

CRM User Forum

July 17, 2024

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Objectives

- Ø Monthly CRM To-Do's
- Ø Marking Donors as worked
- Ø Duplicate Checker
- Ø BSAFR Cleanup
- Ø Topic Suggestions
- Ø Questions – Answers



Monthly To-Do's

- Council should consider creating a To-Do's list
 - o Monthly To-Do's
 - o Yearly To-Do's
- Each council has a business cycle that may differ
 - o Example: When Reminders are sent out
When Acknowledgements are sent out



Monthly To-Do's

- Send Reminders
 - o Ensure all pledge payments are entered before running.
- Send Acknowledgements
- Process Batches Daily
- Commit or clear all batches created monthly
- Review Appeal Detail Splits
 - o Check for duplicated entries
 - o Check for donations that should be pledge payments



Monthly To-Do's

- Review Data Hygiene Data list
 - o Check for missing report attributes
 - o Check for mismatched appeals
 - o Check for items not posted
 - o Check for items missing BSAFR Groups
 - o Check for items missing Solicitors



Monthly To-Do's

Revenue

More tasks

-  Appeal progress results
-  Daily Revenue Transactions List
-  Gift in Kind List
-  Open Pledge List
-  Recurring Gift List
-  Revenue Data Hygiene
-  Write-Offs Data List

Data list if found under Revenue \ More Task \ Revenue Data Hygiene. When you click the link search for your council and a list site secured for your council will appear for you to use. Check each of the tabs for possible issues. If you have questions with what you see, please create a ticket and ask an expert.

Central Georgia Council (096) - Revenue Data Hygiene

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

For finding CY or LY revenue with blank revenue attributes (2)  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	
📄	8-607			\$154.50	Payment	Donation	(096) S23 - 2023 Frien...			
📄	8-572			\$515.00	Payment	Donation	(096) S24 - 2024 Frien...			



Marking Constituent as worked

When running unworked reports like the OLTP, there are two ways to prevent already worked constituents from showing up

- o Marking Constituents with a \$0 Pledge
- o Marking Constituents with an appeal response



Marking Constituent as worked

- \$0 Pledge Method
- Create an LC Pledge Commitment Batch
- Bring in constituent, set amount to \$0 and choose appeal to mark worked, then commit

The screenshot shows a software interface with the following components:

- Tabs:** Main (selected), Revenue
- Batch Section:** Save, Save and close, Export
- Constituent Section:** Solicit codes, Edit, Go to
- Configuration Section:** Properties, Customize fields
- Processes Section:** Validate, Update status, Validate addresses (all rows), Update projected totals
- Messages Section:** Set row message, Clear row message, Clear all, Show all, Select, Filter
- Properties Table:**

Constituent	Lookup ID	Group ID	Amount	Date	GL post date	Revenue type
John Smith	8-XXXXXX		\$0.00	7/16/2024		Pledge



Marking Constituent as worked

- Appeal Response Method
- At the start of the year, your council should have run pledge cards and marked constituents with the CY FOS appeal.

Pledge Card Report

Main | Sort Options | Production Options

Appeal ID: (227) 2024 Friends of Scouting

Constituent:

Constituent Selection:

Group: L227 Family BSAFR Parent Group

Group Selection:

☒ Include Subordinate Groups

Inclusion Options

☒ Include current donor group members

☐ Include former donor group members as of mm/dd/yyyy

☐ Include donor group members that have given in the past years.

☐ Include donor group members that have given at least dollars.

[Download export file](#)

[View report](#)

1 of 1 Find | Next

 **BOY SCOUTS OF AMERICA**
Spirit of Adventure Council
2024 FOS CAMPAIGN

You can count on my support of Scouting!

Total Contribution/Pledge: \$
Payment Enclosed: \$ cash, check, or credit card
Remaining Balance: \$ paid in installments (#):
Installment frequency: Once Semi-Annual Quarterly Monthly Recurring
Remind me to pay next installment by: / (MM/DD/YYYY)

SIGNATURE: DATE:

Email (please print):
Phone(s) Mobile:
Home:

