

# CRM User Forum

March 26, 2025

John Kuehn ~ Cornelia Ellis ~ Don Day  
~ Rich White



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# Objectives

- Master ID
- The 990
- Special Events
- Scouting Gives & Appeal Setup



# Duplicates and Multiples

Liora Everhart  
DOB: 2/2/2002  
Address: 123 Main St  
LookupID: 8-61851380  
MemberID: 148000001  
Council: 571

Liora Everhart  
DOB: 2/2/2002  
Address: 123 Main St  
LookupID: 8-61851381  
MemberID: 148000002  
Council: 571

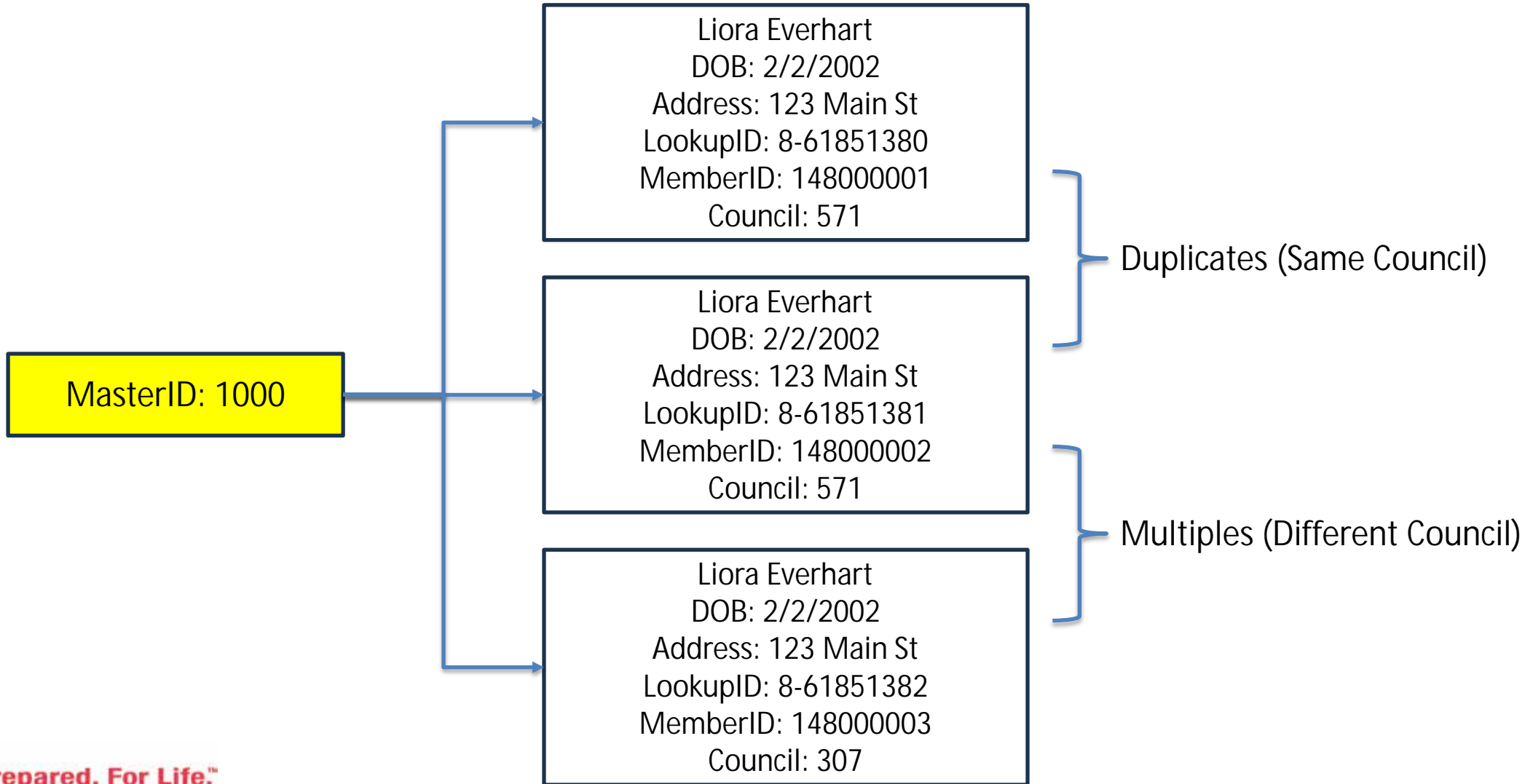
Liora Everhart  
DOB: 2/2/2002  
Address: 123 Main St  
LookupID: 8-61851382  
MemberID: 148000003  
Council: 307

