

CRM User Forum

October 16, 2024

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Objectives

- Ø Pledge Receivable Aging Report
- Ø Creating the Unworked Constituent List
- Ø Setting up a 2025 Appeal
- Ø Scouting Gives and Stripe
- Ø Revenue Category in Batch Entry
- Ø Revenue Data Hygiene
- Ø Questions – Answers



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



Pledge Receivable Aging Report



Pledge Receivable Aging Report

BSA Organization [REDACTED] Area Council

Report Code 2024

Appeal [REDACTED] SE24 - 2024 Board Campaign FOS

1 of 1 Find Next

Giving Category: ALL

Appeal: [REDACTED] 2024 Board Campaign FOS
BSA Structure: [REDACTED] Area Council
Giving Category: Board Campaign

Constituent Name	Pledge Date	Pledge Amount	Pledge Balance	Current Due	Past Due		
					30+	60+	90+
38460)	15-Nov-23	5,000.00	5,000.00	0.00	0.00	0.00	5,000.00
436)	15-Nov-23	24,000.00	24,000.00	0.00	0.00	0.00	24,000.00
4)	31-Dec-23	1,500.00	1,500.00	0.00	0.00	0.00	1,500.00
4048)	17-Nov-23	2,500.00	2,500.00	0.00	0.00	0.00	2,500.00
)	16-Nov-23	2,500.00	2,500.00	0.00	0.00	0.00	2,500.00
3978)	22-Nov-23	5,000.00	5,000.00	0.00	0.00	0.00	5,000.00
11)	22-Nov-23	1,500.00	1,500.00	125.00	125.00	125.00	750.00
808)	22-Dec-23	2,000.00	2,000.00	0.00	0.00	0.00	2,000.00



Pr

December – Year end

- Run the report at the beginning of the month and at the end.
- At the end of December – enter all payments that received.
- It is recommended that you run it on the last day of the year.
- The report will show all entries entered the day before.