BOY SCOUTS OF AMERICA
Spirit of Adventure Council
2024 FOS CAMPAIGN

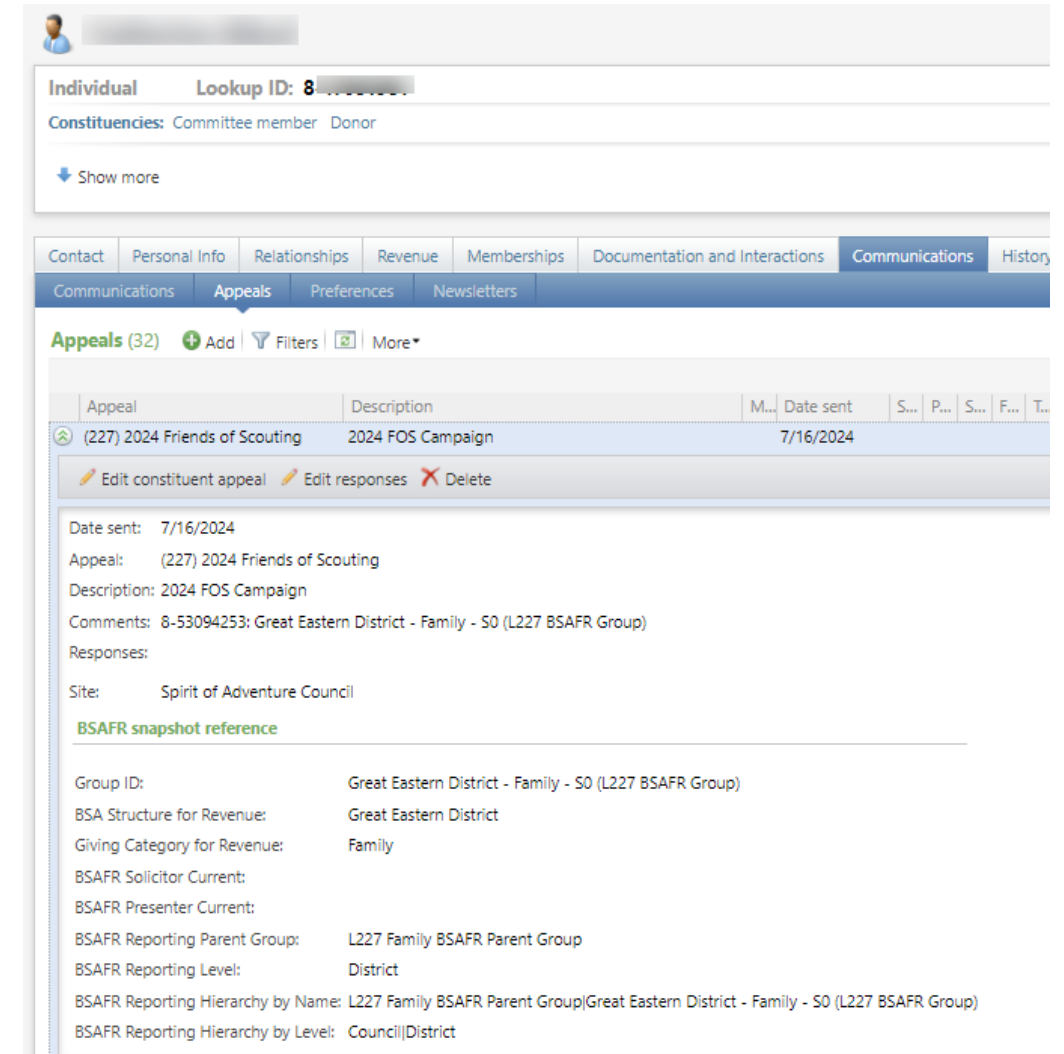
Pledge: \$
Payment: \$
Date:
Received by:

Thank you for your generous support of Scouting!



Marking Constituent as worked

- Appeal Response Method
- This will create an Appeal Response under the Communications>Appeals tab on the constituent record.



The screenshot displays the BSAFR system interface for a constituent record. The top navigation bar includes tabs for Contact, Personal Info, Relationships, Revenue, Memberships, Documentation and Interactions, Communications, and History. The 'Communications' tab is active, and the 'Appeals' sub-tab is selected. The 'Appeals (32)' section shows a table with columns for Appeal, Description, M..., Date sent, S..., P..., S..., F..., and T... The first row shows an appeal for '(227) 2024 Friends of Scouting' with a description of '2024 FOS Campaign' and a date sent of '7/16/2024'. Below the table, there are links to 'Edit constituent appeal', 'Edit responses', and 'Delete'. The 'Date sent' is 7/16/2024, the 'Appeal' is (227) 2024 Friends of Scouting, and the 'Description' is 2024 FOS Campaign. The 'Comments' field contains '8-53094253: Great Eastern District - Family - SO (L227 BSAFR Group)'. The 'Responses' field is empty. The 'Site' is Spirit of Adventure Council. A 'BSAFR snapshot reference' section follows, listing various identifiers and their corresponding values.

