designations	PY - United Way - Donor Designations
United Way - Donor Designations		



# Revenue Category - Restrictions

- Used to determine restriction – Time or Project
- Unrestricted = Contribution will be used this year
- Temp Restricted = Contribution will be released when the time for it use arrives. Capital Dollars for a building
- Permanently Restricted = Contribution can't be spent. Used when a donor placed monies in your endowment.

Unrestricted by donor

Temporarily restricted by donor

Permanently restricted by donor



# Revenue Category – Special Events

- Used in conjunction with the Inbound Channel "Special Event Fundraising"
- Special Event Fundraising with Unrestricted by donor will send the transaction to your default special event account – Sponsorships (4201) or Ticket Sales (4202).
- You can alter the Revenue Category to pick a specific Special Event Contribution account other than your default.



# Inbound Channel + Revenue Category

## Specific Special Event Revenue Account

Designation	Inbound channel	Revenue category
30708011 Invest in Charactor-Counci -...	Special Event Fundraising	Event - Advertising

Designations can be permissioned to allow specific GL Account to be used. The Revenue Categories to the right will drive special event revenue to specific accounts when the Special Event Fundraising Inbound Channel is selected.

### Event - Advertising

Event - Auction item donation

Event - Participant/Ticket

Event - Program item

Event - Concessions

Event - Sponsorship

Event - Other revenue

Event - Fees

Sales/Non-Fundraising Revenue

Tax - State Sales Tax



# PeopleSoft Account

- Designation – 30708011
- Inbound Channel – Friends of Scouting – 4001
- Revenue Category – Unrestricted
- Account created for Peoplesoft – L307-1-4001-801-90

Council #	Fund	Contribution Account	Project Code	Restriction
Designation	Designation	Inbound Channel	Designation	Revenue Category
L307	1	4001	801	90





# Designation Creation

- See if your designation is in CRM before requesting it.
- Use a new designation worksheet to request a new designation.
- The designation worksheet will have you determine which Inbound Channels should work with your project code
- Hint – If you want to know which contribution accounts in PeopleSoft are connected to an Inbound Channel look at the new designation worksheet.



# Blackbaud CRM Resources

- MyBSA / Fundraising / Blackbaud CRM Resources
- When screen opens slide to the bottom to find:
  - Designation Request Sheet
  - Event Revenue Setup Request
  - Read direction tab on worksheet, fill in information tab
  - Submit via Member Care ticket for service

The image shows two screenshots from a Blackbaud CRM interface. The top screenshot is a dropdown menu titled "Fundraising" with up and down arrow icons. It lists several options: "Blackbaud CRM", "Blackbaud CRM Resources" (which is highlighted with a red checkmark), "Blackbaud CRM User Guide", "Learn Blackbaud CRM (self-study)", "Scouting Gives Log-in", "Scouting Gives User Guide", and "MatchFinder Matching Gifts Search". The bottom screenshot shows a section titled "Blackbaud Setup Documents" with a list of documents: "Barcode Scanner Specifications", "Blackbaud Merchant Services Checklist", "Designation Request sheet", and "Event Revenue Setup Request".



BUSINESS UNIT	
Council/Business Unit ID	L358
Name	Patriots' Path Council

PEOPLESOFT PROJECT ID AND NAME	
Project ID (3-8 Digits)	834
PeopleSoft Project Description/Name	Stem Awards Dinner

FUND TYPE(S) NEEDED FOR THIS PROJECT		
FUND 1	OPERATING	YES
FUND 2	CAPITAL	no
FUND 3	ENDOWMENT	no

**SPECIAL INSTRUCTIONS/REQUESTS**  
 Type any special instructions here. For example:  
 1. Different names your Council may want for the separate Operating, Capital and Endowment designations that could be created for this Project.  
 2. Any additional PeopleSoft Accounts (from Chart of Accounts) that are needed to process fundraising revenue for this Project.