} Duplicates (Same Council)

} Multiples (Different Council)



# Duplicates and Multiples – The MasterID Solution



# MasterID Demonstration

## Liora Everhart

**Individual**    Lookup ID: **8-61851380**

**Personal Information** ✎

**Liora Everhart**  
 Nickname:  
 Maiden:

**Contact Information**

**Primary phone**  
 + Primary phone

**Primary email**  
 + Primary email

**Addresses** + ✎

123 Main St  
 ✓ (Current)

**Primary Relationships**

**Spouse**  
 + Spouse

**Household**  
 + Add to household

**Primary business**

**Sites** +

Global (GLOBAL)  
 Circle Ten Council (571)

[↑ Show less](#)

Consolidated View
Personal Info
Summary
Attributes
Contact
Revenue
Relationships
Communications
Memberships
Documentation and Interactions
History
Smart Fields
Security

MasterID
Revenue
Contacts
Constituencies
Wealth and Ratings

**MasterID Summary** (3) 🔍 | More ▾

+ Columns ▾  
 📄 Save list  
 📂 Open list  
 🗑️ Clear all filters

StatisticName	SiteID	SiteName	StatisticValue
Linked Record Count	ALL	All Sites	3
Linked Record Count	571	Circle Ten Council	2
Linked Record Count	307	Heart of America Council	1

**MasterID List** (3) 🔍 | More ▾

+ Columns ▾  
 📄 Save list  
 📂 Open list  
 🗑️ Clear all filters

ConstituentLookupID	ConstituentType	ConstituentName	AlternateID	MasterID	IsPreferredForFundraising	SiteID	SiteName
8-61851380	Individual	Liora Everhart	148000001	1000	571	571	Circle Ten Council
8-61851381	Individual	Liora Everhart	148000002	1000		571	Circle Ten Council
8-61851382	Individual	Liora Everhart	148000003	1000		307	Heart of America Council



Pre

# IRS 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 donors who have pledge or donated \$5,000 or more in the previous tax year.
  - The IRS 990 Schedule B is based on contributions (pledges/straight donations/etc.) a person has given during the year. Pledge Payments do not count towards this, so if a donor is not on the list, they may not have made any new contributions during the year.
  - We use an accrual basis instead of a cash basis, which means that if a donor pledged \$5,000 but only paid \$4,000, they will show up as \$5,000.
- 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.

<b>Name of Organization</b>		<b>Employer identification number</b>	
< 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 Lehi	\$ 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	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



# Scouting Gives

- Note – if a donor has agreed to pay the fees, this is still part of his/her donation
- The donor contribution statement will be for the whole amount



# CRM Events to Scouting Gives Sync/Setup

- CRM
  - Appeal Setup
  - Event Setup
    - Designations
    - Appeal
    - Registration Options
  - Designation Mapping
- Scouting Gives
  - There may be a few minutes lag between setting the event up in CRM and having the information ready for Scouting Gives
  - Drop downs will populate with information created in CRM.

# Create Appeal in CRM



## Appeal: (XXX) SG25 Scouting Gives Sporting Clays

Description: 2025 Sporting Clays Start date: 1/1/2025  
Business unit: End date: 12/31/2025  
Category: Special Events Goal: \$0.00  
Report code: 2025 Status: Active  
Site: Bay-Lakes Council Membership:

Follow directions in the CRM user guide to create an event appeal. All monies in CRM must be connected to an appeal. The designation tab must be completed with at least the main designation. Sub-designation are not available until you have your designation event mapping completed.

← Designations Revenue Details (Splits) Contributions Balances Prior Appeal Mailings Mis

**Designations (3)** Edit list of appeal designations More ▾

Designation Default designation ▾

63508521 SG Event - Operating

63508521 SG Event - Operating \ 63508521-4202 SG Event - Operating (Ticket)

63508521 SG Event - Operating \ 63508521-4250 SG Event - Operating (Fees)

**Benefits (0)** View benefits catalog Add More ▾

	Level	From	To	Benefits
--	-------	------	----	----------

# Creating an Event in CRM

Proceed to the Events functional area in CRM and click "Add new" and use the "Event" button to begin to create a new event.