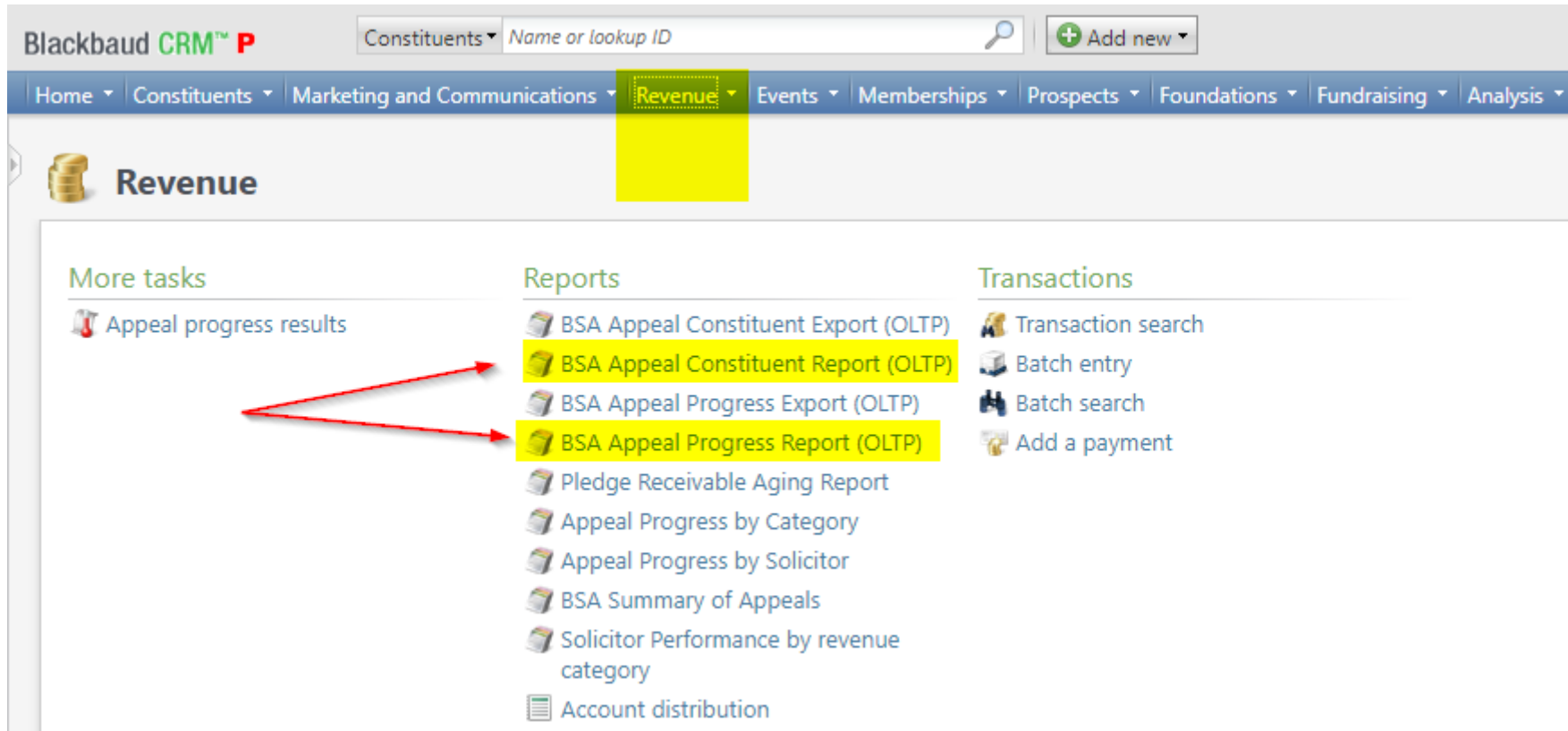


“Easy Button” Reports

- Appeal Constituent Report
 - Unworked or worked report
 - Flat list report
 - Export to PDF or Excel
- Appeal Progress Report
 - How are we doing this year compared to prior year
 - Export to PDF or Excel



“Easy Button” Reports



The screenshot displays the Blackbaud CRM P interface. At the top, there is a navigation bar with the following tabs: Home, Constituents, Marketing and Communications, **Revenue** (highlighted in yellow), Events, Memberships, Prospects, Foundations, Fundraising, and Analysis. Below the navigation bar, the main content area is titled "Revenue" with a stack of coins icon. Under the "Revenue" section, there are three columns: "More tasks", "Reports", and "Transactions". The "Reports" column contains a list of reports, with the first three items highlighted in yellow: "BSA Appeal Constituent Report (OLTP)", "BSA Appeal Progress Report (OLTP)", and "BSA Appeal Progress Export (OLTP)". Two red arrows point from the "More tasks" column to the first two highlighted reports. The "Transactions" column contains a list of transactions: "Transaction search", "Batch entry", "Batch search", and "Add a payment".

Blackbaud CRM™ P

Constituents

Home ▾ Constituents ▾ Marketing and Communications ▾ **Revenue** ▾ Events ▾ Memberships ▾ Prospects ▾ Foundations ▾ Fundraising ▾ Analysis ▾

 **Revenue**

More tasks

-  Appeal progress results

Reports

-  BSA Appeal Constituent Export (OLTP)
-  **BSA Appeal Constituent Report (OLTP)**
-  BSA Appeal Progress Export (OLTP)
-  **BSA Appeal Progress Report (OLTP)**
-  Pledge Receivable Aging Report
-  Appeal Progress by Category
-  Appeal Progress by Solicitor
-  BSA Summary of Appeals
-  Solicitor Performance by revenue category
-  Account distribution

Transactions

-  Transaction search
-  Batch entry
-  Batch search
-  Add a payment



BSA Appeal Constituent Report

BSA Appeal Constituent Report (OLTP)

Site: 1

Report Code: 2

Annual Appeal(s):

- ☐ All
- ☐ (144) 2021 Eagle Recognition Event
- ☐ (144) EN21 - 2021 Endowment Campaign
- ☐ (144) R21 - 2021 Gifts-in-Kind

3

Multi-year Appeal(s):

☐ Only include multi-year appeal revenue for:

4

Include Exclude Breakdown Filter

☐ Include All

- ☐ Include Prior Year 1 Giving ☐ Include Current Year Constituent Appeal/Response (Worked) Info
- ☐ Include Prior Year 2 Giving ☐ Include Current Year \$0 Pledge (Worked) Info
- ☐ Include Prior Year 3 Giving ☐ Include Donor Status Stats

[View report](#)



BSA Appeal Constituent Report - Exclude

BSA Appeal Constituent Report (OLTP)

Site: Council 1

Report Code: 2

Annual Appeal(s):
All ☐
(E) 2021 Eagle Recognition Event ☐
(E) EN21 - 2021 Endowment Campaign ☐
(R) R21 - 2021 Gifts-in-Kind ☐ 3

Multi-year Appeal(s):
☐ Only include multi-year appeal revenue for:

4

☐ Exclude All

☒ Exclude Current Year Donors check this for Unworked

☐ Exclude Current Year Non-Donors

☒ Exclude Current Year Worked Constituents (via an Appeal Response)

