CRM User Forum

October 15, 2025

John Kuehn – Valerie Eaton – Don Day

Prepared. For Life.™

Objectives

- Pledge Receivable Aging Report
- Setting up a 2026 Appeal
- Use of FY – Inbound Channels
- Revenue Category in Batch Entry
- Revenue Data Hygiene
- CRM Production – Multi Factor Authentication
- Questions – Answers

Prepared. For Life.™

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.
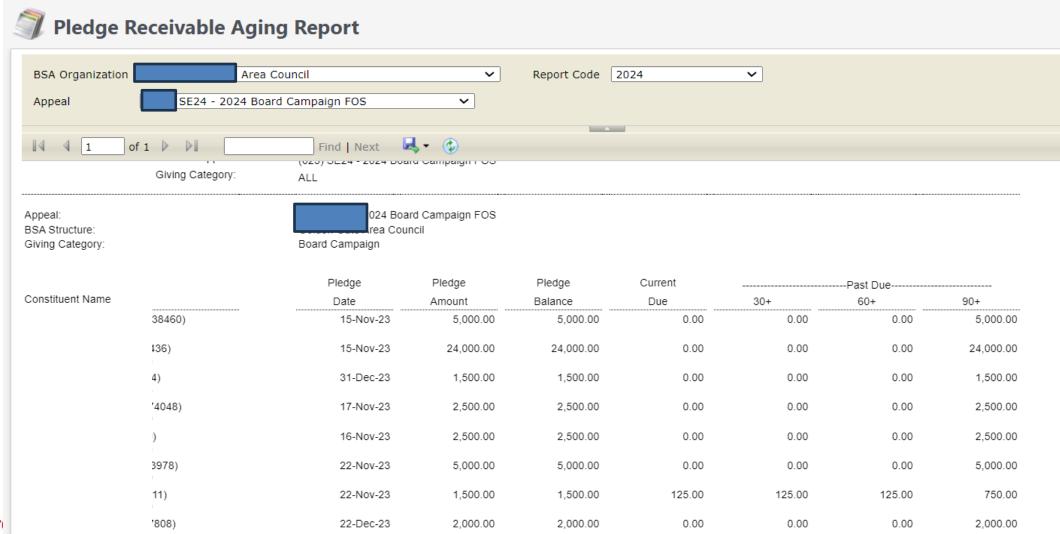- Run this report twice a month.

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

Prepared. For Life.™

Pledge Receivable Aging Report

December – Year end

- Run the **Pledges Aging Receivable report** at the beginning of the month and at the end of the month.

- At the end of December – enter all payments that have been received.

- It is recommended that you run the report on the last day of the year.

- The report will show all entries entered the day before.

Prepared. For Life.™

Creating a 2026 Appeal

- Create all FY appeals at the same time

- Mirror the Appeal name from this year when creating 2026 appeals like below

- (023) UW25 - 2025 United Way
  (023) UW26 - 2026 United Way

- Marketing & Communications > Add an Appeal

- Remember to use FY inbound channels with monies applied to 2026 appeals with 2025 postdates.

Marketing and Communications

Acknowledgements & Reminders
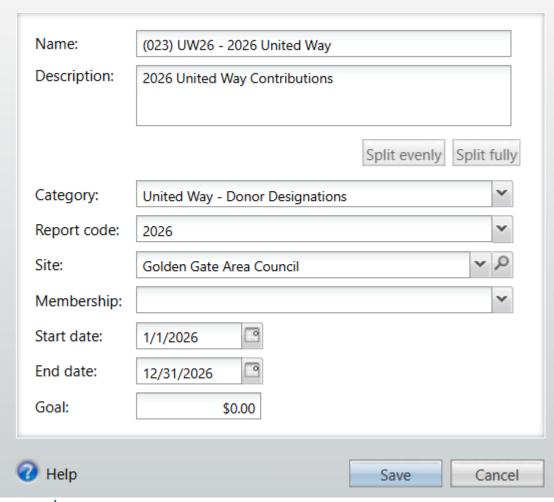
Add an Appeal - Detailed Steps

Add an Appeal - Quick Reference

In MyBSA>Blackbaud CRM User Guide, there is a one page refresher on setting up appeals for the next year, and another that will walk you through each step in the process in detail.