The screenshot displays the CRM 'Events' page. At the top, there is a search bar with the placeholder text 'Enter the name of an event'. To the right of the search bar is a '+ Add new' button. A dropdown menu is open from this button, with the 'Event' option highlighted by a red box. Other options in the menu include 'Multi-level event' and 'Auction'. Below the search bar is the 'Event calendar' section, which includes a 'Jump to date' field set to '9/18/2019' and a 'Group by' dropdown set to 'Category'. On the left side, there are filters for 'Events', 'Sites' (set to 'All sites'), 'Locations' (set to 'All locations'), and 'Categories' (set to 'All categories'). There are also checkboxes for 'Include inactive', 'Only show my events', 'Show tasks', and 'Include completed tasks'. The main content area shows a calendar for 'September 2019' with a grid of days from Sunday to Thursday. Various events are listed across the calendar, such as '(177) Woodland Trails Golf 2019', '(087) M19 - Bradford Sporting Clays 2019', and '(028) AU19 Gala and Auction'. The event '(028) AU19 Gala and Auction' is highlighted in yellow.



# CRM Add an Event Form

**Add an event**

**General**

Name: LXXX 2025 Scouting Gives Event

Description: 2025 Scouting Gives Event

Category: Special Fundraising Event

Sites:

Site
Scouting America
*

Event is an auction

Do not show event on calendar

Event allows designations on fees

Copy options

**Details**

Start date: 6/15/2025 Start time: hh:mm AM

End date: 6/15/2025 End time: hh:mm AM

**Location information**

Location: M&M Hunting Preserve

Room/Unit: Capacity: 0

Contact: John Kuehn

Help Save Cancel

Fill in the information on the event form. Ensure that you select "Event allows designation on fees" and "Event is an auction". You do not need to use the auction side of the event. However, if you fail to select either option, neither option can be added after you click save.

# CRM Event Home Page

Before you create your Scouting Gives event, you need to complete the rest of your event set up in CRM. You need to add the appeal, designations and options that people will use to register with.

## LXXX 2025 Scouting Gives Event

Event date: 6/15/2025      Status: ✔ Active

Site: Scouting America      Lookup ID: 8-10003102

Location: M&M Hunting Preserve  
2 Winslow Rd  
Pennsville, NJ 08070

Room/Unit:

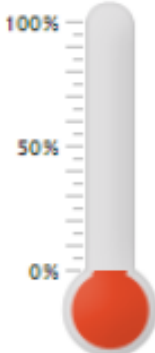
Contact: John Kuehn

Coordinator:

Category: Special Fundraising Event

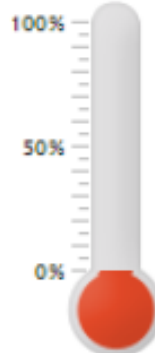
**Event expenses**

Expense budget: \$0.00  
Agreed expenses: \$0.00  
Amount paid: \$0.00  
0% of budget




**Event capacity**

Event capacity: 0  
Will attend: 0  
Will not attend: 0  
0% of capacity



← Registrations Options Designations Appeals Event Attendees Tasks/Coordinators Speakers Expenses Invitations Do

**Registrations (0)** + Add  More ▾

Type:  ▾    Registrant:

Status:  ▾    Attended:  ▾    ✔ Apply ✖ Reset


<input checked="" type="checkbox"/>	Registrant	Type	Status	Attended	Online registrant
-------------------------------------	------------	------	--------	----------	-------------------

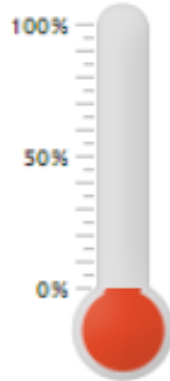
# Add Appeal to Event

The appeal added here will be available to select when creating your Scouting Gives event.

