

CRM User Forum

August 28, 2024

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Objectives

- Ø BSAFR Groups Cleanup
- Ø BSAFR Revenue Cleanup
- Ø Pledge Cards
- Ø Questions – Answers



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

- 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 Group Cleanup

- Groups should be reviewed annually
- Check to ensure new units have the correct BSA Structure, Giving Category and Solicitor
- Adjust other groups that may be wrong



BSAFR Group Cleanup

- Find your BSAFR Group Query in your query folder
- Dump it to excel
- Sort by Hierarchy by Name
- Look for inconsistencies



BSAFR Group Cleanup

- Conversion sorted your groups under two lead groups
 - o LXXX Community BSAFR Parent Group (Prior Community group)
 - o LXXX Family BSAFR Parent Groups (units will be under this)
- If BSAFR groups are adjusted the will probably look as
 - o Council
 - § District
 - Units
 - § District
 - Units



BSAFR Group Cleanup

B	C	D	E	F	G
Lookup ID	Name	BSAFR\Solicit for BSAFR	BSAFR\BSA structure for revenue	BSAFR\Giving category for revenue	BSAFR\BSAFR solicitor current
8-35341467	L311 Community BSAFR Parent Group	Yes			
8-53340859	Grand River Trails Community	Yes	Grand River Trails District 02	Community Campaign	
8-35339259	Grand River Trails District - Community Campaign - S0	Yes	Grand River Trails District 02	Community Campaign	Created by conversion set up.
8-35339268	Grand River Trails District - Gifts In Kind - S0	Yes	Grand River Trails District 02	Gifts in Kind	
8-53348263	Lewis & Clark Community	Yes	Lewis & Clark District 03	Community Campaign	
8-35339240	Lewis & Clark District - Community Campaign - S0	Yes	Lewis & Clark District 03	Community Campaign	
8-35339258	Lewis & Clark District - Gifts In Kind - S0	Yes	Lewis & Clark District 03	Gifts in Kind	
8-53348272	Loess Hills Community	Yes	Loess Hills District 01	Community Campaign	
8-35339177	Loess Hills District -Community Campaign - S0	Yes	Loess Hills District 01	Community Campaign	
8-35339239	Loess Hills District - Gifts In Kind - S0	Yes	Loess Hills District 01	Gifts in Kind	
8-35339317	Pony Express Council - Executive Board Campaign - S0	Yes	Pony Express Council	Executive Board Campaign	
8-35339366	Pony Express Council - Gifts In Kind - S0	Yes	Pony Express Council	Gifts in Kind	
8-35341507	L311 Family BSAFR Parent Group	Yes			
8-32176947	Grand River Trails District Family	Yes	Grand River Trails District 02	Family Campaign	
8-35284415	Crew 0120 NA Chillicothe - 311 (344122)	Yes	Grand River Trails District 02	Family Campaign	Crew 0120 NA Chillicothe - 311 (344122)
8-35284392	Pack 0023 BP Trenton - 311 (65024)	Yes	Grand River Trails District 02	Family Campaign	Pack 0023 BP Trenton - 311 (65024)
8-32179059	Pack 0066 BP Plattsburg - 311 (112312)	Yes	Grand River Trails District 02	Family Campaign	Pack 0066 BP Plattsburg - 311 (112312)
8-35284401	Pack 0120 FP Chillicothe - 311 (68289)	Yes	Grand River Trails District 02	Family Campaign	Pack 0120 FP Chillicothe - 311 (68289)
8-32178978	Pack 0222 BP Stewartsville - 311 (77426)	Yes	Grand River Trails District 02	Family Campaign	Pack 0222 BP Stewartsville - 311 (77426)
8-32178957	Pack 0249 FP Cameron - 311 (113235)	Yes	Grand River Trails District 02	Family Campaign	Pack 0249 FP Cameron - 311 (113235)
8-55317907	Troop 0008 GT Cameron - 311 (359323)	Yes	Grand River Trails District 02	Family Campaign	Troop 0008 GT Cameron - 311 (359323)
8-32179029	Troop 0067 BT Gallatin - 311 (277176)	Yes	Grand River Trails District 02	Family Campaign	Troop 0067 BT Gallatin - 311 (277176)
8-32179031	Troop 0070 BT Hamilton - 311 (118024)	Yes	Grand River Trails District 02	Family Campaign	Troop 0070 BT Hamilton - 311 (118024)
8-32179040	Troop 0087 BT Cameron - 311 (44820)	Yes	Grand River Trails District 02	Family Campaign	Troop 0087 BT Cameron - 311 (44820)