Appeal	Description	M...	Date sent	S...	P...	S...	F...	T...
(227) 2024 Friends of Scouting	2024 FOS Campaign		7/16/2024					

[Edit constituent appeal](#) [Edit responses](#) [Delete](#)

Date sent: 7/16/2024
Appeal: (227) 2024 Friends of Scouting
Description: 2024 FOS Campaign
Comments: 8-53094253: Great Eastern District - Family - SO (L227 BSAFR Group)
Responses:
Site: Spirit of Adventure Council

BSAFR snapshot reference

Group ID:	Great Eastern District - Family - SO (L227 BSAFR Group)
BSA Structure for Revenue:	Great Eastern District
Giving Category for Revenue:	Family
BSAFR Solicitor Current:	
BSAFR Presenter Current:	
BSAFR Reporting Parent Group:	L227 Family BSAFR Parent Group
BSAFR Reporting Level:	District
BSAFR Reporting Hierarchy by Name:	L227 Family BSAFR Parent Group Great Eastern District - Family - SO (L227 BSAFR Group)
BSAFR Reporting Hierarchy by Level:	Council District



Marking Constituent as worked

- Appeal Response Method
- To mark those appeal responses as worked later in the year, go to Constituent Record > Communications > Appeals
- Click chevron next to desired appeal, then Edit Responses to mark Worked.

The screenshot shows the Scout CRM interface. The top navigation bar includes tabs for Contact, Personal Info, Relationships, Revenue, Memberships, Documentation and Interactions, and Communications. The Communications tab is active, and the Appeals sub-tab is selected. Below the navigation bar, there's a section for 'Appeals (32)' with options to Add, Filter, and More. A table lists appeals, with one entry highlighted: (227) 2024 Friends of Scouting - 2024 FOS Campaign, dated 7/16/2024. Below the table, there are links for 'Edit constituent appeal', 'Edit responses' (which is underlined), and 'Delete'. The 'Edit responses' dialog box is open, showing a table with columns: Date, Category, Response, and Code. The first row shows 7/16/2024, Prospect Status, Worked, and W. There's a second row with an asterisk in the first column. At the bottom of the dialog, there are 'Save' and 'Cancel' buttons, with 'Save' being underlined.

Appeal	Description	M...	Date sent	S...	P...	S...
(227) 2024 Friends of Scouting	2024 FOS Campaign		7/16/2024			

Buttons: Edit constituent appeal, Edit responses, Delete

Edit responses

	Date	Category	Response	Code
	7/16/2024	Prospect Status	Worked	W
*				

Buttons: ? Help, Save, Cancel



Marking Constituent as worked

- Running the BSA Appeal Constituent Export (OLTP)
- Under Include, choose 1-3 PY, then include CY Appeal Response and \$0 Pledge info
- Under Exclude, exclude CY Donors, CY Appeal Response and \$0 Pledge info
- Changes will update overnight

BSA Appeal Constituent Export (OLTP)

Site: Spirit of Adventure Council Report Code: 2024

Annual Appeal(s): (227) 2024 Endowment (227) 2024 Foundations & Trusts (227) 2024 Friends of Scouting (227) 2024 Greater Lowell Event (227) 2024 NFBC Project Fund

Multi-year Appeal(s): All (227) 2018 Multi-year Capital Campaign (227) 2018 RM Multyear Restricted

☐ Only include multi-year appeal revenue for: 2024

Include Exclude Breakdown Filter

☐ Include All

☒ Include Prior Year 1 Giving ☒ Include Current Year Constituent Appeal/Response (Worked) Info ☐ Include Barcode Numbers

☒ Include Prior Year 2 Giving ☒ Include Current Year \$0 Pledge (Worked) Info

☒ Include Prior Year 3 Giving ☐ Include Donor Status Stats

Include Exclude Breakdown Filter

☐ Exclude All

☒ Exclude Current Year Donors ☐ Exclude Current Year Non-Donors ☐ Exclude Current Year Solicitees ☐ Exclude Current Year Non-Solicitees ☒ Exclude Constituents Marked as Do Not Solicit

