

# CRM User Forum

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# Objectives

- 2024 Preparing for Year-End
  - Review Uncommitted Batches
  - Recording Future contribution
  - Year End Revenue Check
  - Printing the pledge receivable aging report
- 2025 Activities
  - Setting up 2025 Appeal & Creating 2024 Events
  - Billing and Acknowledgement Updates
  - Updating Recurring gifts
  - Contribution Statements
- Scouting America branding
- Questions - Answers



# Uncommitted Batches

- Uncommitted batches should be reviewed
- If batch has revenue that needs to be committed – Commit
- If batch has revenue that has been committed – Delete
- If batch is empty – use the batch or delete the batch
- Currently we have 758 uncommitted batches.
- 259 of these batches have added dates before 12/1/24



# Check for Uncommitted batches

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



- Before Filter Change

The screenshot shows the 'Batch Entry' interface with the 'Uncommitted Batches' tab selected. The header indicates 'Uncommitted batches (2)'. A red box highlights the 'Date range' dropdown menu, which is currently set to 'Last 30 days'. Other filters include 'Sites: All sites' and a checkbox for 'Show only batches with exceptions'. The table below shows two batches:

Batch numb...	Batch template	Description	Date added
L1172746	zAPTG Local Council Recurring Gift Payment Batch	Online Donation Recurring for 2024-11-26 for 527	11/26/2024
L1174369	zAPTG Local Council Donation Batch	Online Donation for 2024-12-03 for 527	12/3/2024

- After Filter Change – 12 uncommitted batch show

The screenshot shows the 'Batch Entry' interface with the 'Uncommitted Batches' tab selected. The header indicates 'Uncommitted batches (12)'. A red box highlights the 'Date range' dropdown menu, which is now empty. Other filters include 'Sites: All sites' and a checkbox for 'Show only batches with exceptions'. The table below shows four batches:

Batch numb...	Batch template	Description	Date added
L1082529	zAPTG Local Council Donation Batch	Online Donation for 2024-02-27 for 527	2/27/2024
L1100602	zAPTG Local Council Donation Batch	Online Donation for 2024-04-08 for 527	4/8/2024
L1120013	zAPTG Local Council Recurring Gift Pay	Online Donation Recurring for 2024-05-26 for 527	5/26/2024
L1129928	zAPTG Local Council Recurring Gift Pay	Online Donation Recurring for 2024-06-26 for 527	6/26/2024



# Year End Revenue Check

- 2024 Postdates to 2024 Appeals = CY Inbound Channel
- 2024 Postdates to 2025 Appeals = FY Inbound Channel
- 2025 Postdates to 2024 Appeals = PY Inbound Channel
- 2025 Postdates to 2025 Appeals = CY Inbound Channel

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



# Revenue Details Splits Tab

## Appeal: 2024 Friends of Scouting

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

Revenue Summary   Contributions   Payments   Balances   **Revenue Details (Splits)**   Revenue Details (Write-offs)

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

Constituent equal to:  Transaction equal to:  Application

GL Post Date	D... R...	Balance	Designation	Inbound Channel
12/10/2024	3...	\$0.00		Friends of Scouting
11/29/2024	p...	\$0.00		Friends of Scouting

2024 appeal. Post Dates of 2024 with Current Year inbound channel as we approach year-end

## Appeal: 2025 Friends of Scouting

Description: 2025 Friends of Scouting      Start date: 11/15/2024  
Business unit:      End date: 12/31/2025  
Category: Annual Giving (Friends of Scouting)      Goal: \$0.00  
Report code: 2025      Status: Active  
Site:      Membership:

Revenue Summary   Contributions   Payments   Balances   **Revenue Details (Splits)**   Revenue Details (Write-offs)

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


Constituent equal to:  Transaction equal to:  Application no

GL Post Date	D... R...	Balance	Designation	Inbound Channel
11/19/2024		\$2,500.00		FY - Friends of Scouting
11/19/2024		\$250.00		FY - Friends of Scouting

2025 Appeal. Postdates of 2024 with Future Year inbound channel.



# Mismatched Appeals

 **Appeal:** XXXX **2025 Friends of Scouting**

Description: 2025 Friends of Scouting

Start date: 11/15/2024

Business unit:

End date: 12/31/2025

Category: Annual Giving (Friends of Scouting)

Goal: \$0.00

Report code: 2025

Status: Active

Site: XXXX

Membership:

Details (Splits)

Revenue Details (Write-offs)

Household Donors

Designations

Matching Gift Claims

Mailings

Documentation

**Mismatch: Appeals?**

Expand all

Collapse all

⌵ Pledge (with Payment having mismatched Appeal) (1)

Filters

More

Pledge: Appeal	Payment: Appeal	Constituent Name	Transaction	Date	GL Post Date	Start: GL Post	End: GL Post
<div>⌵ <span style="background-color: #cccccc; padding: 0 5px;">XXXX</span> 2025 Frie...</div>	<div>⌵ <span style="background-color: #cccccc; padding: 0 5px;">XXXX</span> 2024 Frie...</div>	<span style="background-color: #cccccc; padding: 0 5px;">XXXX</span>	Pledge	11/19/2024	11/19/2024	11/19/2024	11/19/2024

Go to pledge

(No refresh) Mark: Verified as Correct

(Refresh) Mark: Verified as Correct

Go to payment

Pledge amount: \$1,000.00

Date: 11/19/2024

Batch number: L1170424

Revenue ID: rev-46117991

Review your appeals and visit the Mismatch: Appeals tab. If data populates, review and fix in an update batch. This example shows a 2025 pledge that has a payment attached. The payments have a 2024 appeal on them. This throws your reports off. Dropping the chevron allows you to see the Revenue ID's need for your update batch.





# Revenue Data Hygiene

The screenshot shows the 'Revenue' application window. It has a sidebar with 'More tasks' and 'Reports' sections. The 'More tasks' section includes 'Appeal progress results', 'Daily Revenue Transactions List', 'Gift in kind List', 'Open Pledge List', 'Recurring Gift List', and 'Revenue Data Hygiene' (which is highlighted with a red underline). The 'Reports' section includes 'BSA Appeal Constituent Export (OLTP)', 'BSA Appeal Constituent Report (OLTP)', 'BSA Appeal Progress Export (OLTP)', 'BSA Appeal Progress Report (OLTP)', 'Pledge Receivable Aging Report', and 'Appeal Progress by Category'. The main area is titled 'Site Search' and contains a search form with fields for 'Site ID', 'Name', 'Short name', 'Acronym', and 'Site type'. There are 'Search' and 'Clear' buttons. Below the search form, it says 'Results (1 record found)' and displays a table with one row. The table has columns for 'Site ID', 'Name', 'Short name', 'Acronym', 'Site type', and 'Site path'. The row shows a 'Local Council' with the path 'Boy Scouts of A...'. At the bottom, there are 'Help', 'Select', and 'Cancel' buttons.