PAY METHODS ACCEPTED		
Used?	Account	Description
<b>DEFAULT</b>	1001	Checking Account Bank 1
no	1002	Checking Account Bank 2
no	1003	Checking Account Bank 3
no	1004	Checking Account Bank 4
no	1005	Checking Account Bank 5
no	1006	Checking Account Bank 6
no	1007	Checking Account Bank 7
no	1008	Checking Account Bank 8
no	1009	Checking Account Bank 9
no	1010	Checking Account Bank 10
no	1011	Checking Account Bank 11
no	1012	Checking Account Bank 12
no	1013	Checking Account Bank 13
no	1014	Checking Account Bank 14
no	1030	Depository Account Bank 1
no	1031	Depository Account Bank 2
no	1032	Depository Account Bank 3
no	1049	Transfer between Bank Accounts
no	1051	Savings Account Bank 1
no	1052	Savings Account Bank 2
no	1101	Short Term Investments Bank 1
no	1751	Other Current Assets (for Auction Items)
no	1800	Camp Fixed Assets
no	1800	Service Center Fixed Assets
no	1841	Camp Construction-in-Progress
no	1841	Service Center Construction-in-Progress
no	1841	Service Center Construction-in-Progress
no	1901	Long Term Invest Bank 1
no	1902	Long Term Invest Bank 2
no	2237	Payroll Deduction**
no	9430	Gift-in-Kind**
no	9430	Service Contribution**

INBOUND CHANNELS NEEDED		
Needed?	Account	Chart of Accounts Category
no	4001	Friends of Scouting
no	4010	Direct Mail
no	4071	Project Sales
no	4101	Capital Contributions
<b>SPE default:</b>	<b>4201</b>	<b>Special Event Fundraising</b>
n	4201	Sponsorship/Donation [S]
n	4202	Participant/ Ticket [T]
n	4203	Program Item [P]
n	4204	Advertising [A]
n	4205	Concessions [C]
n	4209	Auction Item Donation [I]
n	4231	Other Revenue [O]
n	4250	Fees (Fair Market Value) [F]
n	2761	State Sales Tax [X]
no	4301	Legacies and Bequests
no	4401	Foundations and Trusts
no	4501	Other Direct Contributions
no	4531	Other Direct - Service Contributions
no	4551	Other Direct - Learn for Life
no	4601	Associated Organizations - OA
no	4602	Associated Organizations - National Council
no	4603	Associated Organizations - Other
no	4604	Associated Organizations - LFL Foundation
no	4701	United Way - Allocations
no	4702	United Way - Donor Designations
no	4801	Unassociated Organizations
no	4901	Other Indirect Contributions
no	5001	Government Fees



Pre

New\_Designation\_Request Instructions





Council Support

Council Management Support

Contact Council Management Support

Council Assessments

Council Board Resources

Council Business Practices

Council Fiscal Management and Training

Journey to Excellence

Council Funding and Finance

Financial Planning

Funding The Council

Council Administration

Local Council Financial Audits

Back Office Business Solutions

Home > Council Support > Council Funding and Finance > Council Administration

# Council Administration

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

[Accountable Plan Template](#)

[Council Office Procedures](#)

[Council Stewardship Policies](#)

[FASB Accounting Changes and the BSA](#) – new for 2018

[Fiscal Management Procedures for Stewardship](#)

[Fiscal Policies and Procedures for BSA Units](#) – Revised April 2022

– [BSA Units PayPal and Venmo Reporting Update](#)

[Interpreting Financial Statements](#)

[Life Insurance Imputed Calculation](#)

[Local Council Accounting Manual](#)

[Local Council Financial Audit Tools](#)

[New York Conflict of Interest Policy](#)—Updated March 2014

[New York Conflict of Interest Policy](#)—March 2014

[Records Retention Policy](#)— Updated January 2019

Presentation: [Fringe Benefits: Employer-Provided Vehicles and Group-Term Life Insurance](#) – Uploaded April 2014

[Record Camp Card Transactions](#)—PeopleSoft

[Record Product Sales](#) in General Ledger

[Time Study Forms](#)

**Blackbaud CRM Resources**

[BSA Fiscals Forum](#)

[PeopleSoft Support](#)

- [Accounts Payable](#)