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

☐ Exclude Current Year Solicitees

☐ Exclude Current Year Non-Solicitees

☐ Exclude Current Year Non-Donor, Non-Solicitees

☒ Exclude Constituents Marked as Do Not Solicit

☒ Exclude Constituents Marked as Deceased

☒ Exclude Constituents Marked as Inactive



BSA Appeal Constituent Report - Breakdown

BSA Appeal Constituent Report (OLTP)

Site:

Council

Report Code:

2021

Annual Appeal(s):

All

(144) 2021 Eagle Recognition Event

(144) EN21 - 2021 Endowment Campaign

(144) R21 - 2021 Gifts-in-Kind

Multi-year Appeal(s):

☐ Only include multi-year appeal revenue for:

2021

IncludeExcludeBreakdownFilter

☐ Breakdown by All

☐ Break Down by BSA Structure

☐ Anchor to Latest Revenue or Constituent Appeal

☐ Break Down by Giving Category

☐ Sort by Name (Last/First) Only

☐ Break Down by Solicitor

☐ Break Down by Revenue BSAFR Group

View report



BSA Appeal Constituent Report – Filter - View

BSA Appeal Constituent Report (OLTP)

Site:

Council

Report Code:

2021

Annual Appeal(s):

All

(144) 2021 Eagle Recognition Event

(144) EN21 - 2021 Endowment Campaig

(144) R21 - 2021 Gifts-in-Kind

Multi-year Appeal(s):

☐ Only include multi-year appeal revenue for:

2021

Include

Exclude

Breakdown

Filter

As of Date:

Filter on BSA Structure:

Current Year Minimum Giving:

Filter on Giving Category:

Prior Year(s) Minimum Giving:

Filter on Solicitor:

☒ Prior Year Minimum is Cumulative

View report



BSA Appeal Constituent Report (OLTP)

As of 8/18/2021

CY Appeal: S21 - 2021 Friends of Scouting
 PY1 Appeal: S20 - 2020 Friends of Scouting
 PY2 Appeal: S19 - 2019 Friends of Scouting
 PY3 Appeal: S18 - 2018 Friends of Scouting

Pack 0422 (Individual, Lapsed, Unworked)

Community Campaign, [No Solicitor],

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY2	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00
PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Crew 2727 (Individual, Lapsed, Unworked)

Family Campaign, C

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY2	\$185.00	\$185.00	\$0.00	\$0.00	\$185.00
PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Fabrication, LLC (Organization, Lapsed, Unworked)

Community Campaign, [No Solicitor],

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$100.00	\$0.00	\$100.00	\$0.00	\$0.00
PY2	\$100.00	\$100.00	\$0.00	\$0.00	\$0.00
PY3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Deb (Individual, Lapsed, Unworked)

Family Campaign, F

1	Contribution	Paid	Write-off	Balance	Sol Credit
CY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PY2	\$50.00	\$50.00	\$0.00	\$0.00	\$50.00
PY3	\$50.00	\$50.00	\$0.00	\$0.00	\$50.00

Abid



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BSA Appeal Progress Report

BSA Appeal Progress Report (OLTP)

Site: Abraham Lincoln Council

Report Code: 2024

Annual Appeal(s):

- All
- (144) 2024 Eagle Recognition Event
- (144) EN24 - 2024 Endowment Campaign
- (144) O24 - 2024 Other Direct Contributions

Multi-year Appeal(s):

- (144) CB22-2022 Camp Bunn Cabin

☐ Only include multi-year appeal revenue for: 2024

Include Breakdown Other

☐ Include All

- | | | |
|--|---|---|
| ☐ Include Prior Year 1 Giving | ☐ Include BSAFR Group Goals | ☐ Include Donor Status Stats |
| ☐ Include Prior Year 2 Giving | ☐ Include Year-Over-Year Comparisons | ☐ Included Worked/Unworked Stats |
| ☐ Include Prior Year 3 Giving | ☐ Include Lapsed Donor Opportunity Amounts | ☐ Include Current Year Constituent Appeal/Response (Worked) Info |
| ☐ Include Basic Giving Stats | Lapsed Donor Recapture Rate Goal %: 50 | Include the value (opportunity) of prior year donations that have not been renewed |



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BSA Appeal Constituent Report - Breakdown

BSA Appeal Progress Report (OLTP)

Site: Abraham Lincoln Council

Report Code: 2024

Annual Appeal(s):