BSAFR Group Cleanup

Lookup ID	Name	BSAFR\Solicit for BSAFR	BSAFR\BSA structure for revenue	BSAFR\Giving category for revenue	BSAFR\BSAFR solicitor current	B
8-46012406	Pine Burr Area Council 304	No	Council		Structure altered after conversion process. Note items in red. These groups would need updating on the BSAFR Tab.	
8-47366862	Chickasawhay 02	Yes	Chickasawhay			
8-53094339	Chickasawhay Community	Yes	Chickasawhay	Community		
8-53094402	Chickasawhay Family	Yes	Chickasawhay	Family		
8-53094355	Chickasawhay Pacesetter	Yes	Chickasawhay	Pacesetter		
8-53932632	Chickasawhay Whitney M. Young	Yes	Chickasawhay	Whitney M. Young		
8-55187235	Covington County	Yes	Chickasawhay	Covington County		
8-55131295	Jones County	Yes	Chickasawhay	Jones County		
8-47368283	Pack 0010 BP Ellisville - 304 (235907)	Yes	Chickasawhay	Family		Pack 0010 BP Ellisville - 304 (235907)
8-47368288	Pack 0029 FP Laurel - 304 (135935)	Yes	Chickasawhay	Family		Pack 0029 FP Laurel - 304 (135935)
8-52161834	Pack 0033 FP Laurel - 304 (333823)	Yes	Chickasawhay	Family		Pack 0033 FP Laurel - 304 (333823)
8-60400939	Pack 0039 BP Hattiesburg - 304 (373601)	Yes	Chickasawhay			Pack 0039 BP Hattiesburg - 304 (373601)
8-56274636	Pack 0440 BP Laurel - 304 (362445)	Yes	Chickasawhay	Family		Pack 0440 BP Laurel - 304 (362445)
8-54052496	Pack 0509 FP Waynesboro - 304 (354627)	Yes	Chickasawhay			Pack 0509 FP Waynesboro - 304 (354627)
8-59046317	Pack 2308 BP Heidelberg - 304 (370331)	Yes	Chickasawhay			Pack 2308 BP Heidelberg - 304 (370331)
8-47368401	Troop 0010 BT Ellisville - 304 (314246)	Yes	Chickasawhay	Family		Troop 0010 BT Ellisville - 304 (314246)
8-47368409	Troop 0029 BT Laurel - 304 (60613)	Yes	Chickasawhay	Family		Troop 0029 BT Laurel - 304 (60613)
8-47368411	Troop 0033 BT Laurel - 304 (104586)	Yes	Chickasawhay	Family		Troop 0033 BT Laurel - 304 (104586)
8-56749569	Troop 0033 GT Laurel - 304 (364757)	Yes	Chickasawhay	Family		Troop 0033 GT Laurel - 304 (364757)
8-47366865	Singing River 05	No	Singing River			
8-55187236	George County	Yes	Singing River	George County		
8-55187239	Ocean Springs	Yes	Singing River	Ocean Springs		
8-52279639	Pack 0127 NA Leakesville - 304 (336027)	Yes	Singing River			Pack 0127 NA Leakesville - 304 (336027)
8-47368355	Pack 0228 BP Vancleave - 304 (304652)	Yes	Singing River	Family		Pack 0228 BP Vancleave - 304 (304652)
8-50599932	Pack 0229 FP Ocean Springs - 304 (194432)	Yes	Singing River			Pack 0229 FP Ocean Springs - 304 (194432)
8-52038865	Pack 0240 BP Moss Point - 304 (329507)	Yes	Singing River	Family		Pack 0240 BP Moss Point - 304 (329507)
8-47368383	Pack 0476 BP Moss Point - 304 (230877)	Yes	Singing River	Family		Pack 0476 BP Moss Point - 304 (230877)

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. To use in batch, it needs to be flagged as a BSAFR Group and it needs to Solicit for BSAFR.