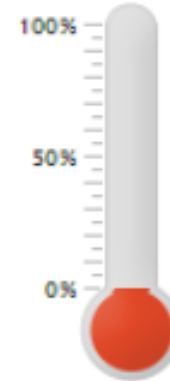
## LXXX 2025 Scouting Gives Event

Event date: 6/15/2025  
Site: Scouting America  
Location: M&M Hunting Preserve  
2 Winslow Rd  
Pennsville, NJ 08070  
Room/Unit:  
Contact: John Kuehn  
Coordinator:  
Category: Special Fundraising Event

Status:  Active  
Lookup ID:  
8-10003102





**Event expenses**  
Expense budget: \$0.00  
Agreed expenses: \$0.00  
Amount paid: \$0.00  
0% of budget



**Event capacity**  
Event capacity: 0  
Will attend: 0  
Will not attend: 0  
0% of capacity


- ← Registrations
- Options
- Designations
- Appeals**
- Event Attendees
- Tasks/Coordinators
- Speakers
- Expenses
- Invitations
- Docun

**Appeals (1)**  Edit appeals  More ▾

Appeal	Start date
(XXX) SG25 Scouting Gives Sporting Clays	1/1/2025

# Add Designations to Event

 **LXXX 2025 Scouting Gives Event**

Event date: 6/15/2025      Status:  Active

Site: Scouting America      Lookup ID: 8-10003102

Location: M&M Hunting Preserve  
2 Winslow Rd  
Pennsville, NJ 08070

Room/Unit:

Contact: John Kuehn

Coordinator:

Category: Special Fundraising Event

**Event expenses**


Expense budget: \$0.00  
Agreed expenses: \$0.00  
Amount paid: \$0.00  
0% of budget


100%  
50%  
0%

100%  
50%  
0%

Event  
Will  
Will  
0% c

← Registrations Options **Designations** Appeals Event Attendees Tasks/Coordinators Speakers Expenses

**Designations (3)**  Edit  More ▾

Designation ▲	Default
63508521 SG Event - Operating	
63508521 SG Event - Operating \ 63508521-4202 SG Event - Operating (Ticket)	
63508521 SG Event - Operating \ 63508521-4250 SG Event - Operating (Fees)	

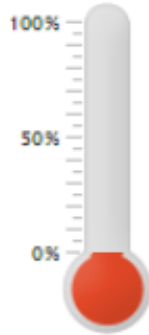
Add the main designation to the event. Before you process revenue against event registration, you need to fill out and submit your event designation mapping worksheet. Once completed, you can then add the other sub-designations. 4250 is important because without it your transactions will not split properly to the correct GL accounts. Default the one you want the majority of your event revenue to process to. In this example, the main designation will process to account 4201. The default will be available to select in Scouting Gives

# Create Event Options (Registration Types)

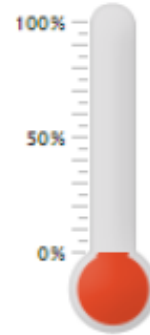
## LXXX 2025 Scouting Gives Event

Event date: 6/15/2025  
Site: Scouting America  
Location: M&M Hunting Preserve  
2 Winslow Rd  
Pennsville, NJ 08070  
Room/Unit:  
Contact: John Kuehn  
Coordinator:  
Category: Special Fundraising Event

Status: Active  
Lookup ID: 8-10003102



**Event expenses**  
Expense budget: \$0.00  
Agreed expenses: \$0.00  
Amount paid: \$0.00  
0% of budget



**Event capacity**  
Event capacity:  
Will attend:  
Will not attend:  
0% of capacity

We have two options below. The next slide will show how they are created. These will be available to select in Scouting Gives during event creation.

← Registrations **Options** Designations Appeals Event Attendees Tasks/Coordinators Speakers Expenses Invitations Doc

**Registration options (2)** + Add + Copy from More

Registration type	Name	Registration fee...	Receipt amount	Registration count	Benefits
<span>Down Arrow</span> Sponsorship (Default)	Green Table Sponsor	\$4,000.00	\$3,520.00	8	Meals
<span>Down Arrow</span> Sponsorship (Default)	Red Table Sponsor	\$2,500.00	\$2,020.00	1	Meals

**Preferences (0)** + Add + Copy from More

Name	Options
------	---------

Below are two event registration options. The registration type is "sponsorship". This event defaults to 4201. The name will default to "sponsorship". You can change this to what you would like it to be. The registration count is 8 because the event will seat 8 people at a table. If this was a golf foursome, it would be 4 for the 4 golfers. The registration fee is what the sponsorship costs the donor. The cost for the event is the benefits the donor will receive. In the benefits section, we add our benefit description and the quantity which matches the number associated with the table seating. The unit value needs to be \$0. Clear it and make it \$0. The benefits drive to account 4250 and are captured in the cost field not the total value field.