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



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COUNCIL SUPPORT

Council Management Support

Council Funding and Finance

# CRM Resources

## CRM Process Videos

### CRM (Blackbaud) User Forum Presentations

[Report Cookbook \(for OLTP\) BSA Appeal Progress & Appeal Constituent Reports](#)

### 2024

January 2024 User Forum – [Slide Deck](#) – [recording](#)

– Creating 2023 Contribution Statements – Pledge Write-offs – Prior Year – Events & Mapping -Updating Reminders

February 2024 User Forum – [Slide Deck](#) – [recording](#)

– Finishing Up 2023 – Year-End GL Transactions – Tracking 2024 Appeals – BSAFR in Batch

### 2023

January 2023 User Forum – [Slide Deck](#) – [recording](#)

– Creating 2022 Contribution Statements – Cleaning Up Unposted batches

February 2023 User Forum – [Slide Deck](#) – [recording](#)

– Global Write-off – Reports for 990 – Beginning GL FR Transactions – Using Group ID in batch

March 2023 User Forum – [Slide Deck](#) – [recording](#)



# Member Care

- Phone 972-580-2489
- <http://membercare.scouting.org>
  - Creating an incident directly in JIRA








# Welcome to the National IT Service Catalog




We value your feedback. [Click Here](#)

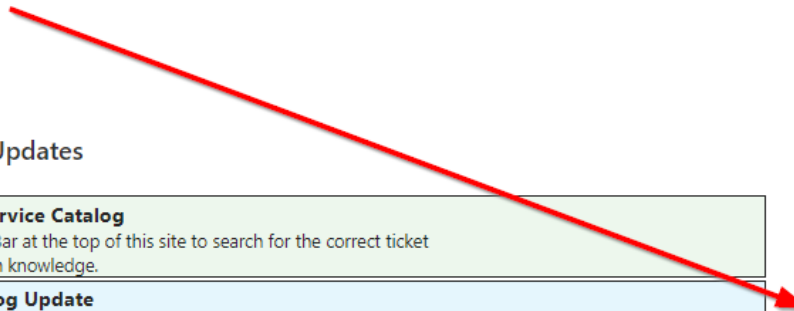
[My Open Tickets](#) | [My Closed Tickets](#) | [Knowledge Base](#) | [Report Security Issue](#) | [Report Phishing Attempt](#) | [Password Reset](#) | [Office365](#) | [HR Gateway](#) | [MyBSA](#)

## Announcements & Updates

-  **Search the Service Catalog**  
Use the Search Bar at the top of this site to search for the correct ticket type or to search knowledge.
-  **Service Catalog Update**  
A new form has been created to make adding or removing Scout Executive Designees and System Admins easier. Scout Executives can submit up to 3 requests on a single form.
-  **Andy the Chatbot**  
January 16, 2024, the new and improved Andy was introduced. To reach out to Andy for Assistance, please click on the 'Andy the Chatbot' link on the right.

## IT Online Service Catalog

-  I am a National Employee
-  I am a Council Employee
-  Andy the Chatbot



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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
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- Network Services
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- 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 in the order received.

**Open A Request**





## General Assistance



The General Assistance option should be used when the issue or question isn't found in the Service Catalog.

When possible, open a ticket by selecting the service from the Service Catalog and use the "Open A Request" link. Doing so will ensure all the necessary information is collected and the ticket can be quickly routed to the right department/team.

Tickets opened using the General Assistance option, go into the general queue and are answered in the order received.

Hi, Don. When you submit this form, the owner will see your name and email address.

\* Required


1. **Description** \* 


A brief description of your problem.


Enter your answer





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1. **Description** \*   
A brief description of your problem.

Enter your answer 


2. **Application** \*   
If you are needing assistance with an application, please enter application below (Example: Blackbaud, Peoplesoft, Membership, Adobe, etc.) (optional)

Enter your answer 

3. **Attachment(s)** (Non-anonymous question)   
(optional)

 Upload file 

File number limit: 10 · Single file size limit: 10MB · Allowed file types: Word, Excel, PPT, PDF, Image, Video, Audio

**Submit** 

## Fill in the Boxes – Add an Attachment

CLICK - Submit



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# Next Forum

May 15, 2024

10:00 am & 2:00 pm CT



# Questions & Answers



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