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

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

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



# Revenue Data Hygiene

**Revenue Data Hygiene**

Revenue Missing Revenue Attributes | Revenue Missing Solicitor | Revenue Missing BSAFR Group | Mismatched Inbound Channels | Mismatched Appeals | Revenue Not Posting | Donor Missing Council Site

For finding CY or LY revenue with blank revenue attributes (44) [\[8\]](#) More ▾

Name equal to:  Appeal Name equal to:  BSA Structure equal to:  Giving Category equal to:

Lookup ID	Name	Revenue ID	Amount	Transaction type	Application	Appeal Name	BSA Structure	Giving Category
8-3	Mi	rev-45607403	\$42.78	Payment	Donation	( ) OOD23 - Operating Other Direct		
<a href="#">+ Add Attribute</a> <a href="#">Go to Revenue</a>								
8-3	M	rev-45607373	\$357.38	Payment	Donation	( ) OOD23 - Operating Other Direct		
8-3	M	rev-45607397	\$10.68	Payment	Donation	( ) OOD23 - Operating Other Direct		
8-3	M	rev-45607394	\$68.44	Payment	Donation	( ) OOD23 - Operating Other Direct		
8-3	M	rev-45607415	\$296.04	Payment	Donation	( ) OOD23 - Operating Other Direct		
8-3	M	rev-45607387	\$287.40	Payment	Donation	( ) OOD23 - Operating Other Direct		

The Revenue Missing Revenue Attributes tab will find any revenue from the current or last calendar year that is missing either a BSA Structure or a Giving Category.

**Revenue Data Hygiene**

Revenue Missing Revenue Attributes | Revenue Missing Solicitor | Revenue Missing BSAFR Group | Mismatched Inbound Channels | Mismatched Appeals | Revenue Not Posting | Donor Missing Council Site

For finding 2021-2024 FOS revenue with missing Solicitor (10,000) [\[8\]](#) More ▾

Name equal to:  Report Code equal to:  Appeal Name equal to:  BSA Structure equal to:  Giving Category equal to:

Lookup ID	Name	Amount	Transaction type	Application	Report Code	Appeal Name	Revenue ID	BSA Structure	Giving Category	Solicitor Looku...	Solicitor Name	BSAFR Gro...	BSAFR Group ...
8-5	Res	\$150.00	Payment	Matching gift	2024	( ) S24 - 2024 Frien...	rev-46076486						
<a href="#">Go to Revenue</a>													
8-5	Art	\$0.00	Pledge	Donation	2024	( ) S24 - 2024 Frien...	rev-45949356	Appalachian...	Community		8-40	Appalachian Tr...	
8-4	AT	\$5.00	Payment	Matching gift	2024	( ) S24 - 2024 Frien...	rev-45829259	Appalachian...	Community		8-40	Appalachian Tr...	
8-4	AT	\$2.50	Payment	Matching gift	2024	( ) S24 - 2024 Frien...	rev-45877258	Appalachian...	Community		8-40	Appalachian Tr...	
8-4	AT	\$2.50	Payment	Matching gift	2024	( ) S24 - 2024 Frien...	rev-45975178	Appalachian...	Community		8-40	Appalachian Tr...	

The Revenue Missing Solicitor tab will find any revenue with report code 2021-2024 and appeal category of Friends of Scouting that is missing a Solicitor.



# Revenue Data Hygiene

**- Revenue Data Hygiene**

Revenue Missing Revenue Attributes Revenue Missing Solicitor **Revenue Missing BSAFR Group** Mismatched Inbound Channels Mismatched Appeals Revenue Not Posting Donor Missing Council Site

For finding 2021-2024 FOS revenue with missing BSAFR Group (1,510) [\[x\]](#) More ▾

Name equal to:  Report Code equal to:  Appeal Name equal to:  BSA Structure equal to:  Giving Category equal to:

Lookup ID	Name	Amount	Transaction type	Application	Report Code	Appeal Name	Revenue ID	BSA Structure	Giving Category	Solicitor Looku...	Solicitor Name	BSAFR Group ID	BSAFR Group ...
8-40	Ad...	\$15.00	Pledge	Donation	2023	( ) S23 - 202...	rev-45527856	Appalachian Trail	Family Division				
Go to Revenue													
8-53	Alic...	\$51.50	Payment	Donation	2023	( ) S23 - 202...	rev-45387371	Appalachian Trail	Family Division				
8-40	Am...	\$3.00	Payment	Donation	2023	( ) S23 - 202...	rev-45667905	Appalachian Trail	Family Division				
8-40	Am...	\$100.00	Pledge	Donation	2023	( ) S23 - 202...	rev-45399981	Appalachian Trail	Family Division				
8-35	Ant...	\$51.50	Payment	Donation	2023	( ) S23 - 202...	rev-45341531	Appalachian Trail	Family Division				
8-58	Asa...	\$3.00	Payment	Donation	2023	( ) S23 - 202...	rev-45490473	Appalachian Trail	Family Division				
8-39	Ass...	\$100.00	Payment	Matching gift	2023	( ) S23 - 202...	rev-45829276	Appalachian Trail	Family Division	8-40	Pack 8880 FP A...		

The Revenue Missing BSAFR Group tab will find any revenue with report code 2021-2024 and appeal category of Friends of Scouting that is missing a BSAFR Group.