**Edit registration option**

**General**

Registration type: Sponsorship (Default)

Name:

Registration count:

Registration fee:

Cost:

**Benefits**

	Benefit	Quantity	Unit value	Total value	Details
	Meals	8	\$0.00	\$0.00	
*					

Benefits total value: \$0.00

Receipt amount: \$3,520.00

[? Help](#)

**Edit registration option**

**General**

Registration type: Sponsorship (Default)

Name:

Registration count:

Registration fee:

Cost:

**Benefits**

	Benefit	Quantity	Unit value	Total value	Details
	Meals	8	\$0.00	\$0.00	
*					

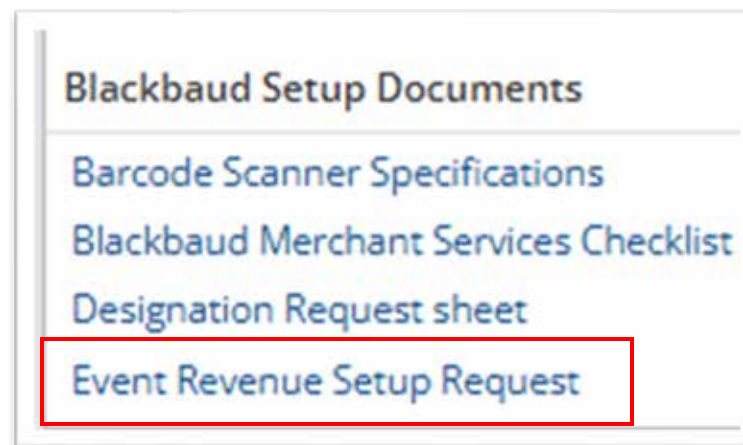
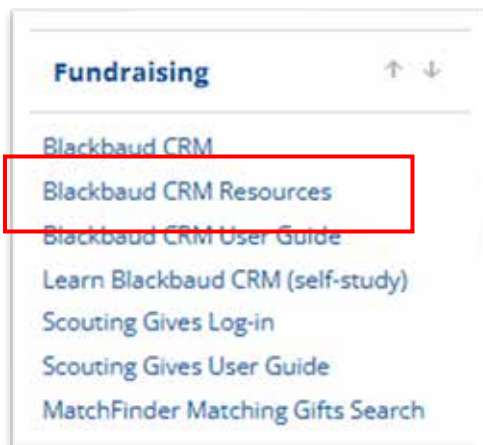
Benefits total value: \$0.00

Receipt amount: \$2,020.00

[? Help](#)

# Event Revenue Mapping

- Fill out your event revenue mapping excel sheet
- Create a Jira ticket with member care and attach the sheet to it
- The designation and event need to be mapped so that you can commit batches when they arrive from Scouting Gives.
- The Event Revenue Setup Request form found in the Blackbaud CRM Resources area at the bottom of the list.



# Event Revenue Mapping

- Review the instruction tab in the workbook.
- Before turning in form, the appeal, event and designation needs to be created.
- Complete the New Events tab
- Copy in the Event Name, Designation Name, Appeal Name from CRM
- Pick what GL Account you may need to use it with.

Distribution Account	First Create Records in Blackbaud CRM. Then Copy-&-Paste Record Names Below.			Revenue Contribution	
<u>Event Name</u> <i>First create each Event in BCRM.                      Then copy-&amp;-paste each Event name here.                      Use 2 rows if an Event needs 2 Designations.</i>	<u>Appeal Name</u> <i>First create each Appeal record in BCRM.                      Then copy-&amp;-paste each Appeal name here.                      An Appeal can only be linked to 1 Event.</i>	<u>Designation Name</u> <i>Designations should already exist in BCRM.                      Use the exact same Designations as last year.                      Request new Designations for any new Projects.</i>	<u>Fund Type</u> Auto-generated	<u>4201</u> Sponsorship/ Donation	<u>4202</u> Participant/ Ticket
L999 Sporting Clays 2018 (example)	L999 R18 - Sporting Clays 2018 (example)	99907771 Sporting Clays - Operating (example)	1	YES	no
LXXX 2025 Scouting Gives Event	(XXX) SG25 Scouting Gives Sporting Clays	63508521 SG Event - Operating	1	YES	y



# Scouting Gives Event Creation

Welcome, guest635

## Events

ACTIVE 673 UNPUBLISHED 58 DEACTIVATED 89 DELETED 106

Search by name

Scouting Gives now only offers a long form template on all newly created events. If an event was created in the full page template, that event will remain in full page until changed by an admin user.