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 with the appeal it will populate the BSA structure, giving category and solicitor for you.



BSAFR Cleanup

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



BSAFR Revenue Cleanup

- v Revenue should be reviewed
- v If donor has multiple lines on BSA Constituent appeal Export
 - Ø Different BSA Structure or giving categories used (years)
 - Ø Different BSAFR Group or solicitor used (years)
- v Spread yearly donation over several lines on report
- v Donor will have multiple pledge cards generated if connected to multiple groups.



BSAFR Revenue Example issue

From Query

Appeal\Revenue	ID	Amount	Structure	Giving Cat	Solicitor ID	BSAFR GR Name
2022 rev-452	4429	\$50.00	Tukabatchee Area Council	Council	8-41804961	TAC CD Denise Miller
2023 rev-456	4429	\$50.00	Ecunchatee	Community		Enunchatee Community Unassigned
2023 rev-455	4429	\$50.00	Ecunchatee	Community		Enunchatee Community Unassigned
2023 rev-455	4429	\$50.00	Ecunchatee	Community		Enunchatee Community Unassigned
2023 rev-456	4429	\$50.00	Ecunchatee	Community		Enunchatee Community Unassigned
2024 rev-460	4429	\$50.00	Ecunchatee	Community		Enunchatee Community Unassigned
2024 rev-460	4429	\$50.00	Ecunchatee	Community		Enunchatee Community Unassigned

From Constituent Appeal Export

BSA Structure	Giving Category	Solicitor	Group	24 Gift	23 Gift	22 Gift
Ecunchatee	Community		Enunchatee Community Unassigned	\$50.00	\$100.00	\$0.00
Tukabatchee Area Council	Council	Denise	TAC CD Denise Miller	\$0.00	\$0.00	\$50.00

From Pledge Card Export file

GROUPNAME	BSA STRUCTURE	GROUPGIVINGCATEGORY	GROUPSOLICITOR	2024	2023	2022
Enunchatee Community Unassigned	Ecunchatee	Community		\$50.00	\$100.00	\$0.00
TAC CD Denise Miller	Tukabatchee Area Council	Council	Denise	\$0.00	\$0.00	\$50.00



BSAFR Revenue Fix

- Seek permission before changing historical gifts.
 - o Changes affect history reports
 - o The goal would be to leave in same structure
- Revenue Attributes can be changed outside of batch
- BSAFR Groups can be changed with a Revenue Update Batch
- Large number of changes - submit a change sheet with Jira ticket – Ask for help



