

CRM User Forum

January 15, 2025

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Objectives

- Finishing Up 2024
 - Review Uncommitted Batches
 - Recording Future contribution
 - Global write-off process
 - Reports for Fiscal Audit and 990
 - Beginning of year GL transactions



Objectives cont'd

- 2025 Activities
 - Billing and Acknowledgement Updates
 - Updating Recurring gifts
 - Contribution Statements
- Scouting America branding
- Workplace – Viva Engage
- Questions - Answers



Uncommitted Batches



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Uncommitted Batches

- Uncommitted batches should be reviewed
- If batch has revenue that needs to be committed – Commit
- If batch has revenue that has been committed – Delete
- If batch is empty – use the batch or delete the batch
- Currently we have 733 uncommitted batches.
- 156 of these batches have added dates before 1/1/25



Check for Uncommitted batches

- Navigate to Revenue \ Batch Entry
- Click on the Uncommitted Batch Tab
- Change the Date Range filter to "blank"
- Ensure the Site filter is set to "All Sites"
- Click "Apply" to engage your new filters
- Recommendation: Keep your filters set like this on the Uncommitted Batch Tab.



- Before Filter Change

The screenshot shows the 'Batch Entry' interface with the 'Uncommitted Batches' tab selected. The header indicates 'Uncommitted batches (2)'. A red box highlights the 'Date range' dropdown menu, which is currently set to 'Last 30 days'. Other filters include 'Sites: All sites' and a checkbox for 'Show only batches with exceptions'. The table below shows two batches:

Batch numb...	Batch template	Description	Date added
L1172746	zAPTG Local Council Recurring Gift Payment Batch	Online Donation Recurring for 2024-11-26 for 527	11/26/2024
L1174369	zAPTG Local Council Donation Batch	Online Donation for 2024-12-03 for 527	12/3/2024

- After Filter Change – 12 uncommitted batch show

The screenshot shows the 'Batch Entry' interface with the 'Uncommitted Batches' tab selected. The header indicates 'Uncommitted batches (12)'. A red box highlights the 'Date range' dropdown menu, which is now empty. Other filters include 'Sites: All sites' and a checkbox for 'Show only batches with exceptions'. The table below shows four batches:

Batch numb...	Batch template	Description	Date added
L1082529	zAPTG Local Council Donation Batch	Online Donation for 2024-02-27 for 527	2/27/2024
L1100602	zAPTG Local Council Donation Batch	Online Donation for 2024-04-08 for 527	4/8/2024
L1120013	zAPTG Local Council Recurring Gift Pay	Online Donation Recurring for 2024-05-26 for 527	5/26/2024
L1129928	zAPTG Local Council Recurring Gift Pay	Online Donation Recurring for 2024-06-26 for 527	6/26/2024



Year End Revenue Check

- 2024 Postdates to 2024 Appeals = CY Inbound Channel
- 2024 Postdates to 2025 Appeals = FY Inbound Channel
- 2025 Postdates to 2024 Appeals = PY Inbound Channel
 - Pledge payments only
- 2025 Postdates to 2025 Appeals = CY Inbound Channel

Use your Revenue Details (Splits) tab to check your data on the Appeal



Global Write-off Process



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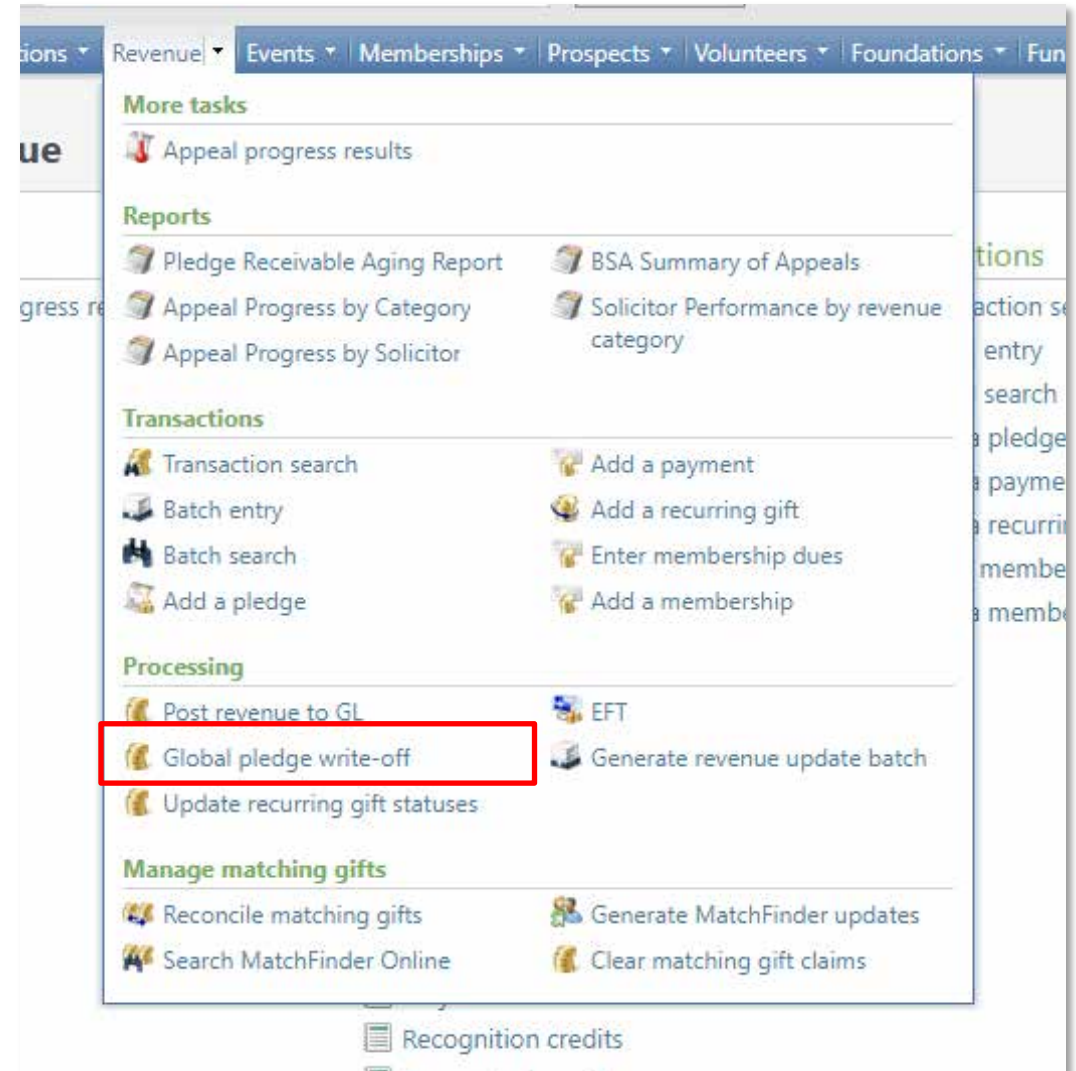
Global Write-off Process

- Should be run yearly
- Run when you no longer want older pledges showing up in your overdue reminder process
- Closes pledge in CRM
- Does not write to PeopleSoft
- Reduces data entry error with mismatched appeals, since pledge payments want to fulfill oldest pledges first

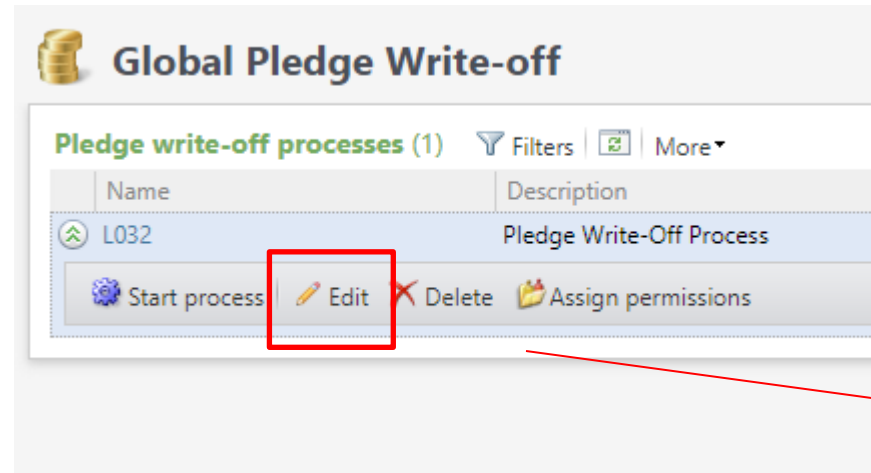


Global Write-off Process

Your Global Write-off routine can be found under the revenue functional area. Navigate to Processing and then click "Global Pledge Write-off" to access your business process.



