

CRM User Forum

May 21, 2025

John Kuehn

Cornelia Ellis

Valerie Eaton

Don Day



Prepared. For Life.™

Objectives

- Scouting Give Batches – Constituent Replacement
- CRM Batch issues and how to solve
- Special Events Registrations and Payment
- Available Data List
- MasterID Search Update



Scouting Give Batches Constituent updates



Prepared. For Life.™

Replace APTG Default

	Constituent	Lookup ID	Group ID	Amount	Receipt ...	Date	GL post ...	Deposit Reference
1	APTG Default	8-46000804		\$103.00	\$103.00	1/25/2025	1/25/2025	

	APTG Donor First ...	APTG Donor Last Name	APTG Donor Address 1	Constituent	Lookup ID	C
1		Stage	1401	APTG Default Replace	8-46000804	
The current user does not have rights to use this feature in the context of this specific record.						

1. Constituent fields moved in April to assist in data entry and site security was adjusted.
2. If you validate your batch or attempt to commit the batch without replacing the constituent, you will get the error above.
3. Solution: Use the first three fields to conduct a constituent search in the 4th field to find and replace the APTG Default Replace constituent.

Last/Org/Group name: Address:

First name: City:

Lookup ID: State:

Sites: ZIP/Postal code:

Email address:

☐ Match all criteria exactly

 Show advanced search options

Results (4 records found)

Lookup ID	Name	Address ▲	City
8-122	Tro	a pevine - 662...	Southlake
8-157	Sta	1401	Southlake
8-129	Sta	1401	Southlake
8-139	Sta	1401	Southlake

Search with last name and part of address to quickly find then donor. You may need to review the email address in the rear of your batch to narrow it down. Select and replace the default. Make sure "match all criteria exactly" is not checked.

CRM Batch Errors

How do I resolve?



Prepared. For Life.™

Missing Fields

Properties								
		Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type
1	✖	John D. Kuehn	8-14225721	\$10.00	\$10.00	5/20/2025	5/20/2025	Payment
Required field missing: Appeal								
Required field missing: Giving Category								
Required field missing: BSA Structure								

Properties								
		Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type
1	✖	John D. Kuehn	8-14225721	\$10.00	\$10.00	5/20/2025	5/20/2025	Payment
You must have at least one application.								
Please enter at least one designation.								

1. These errors will show when you click the validate button at the top of the batch.
2. Read error and complete required field then validate.



Inbound channel / Designation mismatch

Properties								
		Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue ty
1	✖	John D. Kuehn	8-14225721	\$10.00	\$10.00	5/20/2025	5/20/2025	Payment
In account system "Local Council", the account "L307-1-CAPC-CASH-L30700001-UNR" does not exist.								

Designation	Inbound channel
30700001 NO...	Capital Contributio...

Properties								
		Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue ty
1	✖	John D. Kuehn	8-14225721	\$10.00	\$10.00	5/20/2025	5/20/2025	Payment
In account system "Local Council", the account "L307-3-FOSC-CASH-L30700003-UNR" does not exist.								

Designation	Inbound channel
30700003 NO...	Friends of Scouting

Properties								
		Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue ty
1	✖	John D. Kuehn	8-14225721	\$10.00	\$10.00	5/20/2025	5/20/2025	Payment
In account system "Local Council", the account "L307-2-DMLC-CASH-L30700002-UNR" does not exist.								

Designation	Inbound channel
30700002 NO...	Direct Mail

1. These errors show up after you commit the batch.
2. All are examples of Designations that do not work with the selected Inbound Channels



Duplicate Constituent

Properties									
		Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type	Application
1	⚠	Rich White		\$10.00	\$10.00	5/20/2025	5/20/2025	Payment	Donation
This constituent matches multiple records. Click here to view.									