Event Name	Registrations	Dollars Billed	Balances
Automation Test Event Save 09/24/2019 ublish	0/1000	\$252.00	\$0.00
Automation Test Event Save 09/24/2019 ublish	20/1000	\$335.00	\$0.00
Automation Test Event Save 09/25/2019 ublish			
Automation Test Event Save 09/25/2019 ublish			
Automation Test Event Save 09/25/2019 ublish			
Automation Test Event Save 09/25/2019 ublish			
Automation Test Event Save			
BASIC_ADMIN_S07_04_CreateEventUploa 09/25/2019	01/18/2021		REACTIVATE

Log into Scouting Gives. Once in the system, you will need to proceed to the event module which is found on the left-hand side panel. This is where you will create new events. Click the "Create New Event" button to open the event creation form. This form has 4 sections.

# Fill in the Event Creation Form

The screenshot shows the 'Event Creation Form' interface. On the left is a dark sidebar with navigation icons and labels: Dashboard, Appeals, Events, Text Giving, Peer 2 Peer, Reports, Unit Campaigns, and Manage. The main form area contains the following fields:

- Event Category:** A dropdown menu with 'General' selected.
- Event Location:** A text input field.
- Room / Unit:** A text input field.
- Start Date:** A date picker showing 'Mar 26, 2025'.
- End Date:** A date picker showing 'Mar 26, 2025'.
- Start Time:** A dropdown menu with '12:42 pm' selected.
- End Time:** A dropdown menu with '8:42 pm' selected.
- Time Zone:** A dropdown menu.
- Blackbaud Appeal:** A dropdown menu with '(XXX) SG25 Scouting Gives Sporting Clays' selected. This field is highlighted with a red box.
- Blackbaud Designation:** A dropdown menu with '63508521 SG Event- Operating' selected. This field is also highlighted with a red box.
- Activate Goal Progress:** A toggle switch that is currently turned off.

In the first section, you will fill in the blanks about the event and select an image. The Appeal and Designation are selected from a drop-down list. This list comes from CRM. If your appeal and designation were not selected on your event within CRM, they will not show up here, and you will not be able to correctly set up your event in Scouting Gives.



Dashboard



Appeals



Events



Text Giving



Peer 2 Peer



Reports



Unit Campaigns



Manage

### Create New Event



Define Event



Define Template



Set Payment



Acknowledgement

On this page of creation, select how you want your web page to look by selecting a template.

#### EVENT TEMPLATE



Template One



Template Two

#### Template Preview



Register

Share on:



### 2025 SCOUTING GIVE EVENT SAMPLE

Event Start Date: 06/16/2025    Event Start Time: 12:42 pm CDT

Event End Date: 06/16/2025    Event End Time: 8:42 pm CDT

2025 Scouting Give Event

# Adding Event Options (Registration Types)

**Create New Event**

Define Event — Define Template — **3 Set Payment** — 4 Acknowledgement

**Payment Methods**

- Credit Card
- e-Check
- Bill Me Later

**Registration Types**

CRM Type	Display Name	Price
CRM Green Table Sponsor	Registration Name High Rollers Table	Price \$ 4,000.00

[Remove Registration](#)

**Payment Settings**

- Allow registrant to pay transaction fees
- Allow donation in addition to the registration fee
- Allow tribute during event registration or donation

**On this page, select the payment method and the registration types you want to display to the registrant. First select the CRM Type, which is the option you created in CRM for your event. You can rename it for display on your web registration form in the Display Name. The quantity should match the quantity on your CRM Option. These are both tables of 8. The price will populate from the CRM option.**

# Scouting Gives Confirmation

Fill in the personal message field and watch it populate into the confirmation email that is to the right. Once done, click "publish" to have it active.

**Create New Event**

Define Event — Define Template — Set Payment — Acknowledgement

**Customize Acknowledgement**

**B I U** [List Icon] [Link Icon]

Thanks for participating in our event.

**Email Preview**


**2025 Scouting Give Event Sample**

Hunt Club

Jun 16th, 2025 at 12:42pm

Hello, [Registrant Name]

Thanks for participating in our event.



Total Amount  
\$ [Amount]

[Registration Type]  
Payment Method: [Payment Method]

# How Event Registrations Process in CRM

- Two batches are created when a registrant uses the online form:
  - A registration batch will be created and come into CRM to be reviewed and committed, thus placing the registration on the event.
  - A payment batch follows with the actual contribution. These need to be applied to the registration created and committed into CRM in the first batch received.