Global Write-off Process



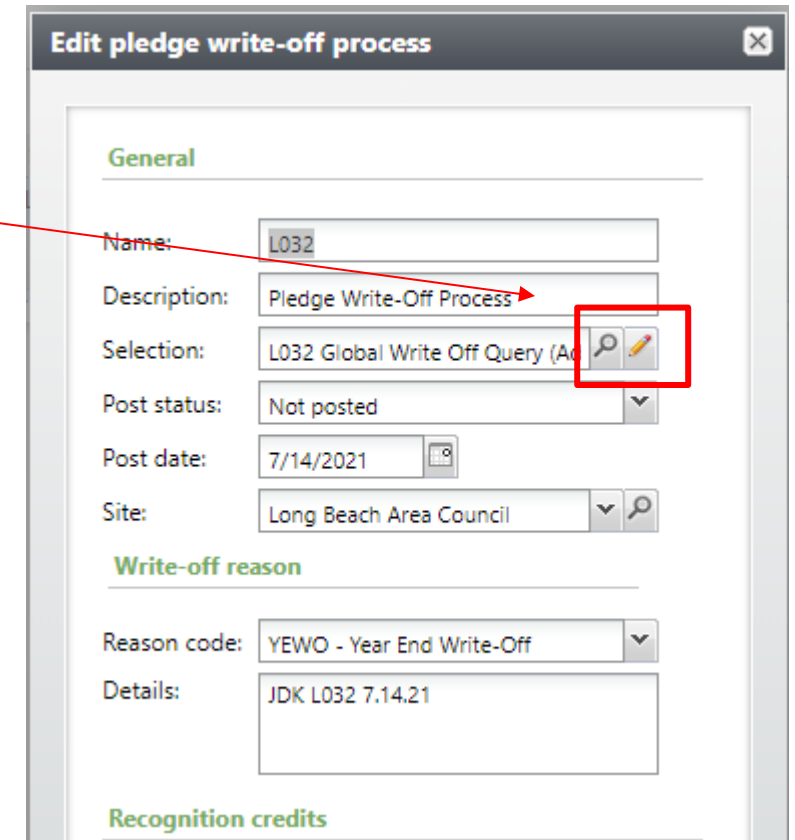
Global Pledge Write-off

Pledge write-off processes (1)

Name	Description
L032	Pledge Write-Off Process

Start process Edit Delete Assign permissions

When you find your business process, drop the chevron and click edit. The "Edit Pledge Write-off process" form will open. Proceed to the selection and click the pencil to open the query to adjust your filters of what should be written-off.



Edit pledge write-off process

General

Name: L032

Description: Pledge Write-Off Process

Selection: L032 Global Write Off Query (A)

Post status: Not posted

Post date: 7/14/2021

Site: Long Beach Area Council

Write-off reason

Reason code: YEWO - Year End Write-Off

Details: JDK L032 7.14.21

Recognition credits



Global Write-off Process

Edit Ad-Hoc Query - L032 Global Write Off Query

Select filter and output fields | Set sort and group options | Preview results | Set save options

Find field:  

Browse for fields in: Select Revenue fields:

Revenue

The filter to adjust is in the upper right hand corner. The one highlighted in blue reads **'Appeal Records Is Not One Of'**. Double click the line to edit the filters. The appeals need to be adjusted to exclude the appeals you want left active (ignored).

You can also use the filter **'Appeal Records Is One Of'** to only list appeals that need to be closed out, depending on your preference.

Include records where:

- Transaction type is equal to Pledge
- and Pledge/Grant award balance is greater than 0
- and Appeal\Site\Site ID is equal to 032**
- and Appeal\Appeal record is not one of (032) C21 - 2021 Capital, (032) F21 - 2021

Results fields to display:

- Appeal\Name
- Pledge/Grant award balance



Global Pledge Write-off

BEFORE

Apply Criteria

Appeal\Appeal record criteria

Not one of ☒ Include blanks

(032) C21 - 2021 Capital
(032) F21 - 2021 Foundations
(032) J21 - 2021 Endowment
(032) S21 - 2021 Friends of Scouting
(032) S20 - 2020 Friends of Scouting
(032) C17 - 2017 Capital
*

☐ Only return records that do not match any of the selected values

OK Cancel

AFTER

Apply Criteria

Appeal\Appeal record criteria

Not one of ☒ Include blanks

(032) F24 - 2024 Foundations
(032) J24 - 2024 Endowment
(032) S24 - 2024 Friends of Scouting
(032) C17 - 2017 Capital
*

☐ Only return records that do not match any of the selected values

OK Cancel



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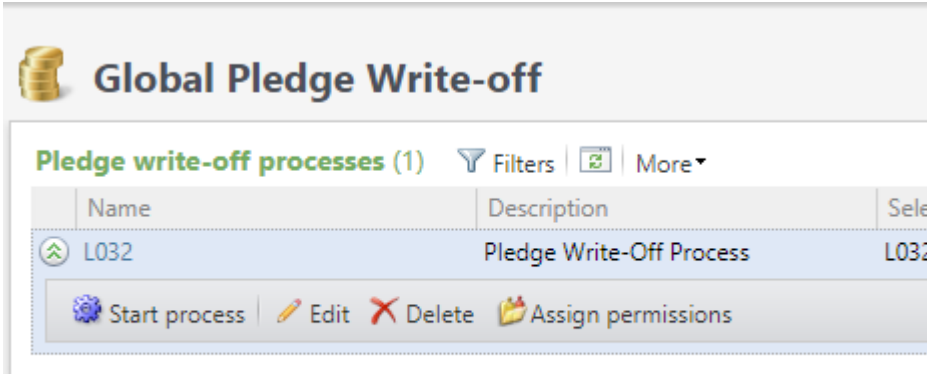
Global Pledge Write-off

After you adjust your filter click the "Preview results" tab. Review the appeals associated with each revenue line. If the appeals are one you do not want to write-off, then go back to the "Select filters" tab and adjust your filters to fix. If the appeals are clean of current year appeals, then save and close the selection and click save on the edit Global Pledge Write-off Screen to save edit.

Select filter and output fields	Set sort and group options	Preview results	Set save options
Results (60 records found)			
Appeal/Name	Pledge/Grant award balance		
(032) F21 - 2021 Foundations	\$41,990.00		
(032) S18 - 2018 Friends of Scouti...	\$20.00		
(032) S19 - 2019 Friends of Scouti...	\$40.00		
(032) S20 - 2020 Friends of Scouti...	\$10.00		
(032) S20 - 2020 Friends of Scouti...	\$10.00		
(032) S20 - 2020 Friends of Scouti...	\$20.00		
(032) S20 - 2020 Friends of Scouti...	\$20.00		
(032) S20 - 2020 Friends of Scouti...	\$20.00		
(032) S20 - 2020 Friends of Scouti...	\$20.00		
(032) S20 - 2020 Friends of Scouti...	\$25.00		
(032) S20 - 2020 Friends of Scouti...	\$30.00		
(032) S20 - 2020 Friends of Scouti...	\$40.00		
(032) S20 - 2020 Friends of Scouti...	\$40.00		
(032) S20 - 2020 Friends of Scouti...	\$40.00		
(032) S20 - 2020 Friends of Scouti...	\$50.00		
(032) S20 - 2020 Friends of Scouti...	\$60.00		
(032) S20 - 2020 Friends of Scouti...	\$70.00		
(032) S20 - 2020 Friends of Scouti...	\$80.00		
(032) S20 - 2020 Friends of Scouti...	\$90.00		
(032) S20 - 2020 Friends of Scouti...	\$90.00		
(032) S20 - 2020 Friends of Scouti...	\$105.00		



Global Pledge Write-off



Global Pledge Write-off

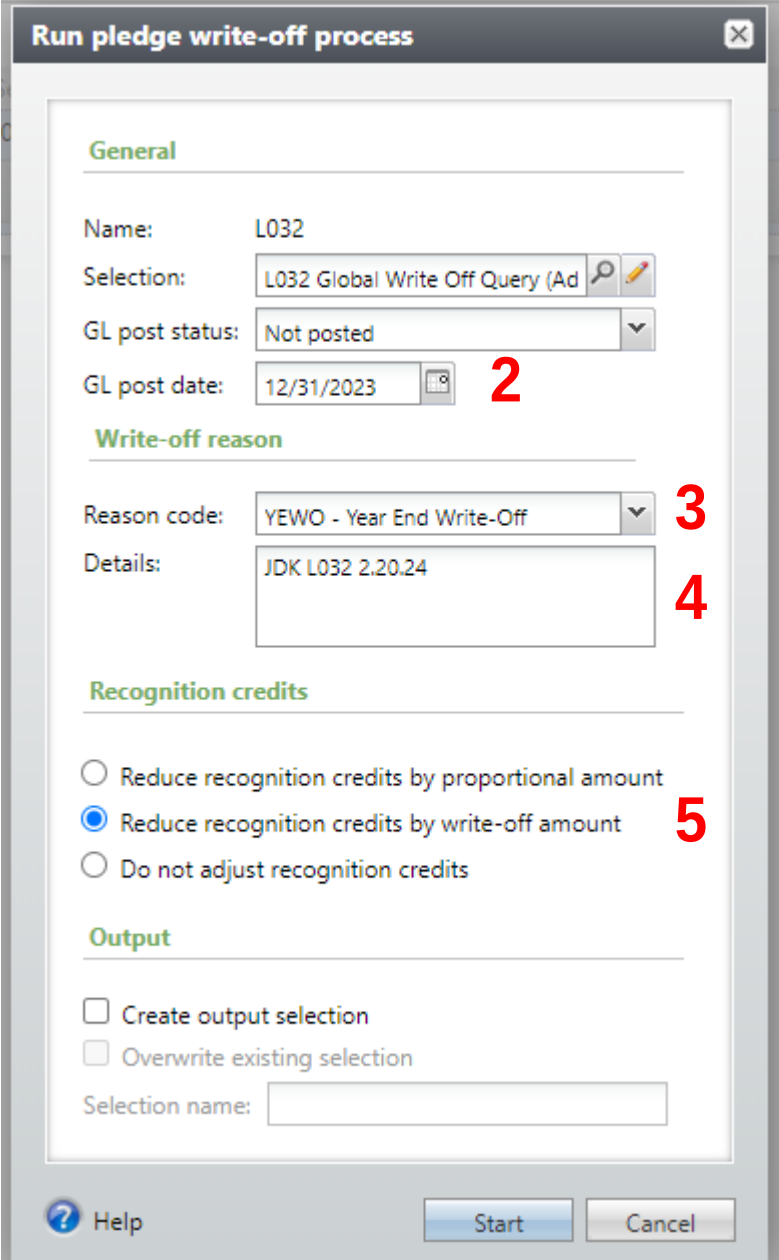
Pledge write-off processes (1) Filters More

Name	Description	Select
L032	Pledge Write-Off Process	L032

Start process Edit Delete Assign permissions

1

1. Drop the chevron on the process and click start.
2. Adjust the GL Post Date to the last day of the prior year.
3. Select the YEWO reason Code
4. Update detail. Be specific. This can help fix a mistake.
5. Reduce recognition credits by write-off amount.
6. Click start.