Possible duplicate matches for Rich White

Incoming constituent data

Batch: L1191073; Created: 4/23/2025

[Add this as a new record](#)

Name:

Mr
Rich
middle name
White
suffix

Address:

[Business]
1325 W Walnut Hill Ln
Irving
TX
75038-3008

Email:

email type
email address

Phone:

phone type

100% match: Richard White
Created: 7/17/2024; Last updated: 1/25/2025

[Confirm this record as a match](#)

Name:

title
Richard
middle name
White
suffix

Address:

[Business]
1325 W Walnut Hill Ln
Irving
TX
75038-3008

Email:

email type
No email address specified

Phone:

phone type

28 potential matches found

100% Richard White
Lookup ID: 8-61015598
1325 W Walnut Hill Ln
Irving, TX 75038-3008

100% Richard White
Lookup ID: 8-15718599
1325 W Walnut Hill Ln
Irving, TX 75038-3008

85% Richard R. Bourlon
Lookup ID: 8-13249930
1325 W Walnut Hill Ln
Irving, TX 75038-3008

85% Richard Bourton
Lookup ID: 8-11505858
1325 W Walnut Hill Ln
Irving, TX 75038-3008

85% Richard K. Christopher
Lookup ID: 8-33157631
1325 W Walnut Hill Ln
Irving, TX 75038-3008

Help Skip Cancel

1. Added a new constituent in batch entry
2. Validation tells us it might be a duplicate.
3. Review the duplicates and select the one that matches.
4. Grab the Lookup ID of the one selected and make sure that it has your site on the security tab.



Constituent site security

Properties									
		Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type	Application
1	✖	Richard White		\$10.00	\$10.00	5/20/2025	5/20/2025	Payment	Donation
The current user does not have rights to use this feature in the context of this specific record.									

Properties						
		APTG Donor First Name	APTG Donor Last Name	APTG Donor Address 1	Constituent	Lookup ID
1	✖	Cory	Lock	5000 W	APTG Default Replace	8-460
The current user does not have rights to use this feature in the context of this specific record.						

1. Top example is from a constituent chosen in a batch and selected via the duplicate checker – Solution: do a constituent search outside of batch, find the constituent, add your site to the security tab, open your batch and validate to clear error.
2. Bottom example is from a Scouting Gives batch – Solution: click the constituent field and search for the constituent with the name and address from the first three fields in the batch.



Event Registration Payment Segment Mapping

Properties										
	Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type	Application	Payment	
1	John D. Kuehn	8-14225721	\$10.00	\$10.00	5/20/2025	5/20/2025	Payment	PATRON registration for John ...	Cash	
In account system "Local Council", account segments have not been defined for the segment values: Segment 'Account Category': Event Category: Special Fun										

Properties											
	Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type	Application	Payment method	Other method	Appeal
1	John D. Kuehn	8-14225721	\$10.00	\$10.00	5/20/2025	5/20/2025	Payment	PATRON registration for John ...	Cash		(307) A25- 20
In account system "Local Council", account segments have not been defined for the segment values: Segment 'Project Plus': Designation: 30708001 FOS - Patron Luncheon - Operating, Events: PATRON											

Revenue type	Application	Payment method	Other method	Appeal	Designation
Payment	PATRON regi...	Cash		(307) A25- 2025 Annual ...	
In account system "Local Council", account segments have not been defined for the segment values: Segment 'Account Category': Event Category: Special Fundraising Event Inbound Channel: _____; Segmer					

1. Check inbound channel to make sure you are using Special Event Fundraising
2. Check to ensure you created and turn in your event revenue mapping sheet (yearly process)
3. If event mapping was completed – create a ticket and attach snipping so that segment can be review. One segment may be missing
4. Wrong inbound channel could be an issue
5. Sub designation not created for an account you are now using.

GL Post Date

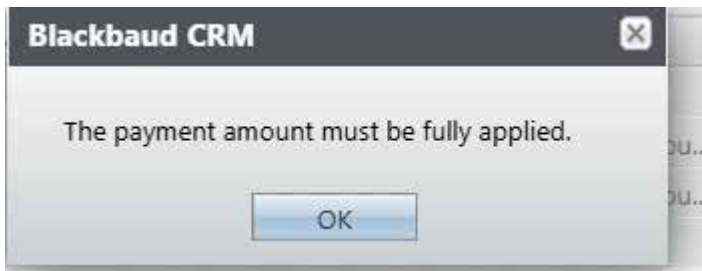
Properties								
		Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type
1		John D. Kuehn	8-14225721	\$10.00	\$10.00	5/20/2025	11/29/2024	Payment
Post date must be in an open period.								

1. Review the GL Post Date
 - o Is it a correct date? If doing an adjustment for a prior year for audit purposes make the date a December date.
 - o If date is incorrect, remove and update to a correct date.
2. December is left open in a prior year for audit adjustments.