# Workplace ~ Viva Engage (Teams)

- Workplace is going away. Facebook will no longer support it mid-year
- We are moving the CRM User Forum to Viva Engage on February 3
- Viva Engage is part of Microsoft Teams
  - Access via Teams
  - Access via web at <https://engage.cloud.microsoft/>

- Activity
- Chat
- Teams
- Calendar
- Calls
- OneDrive
- Andy
- ...
- Apps

# Chat



**Don Day (You)** Chat Shared



0/23/2023 8:10 AM

## ▼ Pinned

- Don Day (You)  
You: need csops1 4...
- Michael Coughlin  
You: need csops1 4...
- Cynthia Day  
You: need csops1 4...
- SR  
You: need csops1 4...
- John Kuster  
You: need csops1 4...
- Brenda J. Smith  
You: need csops1 4...
- DB  
You: need csops1 4...
- Ronald Thompson  
You: need csops1 4...
- Michael Coughlin  
You: need csops1 4...
- William Bennett  
You: need csops1 4...

## ▼ Recent

Thursday, February 2, 2023

From Microsoft to you: Microsoft says you've had 8 unapproved connections to...



Resolving your...  
If you're having trouble with your account...

Thursday, February 2, 2023

Thursday, February 2, 2023

Microsoft says you've had 8 unapproved connections to...

Thursday, February 2, 2023

Thursday, February 2, 2023

Microsoft says you've had 8 unapproved connections to...

Thursday, February 2, 2023

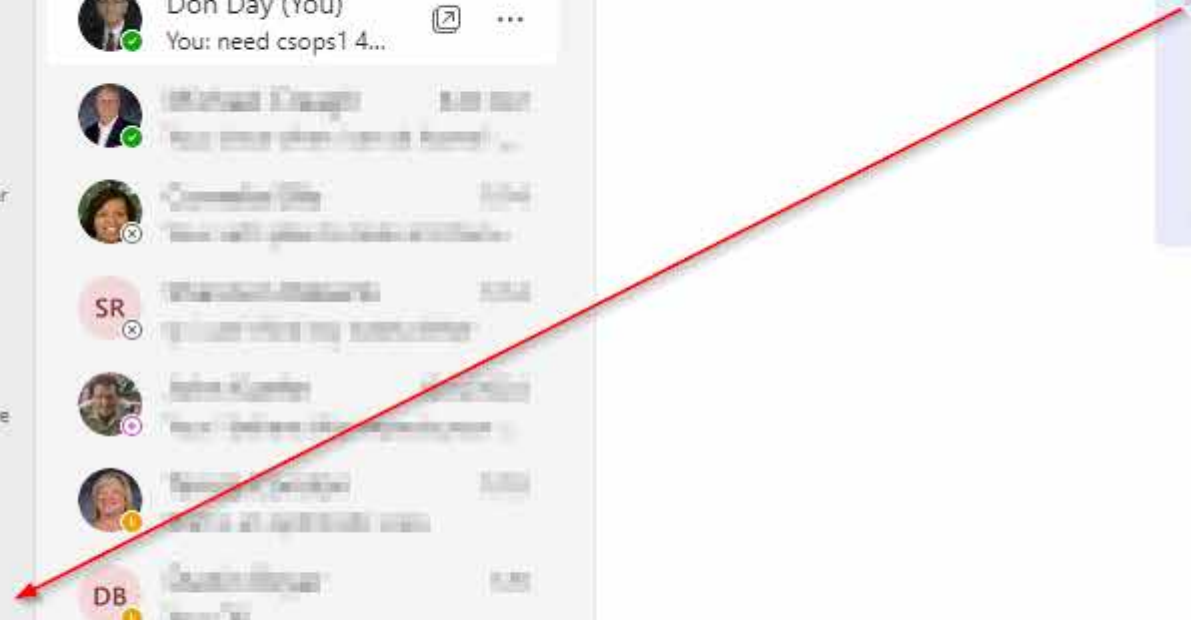
Thursday, February 2, 2023




Microsoft says you've had 8 unapproved connections to...

Thursday, February 2, 2023


Microsoft says you've had 8 unapproved connections to...