- All
- (144) 2024 Eagle Recognition Event
- (144) EN24 - 2024 Endowment Campaign
- (144) O24 - 2024 Other Direct Contributions

Multi-year Appeal(s):

- (144) CB22-2022 Camp Bunn Cabin

☐ Only include multi-year appeal revenue for: 2024

IncludeBreakdownOther

☒ Breakdown by All

- ☐ Break Down by BSA Structure
- ☐ Break Down by Giving Category
- ☐ Break Down by Solicitor
- ☐ Break Down by Revenue BSAFR Group



BSA Appeal Constituent Report - Other

BSA Appeal Progress Report (OLTP)

Site: Abraham Lincoln Council

Report Code: 2024

Annual Appeal(s):

- All
- (144) 2024 Eagle Recognition Event
- (144) EN24 - 2024 Endowment Campaign
- (144) O24 - 2024 Other Direct Contributions

Multi-year Appeal(s):

- (144) CB22-2022 Camp Bunn Cabin

☐ Only include multi-year appeal revenue for: 2024

IncludeBreakdownOther

As of Date:

☐ Adjust As of Date for Prior Years

View report



BSA Appeal Progress Report (OLTP)

CY Appeal: (144) S24 - 2024 Friends of Scouting
 PY1 Appeal: (144) S23 - 2023 Friends of Scouting
 PY2 Appeal: (144) S22 - 2022 Friends of Scouting
 PY3 Appeal: (144) S21 - 2021 Friends of Scouting

As of 9/18/2024

Goal	% Goal Met	# Worked	# Unworked	% Worked
------	------------	----------	------------	----------

	Contribution	Paid	Write-off	Balance
CY				
PY1				
PY2				
PY3				

	Contribution		Amount Paid		Write-off		Balance	
	\$ Change	% Change	\$ Change	% Change	\$ Change	% Change	\$ Change	% Change
CY								
PY1								
PY2								

	BSAFR Group Goal			% Goal Met		
	Amount	\$ Change	% Change	% Met	Change	% Change
CY						
PY1						
PY2						
PY3						

	Donor Count			Gift Count			Average Gift		
	Count	# Change	% Change	Count	# Change	% Change	Amount	\$ Change	% Change
CY									
PY1									
PY2									
PY3									

	New Donors		Renewed Donors		Upgraded Donors		Downgraded Donors		Recovered Donors		Lapsed Donors		
	Count	Contribution	Count	Contribution	Count	Contribution	Count	Contribution	Count	Contribution	Count	Opportunity	Recapture Goal
CY													
PY1													
PY2													



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Creating a 2025 Appeal

- Create all FY appeals at the same time
- Mirror the Appeal name from this year when creating 2025 appeals like below
- (023) UW24 - 2024 United Way
(023) UW25 - 2025 United Way
- Marketing & Communications > Add an Appeal
- Remember to use FY inbound channels with monies applied to 2025 appeals with 2024 postdates.



Add an Appeal

Add an appeal [X]

Name: (067) G25 - 2025 Golf Tournament

Description: 2025 Golf Tournament

[Split evenly] [Split fully]

Category: Special Events [v]

Report code: 2025 [v]

Site: Greenwich Council [v] [m]

Start date: 1/1/2025 [c]

End date: 12/31/2025 [c]

Goal: \$0.00

[?] Help [Save] [Cancel]

Name	Description
(067) FS24 - Friends of Scouting 2024	Friends of Scouting 2024
(067) ER24 - Endowment Restricted 2024	Endowment Restricted 2024
(067) FT24 - 2024 Foundations and Trust	2024 Foundations and Trust
(067) LB24 - Legacy and Bequest 2024	Legacy and Bequest 2024
(067) AP24 - Adult Pinewood Derby 2024	2024 Adult Pinewood Derby
(067) G24 - 2024 Golf Tournament	2024 Golf Tournament
(067) GOE24 - Gathering of Eagles Adult Recognition 2024	Gathering of Eagles Adult Recognition
(067) SC24 - Sporting Clay 2024	Sporting Clay 2024

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



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Add an Appeal

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

The screenshot shows the 'Prior Appeal' tab selected. At the top, there are tabs for 'Revenue Details (Splits)', 'Contributions', 'Prior Appeal', and 'Misma'. Below the tabs, the 'Prior Appeal' section is active, showing 'Prior Appeal: (067) G24 - 2024 Golf Tournament'. Below this, the 'Prior Year Appeal History' section is visible, featuring a table with columns: 'PY1 Year', 'PY1 Appeal', 'PY1 Description', and 'PY2 Year'. The table contains one row: '2024', '(067) G24 - 20...', '2024 Golf Tour...', and '2023'. There are also 'Edit' and 'More' icons next to the 'Prior Appeal' title.