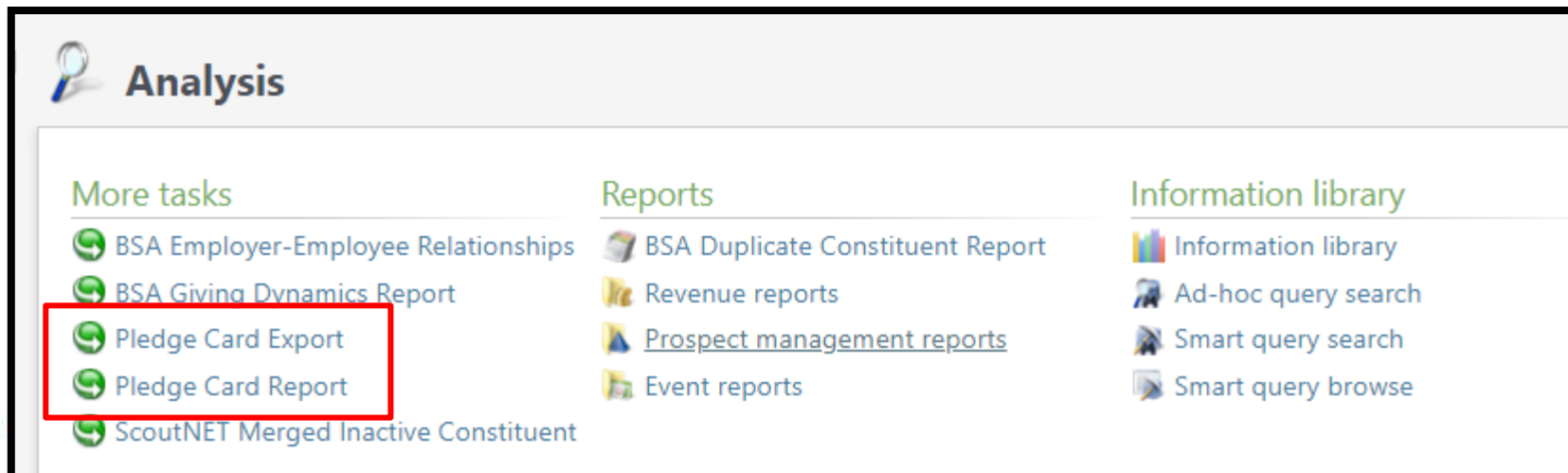
Pledge Card Process

- Two routines – Same prompts
 - o Export provides a file that you can use to mail merge
 - o Report provides standard pledge card in PDF format
- Generated by appeal
- Pledge cards can be run by:
 - o Individual
 - o Selection of individuals
 - o One Groups
 - o Multiple Groups



Pledge Card Process

- Items needed for the process
 - o Cleaned up BSAFR groups
 - o Future Appeal Created
 - o Access to Analysis \ More Tasks \ Pledge Card (Export, Report)
 - o Set of Cards you need to generate (District, Unit, Council)



Pledge Card Process Sample Groups

Lookup ID	Name	BSAFR\Solicit for BSAFR	BSAFR\BSA structure for revenue
8-46012406	Pine Burr Area Council 304	No	Council
8-47366862	Chickasawhay 02	Yes	Chickasawhay
8-53094339	Chickasawhay Community	Yes	Chickasawhay
8-53094402	Chickasawhay Family	Yes	Chickasawhay
8-53094355	Chickasawhay Pacesetter	Yes	Chickasawhay
8-53932632	Chickasawhay Whitney M. Young	Yes	Chickasawhay
8-55187235	Covington County	Yes	Chickasawhay
8-55131295	Jones County	Yes	Chickasawhay
8-47368283	Pack 0010 BP Ellisville - 304 (235907)	Yes	Chickasawhay
8-47368288	Pack 0029 FP Laurel - 304 (135935)	Yes	Chickasawhay
8-52161834	Pack 0033 FP Laurel - 304 (333823)	Yes	Chickasawhay
8-60400939	Pack 0039 BP Hattiesburg - 304 (373601)	Yes	Chickasawhay
8-56274636	Pack 0440 BP Laurel - 304 (362445)	Yes	Chickasawhay
8-54052496	Pack 0509 FP Waynesboro - 304 (354627)	Yes	Chickasawhay
8-59046317	Pack 2308 BP Heidelberg - 304 (370331)	Yes	Chickasawhay
8-47368401	Troop 0010 BT Ellisville - 304 (314246)	Yes	Chickasawhay
8-47368409	Troop 0029 BT Laurel - 304 (60613)	Yes	Chickasawhay
8-47368411	Troop 0033 BT Laurel - 304 (104586)	Yes	Chickasawhay
8-56749569	Troop 0033 GT Laurel - 304 (364757)	Yes	Chickasawhay
8-47366865	Singing River 05	No	Singing River
8-55187236	George County	Yes	Singing River
8-55187239	Ocean Springs	Yes	Singing River
8-52279639	Pack 0127 NA Leakesville - 304 (336027)	Yes	Singing River
8-47368355	Pack 0228 BP Vancleave - 304 (304652)	Yes	Singing River
8-50599932	Pack 0229 FP Ocean Springs - 304 (194432)	Yes	Singing River