☒ Exclude Current Year Worked Constituents (via an Appeal Response) ☐ Exclude Current Year Non-Donor, Non-Solicitees ☒ Exclude Constituents Marked as Deceased

☒ Exclude Current Year Worked Constituents (via a \$0 Pledge) ☒ Exclude Constituents Marked as Inactive



Duplicate Checker

- Built in CRM feature
- Works to reduce duplicated constituent entries in CRM
- Checker pops up when creating a new constituent if it thinks the constituent is already in CRM
- If you pick a suggested constituent, you must add your site to that constituent before placing revenue on it in batch entry.
- At least one person in your council should have the ability to add your site to a Global Constituent.



Duplicate Checker

- Scenario - Donation received, Constituent not found but created during batch entry - Wonder Woman
- If person is added outside of batch the duplicate checker will pop open when you click save for you to make your choices.



Duplicate Checker Scenario

Batch L1069140

Main Revenue

Batch: Save Save and close Export

Constituent: Solicit codes

Constituent: Edit Go to

Configuration: Properties Customize fields

Properties

	Barcode	Constituent
1		Wonder Woman
*		

Looked for the constituent in batch. Search window opened not results. Clicked the add button to create a new constituent.

Batch Revenue Constituent Search

Last/Org/Group name: Woman Address: Search Clear

First name: Wonder City:

Lookup ID: State: ▼

Sites: All sites ▼ ZIP/Postal code: 🔍

Email address:

☐ Match all criteria exactly

✔ Show advanced search options

Results (0 records found)

Lookup ID	Name ▲	Address	City	State	ZIP/P...	Email address
No records found						

+ Add ▼



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Duplicate Checker

1. Clicked the add button to create Wonder Woman as an individual constituent. Added name and address and saved record.
2. This created Wonder Woman in my batch line without a Constituent ID. This will be created when the batch is committed
3. I then filled in rest of batch line to Validate batch
4. When I validated, I got a yellow triangle warning sign. It tells me that this might be a duplicate record.
5. Click to review possibility.

Add an individual

Individual Household Business

Personal

Last name: Woman
First name: Wonder
Middle name:
Title:
Suffix:
Nickname:
Maiden name:
Marital status:
Birth date: mm/dd/yyyy Age:
Gender: Female

Primary contact

Address type: Home
Country: United States
Address: 509 Ocean View
City: Paradise Island
State: FL ☐ Omit from validation
ZIP: 65666
☐ Do not send mail to this address Reason:
Phone type:
Phone number:
Email type:
Email address:

Primary contact source

Information source:

	Barcode	Constituent	Lookup ID	Group ID	Amount
1		Wonder Woman			\$100.00
*					

	Barcode	Constituent	Lookup ID	Group ID	Amount
		Wonder Woman			\$100.00
		This constituent might be a duplicate. Click here to view.			



Duplicate Checker

Possible duplicate matches for Wonder Woman

Incoming constituent data	100% match: Wonder Woman	1 potential match found
Batch: L1069140; Created: 7/16/2024 + Add this as a new record	Created: 8/26/2015; Last updated: 3/20/2024 ✔ Confirm this record as a match	100% Wonder Woman Lookup ID: 8-15220142 509 Ocean View Paradise Island, FL 65666
Name:	Name: more	
<i>title</i>	Ms	
Wonder	Wonder	
<i>middle name</i>	<i>middle name</i>	
Woman	Woman	
<i>suffix</i>	<i>suffix</i>	
Address:	Address: more	
[Home]	[Home]	
509 Ocean View	509 Ocean View	
Paradise Island	Paradise Island	
FL	FL	
65666	65666	
Email:	Email: more	
<i>email type</i>	[Home Email Address]	
<i>email address</i>	johnkuehn66@yahoo.com	
Phone:	Phone: more	
<i>phone type</i>	<i>phone type</i>	

[Help](#) [Skip](#) [Cancel](#)

The system found a match. It's 100% based on the address typed in when creating the person in batch.

1. Write down the batch number of the 100% match
2. **Confirm that this as a match** if you feel it is.
3. If none of the choice are what you are looking for you can click **Add this as a new record**.
4. If you had entered additional information not on the matched record, you can tell the system to add it to the record.