PY1 Year	PY1 Appeal	PY1 Description	PY2 Year
2024	(067) G24 - 20...	2024 Golf Tour...	2023

The screenshot shows the 'Designations' tab selected. At the top, there are tabs for 'Revenue Details (Splits)', 'Contributions', 'Prior Appeal', and 'Designations'. Below the tabs, the 'Designations' section is active, showing 'Designations (1)' and 'Edit list of appeal designations'. Below this, there is a table with columns: 'Designation' and 'Default designation'. The table contains one row: '06707551 Golf Tournamen - Operating' and a green checkmark icon. Below the table, there is a 'Benefits (0)' section with 'View benefits catalog', '+ Add', and 'More' icons. There are also 'Edit' and 'More' icons next to the 'Designations' title.

Designation	Default designation
06707551 Golf Tournamen - Operating	



Scouting Gives and Stripe

- Website connected to CRM for Events and Donations
- Stripe is a payment processor connected to Scouting Gives
- Scouting Gives sends batches to CRM for:
 - o Donations
 - o Recurring Gifts
 - o Recurring gift payments
 - o Event Registrations
 - o Event Registration payments



Scouting Gives and Stripe

- Payment Platform which is connected to Scouting Gives can provide information regarding transaction that come to CRM.
- To access
 - o Log into MyBSA
 - o Click Scouting Gives Log-in link – insert username and password
 - o Click Payment Platform link – insert username and password
 - § Payment Platform access not granted automatically
 - § Member Care ticket must be created to have this access added to you