Run pledge write-off process

General

Name: L032

Selection: L032 Global Write Off Query (Ad) Search Edit

GL post status: Not posted

GL post date: 12/31/2023 Calendar **2**

Write-off reason

Reason code: YEWO - Year End Write-Off **3**

Details: JDK L032 2.20.24 **4**

Recognition credits

☐ Reduce recognition credits by proportional amount

☒ Reduce recognition credits by write-off amount **5**

☐ Do not adjust recognition credits

Output

☐ Create output selection

☐ Overwrite existing selection

Selection name:

Help Start Cancel



Global Pledge Write-off

The Global Pledge Write-off will run. It should take under a minute to run. Once completed, you can hop out to the Write-Off Data List under revenue to get a listing of the pledges closed.

 Global pledge write-off list
L032

Name:

L032

Description:

Pledge Write-Off Process

Reason code:

YEWO - Year End Write-Off

Details:

JDK L032 2.20.24

Selection:

L032 Global Write Off Query (Ad-hoc Query)

Create output selection:

No

GL post status:

Not posted

Output selection name:

GL post date:

12/31/2023

Overwrite existing selection:

No

Recent status

History

Job schedules

Recent status



Status:

 Completed

Status message:

Completed

Started by:

netbsa\L032SvcAcct

Server name:

AZSCUS8BCRMSTG1

Started:

2/20/2024 11:33:53 AM

Total records processed:

60

Ended:

2/20/2024 11:34:28 AM

Number of exceptions:

0

Duration:

00hr 00min 35s

Records successfully processed:

60



Global Pledge Write-off

Proceed to the data list under revenue. Use your council number as the Site ID and click search and select your council. This opens the list. Next place the date in that you ran the process and click apply. This will generate the write-off list for you to download using the "More" button.



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

List for Write-offs

Write-Offs for your council. This list includes write-offs on or after 1/1/2018. (60) More

Appeal equal to: Constituent Name equal to: Date Added on or after: Apply Reset

Council #	Appeal	Constituent ID	Constituent Na...	Pledge Date	Pledge ID	Pledge Amount	Write-Off Am...	Details
032	(032) S23 - 2023 Friends of Scouting	8-41		1/12/2023	rev-45	00	\$900.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-41	...	1/3/2023	rev-45	00	\$100.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-41	ds	1/22/2023	rev-45	00	\$150.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-44	ne	1/6/2023	rev-45	00	\$500.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-44	ll...	1/12/2023	rev-45	00	\$50.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-44	oy	1/29/2023	rev-45	00	\$450.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-44		1/3/2023	rev-45	00	\$240.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-44		1/28/2023	rev-45	00	\$80.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-44	...	1/19/2023	rev-45	00	\$20.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-45	...	1/5/2023	rev-45	00	\$90.00	JDK L032 2.20.24
032	(032) S23 - 2023 Friends of Scouting	8-45		4/25/2023	rev-45	00	\$40.00	JDK L032 2.20.24

IRS 990



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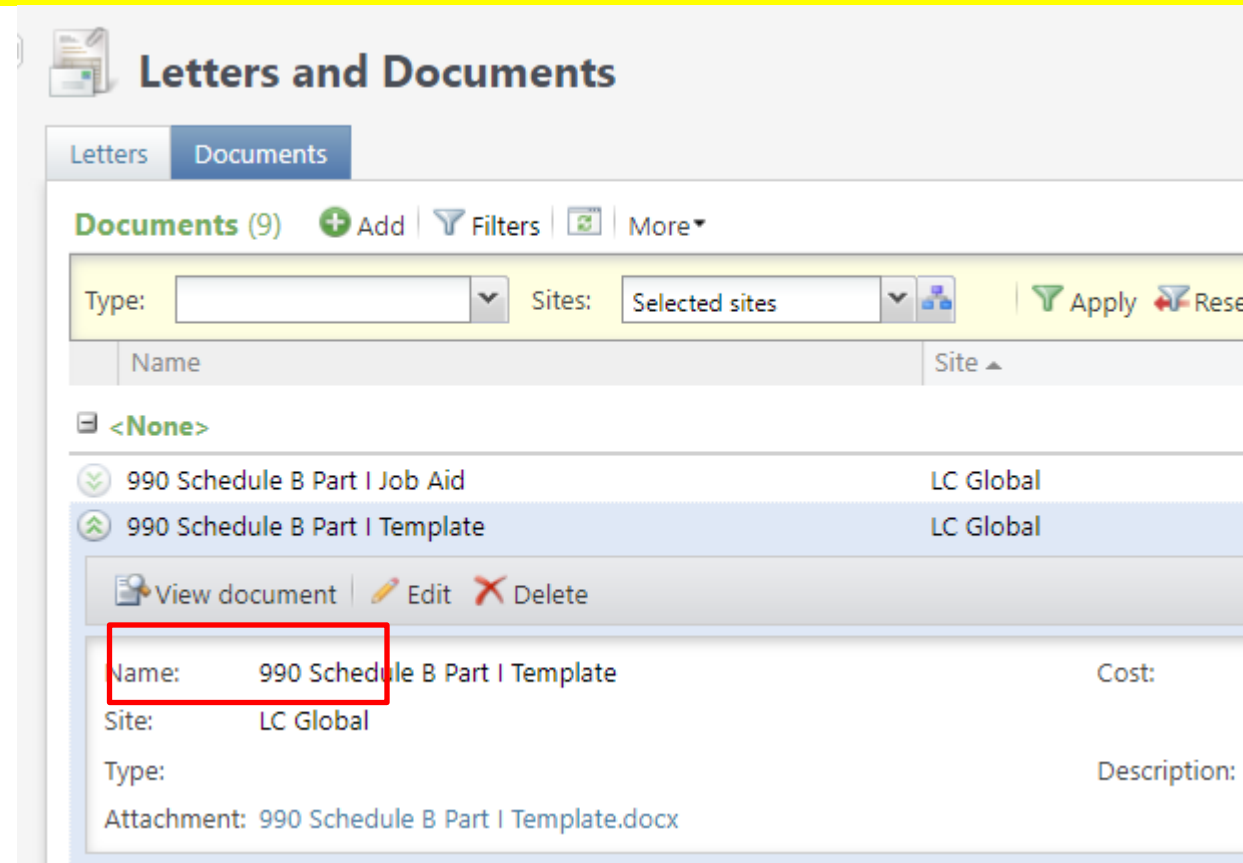
IRS 990

- Download Direction from User Guide under Reports
 - IRS 990 Schedule B
- Process is like running contribution statement.
- Provides a list of donors who have pledge or donated \$5,000 or more in in the previous tax year.
 - The IRS 990 Schedule B is based on contributions (pledges/straight donations/etc.) a person has given during the year. Pledge Payments do not count towards this, so if a donor is not on the list, they may not have made any new contributions during the year.
 - We use an accrual basis instead of a cash basis, which means that if a donor pledged \$5,000 but only paid \$4,000, they will show up as \$5,000.
- No need to create a query.



IRS 990

Under Marketing & Communication you can navigate to Letters and Documents. On the document tab you will find the Job Aid and the 990 template you will need for mail merge. Drop the chevron and click "View document". Save to your desktop. There is no need to click the edit button



Letters and Documents

Letters Documents

Documents (9) + Add Filters More

Type: Sites: Selected sites Apply Reset

Name	Site
<None>	
990 Schedule B Part I Job Aid	LC Global
990 Schedule B Part I Template	LC Global

View document Edit Delete

Name: 990 Schedule B Part I Template Cost:

Site: LC Global

Type: Description:

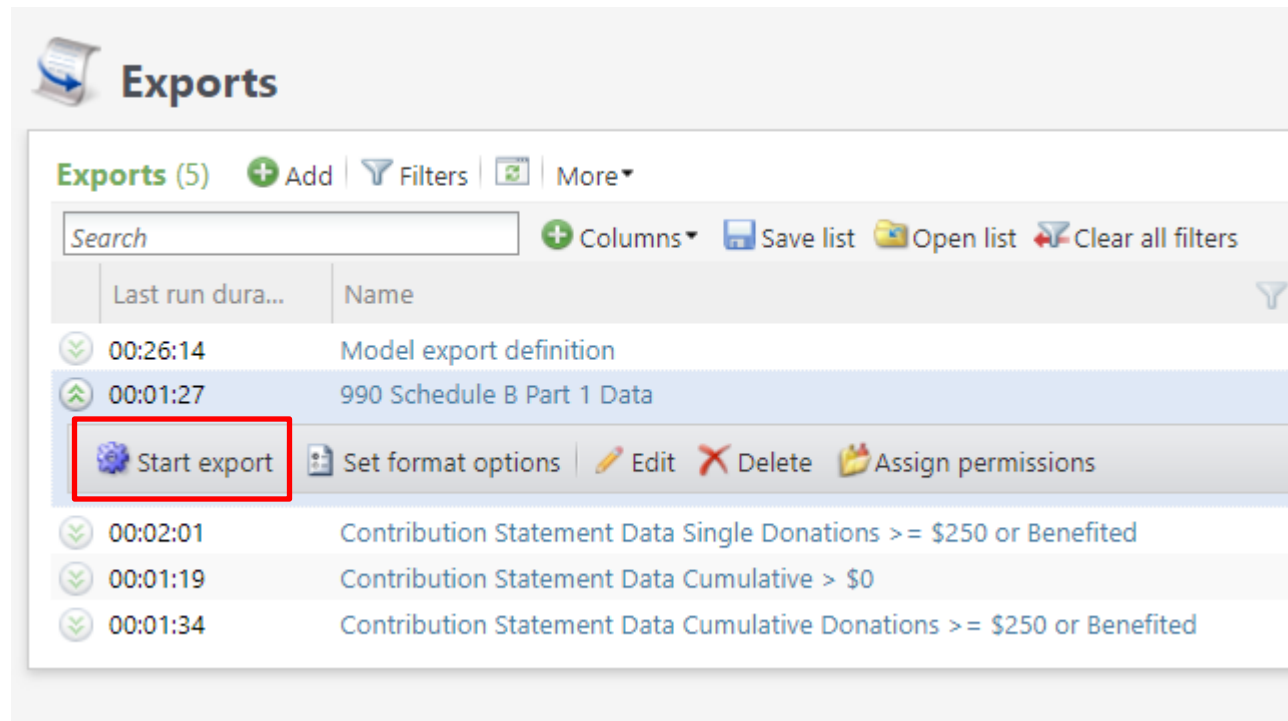
Attachment: 990 Schedule B Part I Template.docx



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IRS 990

Export is found under Administration / Exports. Drop the chevron and click start. There is no need to edit the process.



Exports

Exports (5) + Add Filters More

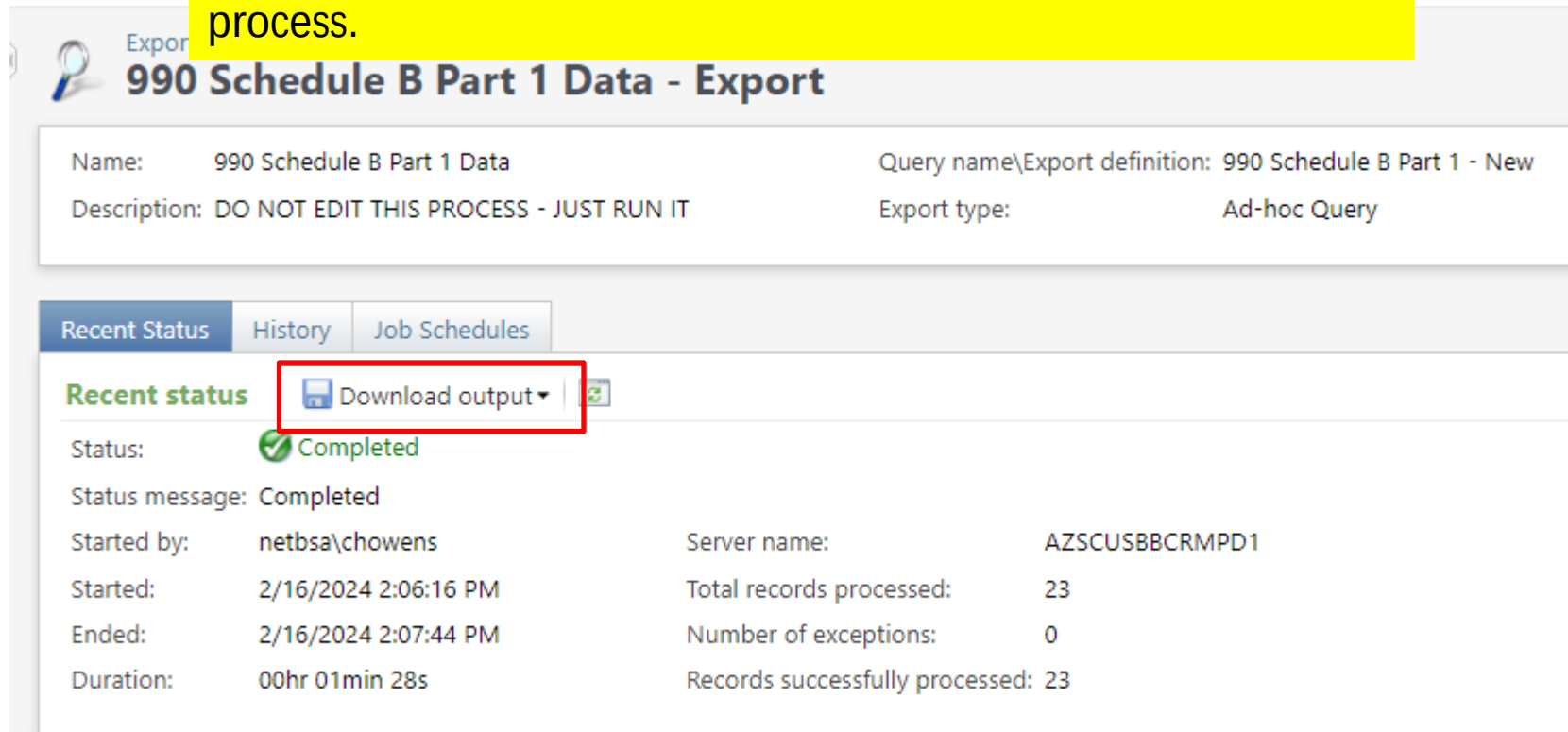
Search Columns Save list Open list Clear all filters

Last run dura...	Name
00:26:14	Model export definition
00:01:27	990 Schedule B Part 1 Data
 Start export  Set format options  Edit  Delete  Assign permissions	
00:02:01	Contribution Statement Data Single Donations >= \$250 or Benefited
00:01:19	Contribution Statement Data Cumulative > \$0
00:01:34	Contribution Statement Data Cumulative Donations >= \$250 or Benefited



IRS 990

When the process completes, use the "Download output" button to export to Excel. Save the file to your desktop so that you can connect your 990 template to it for the mail merge process.



The screenshot displays the '990 Schedule B Part 1 Data - Export' window. At the top, there are fields for 'Name: 990 Schedule B Part 1 Data', 'Description: DO NOT EDIT THIS PROCESS - JUST RUN IT', 'Query name\Export definition: 990 Schedule B Part 1 - New', and 'Export type: Ad-hoc Query'. Below these fields are three tabs: 'Recent Status', 'History', and 'Job Schedules'. The 'Recent status' tab is active, showing a 'Recent status' section with a 'Download output' button (a blue folder icon with a document) highlighted by a red rectangle. Below this, the status is 'Completed' with a green checkmark. Further down, there are details about the process: 'Status message: Completed', 'Started by: netbsa\chowens', 'Server name: AZSCUS8BCRMPD1', 'Started: 2/16/2024 2:06:16 PM', 'Total records processed: 23', 'Ended: 2/16/2024 2:07:44 PM', 'Number of exceptions: 0', and 'Duration: 00hr 01min 28s', 'Records successfully processed: 23'.

990 Schedule B Part 1 Data - Export	
Name:	990 Schedule B Part 1 Data
Description:	DO NOT EDIT THIS PROCESS - JUST RUN IT
Query name\Export definition:	990 Schedule B Part 1 - New
Export type:	Ad-hoc Query

Recent Status | History | Job Schedules

Recent status | **Download output** | 

Status:  **Completed**

Status message: Completed

Started by:	netbsa\chowens	Server name:	AZSCUS8BCRMPD1
Started:	2/16/2024 2:06:16 PM	Total records processed:	23
Ended:	2/16/2024 2:07:44 PM	Number of exceptions:	0
Duration:	00hr 01min 28s	Records successfully processed:	23



IRS 990

Below is the template. You will need to double click the header and add your Council Name, Employer ID Number and update the year next to Contributors. Save your template then mail merge it to your export file. Remove <> and () when changing out information above.

Name of Organization		Employer identification number	
< Council Name>		<Employer ID Number>	
Part I Contributors (2019)			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
Header	Mel 887 Lehi	\$ 25,000.00	Person



IRS 990 – Sample Output

Name of Organization	Employer identification number
XYZ Council	67-8923983829641

Part I Contributors 2023

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Sta PO Cor	\$ 00	Person
2	Mc PO Eug	\$ 00	Person
3	Wil PO Eug	\$ 1.00	Person
4	Bui 195 Eug	\$ 00	Person
5	Cha 302 Eug	\$ 00	Person
6	Lan 302 Eug	\$ 00	Person



PeopleSoft Transactions



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Need to be done PeopleSoft

Beginning of the year in PeopleSoft, after closing the prior year these GL transactions required:

- Journal entry to move balances to new accounts
- Run a Posted detail in PS and Pledge Receivable report in CRM

Contribution - Pledges

- 1301 (CR) to 1321 (DR) (move from current year to prior)
- 1331 (CR) to 1301 (DR) (move from future to current)
- Allowance
- 1371 (DR) to 1381 (CR) (move current to prior)
- 1391 (DR) to 1371 (CR) (move future to current)



Accounts

- 1321 is your Contributions Receivable Prior year account. This is populated with pledges you expect to be paid late after you close your books (GJ from 1301). If you write-off all pledges this will have a zero balance.
- 4002 is your Contributions-FOS Prior Year account. Dollars are move to here if there is negative balance in 1321 as you reconcile monthly during current year.