Prepared. For Life.™

Add an Appeal

Name:	(023) UW26 - 2026 United Way
Description:	2026 United Way Contributions
	Split evenly Split fully
Category:	United Way - Donor Designations
Report code:	2026
Site:	Golden Gate Area Council
Membership:	
Start date:	1/1/2026
End date:	12/31/2026
Goal:	$0.00

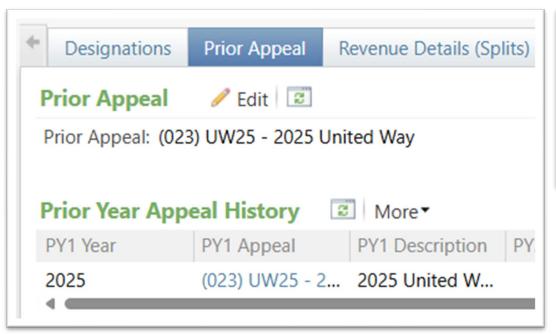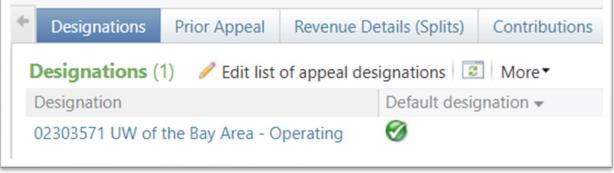Help   Save   Cancel

Name	Description
(023) AP25 - 2025 Adventure Pass	2025 Adventure Pass fundraising
(023) Recurring Gifts 2025	Recurring Gifts 2025
(023) SAE25 - 2025 SA N Com. Event	2025 Service Area E Com. Fundraising Event
(023) SAN25 - 2025 SA N Com.	2025 Service Area N Com. Fundraising Event
(023) SAW25 - 2025 SA W Com. Event	2025 Service Area W Com. Fundraising Event
(023) SC25 - 2025 Community FOS Campaign	2025 Community FOS Campaign
(023) SE25 - 2025 Board Campaign FOS	2025 Board Campaign FOS
(023) SF25 - 2025 Family FOS Campaign	2024 Family FOS contributions
(023) SG25 - 2025 Golden Eagle FOS Campaign Original	2025 FOS contributions not directed to family, c...
(023) CC25 - 2025 Capital Campaign	2025 Capital Campaign Contributions
(023) GK25 - 2025 Gift in Kind	2025 Gift in Kind
(023) DM25 - 2025 Di...	
(023) CE25 - 2025 Can...	
(023) EN25 - 2025 No...	at are not desi...
(023) JW25 - 2025 Jan...	entury endow...

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

Prepared. For Life.™

Add an Appeal

- Add Prior Appeal and Designation
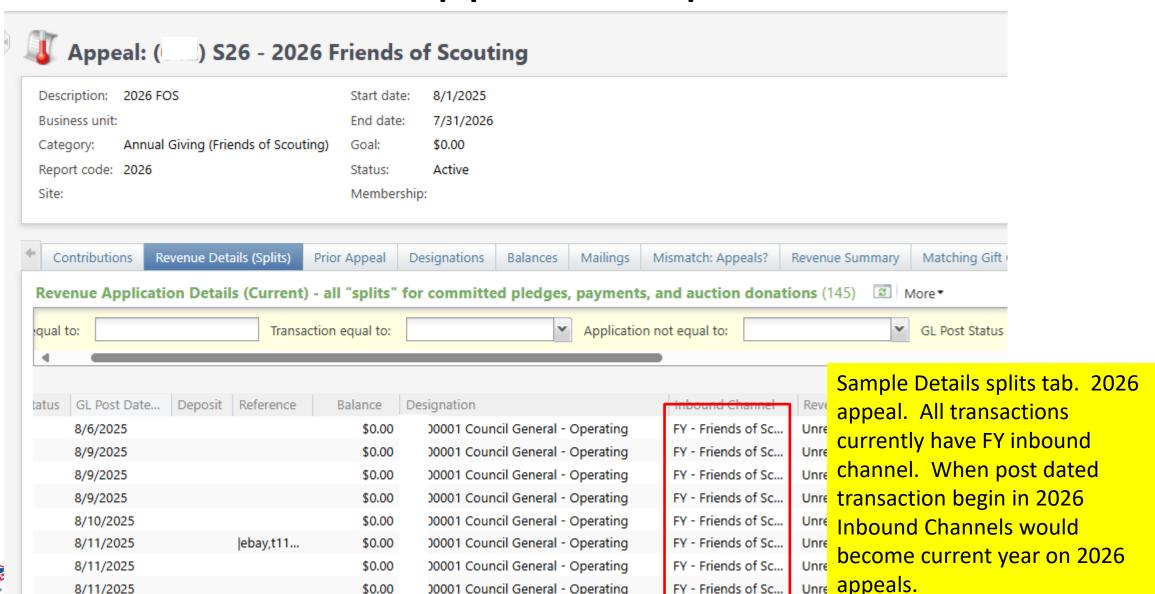- On the Designation tab set a default