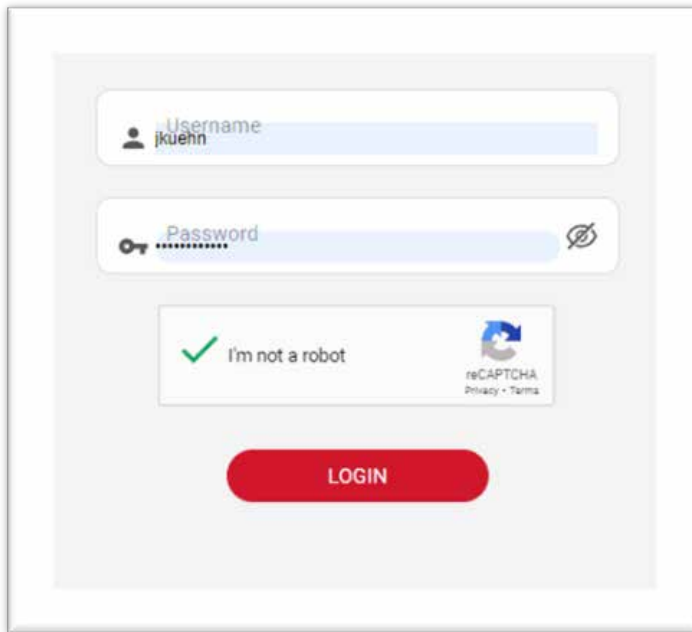


Payment Platform Access

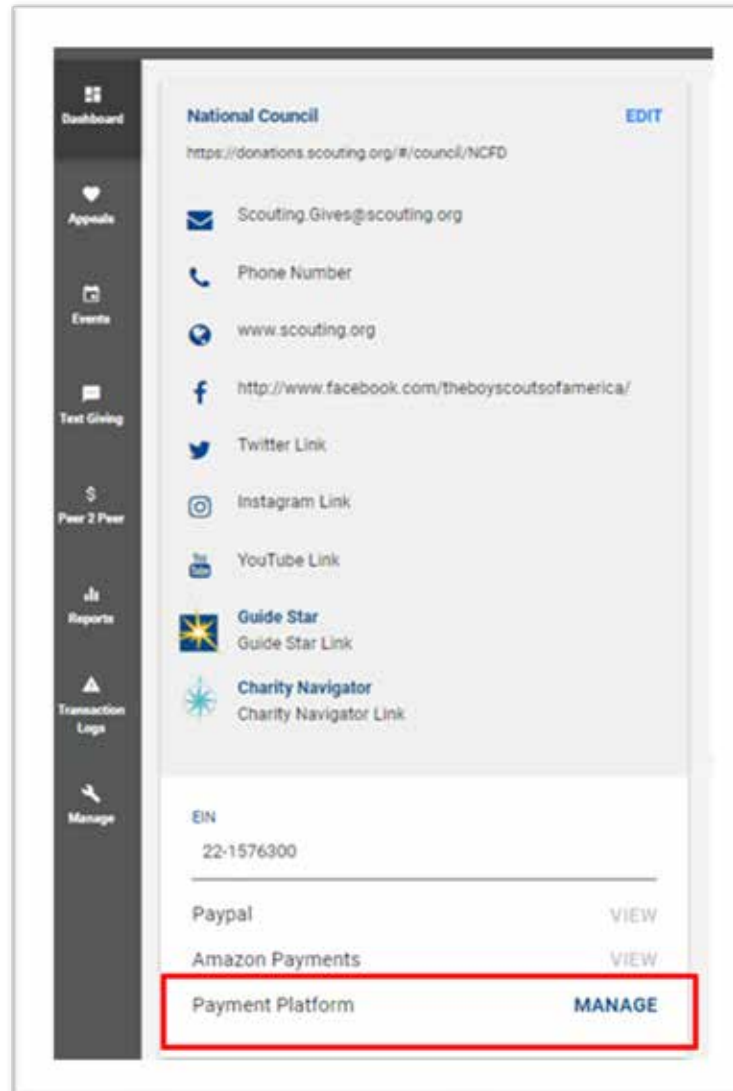
Fundraising

- Blackbaud CRM
- Blackbaud CRM Resources
- Blackbaud CRM User Guide
- Learn Blackbaud CRM (self-study)
- Scouting Gives Log-in**
- Scouting Gives User Guide
- MatchFinder Matching Gifts Search

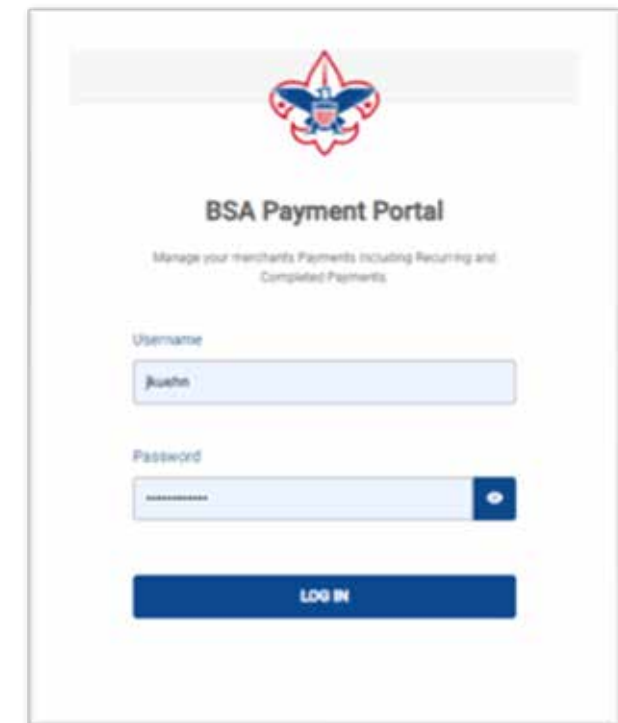
On MyBSA, find the link to Scouting Gives. Use your MyBSA username and password to sign in. Find the Payment Platform link on your SG dashboard and sign in again.



Scouting Gives Log-in form with fields for Username (jkuenn), Password, and a reCAPTCHA "I'm not a robot" checkbox. A red "LOGIN" button is at the bottom.



National Council dashboard showing contact information (Scouting.Gives@scouting.org, Phone Number, www.scouting.org, Facebook, Twitter, Instagram, YouTube, Guide Star, Charity Navigator) and a list of links (Paypal, Amazon Payments, Payment Platform) with a red box around the "Payment Platform" link and a "MANAGE" button.



BSA Payment Portal login form with fields for Username (jkuenn), Password, and a "LOG IN" button.



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Payment Platform

You will enter your dashboard. Stripe payments will be at the top. WePay items are still available for report. Recurring gifts can be found under **Scheduled**. Refunds can be done under **Stripe Payments** or **WePay Payments**.