# Revenue Data Hygiene

**Revenue Data Hygiene**

Revenue Missing Revenue Attributes | Revenue Missing Solicitor | Revenue Missing BSAFR Group | **Mismatched Inbound Channels** | Mismatched Appeals | Revenue Not Posting | Donor Missing

For finding **2024 Report Code** revenue with wrong Inbound Channels - Fund 1 (7) More ▾

Name equal to:  Appeal Name equal to:  Inbound channel equal to:  Apply Reset

	Lookup ID	Name	Revenue ID	Amount	Transaction type	Application	GL post date	Report Code	Appeal Name	Inbound channel	Revenue Cat
	8-	We	rev-46106039	\$375.00	Payment	Pledge	11/5/2024	2024	2024 Frie...	FY - Other Dire...	Unrestricted
Go to Revenue											
	8-	Ma	rev-45724212	\$2,000.00	Pledge	Donation	2/20/2024	2024	2024 Frie...	FY - Friends of ...	Unrestricted
	8-	GA	rev-45751776	\$630.00	Payment	Donation	12/19/2023	2024	2024 Frie...	Friends of Sco...	Unrestricted
	8-	Ro	rev-45751775	\$162.00	Payment	Donation	12/19/2023	2024	2024 Frie...	Friends of Sco...	Unrestricted
	8-	B. C	rev-45751774	\$100.00	Payment	Donation	12/19/2023	2024	2024 Frie...	Friends of Sco...	Unrestricted
	8-	Set	rev-45751773	\$612.00	Payment	Donation	12/19/2023	2024	2024 Frie...	Friends of Sco...	Unrestricted

**Revenue Data Hygiene**

Revenue Missing Revenue Attributes | Revenue Missing Solicitor | Revenue Missing BSAFR Group | **Mismatched Inbound Channels** | **Mismatched Appeals** | Revenue Not Posting | Donor Missing

**Mismatched Appeals - Report Code 2024** (1) More ▾

Appeal Name equal to:  Payment's Appeal Name equal to:  Pledge's Appeal Name equal to:  Apply Reset

	Transaction type	Application Deta...	Amount	Date	Revenue ID	Appeal Name	Payment's Reve...	Payment's Appe...	Pledge's Revenue...	Pledge's Appea
	Payment	Pledge	\$1,000.00	11/21/2024	rev-46120066	2024 Frie...			rev-46117991	2025 Frie...
Go to Revenue										

**Mismatched Appeals - Report Code 2023** (2) More ▾

The Mismatched Inbound Channels tab has two data lists that will find any revenue with report code 2024 in Fund 1 where revenue with a 2023 or 2025 post date has a CY Inbound Channel *or* a 2024 post date and a PY or FY Inbound Channel, and a similar list for 2023 revenue

The Mismatched Appeals tab has two data lists that will find any 2024 or 2023 report code revenue where the appeal of the pledge doesn't match the appeal of the payment



# Revenue Data Hygiene

Revenue Data Hygiene

Revenue Missing Revenue Attributes   Revenue Missing Solicitor   Revenue Missing BSAFR Group   Mismatched Inbound Channels   Mismatched Appeals   **Revenue Not Posting**   Donor Missing Council Site

Revenue added this or last calendar year that's not posting correctly (16) [16](#) More ▾

Lookup ID	Name	Revenue ID	Date added...	GL post date	GL post status	Transaction type	Application	Applicat...	Appeal	Designation	Inbound channel	Revenue Category
8-13	Bn	rev-45924534	5/3/2024 1:3...	5/3/2024	Not Posted	Payment	Donation	\$200.00		03971 Distric...	Friends of Scouti...	Unrestricted by ...
<a href="#">Go to Revenue</a>												
8-55	Ca	rev-45923886	5/3/2024 10:...	5/1/2024	Not Posted	Payment	Donation	\$1,000.00		03971 Distric...	Friends of Scouti...	Unrestricted by ...
8-12	Vo	rev-45906836	4/23/2024 4:...	4/23/2024	Not Posted	Payment	Donation	\$1,000.00		03971 Distric...	Friends of Scouti...	Unrestricted by ...
8-55	Ba	rev-45896626	4/17/2024 8:...	4/4/2024	Not Posted	Payment	Donation	\$100.00		02001 Will R...	Friends of Scouti...	Unrestricted by ...
8-14	Jai	rev-45891489	4/12/2024 4:...	4/12/2024	Not Posted	Payment	Donation	\$40.00		03001 Eagle ...	Friends of Scouti...	

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

Example: Revenue without an appeal may show, or revenue added with GL Post Dates that are far in the future. This may be an error from the user entering the revenue, and the revenue will not post until an appeal is added or those dates are past or corrected



# Revenue Data Hygiene

Management Console - Revenue Data Hygiene

Revenue Missing Revenue Attributes Revenue Missing Solicitor Revenue Missing BSAFR Group Mismatched Inbound Channels Mismatched Appeals Revenue Not Posting Donor Missing Council Site

For finding CY or LY revenue where the donor is missing the council's site. User needs the role 'BSA Constituent View Only' with the 'Global' site added in order to view results (36)

Lookup ID	Name	Revenue ID	Amount	Transaction type	Application	Appeal Name ▲
8-5	Tr	rev-45935729	\$1,000.00	Payment	Donation	A24 - DCAL
Go to Donor Go to Revenue Add Site						
8-5	Tr	rev-45935732	\$500.00	Payment	Donation	CMP24- Camperships 2024
8-2	N	rev-45631964	\$250.00	Payment	Donation	Cy23- Bricks/anniversary Yawgoog
8-6	St	rev-46029435	\$100.00	Payment	Donation	CY24 Yawgoog Bricks
8-3	Jil	rev-46075169	\$250.00	Payment	Donation	CY24 Yawgoog Bricks
8-2	Jc	rev-46082555	\$35.00	Payment	Donation	FDL - Fleur de Lis Society
8-2	Sc	rev-46037148	\$100.00	Payment	Donation	FDL - Fleur de Lis Society

The Donor Missing Council Site tab will show council revenue which is connected to donors who are not connected to the council's site.

Access:

Users will need the role 'BSA Constituent View Only' with the 'Global' site added in order to view results

Users will need the role 'BSA Site Security' with the 'Global' site added in order to add their site to the donor's record.



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# Pledge Receivable Aging Report



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# Pledge Receivable Aging Report

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






# Pledge Receivable Aging Report

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



# Pledge Receivable Aging Report

 **Pledge Receivable Aging Report**

BSA Organization: 001-Greater Alabama Council



Report Code: 2024

View Report

Appeal: (001) 2024 Friends of Scouting

1 of 28

Find | Next

Run Date: 12/16/2024

Pledge Receivable Aging Report

Page 1 of 28

Run Time: 13:27:50

Council

Selection Options:

BSA Organization: Council

Report Code: 2024

Appeal: 2024 Friends of Scouting

Giving Category: ALL

Appeal: 2024 Friends of Scouting

BSA Structure: Arrowhead

Giving Category: Community

Constituent Name	Pledge Date	Pledge Amount	Pledge Balance	Current Due	Past Due		
					30+	60+	90+
Gene Phone No:	30-Nov-23	500.00	125.00	125.00	0.00	0.00	0.00
Christopher Phone No: (	05-Dec-23	200.00	16.30	0.00	0.00	0.00	16.30
Community Total:		700.00	141.30	125.00	0.00	0.00	16.30
Arrowhead Total:		700.00	141.30	125.00	0.00	0.00	16.30



# Creating a New Appeal



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# Creating 2025 Appeal

- Create all FY appeals at the same time
- Mirror the Appeal name from this year when creating 2025 appeals
- (XXX) (Council number in title)
- Marketing & Communications > Add an Appeal
- Remember to use FY inbound channels with monies applied to 2025 appeals with 2024 postdates.