Updating Reminders and Acknowledgements



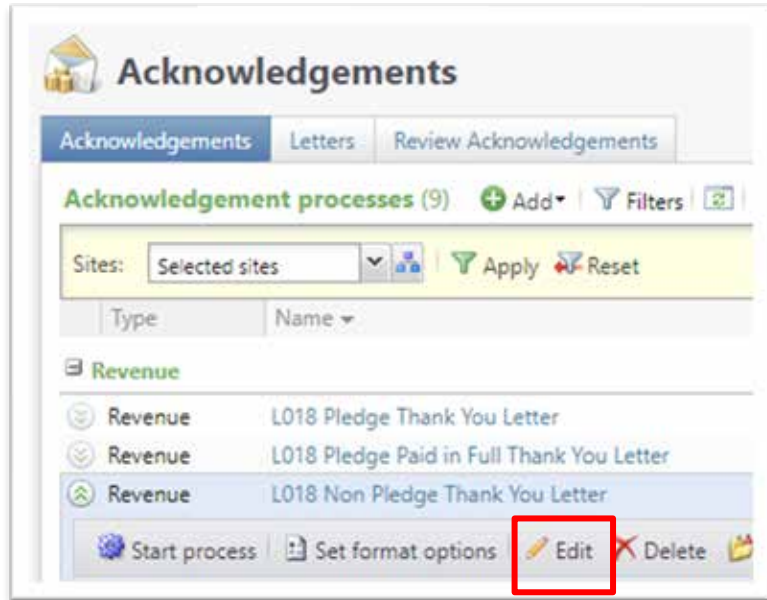
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Update Billing Reminders & Acknowledgements

- Drop Chevron
- Click Edit
- Find Selection and click the pencil next to it
- Edit the Selection's filters if needed
 - o Add 2025 Appeal report Code
 - o Add names of new appeals



Acknowledgements



Acknowledgements

Acknowledgements Letters Review Acknowledgements

Acknowledgement processes (9) Add Filters

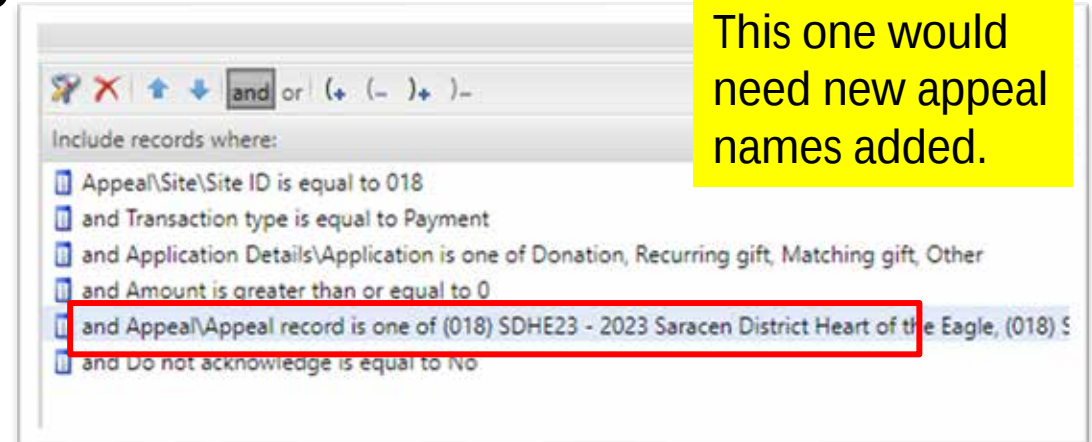
Sites: Selected sites Apply Reset

Type Name

Revenue

- Revenue L018 Pledge Thank You Letter
- Revenue L018 Pledge Paid in Full Thank You Letter
- Revenue L018 Non Pledge Thank You Letter

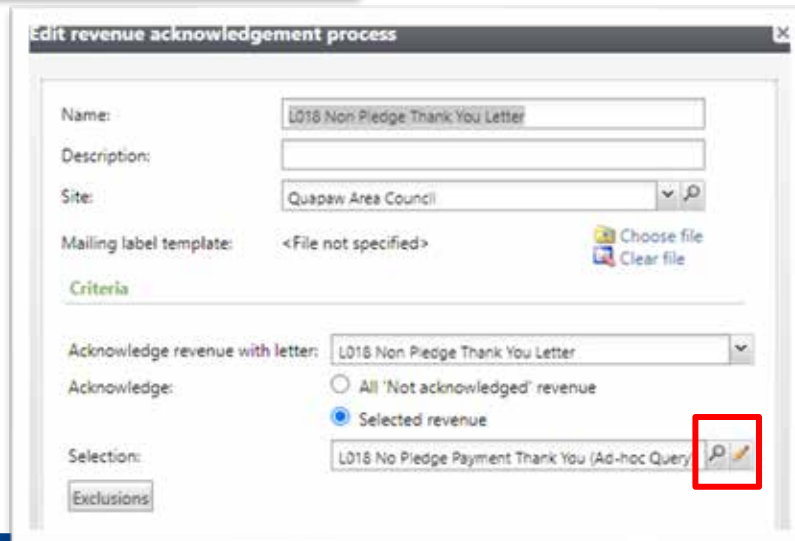
Start process Set format options Edit Delete



Include records where:

- Appeal\Site\Site ID is equal to 018
- and Transaction type is equal to Payment
- and Application Details\Application is one of Donation, Recurring gift, Matching gift, Other
- and Amount is greater than or equal to 0
- and Appeal\Appeal record is one of (018) SDHE23 - 2023 Saracen District Heart of the Eagle, (018) S
- and Do not acknowledge is equal to No

This one would need new appeal names added.



Edit revenue acknowledgement process

Name: L018 Non Pledge Thank You Letter

Description:

Site: Quappaw Area Council

Mailing label template: <File not specified> Choose file Clear file

Criteria

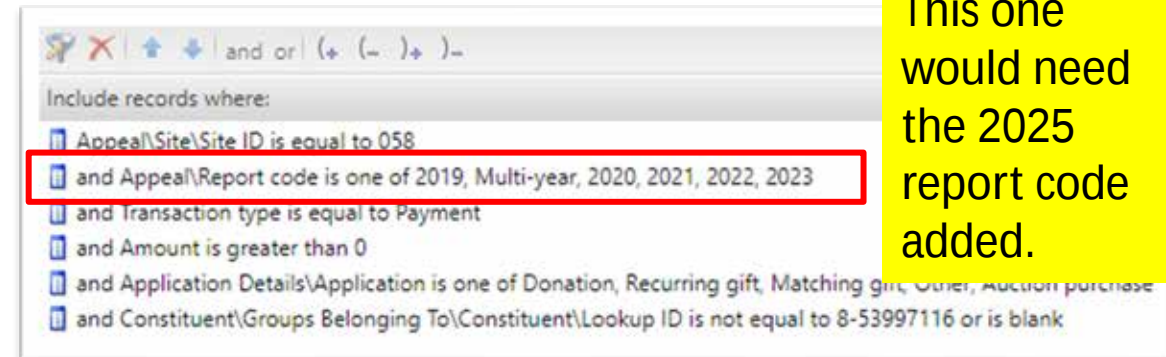
Acknowledge revenue with letter: L018 Non Pledge Thank You Letter

Acknowledge:

- All 'Not acknowledged' revenue
- Selected revenue

Selection: L018 No Pledge Payment Thank You (Ad-hoc Query) Edit

Exclusions



Include records where:

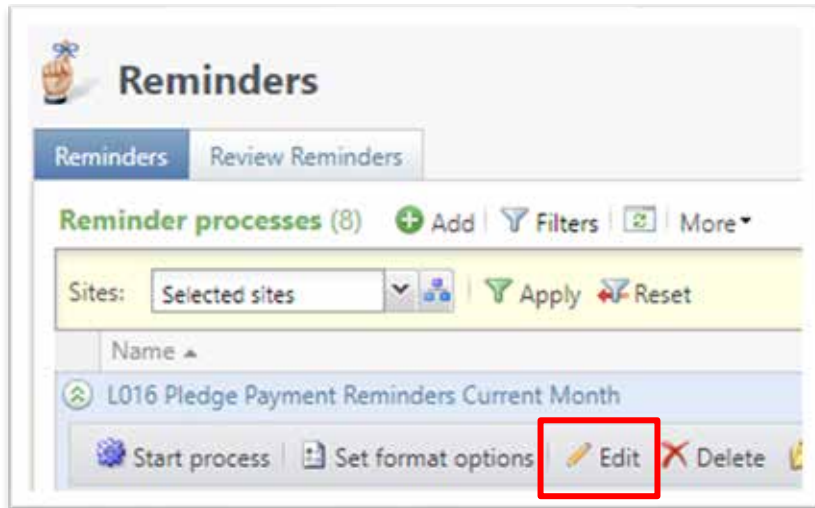
- Appeal\Site\Site ID is equal to 058
- and Appeal\Report code is one of 2019, Multi-year, 2020, 2021, 2022, 2023
- and Transaction type is equal to Payment
- and Amount is greater than 0
- and Application Details\Application is one of Donation, Recurring gift, Matching gift, Other, Auction purchase
- and Constituent\Groups Belonging To\Constituent\Lookup ID is not equal to 8-53997116 or is blank

This one would need the 2025 report code added.