Duplicate Checker

Possible duplicate matches for Wonder Woman

Incoming constituent data	100% match: Wonder Woman
Batch: L1069140; Created: 7/16/2024	Created: 8/26/2015; Last updated: 3/20/2024
Actions:	View other potential matches
Name:	Name: more
title	Ms
Wonder	Wonder
middle name	middle name
Woman	Woman
suffix	suffix
Address:	Address: more
[Home]	[Home]
509 Ocean View	509 Ocean View
Paradise Island	Paradise Island
FL	FL
65666	65666
Email:	Email: more
email type	[Home Email Address]
email address	johnkuehn66@yahoo.com
Phone:	Phone: more
phone type	phone type

**Tips**

If this record is not a match, click 'View other potential matches' to **cancel your changes** and go back to browsing.

Your organization's update rules:

- Update existing name with incoming name
- Add incoming similar address as new address
- Add incoming dissimilar address as new address
- Only make incoming address primary if the old primary address had the same type
- Add incoming phone number as new phone number
- Only make incoming phone number primary if the old primary phone had the same type
- Add incoming email address as new email address
- Only make incoming email address primary if the old primary email address had the same email type

☒ Automatically go to the next duplicate exception

[Help](#) [Save](#) [Cancel](#)

You can read the tips on how the match works. If you had new data on the left, that could be added to the record. It would be in red and give you choices on how to make updates to the record on the right. When done click the save button. **You then need to go to the record and add your council site.** You will need to do this outside of batch entry.

Duplicate Checker

The screenshot shows a user profile for "Wonder Woman" with a Lookup ID of 8-15220142. The profile is categorized as an "Individual" and a "Giving Prospect". The "Security" tab is selected, displaying a list of 9 sites. An "Add constituent sites" dialog is open, showing a search for "Conquistador Council" among other options like "Global" and "LC Global".

Wonder Woman

Notifications: "Major Giving Prospect". Click here for more information.

Individual **Lookup ID: 8-15220142**

Constituencies: Giving Prospect

Show more

Contact Personal Info Revenue Communications History Attributes Smart Fields **Security**

Sites (9) Add sites More

Site

- Boy Scouts of America
- BSA Foundation
- BSA National Council
- Global
- Northeast Illinois Council
- Rainbow Council
- Three Fires Council
- Three Harbors Council
- W.D. Boyce Council

Add constituent sites

Sites:

Site
Conquistador Council
Global
LC Global

Save Cancel

With a constituent search outside of batch, search for your constituent ID you wrote down earlier.

1. Proceed to the security tab.
2. Click the Add Site button.
3. Drop the pick list and select your site.
4. Click Save.

You can now commit your batch. If you do not do this and you commit your batch, the revenue will show in PeopleSoft but it will not show on your reports in CRM because you have not given yourself the rights to see the constituent.



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BSAFR Cleanup

- Have you merged districts?
- Do you have Giving categories that should be consolidated?
- Do you have BSA Structures that should be consolidated?
- Do you need to create Pledge cards with donor history?

These are some of the reason that you may need to create a ticket to seek help to unify / clean your data for future fundraising and correct history reporting.



BSAFR Cleanup

- Help available
 - o Updating fundraising groups in mass
 - o Updating BSAFR Snapshots in mass
 - o Updating revenue records in mass



BSAFR Cleanup

- BSAFR groups are constituents that you tie donors to.
- Using a group in batch entry can add the giving category, BSA structure, appeal and solicitor to your batch line for you.
- The group also unifies your donor history on a pledge card generated from CRM



BSAFR Cleanup

BSAFR	Revenue	Solicitor Credits	Details	Documentation and Interactions	Relationships	Attributes	Security	Co
-------	---------	-------------------	---------	--------------------------------	---------------	------------	----------	----

BSAFR Fields  Edit  Run pledge cards 

Group public name:	Troop 1910
Is BSAFR group:	Yes
Solicit for BSAFR:	Yes
BSA structure for revenue:	Mustang
Giving category for revenue:	Family Division
BSAFR solicitor current:	Troop 1910 BT - 662 (266857) (Lookup ID: 8-12219748)
BSAFR presenter current:	
BSAFR reporting parent group:	Mustang Family Chair (Lookup ID: 8-55272174)
BSAFR reporting level:	Unit
BSAFR reporting hierarchy by name:	Longhorn Council 662 Mustang 43 Mustang Family Chair Troop 1910 BT - 662 (266857)
BSAFR reporting hierarchy by level:	Council District District Unit
Can solicit revenue and set fundraising goals:	Yes
Can set committee goals:	Yes
Can coordinate events:	Yes

Each BSAFR Group has a BSAFR Tab. You populate the tab with information on how it relates to your fundraising activities.