Pledge payment with inbound mismatch

Properties							
	Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue
1	John D. Kuehn	8-14225721	\$200.00	\$200.00	5/20/2025	5/20/2025	Payment
In account system "Local Council", the account "L307-1-DMLC-CASH-L30700001-UNR" does not exist.							



Properties							
	Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type
1	John D. Kuehn	8-14225721	\$200.00	\$200.00	5/20/2025	5/20/2025	Payment
The total amount must be equal to the sum of the amounts applied to commitments.							

Payment has Direct Mail and pledge has Friends of Scouting. Solution is to review the pledge to see inbound channel used. Make payment match.

Pledge payment is not fully applied to the pledge or event registration. May need to add a split application as a donation to assign extra monies to.

The payment has not been applied to items in the apply window. The Application field is currently blank. To fix go to the "Revenue tab" and "Apply" the monies to the appropriate open pledge.



Credit Card Batch Error

Properties			
	Barcode	Constituent	Lookup ID
1		John Kuehn	8-15214421
Card number is not valid. Card number is not valid.			

Properties												
	Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type	Application	Payment method	Card type	Name on card	Card number
1		John Kuehn	8-15214421	\$10.00	\$10.00	5/20/2025	5/20/2025	Payment	Donation	Credit card	Visa	John D Kuehn *****1111
No authorization codes from the payment processor exist for credit card transactions in the batch. Either the credit card process has not been run or it failed to complete. If it failed to complete,												

1. Credit Card validator tells you that the CC # is wrong. Review your data entry. You may need to call the donor to verify number.
2. Batch commit was done before batch ran through Credit Card processor. Credit Card processor adds the authorization code. The authorization code is not the 3-digit code from the back of the Credit Card.
3. Upon processing a batch of credit cards
 - o Successful transactions will be kept in the batch and assigned a 6-digit authorization code.
 - o Hard rejections will be removed from the batch
 - o Provisional rejection will move to a retry batch for a second attempt – error is normally insufficient funds.

Credit card – Error report

 Credit card processing process list
L609 Credit Card Processing Batch

Name: L609 Credit Card Processing Batch
Batch: L1186933
Account: BSA Demo
Description: Use for Batch Processing

Recent status | History | Job schedules

Recent status  Exception report  **Results report**  Download rejection file 

Status:  **Completed**
Status message: Completed

Started by: netbsa\linsmith Server name: AZSCUSBBCRMPD2
Started: 1/21/2025 12:10:13 PM Number of attempts for these transactions: Not applicable
Ended: 1/21/2025 12:13:42 PM Maximum number of allowed attempts: Not applicable
Duration: 00hr 03min 29s

Transaction outcomes

Payments processed:	31	View results report
Authorizations:	13	Batch number L1186933
Rejections:	18	
Provisional rejections:	0	
Permanent rejections:	18	Download rejection file: csv / xlsx

1. CC error report can be found on the Credit card processor at Revenue \ EFT \ Credit Card Processing
2. Pull either the Result Report or the Rejection file.
3. Review the rejection reasons.
4. In most case you need to call the donor to discuss the card number and update at the pledge record or the recurring gift so the new inform populates the next generate payments batch.





Credit Card Processing

Show transactions:

Applications:

1 of 1 Find | Next

Credit Card Processing Results Report

Batch processed: L1186933 Retry batch created: None Process date: 1/21/2025
Payments processed: 31 Authorized transactions: 13 Authorized revenue total: \$270.00
Provisional rejections: 0 Provisionally rejected revenue total: \$0.00
Permanent rejections: 18 Permanently rejected revenue total: \$365.00

Number of times these transactions have been attempted: Not applicable Maximum number of allowed attempts: 2