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Reminders



Reminders

Reminders | Review Reminders

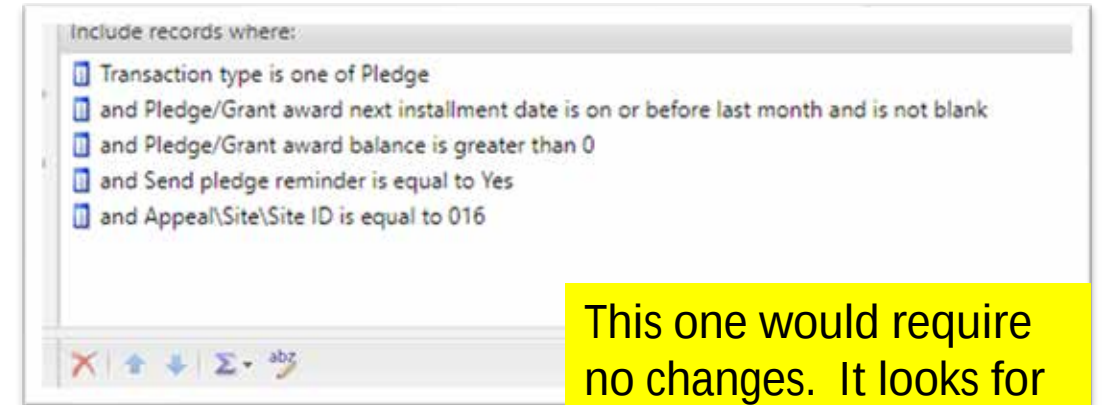
Reminder processes (8) + Add | Filters | More ▾

Sites: Selected sites | Apply | Reset

Name ▴

L016 Pledge Payment Reminders Current Month

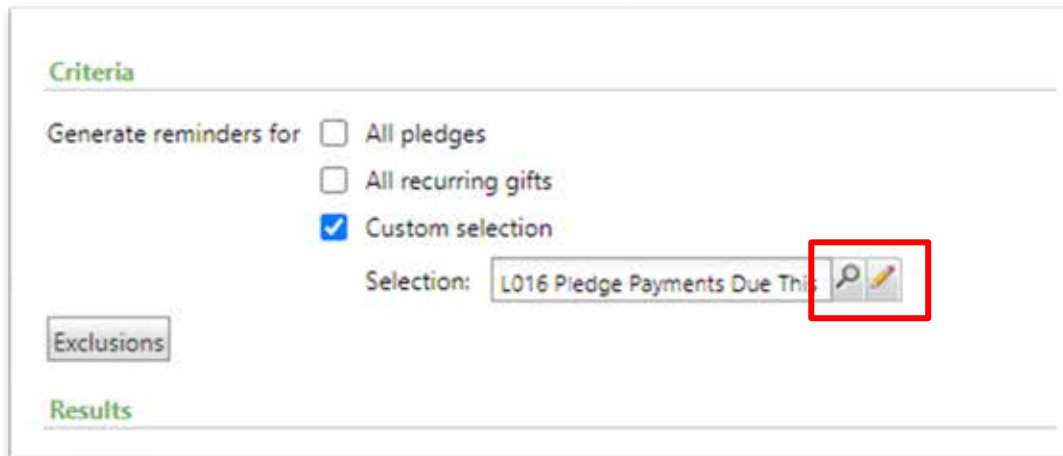
Start process | Set format options | **Edit** | Delete



Include records where:

- Transaction type is one of Pledge
- and Pledge/Grant award next installment date is on or before last month and is not blank
- and Pledge/Grant award balance is greater than 0
- and Send pledge reminder is equal to Yes
- and Appeal\Site\Site ID is equal to 016

This one would require no changes. It looks for all overdue pledges.



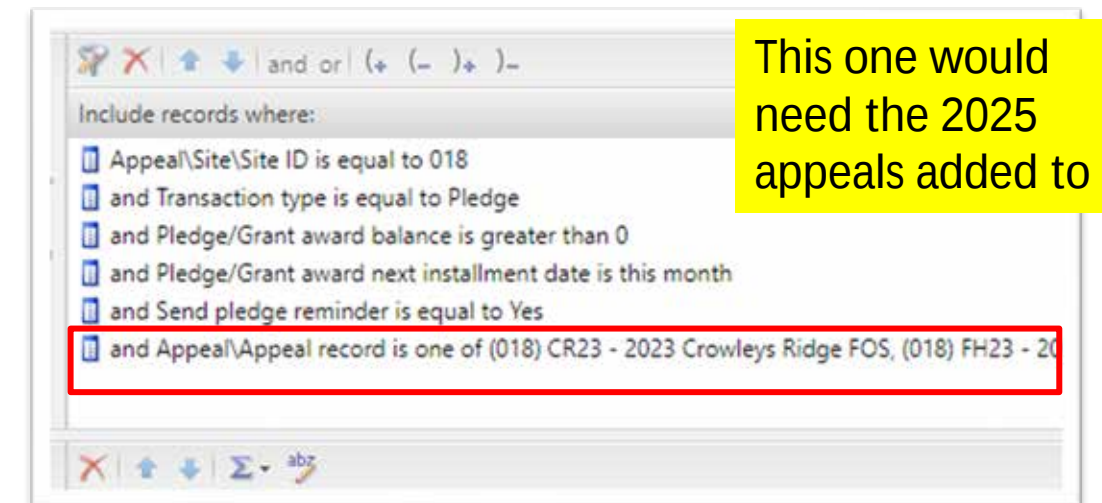
Criteria

Generate reminders for ☐ All pledges
☐ All recurring gifts
☒ Custom selection

Selection: L016 Pledge Payments Due This Month **Edit**

Exclusions

Results



Include records where:

- Appeal\Site\Site ID is equal to 018
- and Transaction type is equal to Pledge
- and Pledge/Grant award balance is greater than 0
- and Pledge/Grant award next installment date is this month
- and Send pledge reminder is equal to Yes
- and Appeal\Appeal record is one of (018) CR23 - 2023 Crowleys Ridge FOS, (018) FH23 - 2023**

This one would need the 2025 appeals added to it.



Recurring Gifts

- Review Recurring Gifts Data List under Revenue
- Revenue \ More Tasks \ Recurring Gift List
- Update Appeal on Recurring gift to next year's appeal
- Do this on January 1

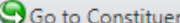
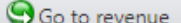
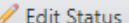


Maintaining Recurring Gifts

Recurring Gifts List

Recurring list for your council (10)  More ▾

Constituent Name equal to: Recurring Status equal to:   Apply  Reset

	Council #	Council	Appeal	Appe...	Constituent ID	Constituent Name	Recurring Amo...	Recurring Frequency	Recurring Start Date	Recurring End Date	Recurring Next Transaction Date
		Council	S23 FOS 2023	2023			\$625.00	Quarterly	4/21/2022	1/21/2024	4/21/2022
		Council	S23 FOS 2023	2023			\$30.00	Monthly	11/19/2022	10/19/2023	10/19/2023
 Go to Constituent  Go to revenue  Edit Status											
		Council	S23 FOS 2023	2023			\$10.00	Monthly	5/8/2023		11/8/2023
		Council	S23 FOS 2023	2023			\$25.00	Monthly	3/15/2023		10/15/2023
		Council	S23 FOS 2023	2023			\$30.00	Monthly	2/25/2023		10/25/2023
		Council	S23 FOS 2023	2023			\$100.00	Monthly	1/30/2023	12/1/2023	9/30/2023
		Council	S23 FOS 2023	2023			\$15.00	Monthly	4/2/2023		11/2/2023
		Council	S23 FOS 2023	2023			\$15.00	Monthly	4/17/2023		10/17/2023
		Council	S23 FOS 2023	2023			\$51.50	Quarterly	12/2/2022		12/2/2023
		Council	S23 FOS 2023	2023			\$50.00	Monthly	5/2/2023		11/2/2023

This council will need to click **Go to Revenue** and then edit the recurrence and change it to the 2025 Appeal. If the recurrence needs to be adjusted from active to terminated or lapsed, you can do this by clicking **Edit Status**.



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Contribution Statements

- Sent to donors by end of January.
- Export files ready to run January 2, 2025.
- All payments for 2024 need to be entered before file generation.
- Print and read Job Aid (Updated 2023).
 - o Located MyBSA \ CRM User Guides \ Marketing and Communication \ Contribution Statements.
 - o CRM \ Marketing & Communications \ Packages \ Letters & Documents \ Documents



CRM and MyBSA

 **Letters and Documents**

Letters Documents

Documents (9) [Add](#) [Filters](#) [More](#)

Type: Sites: [Apply](#) [Reset](#)

Name	Site
<None>	
990 Schedule B Part I Job Aid	LC Global
990 Schedule B Part I Template	LC Global
Pledge Card Brief BSAFR	LC Global
Preparing to Print Pledge Cards	LC Global
Update Group BSAFR Values	LC Global
Update Revenue Values BSAFR Template	LC Global
Acknowledgement	
Contribution Statement Job Aid	LC Global
Contribution Statement Template	LC Global
Contribution Statement Template - Margin Option 1	LC Global

Marketing and Communications

[Acknowledgements & Reminders](#)

[Add an Appeal - Detailed Steps](#)

[Add an Appeal - Quick Reference](#)

[Billing Statements](#)

[Mail Merge](#)

[BSAFR Group Set Up](#)

[BSAFR Heirarchy Review and Edit](#)

[BSAFR Event Committee Group](#)

[BSAFR Printing Pledge Cards](#)

[Print Individual Pledge Cards](#)

[Print Parent Group level Pledge Cards](#)

[Print Pledge Cards from a Query](#)

[Print Top Level Pledge Cards](#)

[Print Unit Pledge Cards](#)

[Billing Reminders](#)