BSAFR Cleanup

BSAFR	BSAFR Snapshot	Revenue	Solicitor Credits	Details	Documentation and Interactions	Relationships	Attributes	Security	Contact	Smart Fields	Communicat
BSAFR Snapshot (7)  More ▾											
Appeal	Group ID	BSA structure for revenue	Giving category for reven...	BSAFR solicitor ...	BSAFR presente...	BSAFR reportin...	BSA				
 (662) FOS Recurring	Troop 1910 BT - 662 (266857)	Mustang	Family Division	Troop 1910 BT -...		Mustang Family...	Uni				
 (662) S17 - 2017 Friends of Sc...	Troop 1910 BT - 662 (266857)	Mustang	Family Division	Troop 1910 BT -...		Mustang 36	Uni				
 (662) S18 - 2018 Friends of Sc...	Troop 1910 BT - 662 (266857)	Mustang	Family Division	Troop 1910 BT -...		Mustang 36	Uni				
 (662) S20 - 2020 Friends of Sc...	Troop 1910 BT - 662 (266857)	Mustang	Family Division	Troop 1910 BT -...		Mustang Family...	Uni				
 (662) S21 - 2021 Friends of Sc...	Troop 1910 BT - 662 (266857)	Mustang	Family Division	Troop 1910 BT -...		Mustang Family...	Uni				
 (662) S22 - 2022 Investment i...	Troop 1910 BT - 662 (266857)	Mustang	Family Division	Troop 1910 BT -...		Mustang Family...	Uni				
 (662) S23 - 2023 Investment i...	Troop 1910 BT - 662 (266857)	Mustang	Family Division	Troop 1910 BT -...		Mustang Family...	Uni				

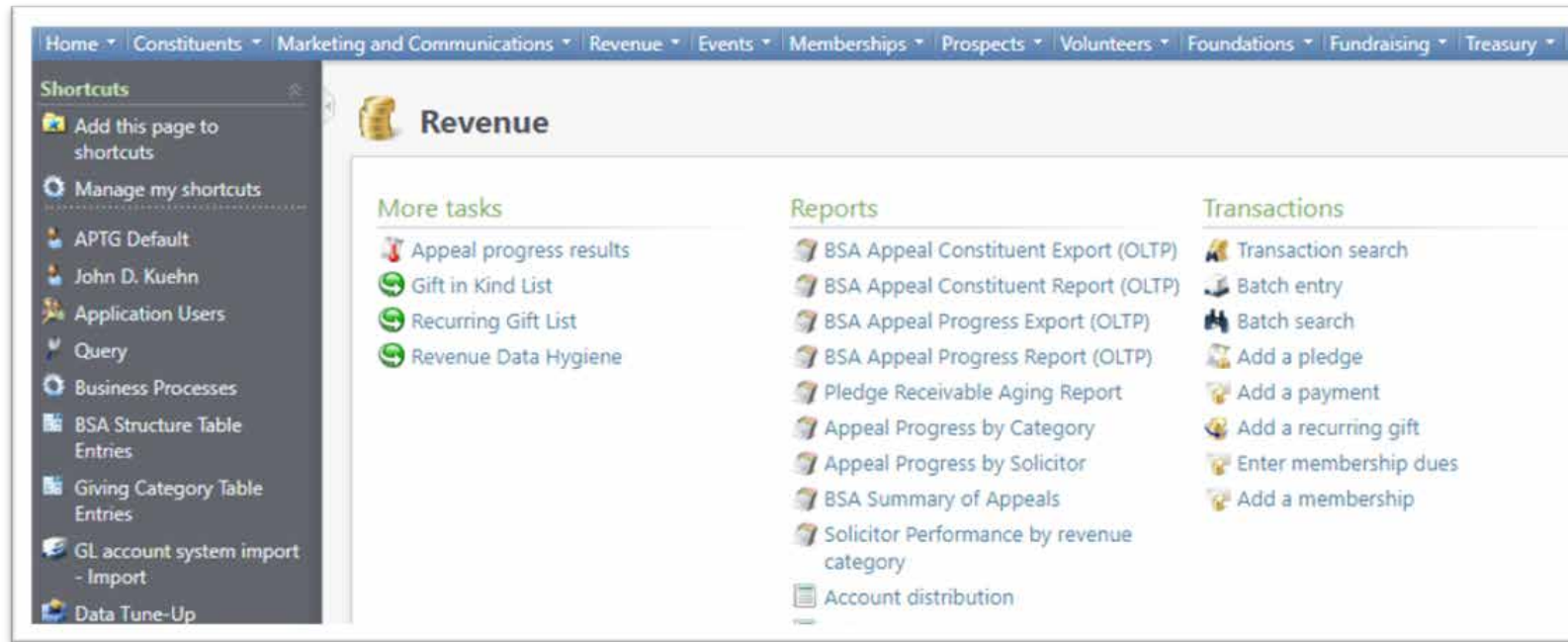
Using the group in batch with an appeal or creating pledge cards will add a snapshot to the group. The next time you use this group in batch it will populate the BSA structure, giving category and solicitor for you.