For pledge cards:

1. If I use **Pine Burr Area Council 304** and check include subordinate groups, I will get all the cards in the council.
2. If I select **Chickasawhay 02** and subordinate groups, I will get only cards for Chickasawhay District.
3. If I pick **Pack 0010 BP Ellisville**, I will get cards only for that unit. Adult leaders and parents of the members if entered in registration.

Pledge Card Process - All

The image displays three screenshots of the BSA Pledge Card Export interface, illustrating the process for generating pledge cards for an entire council.

Tab 1: Main (Left Screenshot)

- Appeal ID: (304) S25 - Friends of Scouting
- Constituent: [Empty]
- Constituent Selection: [Empty]
- Group: Pine Burr Area Council 304
- Group Selection: [Empty]
- ☒ 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 (0-3).
- ☐ Include donor group members that have given at least [] dollars.

Tab 2: Sort Options (Middle Screenshot)

- Sort 1: BSA Structure
- Sort 2: Giving Category
- Sort 3: Group Name
- Sort 4: Name
- Sort 5: [Empty]

Tab 3: Production Options (Right Screenshot)

- ☐ Mark constituent with appeal
- ☐ Reprint for already marked record
- ☒ Print unmarked records
- ☒ Include Barcode in report
- ☒ Include To the Parents of
- Prior X gift amounts (0-3): [] 3
- Card Comment: [Empty]
- Stub Comment: Thanks For Supporting Scouting

A red arrow points from the "Mark constituent with appeal" checkbox in Tab 3 to the yellow text box.

This illustrate top down generate for entire council. Tab 1 – Select Appeal, Select council group, Include subordinate groups, Click inclusions. Tab2 – Determine sorting order. Tab 3 – determine what to include in output. **Only check Mark Constituent with Appeal** when you have verified you output is what you want. 4532 cards would be generated for the council.



Pledge Card Process - District

MainSort OptionsProduction Options

Appeal ID:(304) S25 - Friends of Scouting

Constituent:

Constituent Selection:

Group:Chickasawhay 02

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 (0-3).

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

MainSort OptionsProduction Options

Sort 1:Giving Category

Sort 2:Group Name

Sort 3:Name

Sort 4:

Sort 5:

MainSort OptionsProduction Options

☐ Mark constituent with appeal

☐ Reprint for already marked record

☒ Print unmarked records

☒ Include Barcode in report

☒ Include To the Parents of

Prior X gift amounts (0-3):3

Card Comment:

Stub Comment:Thanks For Supporting Scouting

These represent picking a single district. Tab 1 – Select Appeal, Select district group, Include subordinates, select inclusion options. Tab 2 – Determines sort orders, Tab 3 – Decide on output items. 618 cards are returned for this sort. It would include the community cards and the unit member cards for this district.



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Pledge Card Process - Unit

MainSort OptionsProduction Options

Appeal ID:(304) S25 - Friends of Scouting

Constituent:

Constituent Selection:

Group:Pack 0010 BP Ellisville - 304 (235907)

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 (0-3).

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

MainSort OptionsProduction Options

Sort 1:Name

Sort 2:

Sort 3:

Sort 4:

Sort 5:

MainSort OptionsProduction Options

☐ Mark constituent with appeal

☐ Reprint for already marked record

☒ Print unmarked records

☒ Include Barcode in report

☒ Include To the Parents of

Prior X gift amounts (0-3):3

Card Comment:

Stub Comment:Thanks For Supporting Scouting

These represent picking a single Unit. Tab 1 – Select Appeal, Select unit group, select inclusion options. Tab 2 – Determines sort orders, Tab 3 – Decide on output items. 8 cards are returned for this sort. It would include the current members of the unit group.