 Stripe Payments
 Scheduled
 Wepay Payments
 Wepay Reconciliation
 Orbital Payments
 Failed Recurring Payments
 Orbital Reconciliation
 Orbital Reports
 Wepay Reports
 SIP ACH Payment

Stripe Payments

Search by Name, Council Name, Council No and Product Name

Name	Product Name	Transaction No	Transaction Date
	Scouting Gives Online Donations	pi_3PiyoGJDjDISN3e16I0fTma	2024-07-31 20:18
	Scouting Gives Online Donations	pi_3PijkJGJDjDISN3e07niclJa	2024-07-31 20:40
	Scouting Gives Online Donations	pi_3Pj02GGJDjDISN3e0AQm3W2t	2024-08-01 14:31
	Scouting Gives Online Donations	pi_3Pj09SGJDjDISN3e0w6Mj2KT	2024-08-01 14:38
	Scouting Gives Online Donations	pi_3Pj36FGJDjDISN3e1Y7JtLhb	2024-08-01 17:47
	Scouting Gives Online Donations	pi_3Pj3vsGJDjDISN3e0TvC1zqP	2024-08-01 18:41
	Scouting Gives Online Donations	pi_3Pj3vuGJDjDISN3e1jvXnAW5	2024-08-01 18:41
	Scouting Gives Special Events	pi_3Pj7btGJDjDISN3e1FuNAxNk	2024-08-01 22:36
	Scouting Gives Online Donations	pi_3Pj7EgGJDjDISN3e1Rlm7Emo	2024-08-01 22:12
	Scouting Gives Online Donations	pi_3Pj7jfGJDjDISN3e0ybJk76t	2024-08-01 22:44



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Ending a Recurrence

The screenshot shows a web application interface for managing scheduled payments. At the top, there is a tab labeled 'Scheduled Payments' (1) and a search bar containing 'walbrid' (2). Below the search bar is a table with columns: Name, Product Name, Merchant ID, Recurring ID, Description, Amount, and Frequency. A row is visible with the following data: [redacted], Walbrid, 1823602172, 3998, WPY*BSAGreenMountainCouncil, \$15.45, and 'monthly' (3 & 4). The 'monthly' frequency is highlighted with a red box. To the right of the table, there are buttons for 'Download', 'Refresh', and 'Show: Filter Options'. On the far right, there is an 'Activity' section showing recent transactions. A modal dialog titled 'End Recurring Payment' is open in the center (5). It contains a 'Select End Date' field with the date '2023/09/19' (6 - 8), an 'Add Comments' section with the text 'Donor requested termination.', and two buttons at the bottom: 'End Recurring Payment' and 'Cancel'. To the right of the modal, a calendar is visible, showing dates from September to December 2023. The date 'Sat Sep 30 2023' is highlighted, and the text 'End Recurring Payment' is visible at the bottom of the calendar area.

Scheduled Payments 1

Q walbrid 2

Download Refresh Show: Filter Options

Name	Product Name	Merchant ID	Recurring ID	Description	Amount	Frequency
[redacted]	Walbrid	1823602172	3998	WPY*BSAGreenMountainCouncil	\$15.45	monthly

3 & 4

End Recurring Payment

Select End Date 2023/09/19

Add Comments 6 - 8

Donor requested termination.

End Recurring Payment Cancel

5

End Recurring Payment

10 / page

Sat Sep 30 2023
Scheduled

Tue Oct 31 2023
Scheduled

Thu Nov 30 2023
Scheduled

Sun Dec 31 2023
Scheduled

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Refunding a Payment

1. Select WePay Payments
2. Search for donor
3. Slide to the right to find refund link
4. Fill in refund box and click refund

1

Council Name or Number

2

Wepay Payment History

Merchant ID	Recurring ID	Council No	Council Name	Description	Email	Phone	Form Name	Frequency	Status	Refund
13166365	5764	602						monthly	✓ released	Refund
13166365	5764	602						monthly	✓ released	Refund
13166365	5764	602						monthly	✓ released	Refund
13166365	5764	602						monthly	✓ released	Refund
13166365	5764	602						monthly	✓ released	Refund
100597111		307						Onetime	✓ released	Refund
1019692939		662						Onetime	✓ released	Refund