Pledge Receivable Report

Good to run this before entering new Pledges, Donations to provide duplication.

Found under Revenue/Reports/Pledge Receivable Aging Report



Report Contains

- Donors' information will appear
- Report splits by Structure & Giving Category
- List donors who are past due
- Contains data from the previous days data entry

Run Date:	8/16/2022	Pledge Receivable Aging Report				Page 7 of 7	
Run Time:	20:08:25	[REDACTED]					
Appeal:	[REDACTED]						
BSA Structure:	[REDACTED]						
Giving Category:	[REDACTED]						
Constituent Name	Pledge Date	Pledge Amount	Pledge Balance	Current Due	Past Due		
					30+	60+	90+
[REDACTED]	17-Feb-22	2,000.00	2,000.00	0.00	0.00	0.00	1,000.00
[REDACTED]	06-Feb-22	2,000.00	2,000.00	2,000.00	0.00	0.00	0.00
[REDACTED]	16-Feb-22	2,000.00	1,050.00	0.00	0.00	0.00	1,050.00
[REDACTED]	17-Feb-22	2,000.00	1,000.00	0.00	0.00	0.00	1,000.00



Reconciling

Blackbaud -

- Reports needed from Blackbaud:
 - Appeal Progress Results
 - Pledge Receivable Aging Report
 - BSA Summary of Appeals
- Check the pledges and donations



Topic Suggestions



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Council Support

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

Council Administration

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

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

- [Accounts Payable](#)

www.scouting.org/financeimpact

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

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](#)



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Member Care

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





Welcome to the National IT Service Catalog

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

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

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

Announcements & Updates



Andy the Chatbot Status Update

Andy the Chatbot's full functionality has been restored. You can use him to open tickets or find information once again.



Search the Service Catalog

Use the Search Bar at the top of this site to search for the correct ticket type or to search knowledge.

IT Online Service Catalog



I am a National Employee



I am a Council Employee



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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](#)



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Service Categories



Accounts & Passwords



BSA Applications (Business Operations)



BSA Applications (Scouting Programs)



Email, Communication & Collaboration



Network Services



Security Services



Hardware & Software

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.

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 processor for web applications (like Scouting Gives, STEM, etc.) to collect the payments on the council's behalf.

Payroll

ADP is the provider for BSA Local Council payrolls. Check here if you payroll-related questions.

PeopleSoft Financials

Peoplesoft is the financial application used by councils for fiscals and human relations record keeping.

Registration Data Changes

For making changes to charter or individual registration lengths. The Registration Data Changes form can be used to shorten, extend or correct effective dates and expiration dates.

Registration Refunds

This service provides refunds for payments that have been collected incorrectly.

Riskconnect

Riskconnect is a risk management information system used to intake and manage incidents, near misses, and membership infractions and claims.



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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.

Frequently Asked Questions

- > A user has been added but they cannot access anything in Blackbaud.
- > Is there a training environment for Blackbaud?
- > Reports are set up to show Appeal history but this isn't showing in the report.

Related Services

- [Scouting Gives](#)
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- [National Knowledge Base](#)
- The Blackbaud CRM User Guide can be found on the [MyBSA Home Page](#) on the left-hand side under Fundraising.





* 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



8. Issue Description *



Please provide a detailed summary of the issue or problem.

Enter your answer

9. Attachments (Non-anonymous question)



Please attach documentation such as screenshots.

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Next Forum

August 21, 2024
10:00 am & 2:00 pm CT



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Questions & Answers



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