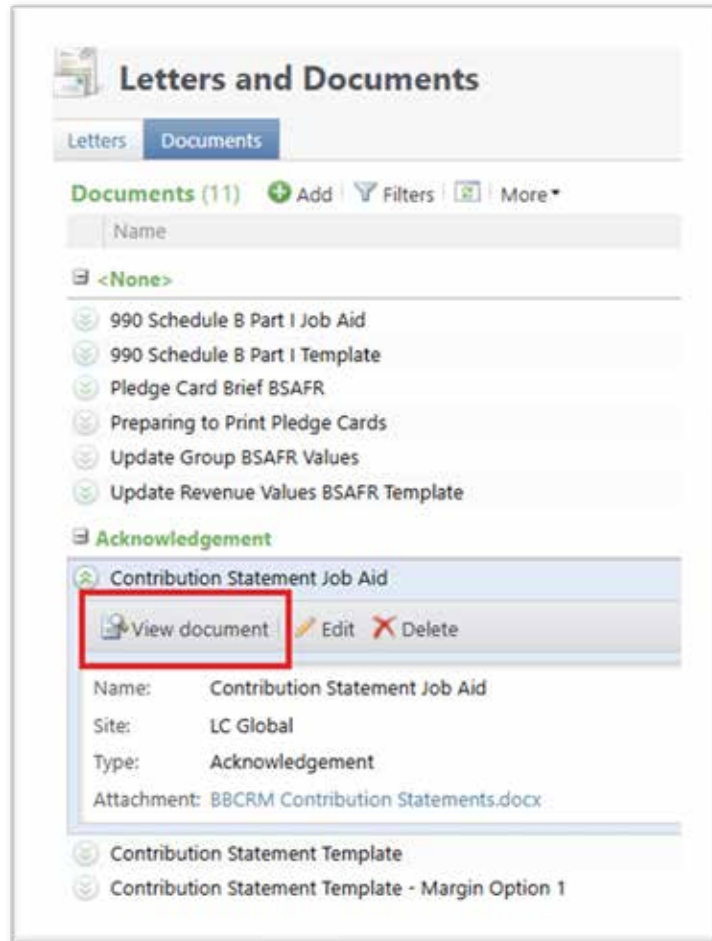
[Contribution Statements](#)

[Running Acknowledgements](#)



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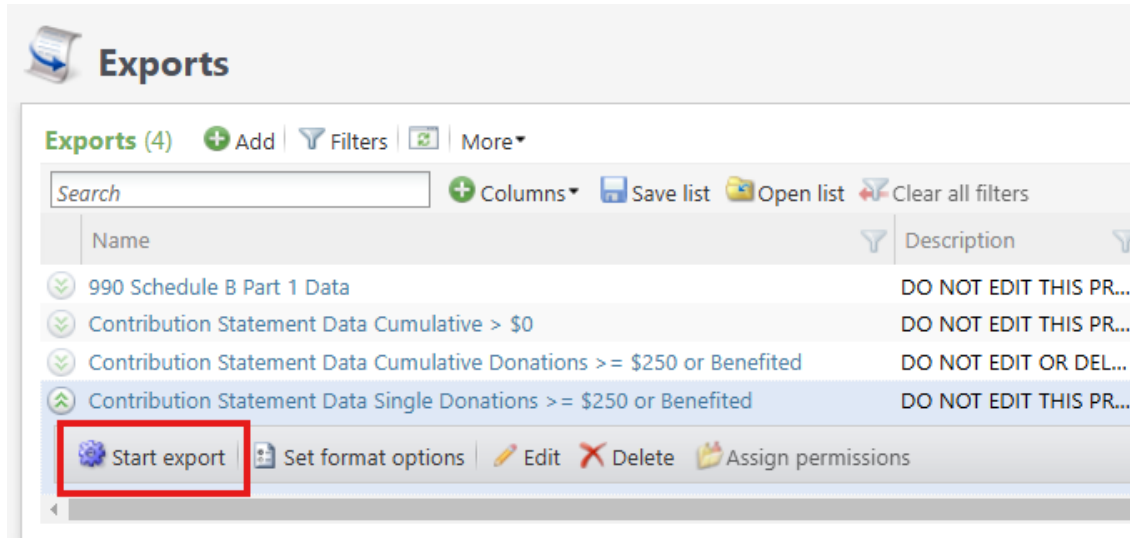
Statements Documentation and Templates



- Drop the chevron and click view document to download the job aid and the desired template.
- The Margin Option – 1 template allows for more footer space if you are merging your statements to stationary.



Contribution Statement Exports



- Found under Administration \ Exports.
- Drop the chevron on the one needed and click start.
- Download your results when completed.

Contribution Cumulative > \$0 will send a statement to all donors who have given any amount.

Contribution Cumulative >= \$250 will send a statement to donors whose summed payments are \$250 or greater.

Contribution Single >= \$250 will send out a statement to a person who has a single payment of \$250 or higher.

It will contain only those payments \$250 or greater.

Minimum requirement



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Statement Export Sheet - Update

Appeal	Amount	Receipt Amount	Benefit Value	Benefit Description
	\$250.00	\$250.00		
	\$2,000.00	\$2,000.00		
	Lake Topgolf Tournament	\$750.00	\$650.00	\$100.00 Meal(s) and Fees
	Elf Tournament 2024	\$750.00	\$500.00	\$250.00 Meals(s) and Green
	Scouting 2024	\$5,000.00	\$5,000.00	
	Scouting 2024	\$3,000.00	\$3,000.00	

1. Benefit Amount and Benefit Description will be blank – Used with Special Events
2. The giving category column to the right may give you additional insight as to what the benefit description might be.
3. For Benefit Value and Benefit Descriptions - type in the correct values
4. The receipt amount for a contribution with benefits will need to be adjusted. Receipt Amount = Amount – Benefit Value. The Receipt Amount is the Charitable Contribution.
5. To speed this process, you can sort your output by appeal and amount. Update your special event appeals benefits. Once completed, sort your output back by the first column.



Contribution Template Updates

Word Options

General
Display
Proofing
Save
Language
Accessibility
Advanced
Customize Ribbon
Quick Access Toolbar
Add-ins
Trust Center

☒ Properties follow chart data point ⓘ

Show document content

☐ Show background colors and images in Print Layout view

☐ Show text wrapped within the document window

☒ Show drawings and text boxes on screen

☐ Show bookmarks

☐ Show text boundaries

☐ Show crop marks

☒ Show field codes instead of their values

Field shading: When selected

☐ Use draft font in Draft and Outline views

Name: Courier New

Size: 10

Font Substitution...

☐ Expand all headings when opening a document ⓘ

```
{ IF{ MERGESEQ } = 1 "Discard This Page. { SET PreviousConstituent "" } { SET CouncilAddress "Example Council, 123  
Main St., Anytown, TX 12345" } { SET CouncilContact "email First.Last@scouting.org" } { SET CouncilTaxID "Federal Tax  
ID#" } { SET Year "2024" } " " } { SET CurrentConstituent { MERGEFIELD ID } } { IF { CurrentConstituent } = {  
PreviousConstituent } "{ MERGEFIELD Date } { MERGEFIELD Amount \# "#,###,###0.00 } { MERGEFIELD  
Appeal } { IF { MERGEFIELD Benefit_Value } <> "" "{ SET SpecifiedBenefitValue { MERGEFIELD Benefit_Value } }" "{ SET
```

- Download your template.
- Update template with council contact info and IEN number.
- File / Options / Advanced / Turn on Field Codes
- Make changes in Field Codes to CouncilAddress, CouncilContact, and CouncilTaxID
- File / Options / Advanced / Turn off Field Codes



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Contribution Directory Merge

- Mailings / Start mail merge / **Directory**
- Mailings / Select Recipients / Use an Existing List
- Mailings / Finish & Merge/ Edit Individual Documents
- Review your file.
- Make needed tweaks.
- Print and mail.



Statement Final Output

Ja
PO
Ly

Dear ,

The following is a list of paid contributions for the calendar year 2024 recorded by Example Council, 123 Main St., Anytown, TX 12345 (Federal Tax ID Federal Tax ID#). Thank you for your generous support of Scouting! If you have any questions or concerns, please email First.Last@scouting.org.

Date	Amount Paid	Appeal Name	Benefit Value	Net Contribution
4/12/2024	250.00		0.00	250.00
10/10/2024	2,000.00		0.00	2,000.00
4/12/2024	750.00		100.00	650.00
		Benefit: Meal(s) and Fees		
4/12/2024	750.00		250.00	500.00
		Benefit: Meals(s) and Green Fees		
1/22/2024	5,000.00		0.00	5,000.00
11/18/2024	3,000.00		0.00	3,000.00
4/12/2024	750.00		0.00	750.00
		smans Challenge		
Total:	\$ 12,500.00		\$ 350.00	\$ 12,150.00

The highlighted areas would have your corrected info for your council.

The benefit descriptions are present.

The benefit value and net contributions are now showing correctly



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Items not in Contribution Statement

- Auctions items donated to the council
 - o CRM event/auction has a tab where you can download a list
- Gifts of Stock
 - o Letter thanks for the number of share form company XYZ on date given
- Gift in Kinds
 - o Data list under Revenue more task for a mailing list

These gifts types thank for an item not a dollar amount.