4

Refund

Reason

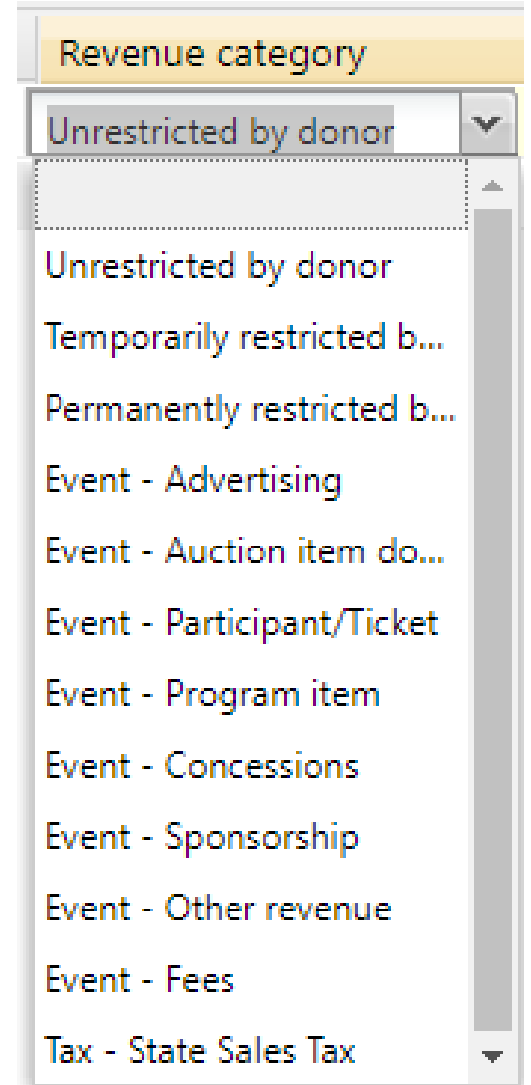
Refund **Cancel**

3



Revenue Category Batch Drop-Down

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



A screenshot of a software interface showing a drop-down menu for 'Revenue category'. The menu is open, displaying a list of options. The current selection is 'Unrestricted by donor'. The list includes various revenue categories, some of which are truncated with ellipses. The options are: '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', and 'Tax - State Sales Tax'.

Revenue category
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** –
 - o Operating revenue given this year to be used this year.
- **Temp restricted by Donor** –
 - o Capital money – Temp restricted by Project
 - o Operating money for a future year. Temp Restricted by time
- **Permanently restricted by Donor** –
 - o Used only with Endowment gifts – James E Wests, Good Turn Society if earmarked for Endowment by the donor.



Revenue Data Hygiene

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

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

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

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



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Revenue Data Hygiene

Revenue Data Hygiene

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

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

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

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

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

Revenue Data Hygiene

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

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

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

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

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



Revenue Data Hygiene

- Revenue Data Hygiene

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

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

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

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

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



Revenue Data Hygiene

- Revenue Data Hygiene

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

For finding 2023 Report Code revenue with wrong Inbound Channels - Fund 1 (279) More ▾

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

	Lookup ID	Name	Revenue ID	Amoun...	Transaction type	Application	GL post date	Repo...	Appeal Name	Inbound channel	Revenue Category
	8-39	Tr...	rev-45222619	\$10,000.08	Pledge	Donation	12/4/2023	2023	() S23 - 2023 Frie...	FY - Friends of Scou...	Temporarily restricte...
Go to Revenue											
	8-39	Se...	rev-45727618	\$10,000.00	Payment	Pledge	1/26/2024	2023	() S23 - 2023 Frie...	Friends of Scouting	Temporarily restricte...
	8-37	M...	rev-45259549	\$10,000.00	Pledge	Donation	2/27/2023	2023	() S23 - 2023 Frie...	FY - Friends of Scou...	Temporarily restricte...
	8-39	Cc...	rev-45240564	\$10,000.00	Pledge	Donation	1/30/2023	2023	() S23 - 2023 Frie...	FY - Friends of Scou...	Temporarily restricte...
	8-39	Ec...	rev-45168518	\$10,000.00	Pledge	Donation	10/4/2022	2023	() S23 - 2023 Frie...	Friends of Scouting	Temporarily restricte...

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

- Revenue Data Hygiene

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

Mismatched Appeals - Report Code 2023 (25) More ▾

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

	Transac...	Applicatio...	Amou...	Date	Revenue ID	Appeal Name	Payment's Revenue ID	Payment's Appeal Name	Pledge's Revenue ID	Pledge's Appeal Name
	Pledge	Donation	\$0.00	12/30/20...	rev-45306886	() S23 - 2023 Frie...	rev-45307255	OOD23 - Operati...		
Go to Revenue										
	Payment	Pledge	\$0.00	12/30/20...	rev-45307255	() OOD23 - Operat...			rev-45306886	() S23 - 2023 Frie...

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



Revenue Data Hygiene

Revenue Data Hygiene

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

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

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

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

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



Revenue Data Hygiene

Management Console - Revenue Data Hygiene

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

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

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

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

Access:

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

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



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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](#)

News and Announcements

	10/1/2024, 4:25:22 PM	National and Council Mandatory Cybersecurity Training 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	National and Council

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](#)



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.



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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



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Next Forum

November 20, 2024
10:00 am & 2:00 pm CT



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Questions & Answers



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