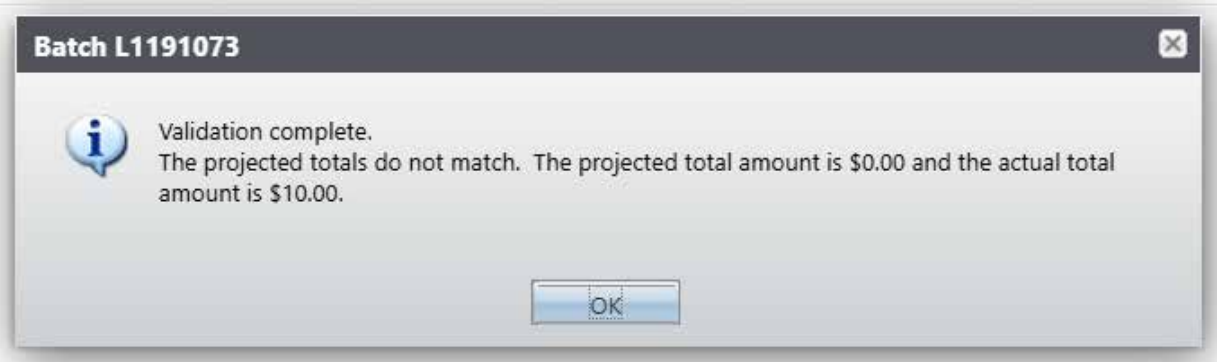
Transaction Number	Commitment Lookup ID	Constituent Name	Last 4 Digits	Transaction Amount	Authorization/Rejection Code	Transaction Outcome
1	rev-22		1332	\$15.00	Please call the number on the back of your card. Your bank requested that we do not honor this card.	Removed for export
10	rev-45		6433	\$20.00	Stolen or lost card.	Removed for export
11	rev-45		7275	\$30.00	Invalid account number.	Removed for export
12	rev-45		1596	\$20.00	Invalid account number.	Removed for export
14	rev-45		8494	\$20.00	Please call the number on the back of your card. Your bank requested that we do not honor this card.	Removed for export
15	rev-45		2418	\$30.00	Please call the number on the back of your card. Your bank requested that we do not honor this card.	Removed for export
17	rev-43		5241	\$20.00	Please call the number on the back of your card. Your bank requested that we do not honor this card.	Removed for export
2	rev-41		6131	\$20.00	Please call the number on the back of your card. Your bank	Removed for export

A file has been added to the VIVA Engage CRM User Forum page that tells you how to handle each rejection.

Many of the solutions involve a conversation with the donor for an updated form of payment.

This is an example of the report for all rejected transactions.

Other Errors



Click the Update Totals button at the top of the batch then click validate.

Properties											
	Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type	Application	Payment method	Other method	Appeal
1	John D. Kuehn	8-14225721	\$10.00	\$10.00	5/20/2025	5/20/2025	Payment	Donation	Other		(307) A25- 2025 Annual ...
Violation of PRIMARY KEY constraint 'PK_#B57E247__3F0526A26399A4AB'. Cannot insert duplicate key in object 'dbo.@AccountCodeMappingTable'. The duplicate key value is (99999999-9999-9999-9999-999999999999, 1).											

1. Payment method of other has been selected but the "Other Method" field is blank.
2. Select an "Other Method" and validate batch to clear error.

Special Events Registrations and Payment



Prepared. For Life.™

Event Process Before Adding Registrants

- Event created in BCRM
- Event linked to Designation(s) & Appeal(s)
- Event spreadsheet sent to BSA National
- National has configured your Event GL
- Your council has defined and entered all Registration Options, including:
 - o Registration Donation amount
 - o Fee/Cost amount (Fair Market Value)



Revenue Applications

- “Payment applied on a(n)...”
 - o Pledge -Donation (one-time gift)
 - o Planned Gift commitment
 - o Matching Gift claim
 - o Event Registration claim
 - o Auction Item Purchase reservation

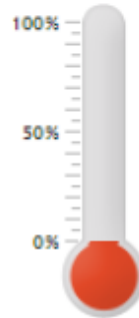


Create Event Options (Registration Types)

LXXX 2025 Scouting Gives Event

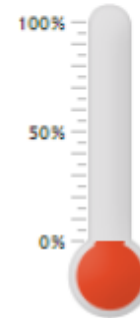
Event date: 6/15/2025
Site: Bay-Lakes Council
Location: M&M Hunting Preserve
2 Winslow Rd
Pennsville, NJ 08070
Room/Unit:
Contact: John Kuehn
Coordinator:
Category: Special Fundraising Event

Status:  Active
Lookup ID: 8-10003102



Event expenses

Expense budget: \$0.00
Agreed expenses: \$0.00
Amount paid: \$0.00
0% of budget



Event capacity

Event capacity: 0
Will attend: 9
Will not attend: 0
0% of capacity

We have two options below. The next slide will show how they are created. These will be available to select in Scouting Gives during event creation.