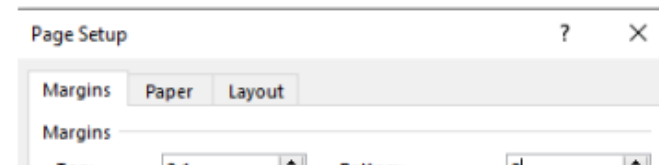


Contribution Statement Common Issues

- The Contribution Job Aid has a list of common issues and steps to resolve them on page 6

Common Issues

1. The dates are sometimes shifted onto the next line, so the formatting is off, especially when there are many different contributions.
 - a. Try merging the letter with the non-raised footer template.
2. Each donation from the donor is showing on a separate line.
 - a. The reason they are on separate lines is in case the donor gets audited, so they have proof of the specific dates they donated on that can be reconciled with their bank statements.
3. Some donors have more than one contribution, but it's only printing one per page/the lines are spread out on two sheets
 - a. When you download your export file, save it as a 'CSV (Comma delimited) (*.csv) file (See Below).
 - b. Make sure your CSV file is in the original sort order that it was when you first downloaded it. (To fix it, Sort on Column A)
 - c. When you click Start Mail Merge, make sure you click 'Directory' instead of Letters
4. The footer needs to be raised even higher than the raised footer template does.
 - a. Open the template, go to the Layout ribbon, select Margins>Custom Margins... (at the very bottom). On the Margins tab of the Page Layout dialog, adjust the Bottom margin value as desired



Scouting America Branding

- Review your templates for Boy Scouts of America
 - o Reminders
 - o Acknowledgement Letter Templates
 - o Pledge Card Report is being adjusted
 - o Key reports are being revised to see if Boy Scouts of America or BSA is on them



Acknowledgement Templates

Acknowledgements **Letters** Review Acknowledgements

Letters (7) Add Filters More

☐ Include inactive letters Sites: Apply Reset

Type	Name	Description	Word template
Revenue	L609 Recurring Gift Thank You	Recurring Gift Thank You	
Revenue	L609 Donation Thank You ag	Donation Thank You Letter	Thank you DONATION.docx

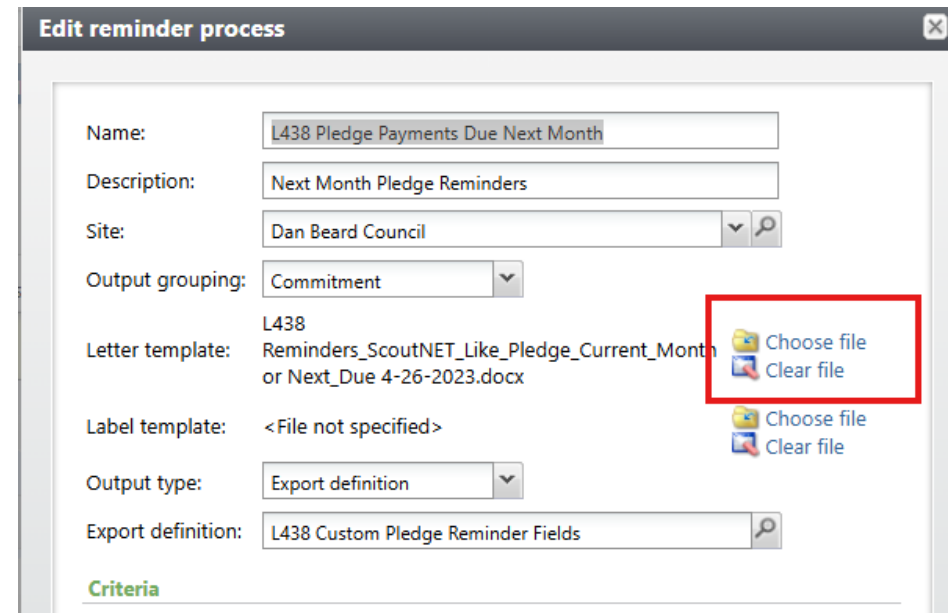
View template Update template Edit Delete Mark inactive

Found under Marketing Communications \ Acknowledgements
Drop the chevron and view template.
Make changes – Save changes – Update template



Reminder Template

- Template located in Letters and Documents under Marketing and Communications.
- If it needs to be changed:
 - o Download template from Marketing and Communications>Letters and Documents>Documents
 - o Make changes, save to desktop
 - o Clear old template
 - o Load new template



The screenshot shows the 'Edit reminder process' window with the following fields and values:

- Name: L438 Pledge Payments Due Next Month
- Description: Next Month Pledge Reminders
- Site: Dan Beard Council
- Output grouping: Commitment
- Letter template: L438 Reminders_ScoutNET_Like_Pledge_Current_Month or Next_Due 4-26-2023.docx
- Label template: <File not specified>
- Output type: Export definition
- Export definition: L438 Custom Pledge Reminder Fields

The 'Letter template' field is highlighted with a red box, showing the file name and two buttons: 'Choose file' and 'Clear file'.



Workplace ~ Viva Engage (Teams)

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



Chat



Don Day (You)

Chat

Shared



▼ Pinned

- Don Day (You)
You: need csops1 4...
- Michael Knight
You: need csops1 4...
- Cristina Diaz
You: need csops1 4...
- SR
You: need csops1 4...
- John Kasper
You: need csops1 4...
- Brenda Lopez
You: need csops1 4...
- DB
You: need csops1 4...
- Ronald Thompson
You: need csops1 4...
- RG
You: need csops1 4...
- William Bennett
You: need csops1 4...

▼ Recent

0/23/2023 8:10 AM

Microsoft Word document preview with text: "Microsoft Word document preview. It appears that the document is a Microsoft Word document. The document is titled 'Microsoft Word document preview' and contains text that is mostly illegible due to blurring. The text appears to be a list or a series of items, possibly related to a project or a task. The document is titled 'Microsoft Word document preview' and contains text that is mostly illegible due to blurring. The text appears to be a list or a series of items, possibly related to a project or a task."

Wednesday, July 12, 2023

Thursday, July 13, 2023

Microsoft Word document preview with text: "Microsoft Word document preview. It appears that the document is a Microsoft Word document. The document is titled 'Microsoft Word document preview' and contains text that is mostly illegible due to blurring. The text appears to be a list or a series of items, possibly related to a project or a task. The document is titled 'Microsoft Word document preview' and contains text that is mostly illegible due to blurring. The text appears to be a list or a series of items, possibly related to a project or a task."

Wednesday, November 1, 2023

Thursday, November 2, 2023

Microsoft Word document preview with text: "Microsoft Word document preview. It appears that the document is a Microsoft Word document. The document is titled 'Microsoft Word document preview' and contains text that is mostly illegible due to blurring. The text appears to be a list or a series of items, possibly related to a project or a task. The document is titled 'Microsoft Word document preview' and contains text that is mostly illegible due to blurring. The text appears to be a list or a series of items, possibly related to a project or a task."

Friday, November 3, 2023

Saturday, November 4, 2023

Microsoft Word document preview with text: "Microsoft Word document preview. It appears that the document is a Microsoft Word document. The document is titled 'Microsoft Word document preview' and contains text that is mostly illegible due to blurring. The text appears to be a list or a series of items, possibly related to a project or a task. The document is titled 'Microsoft Word document preview' and contains text that is mostly illegible due to blurring. The text appears to be a list or a series of items, possibly related to a project or a task."

Microsoft Word document preview with text: "Microsoft Word document preview. It appears that the document is a Microsoft Word document. The document is titled 'Microsoft Word document preview' and contains text that is mostly illegible due to blurring. The text appears to be a list or a series of items, possibly related to a project or a task. The document is titled 'Microsoft Word document preview' and contains text that is mostly illegible due to blurring. The text appears to be a list or a series of items, possibly related to a project or a task."

Chat

Activity

Chat

Teams

Calendar

Calls

OneDrive

Andy

Apps

Pinned

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

Michael Creagh 6:40 AM

Search for Viva Engage

Viva Engage

Approvals

Planner

Avatars

Word

Whiteboard

Stream

Help

OneNote

Get more apps

Engage

Search in Engage

Home

Don Day

Explore

+ New post

Communities

Storylines

Favorites

Keep your favorites at your fingertips. Favorites will appear here. Learn more

Communities

BF BBCRM User Forum

AC Accounting Specialists & Cont...

S Support Center News and Annu...

000-Scouting U Fundraising Es...

PS Professional Staff

Members • 7

Info

Pinned

CRM Resource Page o...

Community resources

SharePoint library

SharePoint site

OneNote

Planner

Create live event

BF

BBCRM User Forum

BBCRM User Forum

Conversations

About

Files

Events

Share thoughts, ideas, or updates

Discussion

Question

Praise

Poll

All conversations

Recent posts

Don Day

Thu at 12:19 PM

Seen by 6

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



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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



Council Support

Council Management
Support

Contact Council
Management Support

Council Assessments

Council Board Resources

Council Business
Practices

Council Fiscal
Management and
Training

Journey to Excellence

Council Funding and Finance

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

CRM Resources

CRM Process Videos

CRM (Blackbaud) User Forum Presentations

[Report Cookbook \(for OLTP\) BSA Appeal Progress & Appeal Constituent Reports](#)

2022

January 2022 User Forum – [Slide Deck](#) – [recording](#)

February 2022 User Forum – [Slide Deck](#) – [recording](#)

March 2022 User Forum – [Slide Deck](#) – [recording](#)

April 2022 User Forum – [Slide Deck](#) – [recording](#)

– Creating Constituent Interactions * Using the Constituent Interaction Data List * Using Development Workspace

* Scouting Gives Setup

2021



Member Care

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





Welcome to the National IT Service Catalog

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

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

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

News and Announcements

	10/1/2024, 4:25:22 PM	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](#)



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Service Categories

 Accounts & Passwords

 BSA Applications
(Operations)

 BSA Applications
(Program)

 Email, Communication &
Collaboration

 General Assistance

 Network Services

 Security Services

 Hardware & Software

Reset User Accounts or Passwords

Accounts & Passwords

Change Display Name or Email Address

Accounts & Passwords

Disable or Remove User Account

Accounts & Passwords

Forward to Email Reply

Accounts & Passwords

Mailbox, Calendar or Group Access

Email, Communication & Collaboration

Email Forwarding or Auto Reply

Email, Communication & Collaboration



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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

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



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Questions & Answers



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