# Add an Appeal

**Add an appeal** ✕

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

Description: 2024 Peach of an Athlete

Split evenly

Split fully

Category: Special Events ▼

Report code: 2024 ▼

Site: Atlanta Area Council ▼ 🔍

Start date: 1/1/2024 📅

End date: 12/31/2024 📅

Goal: \$0.00

? Help

Save

Cancel

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

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

# Add an Appeal

- Add Prior Appeal and Designation
- On the Designations tab set a default
- Prior Appeal will sync to reports overnight

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

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

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

Designation	Default designation
09200111 P - Operating	✓

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



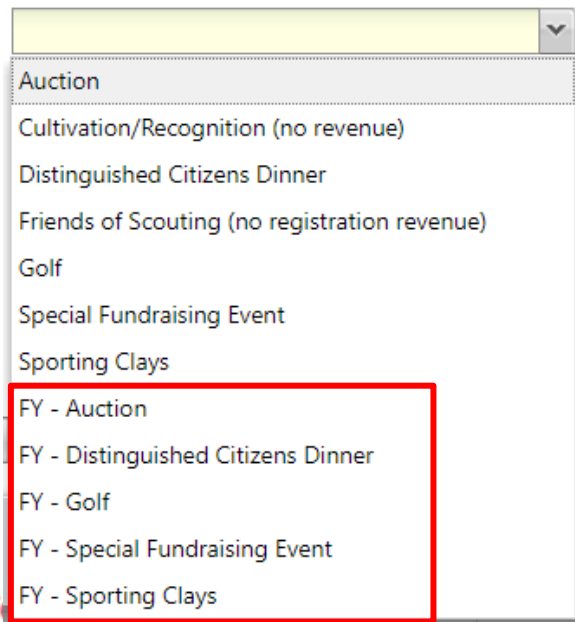
# Adding a FY Event

- Create all repeat events at the same time
- Follow naming conventions from 2024 to 2025
- Use the copy feature when creating
- Update appeals and registration option
- Submit your Event Revenue mapping sheet
- Events > Add New



1. Mirror naming and description from previous year
2. Add dates and location
3. Copy items from last year
4. Pick correct category
  1. If processing monies in 2024, pick "FY" Category
  2. If not processing monies in 2024 pick non-FY Category
5. Update options and dates with correct information when known

# Add an Event



Auction

Cultivation/Recognition (no revenue)

Distinguished Citizens Dinner

Friends of Scouting (no registration revenue)

Golf

Special Fundraising Event

Sporting Clays

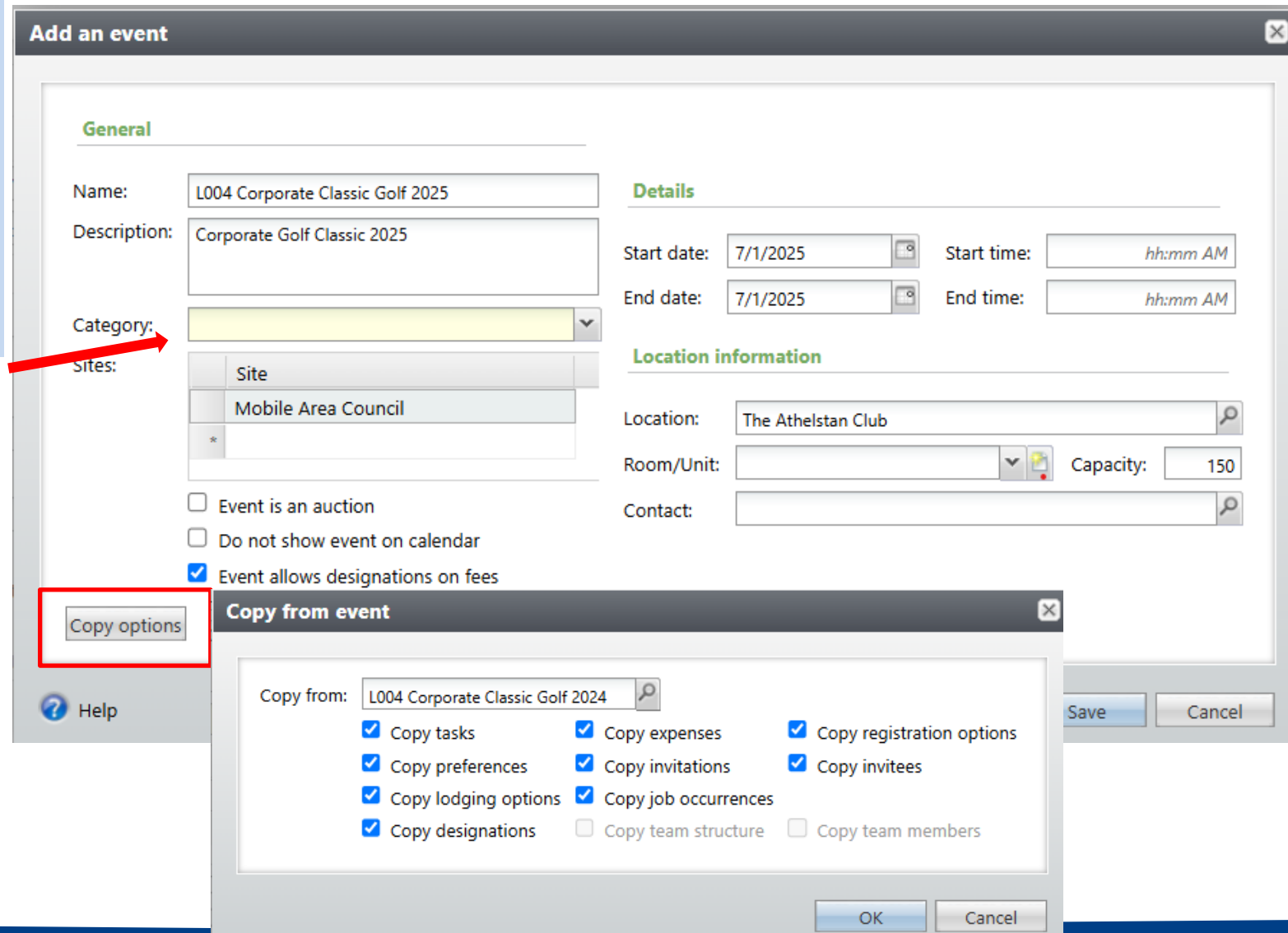
**FY - Auction**

**FY - Distinguished Citizens Dinner**

**FY - Golf**

**FY - Special Fundraising Event**

**FY - Sporting Clays**



**Add an event**

**General**

Name: L004 Corporate Classic Golf 2025

Description: Corporate Golf Classic 2025

Category: **Mobile Area Council**

Sites: **Site**

☐ Event is an auction

☐ Do not show event on calendar

☒ Event allows designations on fees

**Copy options**

**Details**

Start date: 7/1/2025 Start time: hh:mm AM

End date: 7/1/2025 End time: hh:mm AM

**Location information**

Location: The Athelstan Club

Room/Unit: Capacity: 150

Contact:

**Copy from event**

Copy from: L004 Corporate Classic Golf 2024

☒ Copy tasks ☒ Copy expenses ☒ Copy registration options

☒ Copy preferences ☒ Copy invitations ☒ Copy invitees

☒ Copy lodging options ☒ Copy job occurrences

☒ Copy designations ☐ Copy team structure ☐ Copy team members

Save Cancel





# Updating Constituent Reminders and Thank Yous



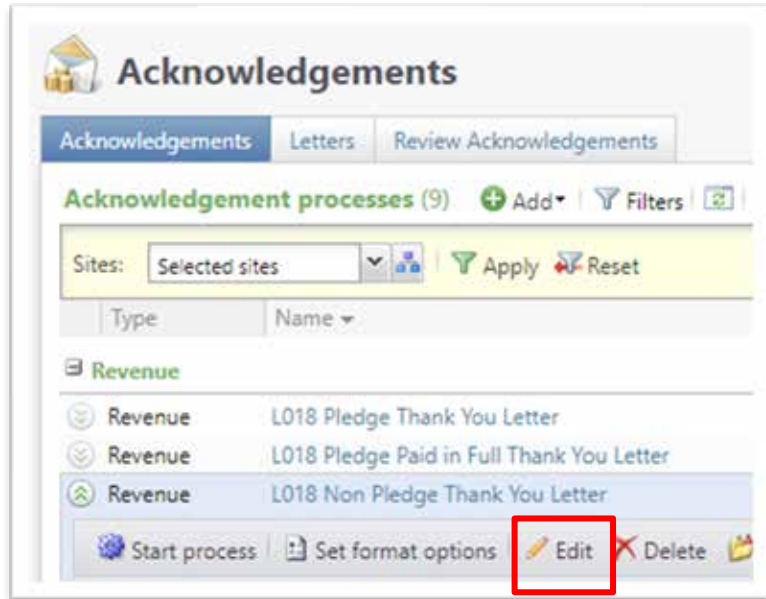
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# Update Billing Reminders & Acknowledgements

- Drop Chevron
- Click Edit
- Find Selection and click the pencil next to it
- Edit the Selection if needed
  - Add 2025 Appeal report Code
  - Add name of new appeal



# Acknowledgements



**Acknowledgements**

Acknowledgements Letters Review Acknowledgements

Acknowledgement processes (9) Add Filters

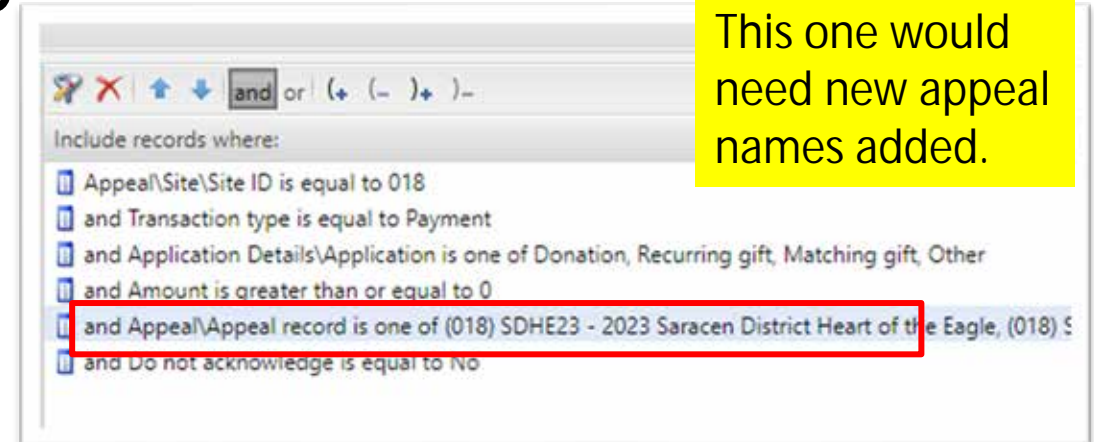
Sites: Selected sites Apply Reset

Type Name

Revenue

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

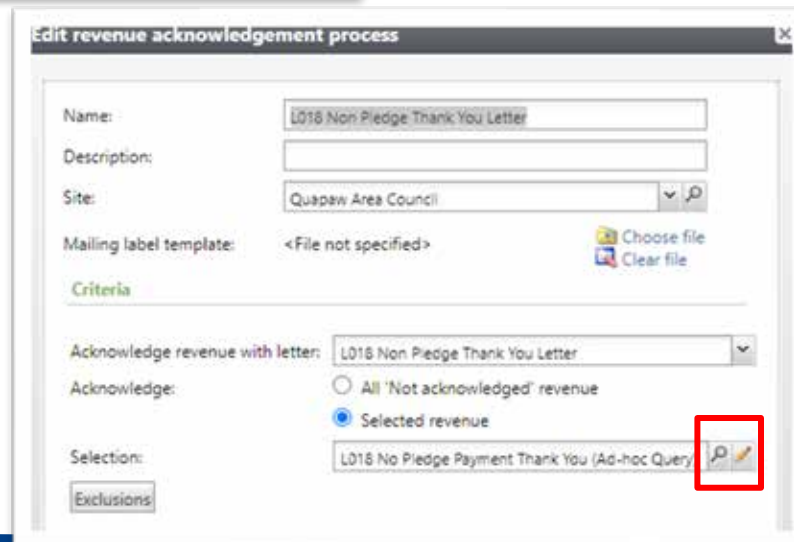
Start process Set format options Edit Delete



Include records where:

- Appeal\Site\Site ID is equal to 018
- and Transaction type is equal to Payment
- and Application Details\Application is one of Donation, Recurring gift, Matching gift, Other
- and Amount is greater than or equal to 0
- and Appeal\Appeal record is one of (018) SDHE23 - 2023 Saracen District Heart of the Eagle, (018) S
- and Do not acknowledge is equal to No

This one would need new appeal names added.