Future Year (FY) – Inbound Channel

- Used normally in the Fall of each year.

- Used with next year's appeals – AKA 2026 Appeal Report Code

- A current year post-dated transactions attached to a 2026 (Future Year) Appeal

- This places monies into the reclass account which becomes your beginning account balances in 2026 when your controller opens PeopleSoft 2026 accounting year.

- Used with fund one designations.

Prepared. For Life.™

What Inbound Channel should be used?

- The GL Post Date is always the postmarked date on the revenue.
- If your GL Post Date's year is the same as your appeal's year, use the CY Inbound channel.
  - EX: (GL Post Date: 1/2/20==26== applied to Appeal: FOS20==26==)
- If your GL Post Date's year is the year prior to your appeal's year, use the FY Inbound channel.
  - EX: (GL Post Date: 12/24/20==25== applied to Appeal: FOS20==26==)
- If your GL Post Date's year is the year after your appeal's year, use the PY Inbound channel. **Only used with Pledge Payments**.
  - EX: (GL Post Date: 1/2/20==26== applied to Appeal: FOS20==25==)

Prepared. For Life.™

Appeal Sample

Appeal: (____) S26 - 2026 Friends of Scouting

Description:	2026 FOS	Start date:	8/1/2025
Business unit:		End date:	7/31/2026
Category:	Annual Giving (Friends of Scouting)	Goal:	$0.00
Report code:	2026	Status:	Active
Site:		Membership:	

Contributions	**Revenue Details (Splits)**	Prior Appeal	Designations	Balances	Mailings	Mismatch: Appeals?	Revenue Summary	Matching Gift

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (145) ⟳ | More▾

equal to:		Transaction equal to:		▼	Application not equal to:		▼	GL Post Status

tatus	GL Post Date...	Deposit	Reference	Balance	Designation		Inbound Channel	Reve
	8/6/2025			$0.00	00001 Council General - Operating		FY - Friends of Sc...	Unre
	8/9/2025			$0.00	00001 Council General - Operating		FY - Friends of Sc...	Unre
	8/9/2025			$0.00	00001 Council General - Operating		FY - Friends of Sc...	Unre
	8/9/2025			$0.00	00001 Council General - Operating		FY - Friends of Sc...	Unre
	8/10/2025			$0.00	00001 Council General - Operating		FY - Friends of Sc...	Unre
	8/11/2025		|ebay,t11...	$0.00	00001 Council General - Operating		FY - Friends of Sc...	Unre
	8/11/2025			$0.00	00001 Council General - Operating		FY - Friends of Sc...	Unre
	8/11/2025			$0.00	00001 Council General - Operating		FY - Friends of Sc...	Unre

Sample Details splits tab. 2026 appeal. All transactions currently have FY inbound channel. When post dated transaction begin in 2026 Inbound Channels would become current year on 2026 appeals.
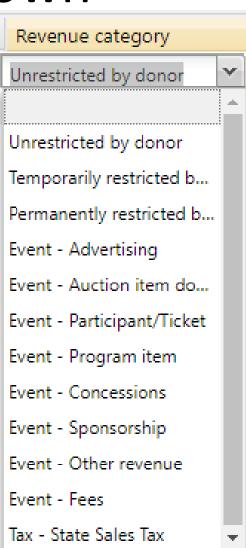
Future Year (FY) - Corrections

- 32 councils currently have revenue entries that need to be corrected.

- Identify revenue that is wrong by reviewing your 2026 appeals.

- Create LC Revenue Update Batch and change the inbound channel to FY inbound channel.