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Pledge Card Process

 **Pack 0010 BP Ellisville - 304 (235907)**

Group **Lookup ID: 8-47368283**

Constituencies: Committee

Group Members

Primary member

Charles R. Ellard

8 current members:

1238 former members

[BSAFR](#) [Summary](#) [Members](#) [Solicitor Credits](#) [Contact](#) [Details](#) [Relationships](#) [Revenue](#) [Committee](#) [D](#)

BSAFR Fields  Edit  Run pledge cards 

Group public name:

Is BSAFR group:	Yes
Solicit for BSAFR:	Yes
BSA structure for revenue:	Chickasawhay
Giving category for revenue:	Family
BSAFR solicitor current:	Pack 0010 BP Ellisville - 304 (235907) (Lookup ID: 8-47368283)
BSAFR presenter current:	
BSAFR reporting parent group:	Chickasawhay 02 (Lookup ID: 8-47366862)
BSAFR reporting level:	Unit
BSAFR reporting hierarchy by name:	Pine Burr Area Council 304 Chickasawhay 02 Pack 0010 BP Ellisville - 304 (235907)
BSAFR reporting hierarchy by level:	Council District Unit
Can solicit revenue and set fundraising goals:	Yes
Can set committee goals:	Yes
Can coordinate events:	Yes

Quick review of the unit / group reveals it has 8 current members. The BSAFR tab controls the structure, category and solicitor for the pledge cards.



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Pledge Card Process – Mark Constituent with Appeal

When you check "Mark Constituent with Appeal" and view the report CRM does 2 items. 1. It places an appeal on the constituent record. This can be edited with an appeal response. 2. It also places a snapshot on the group record. The snapshot supplies the Structure, Giving Category, Solicitor to the batch line when you use the group in the Group ID field.

Production Options

- ☒ Mark constituent with appeal
- ☐ Reprint for already marked record
- ☐ Print unmarked records
- ☒ Include Barcode in report
- ☒ Include To the Parents of

Prior X gift amounts (0-3):

Card Comment:

Stub Comment:

Appeals (1) + Add Filters More

Appeal	Description	Mailing	Date sent	Source code
This month				
(304) S25 - Friends of Scouting	2025 FOS Campaign		8/19/2024	
Edit constituent appeal Edit responses Delete				
Date sent: 8/19/2024				
Appeal: (304) S25 - Friends of Scouting				
Description: 2025 FOS Campaign				
Comments: 8-47368283: Pack 0010 BP Ellisville - 304 (235907)				
Responses:				
Site: Pine Burr Area Council				
BSAFR snapshot reference				
Group ID: Pack 0010 BP Ellisville - 304 (235907)				
BSA Structure for Revenue: Chickasawhay				
Giving Category for Revenue: Family				
BSAFR Solicitor Current: Pack 0010 BP Ellisville - 304 (235907)				
BSAFR Presenter Current:				
BSAFR Reporting Parent Group: Chickasawhay 02				
BSAFR Reporting Level: Unit				
BSAFR Reporting Hierarchy by Name: Pine Burr Area Council 304 Chickasawhay 02 Pack 0010 BP Ellisville - 304 (235907)				
BSAFR Reporting Hierarchy by Level: Council District Unit				

BSAFR Snapshot	BSAFR	Summary	Members	Solicitor Credits	Contact	Details	Relationships	Revenue	Committee	Documentation and Interactions	Communications	History	Attributes	Smart Field
BSAFR Snapshot (1)  More														
Appeal	Group ID	BSA structure for re...	Giving category for ...	BSAFR solicitor curr...	BSAFR presenter cu...	BSAFR reporting pa...	BSAFR reporting lev...	BSAFR hierarchy by...	BSAFR hierarchy by...					
 (304) S25 - Friends ...	Pack 0010 BP Ellisvil...	Chickasawhay	Family	Pack 0010 BP Ellisvil...	Chickasawhay 02	Unit	Pine Burr Area Cou...	Council District Unit						

Pledge Card Process - Report

If you create your own pledge card, you can use the Pledge Card Export to get your excel sheet to merge from. If you want standard pledge cards, you will then want to run the Pledge Card Report. You would use the same appeal and groups and click the same boxes to get your cards. If you **marked your constituents** with the Pledge Card Export process you will need to click the box "Reprint for Already Marked Records" to have your standardize cards generate. If you use the bar code in batch entry, they system will place the constituent, group, appeal, structure, giving category and solicitor into the batch form you.