Edit revenue acknowledgement process

Name: L018 Non Pledge Thank You Letter

Description:

Site: Quappaw Area Council

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

Criteria

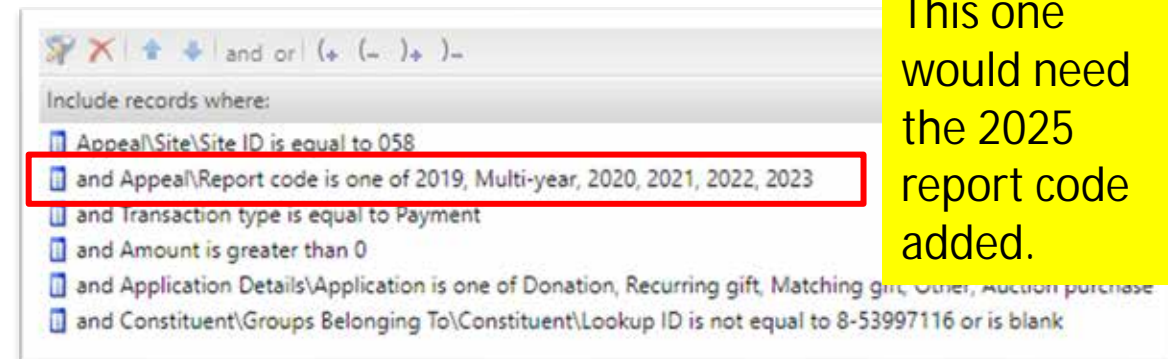
Acknowledge revenue with letter: L018 Non Pledge Thank You Letter

Acknowledge:

- All 'Not acknowledged' revenue
- Selected revenue

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

Exclusions



Include records where:

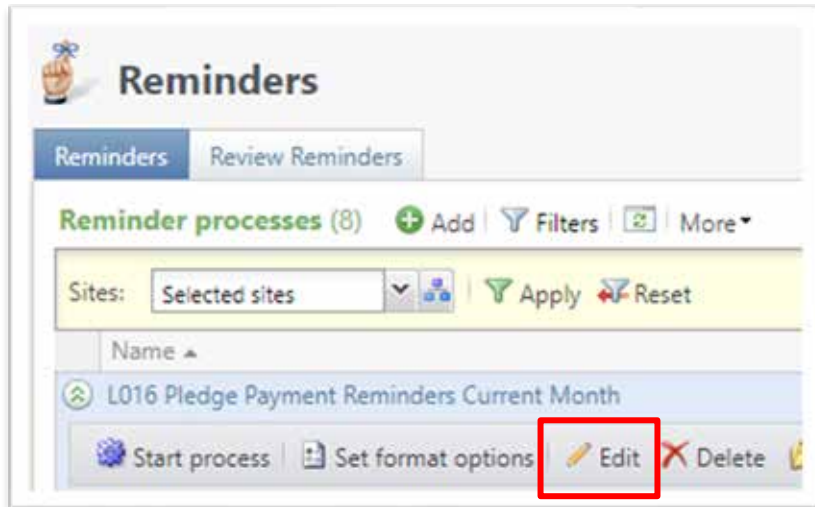
- Appeal\Site\Site ID is equal to 058
- and Appeal\Report code is one of 2019, Multi-year, 2020, 2021, 2022, 2023
- and Transaction type is equal to Payment
- and Amount is greater than 0
- and Application Details\Application is one of Donation, Recurring gift, Matching gift, Other, Auction purchase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

This one would need the 2025 report code added.

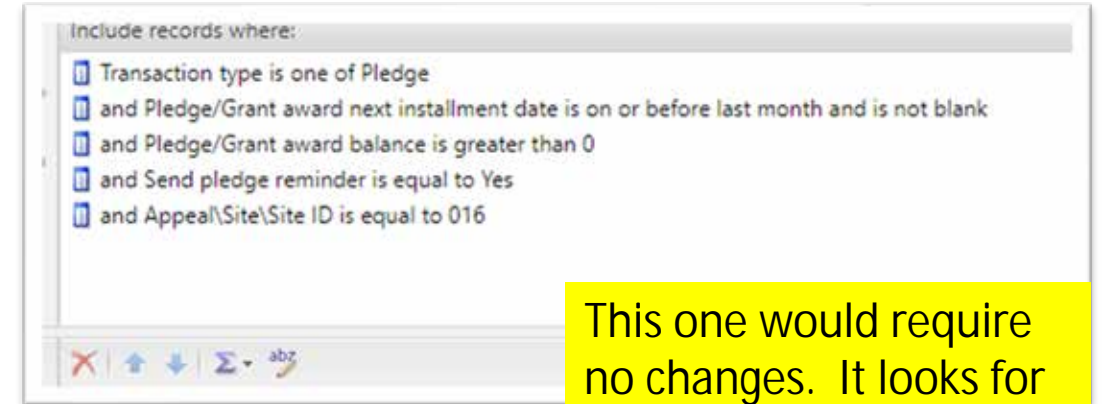


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# Reminders



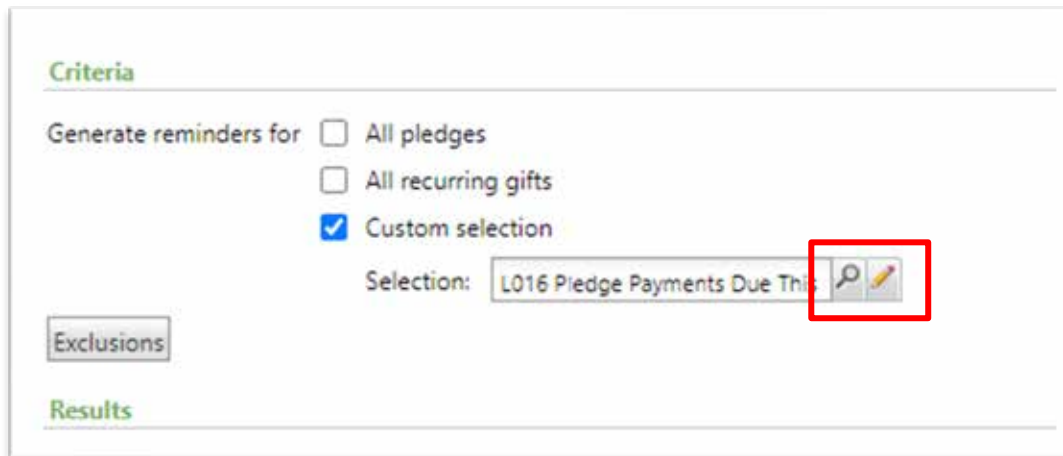
The interface shows a list of reminder processes. The first process, "L016 Pledge Payment Reminders Current Month", is selected. Below the list, there are buttons for "Start process", "Set format options", "Edit", and "Delete". The "Edit" button is highlighted with a red box.