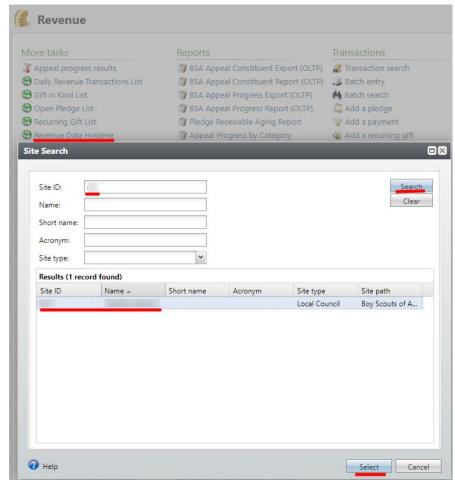- Fund 3 revenue should always be temp or permanently restricted.

Prepared. For Life.™

Revenue Category Batch Drop-Down

- Revenue Category in Batch is used for 2 items
  - Setting a restriction on the revenue
  - Setting a different special event account when Inbound Channel is set to Special Event Fundraising.

Revenue category

Unrestricted by donor

Unrestricted by donor
Temporarily restricted b...
Permanently restricted b...
Event - Advertising
Event - Auction item do...
Event - Participant/Ticket
Event - Program item
Event - Concessions
Event - Sponsorship
Event - Other revenue
Event - Fees
Tax - State Sales Tax
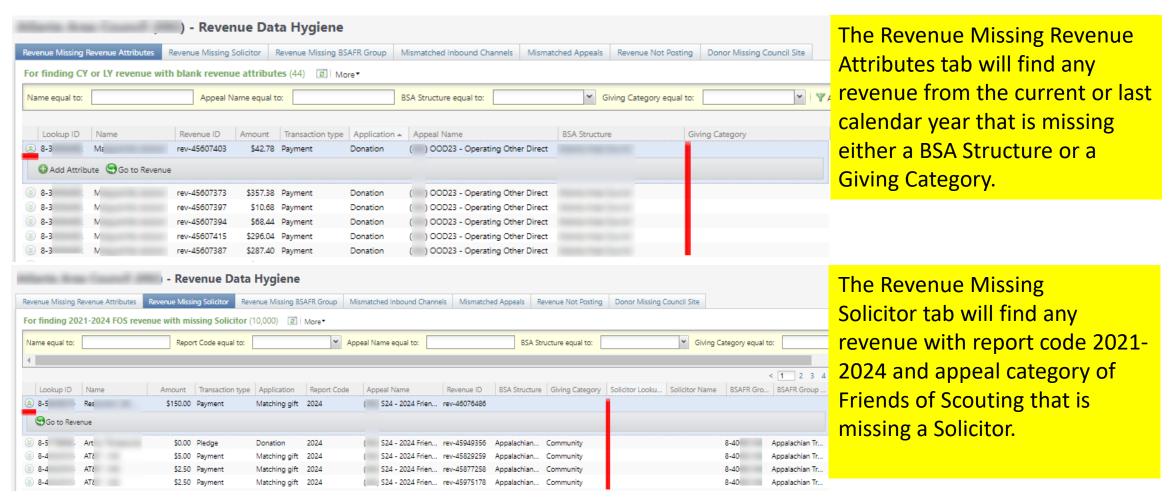
Revenue Category Field
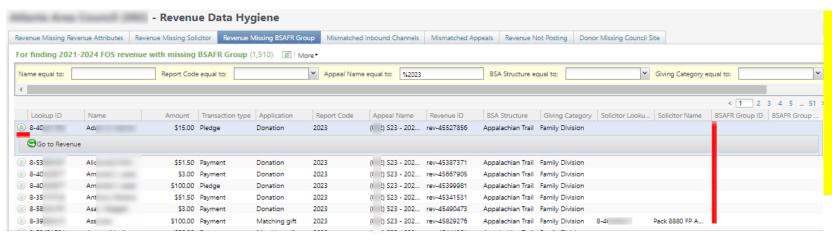
- **Unrestricted By Donor** –
  - Operating revenue given this year to be used this year.
- **Temp restricted by Donor** –
  - Capital money – Temp restricted by Project
  - Operating money for a future year. Temp Restricted by time
- **Permanently restricted by Donor** –
  - Used only with Endowment gifts – James E Wests, Good Turn Society if earmarked for Endowment by the donor.