**Chat** ... ☰ ✍️  Do

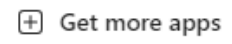
▼ Pinned

 Don Day (You) 11/28/2023  
You: need csops1 468 & acna 571

 Michael Creagh 6:40 AM

🔍 Search for Viva Engage

 Viva Engage	 Approvals	 Planner
 Avatars	 Word	 Whiteboard
 Stream	 Help	 OneNote


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Calendar  
Calls  
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Andy  
Apps

**Engage** ☰

🔍 Search in Engage






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-  000-Scouting U Fundraising Es...
-  Professional Staff




**BBCRM User Forum**  
BBCRM User Forum

Conversations About Files Events

Share thoughts, ideas, or updates

Discussion Question Praise Poll

All conversations Recent posts

 **Don Day**  
Thu at 12:19 PM  
Seen by 6

Workplace is being discontinued by Facebook so welcome to the new CRM User

Members • 7

Info

Pinned  
CRM Resource Page o...

Community resources

- SharePoint library
- SharePoint site
- OneNote
- Planner

Create live event

Activity  
Chat  
Teams  
Calendar  
Calls  
OneDrive  
Andy  
Viva Engage  
Apps



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](#) | [Member Care Contact Center Calendar](#) | [National Directory](#)

## News and Announcements

	10/1/2024, 4:25:22 PM	<b>National and Council</b> <b>Mandatory Cybersecurity Training</b> Please be on the lookout for an email from Scouting University regarding Cybersecurity training. Click this announcement for more details.
	10/1/2024, 3:19:06 PM	<b>National and Council</b>

## IT Online Service Catalog

 I am a National Employee
 I am a Council Employee

## Service Categories



Accounts & Passwords



BSA Applications (Business Operations)



BSA Applications (Scouting Programs)



Email, Communication & Collaboration



Network Services



Security Services



Hardware & Software

## 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](#)

## Service Categories



Accounts & Passwords



BSA Applications (Business Operations)



BSA Applications (Scouting Programs)



Email, Communication & Collaboration



Network Services

### Blackbaud

Blackbaud CRM is a cloud based Constituent Relationship Management platform. It facilitates the management of contacts, prospects, reporting and the recording of

### BSA Digital Assets

Access to BSA Digital Assets.

### Criminal Background Check

Sterling provides Criminal Background Checking (CBC) for Adult Volunteer Registrants and CBC-Required Positions.

### E-Invoices

E-Invoices is an online platform for collecting Supply Invoices.

### MyBSA

Internal employee resource portal for both national and council staff.

### National Support Center

Ticketing and knowledge base systems used by the National Support Center to provide technical support.

### Payment Processor

Stripe, WePay, and the BSA Payment Platform serve as the payment

### Payroll

ADP is the provider for BSA Local Council payrolls. Check here if you

### PeopleSoft Financials

Peoplesoft is the financial application used by councils for fiscals and human

## Overview

Blackbaud CRM is a cloud-based Constituent Relationship Management platform. It facilitates the management of contacts, prospects, reporting and the recording of fundraising activities. It can be accessed via the following link: [Blackbaud CRM](#)

## Request Support

- [Open A Request](#) - To add a current employee as a user within Blackbaud.
- [Open A Request](#) - If adding a new employee, Blackbaud access can be requested during this process.
- [Open A Request](#) - To report a problem or request troubleshooting in Blackbaud.



\* Required

## Blackbaud



Blackbaud CRM is a cloud based Constituent Relationship Management platform. It facilitates the management of contacts, prospects, reporting and the recording of fundraising activities.

### 4. Constituent Name

Please provide the name of the Constituent if applicable

### 5. Constituent ID

Please provide the Constituent ID applicable

### 6. Appeal

Please provide the name of the Appeal if applicable

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

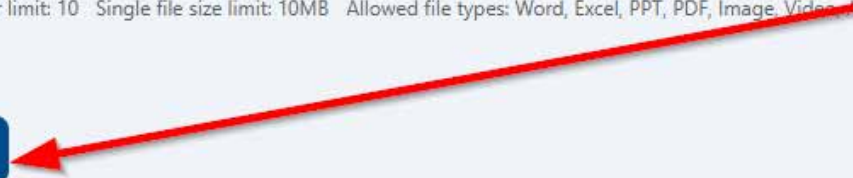
3. **Attachment(s)** (Non-anonymous question ) 

(optional)

 Upload file

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

Submit



# Next Forum

April 16, 2025

10:00 am & 2:00 pm CST



# Questions & Answers



Prepared. For Life.™