The criteria window shows the following conditions:

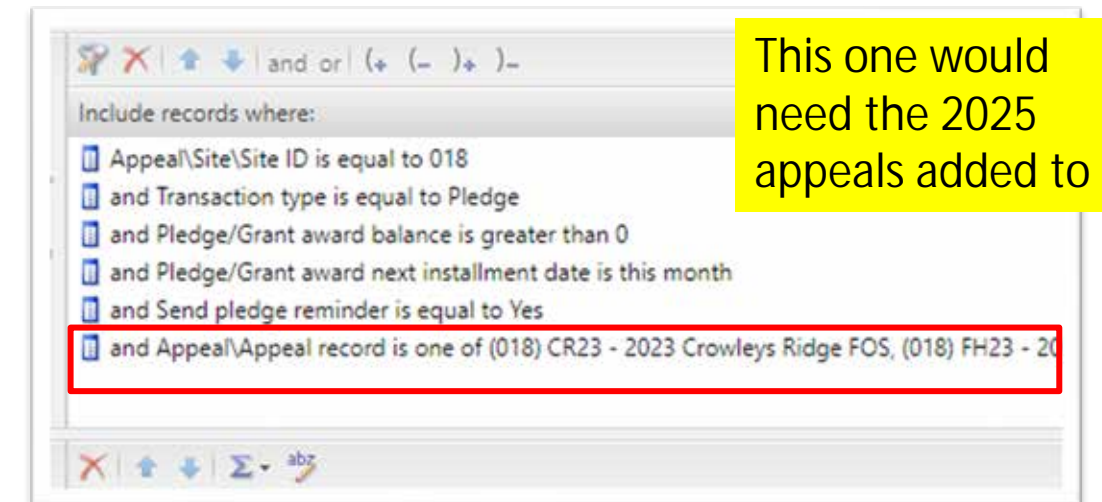
- Transaction type is one of Pledge
- and Pledge/Grant award next installment date is on or before last month and is not blank
- and Pledge/Grant award balance is greater than 0
- and Send pledge reminder is equal to Yes
- and Appeal\Site\Site ID is equal to 016

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



The criteria window shows the following options:

- Generate reminders for:
  - ☐ All pledges
  - ☐ All recurring gifts
  - ☒ Custom selection
- Selection: L016 Pledge Payments Due This Month



The criteria window shows the following conditions:

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

This one would need the 2025 appeals added to it.



# Recurring Gifts




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
















# Maintaining Recurring Gifts

## Recurring Gifts List

Recurring list for your council (10)  More ▾

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

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

This council will need to click **Go to Revenue** and then edit the recurrence and change it to the 2025 Appeal. If the recurrence needs to be adjusted from active to terminated or lapsed, you can do this by clicking **Edit Status**.



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# Contribution Statements

- Sent to donors in January
- Export files will be ready to run January 2, 2025.
- All payments for 2024 need to be entered before file generation
- Print and read Job Aid (Updated 2023).
  - Located MyBSA \ CRM User Guides \ Marketing and Communication \ Contribution Statements.
  - CRM \ Marketing & Communications \ Packages \ Letters & Documents \ Documents
  - January 2025 CRM Forum will detail process





# CRM and MyBSA

 **Letters and Documents**

Letters Documents

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

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

Name	Site
<a href="#">&lt;None&gt;</a>	
990 Schedule B Part I Job Aid	LC Global
990 Schedule B Part I Template	LC Global
Pledge Card Brief BSAFR	LC Global
Preparing to Print Pledge Cards	LC Global
Update Group BSAFR Values	LC Global
Update Revenue Values BSAFR Template	LC Global
<a href="#">Acknowledgement</a>	
Contribution Statement Job Aid	LC Global
Contribution Statement Template	LC Global
Contribution Statement Template - Margin Option 1	LC Global

## Marketing and Communications

[Acknowledgements & Reminders](#)

[Add an Appeal - Detailed Steps](#)

[Add an Appeal - Quick Reference](#)

[Billing Statements](#)

[Mail Merge](#)

[BSAFR Group Set Up](#)

[BSAFR Heirarchy Review and Edit](#)

[BSAFR Event Committee Group](#)

[BSAFR Printing Pledge Cards](#)

[Print Individual Pledge Cards](#)

[Print Parent Group level Pledge Cards](#)

[Print Pledge Cards from a Query](#)

[Print Top Level Pledge Cards](#)

[Print Unit Pledge Cards](#)

[Billing Reminders](#)

[Contribution Statements](#)

[Running Acknowledgements](#)



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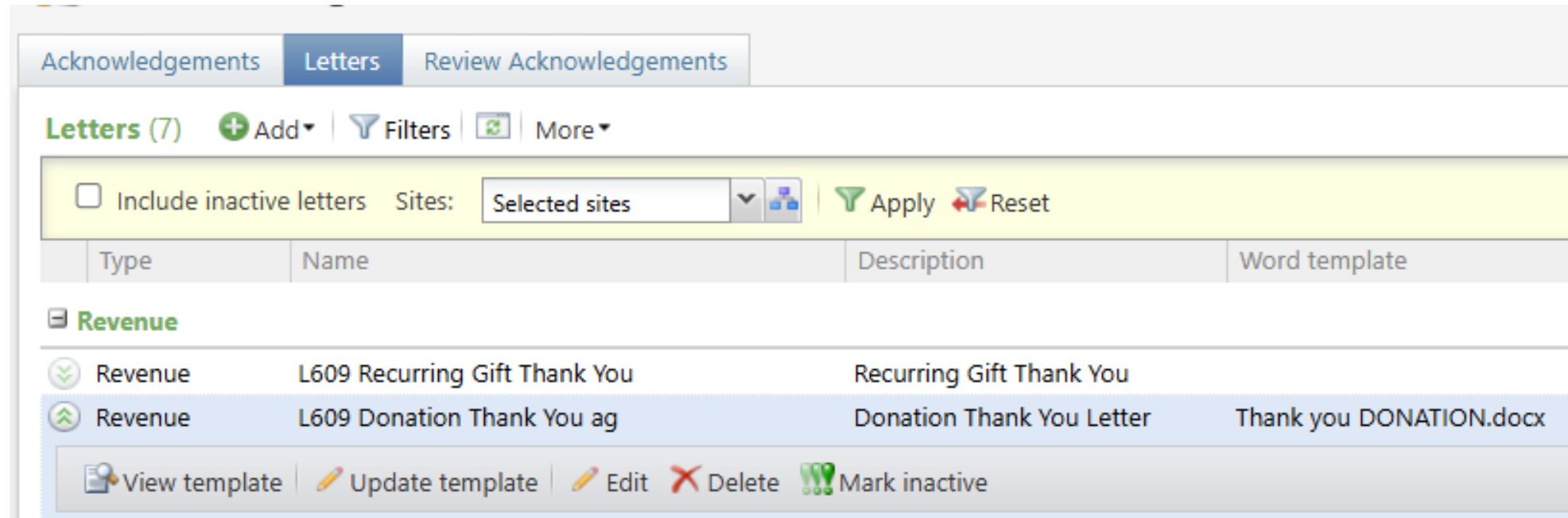