Prepared. For Life.™

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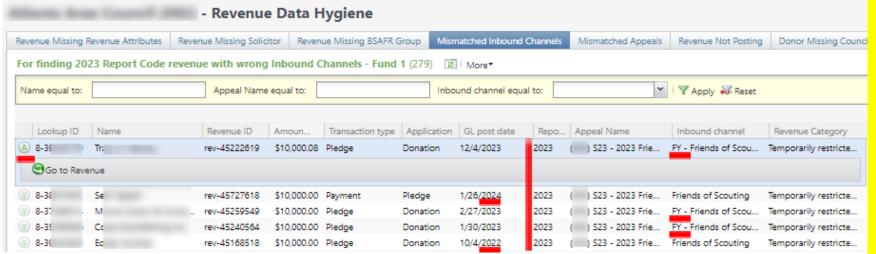
We have a set of data lists to help councils more quickly locate potential issues with their revenue.

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

Prepared. For Life.™

Revenue Data Hygiene

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.

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

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
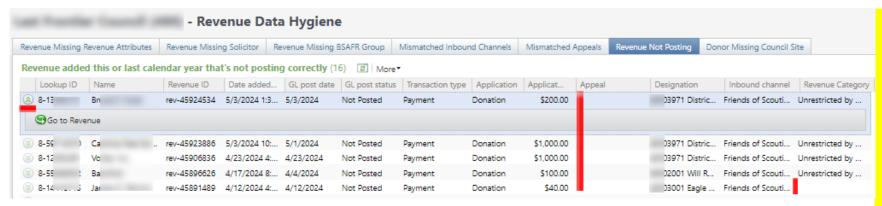
The Mismatched Inbound Channels tab has two data lists that will find any revenue with report code 2023 in Fund 1 where revenue with a 2022 or 2024 post date has a CY Inbound Channel *or* a 2023 post date and a PY or FY Inbound Channel, and a similar list for 2024 revenue
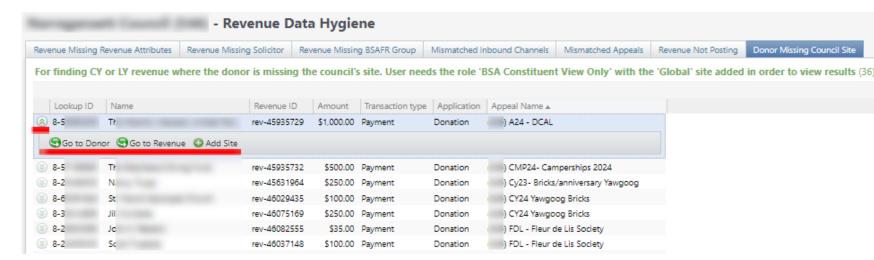
The Mismatched Appeals tab has two data lists that will find any 2023 or 2024 report code revenue where the appeal of the pledge doesn't match the appeal of the payment

Prepared. For Life.™

Revenue Data Hygiene

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

Prepared. For Life.™

Revenue Data Hygiene

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.

Multi-Factor Authentication

- Activation will occur on Friday, October 24th

- Redirection to Microsoft Login Page will occur

- User your username@scouting.org and password

- Enter your MFA code

- This will then redirect you back to the Blackbaud application.

JOIN US   GIVE   SHOP   MY.SCOUTING

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

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

Prepared. For Life.™

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

Prepared. For Life.™

Member Care

- Phone 972-580-2489

- http://membercare.scouting.org
  - Creating an incident directly in JIRA

Prepared. For Life.™

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

Prepared. For Life.™

Service Categories

- **Accounts & Passwords**
- **BSA Applications (Operations)**
- **BSA Applications (Program)**
- **Email, Communication & Collaboration**
- **General Assistance**
- **Network Services**
- **Security Services**
- **Hardware & Software**

General Assistance

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.

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

Managed Council Firewalls

Network Services

The National Office provides 24/7/365 managed firewall services for local council offices.

Security Compliance / Auditor Information

Security Services

Request for security information for insurance company or auditors.

Security Incident Report

Security Services

Report a security incident or issue to the National Security Team.

Web Content Filtering

Security Services

Web content filtering is the practice of blocking access to web content that may be deemed offensive, inappropriate, or even dangerous.

Prepared. For Life.™

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

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

November 19, 2025
10:00 am & 2:00 pm CT

Prepared. For Life.™

Questions & Answers

Prepared. For Life.™