 **BSA Pledge Cards**

MainSort OptionsProduction Options

☐ Mark constituent with appeal

☒ Reprint for already marked records

☐ Print unmarked records

☒ Include Barcode in report

☒ Include To the Parents of

Prior X gift amounts (0-3):

3

Card Comment:

Stub Comment:

Thanks for Supporting Scouting!

1 of 3FindNext

**BOY SCOUTS OF AMERICA**
Pine Burr Area Council
2025 FOS CAMPAIGN


583725594736828300057712

BOY SCOUTS OF AMERICA
Pine Burr Area Council
2025 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/YY)

Giving History

2024	\$0.00
2023	\$0.00
2022	\$0.00

SIGNATURE: DATE:

Chickasawhay | Family | Pack 0010 BP Ellisville - 304 (235907) | 8-47368283 | 8-58372559 | 8/19/2024

Chris
S Eva
Ellisv

Email (please print): c.blackv
Phone(s) Mobile:
Home:
Business:

Credit Card #

Please circle: MasterCard Visa American Express Discover

Expires

Pledge: \$

Payment: \$

Date:

Received by:

Thank you for your generous support of Scouting!

Thanks for Supporting Scouting!

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- [redacted]		<u>\$0.00</u>	7/16/2024		<u>Pledge</u>



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 table contains one entry: (227) 2024 Friends of Scouting, 2024 FOS Campaign, 7/16/2024. Below the table are links for Edit constituent appeal, Edit responses, and Delete. The 'Date sent' field is 7/16/2024. The 'Appeal' field is (227) 2024 Friends of Scouting. The 'Description' field is 2024 FOS Campaign. The 'Comments' field is 8-53094253: Great Eastern District - Family - S0 (L227 BSAFR Group). The 'Responses' field is empty. The 'Site' field is Spirit of Adventure Council. Below the table is a 'BSAFR snapshot reference' section with fields for Group ID, BSA Structure for Revenue, Giving Category for Revenue, BSAFR Solicitor Current, BSAFR Presenter Current, BSAFR Reporting Parent Group, BSAFR Reporting Level, BSAFR Reporting Hierarchy by Name, and BSAFR Reporting Hierarchy by Level.

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 - S0 (L227 BSAFR Group)
Responses:
Site: Spirit of Adventure Council

BSAFR snapshot reference

Group ID:	Great Eastern District - Family - S0 (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 - S0 (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 the first row highlighted: (227) 2024 Friends of Scouting, 2024 FOS Campaign, 7/16/2024. Below the table are links for 'Edit constituent appeal', 'Edit responses' (underlined), and 'Delete'. The 'Edit responses' dialog box is open, showing a table with columns: Date, Category, Response, and Code. The first row contains: 7/16/2024, Prospect Status, Worked, W. There are 'Save' and 'Cancel' buttons at the bottom of the dialog box.

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 Multityear 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 Solicitees ☒ Exclude Constituents Marked as Do Not Solicit

☐ Exclude Current Year Non-Donors ☐ Exclude Current Year Non-Solicitees ☒ Exclude Constituents Marked as Deceased

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

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





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](#)
- [WePay](#)

Related Articles and Training

- [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.

↑ Upload file

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

☐ Send me an email receipt of my responses

Back

Submit

Fill in the Boxes – Add an Attachment

CLICK - Submit



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Next Forum

September 18, 2024
10:00 am & 2:00 pm CT



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Questions & Answers



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