# Scouting America Branding

- Review your templates for Boy Scouts of America
  - Reminders
  - Acknowledgement Letter Templates
  - Pledge Card Report is being adjusted
  - Key reports are being revised to see if Boy Scouts of America or BSA is on them



# Acknowledgement Templates



The screenshot shows a web interface for managing acknowledgement templates. At the top, there are three tabs: 'Acknowledgements', 'Letters' (which is selected), and 'Review Acknowledgements'. Below the tabs, there is a section for 'Letters (7)' with options to 'Add', 'Filter', and 'More'. A filter bar includes a checkbox for 'Include inactive letters', a 'Sites' dropdown menu set to 'Selected sites', and buttons for 'Apply' and 'Reset'. Below this is a table with columns: 'Type', 'Name', 'Description', and 'Word template'. The table has two rows, both under the 'Revenue' category. The first row is 'L609 Recurring Gift Thank You' with description 'Recurring Gift Thank You'. The second row is 'L609 Donation Thank You ag' with description 'Donation Thank You Letter' and word template 'Thank you DONATION.docx'. At the bottom of the table, there is a row of action buttons: 'View template', 'Update template', 'Edit', 'Delete', and 'Mark inactive'.

Type	Name	Description	Word template
Revenue	L609 Recurring Gift Thank You	Recurring Gift Thank You	
Revenue	L609 Donation Thank You ag	Donation Thank You Letter	Thank you DONATION.docx

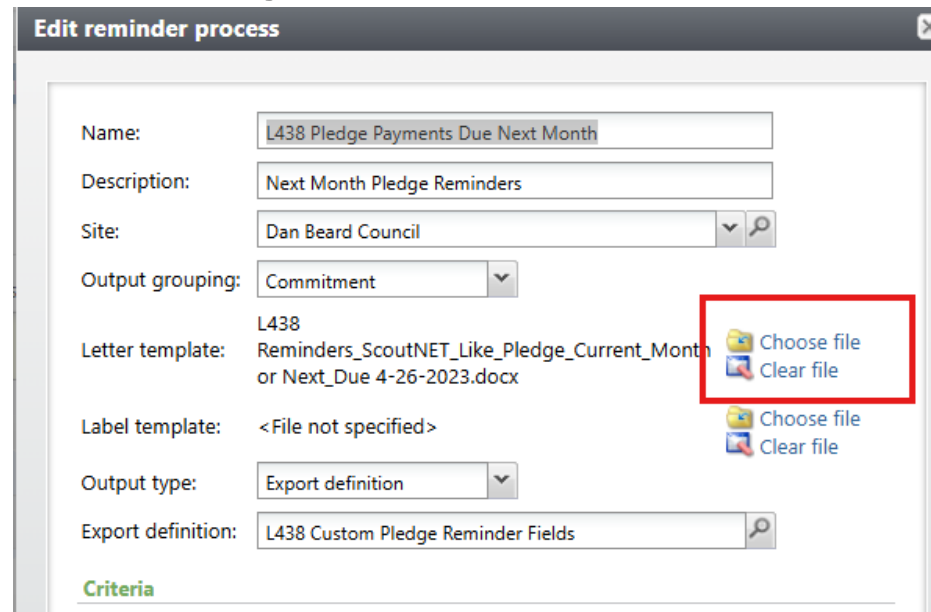
View template | Update template | Edit | Delete | Mark inactive

Found under Marketing Communications \ Acknowledgements  
Drop the chevron and view templated.  
Make changes – Save changes – Update template



# Reminder Template

- Template located in Letters and Documents under Marketing and Communications.
- If it needs to be changed:
  - Download template – Make changes – Save to desktop
  - Clear old template
  - Load new template



The screenshot shows the 'Edit reminder process' window with the following fields and values:

- Name: L438 Pledge Payments Due Next Month
- Description: Next Month Pledge Reminders
- Site: Dan Beard Council
- Output grouping: Commitment
- Letter template: L438 Reminders\_ScoutNET\_Like\_Pledge\_Current\_Month or Next\_Due 4-26-2023.docx
- Label template: <File not specified>
- Output type: Export definition
- Export definition: L438 Custom Pledge Reminder Fields

The 'Letter template' field is highlighted with a red box, showing 'Choose file' and 'Clear file' buttons.





## Council Support

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

## Council Administration

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

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

- [Accounts Payable](#)

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



## Council Support

Council Management  
Support

Contact Council  
Management Support

Council Assessments

Council Board Resources

Council Business  
Practices

Council Fiscal  
Management and  
Training

Journey to Excellence

Council Funding and Finance

[Home](#) > [Council Support](#) > [Council Funding and Finance](#) > [Council Administration](#) > CRM Resources

# CRM Resources

## CRM Process Videos

### CRM (Blackbaud) User Forum Presentations

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

#### 2022

January 2022 User Forum – [Slide Deck](#) – [recording](#)

February 2022 User Forum – [Slide Deck](#) – [recording](#)

March 2022 User Forum – [Slide Deck](#) – [recording](#)

April 2022 User Forum – [Slide Deck](#) – [recording](#)

– Creating Constituent Interactions \* Using the Constituent Interaction Data List \* Using Development Workspace

\* Scouting Gives Setup

#### 2021



# Member Care

- Call 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



### 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

January 15, 2025  
10:00 am & 2:00 pm CT



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# Questions & Answers



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