← Registrations **Options** Designations Appeals Event Attendees Tasks/Coordinators Speakers Expenses Invitations Doc

Registration options (2) Add Copy from More

Registration type	Name	Registration fee...	Receipt amount	Registration count	Benefits
 Sponsorship (Default)	Green Table Sponsor	\$4,000.00	\$3,520.00	8	Meals
 Sponsorship (Default)	Individual Ticket	\$250.00	\$190.00	1	Meals

Preferences (0) Add Copy from More

Name	Options
------	---------

Below are two event registration options. The registration type is “sponsorship”. This event defaults to 4201. The name will default to “sponsorship”. You can change this to what you would like it to be. The registration count is 8 because the event will seat 8 people at a table. If this was a golf foursome, it would be 4 for the 4 golfers. The registration fee is what the sponsorship costs the donor. The cost is the benefits the donor will receive. In the benefits section, we add our benefit description and the quantity which matches the number associated with the table seating. The unit value needs to be \$0. Clear it and make it \$0. The benefits drive to account 4250 and are captured in the cost field not the total value field.

Edit registration option

General

Registration type: Sponsorship (Default)
Name: Green Table Sponsor
Registration count: 8
Registration fee: \$4,000.00
Cost: \$480.00

Benefits

	Benefit	Quantity	Unit value	Total value	Details
	Meals	8	\$0.00	\$0.00	
*					

Benefits total value: \$0.00
Receipt amount: \$3,520.00

Help

SaveCancel

Edit registration option

General

Registration type: Sponsorship (Default)
Name: Individual Ticket
Registration count: 1
Registration fee: \$250.00
Cost: \$60.00

Benefits

	Benefit	Quantity	Unit value	Total value	Details
	Meals	1	\$0.00	\$0.00	
*					

Benefits total value: \$0.00
Receipt amount: \$190.00

Help

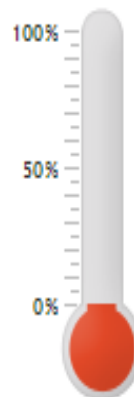
SaveCancel

LXXX 2025 Scouting Gives Event

Click the add button
to place a registrant
in your event.

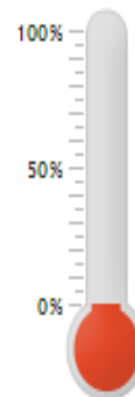
2025
akes Council
Hunting Preserve
slow Rd
enville, NJ 08070
Room/Unit:
Contact: John Kuehn
Coordinator:
Category: Special Fundraising Event

Status:  Active
Lookup ID:
8-10003102



Event expenses

Expense budget: \$0.00
Agreed expenses: \$0.00
Amount paid: \$0.00
0% of budget



Event capacity

Event capacity: 0
Will attend: 0
Will not attend: 0
0% of capacity

← Registrations Tasks/Coordinators Speakers Expenses Options Invitations Designations Appeals Documentation Job Occurrences Lodging Options

Registrations (0)

 Add  More▼

Type: Registrant:
Status: Attended:

 Apply  Reset

☒	Registrant	Type	Status	Attended	Online registrant	Balance	Host
-------------------------------------	------------	------	--------	----------	-------------------	---------	------

The add form opens and you need to select your registrant. Do this with a constituent search.

Add a registrant

Registrant:

☒ Preregistration
☐ Walk-in registration

Total registration fees: \$0.00
Receipt amount: \$0.00

PackagesSingle Events

LXXX 2025 Scouting Gives Event - Single Events
LXXX 2025 Scouting Gives Event(Sunday, June 15, 2025)

Registration option	Registration fee	Registrants Benefits
Green Table Sponsor	8 for \$4,000.00	0 Meals ☐ Waive benefits
Red Table Sponsor	\$2,500.00	0 Meals ☐ Waive benefits

Registration option	Registrant	Waive registration fee
*		☐

Help

SaveCancel

Type in the name
and then click
search and pick the
correct person or
organization.

Record Search

Last/Org/Household name:	Kuehn	Address:	
First name:	John	City:	
Middle name:		State:	
Suffix:		ZIP:	
Lookup ID:		Phone number:	
Sites:	All sites	Prospect manager:	
Primary business:			
Email address:			

☐ Match all criteria exactly

 Show advanced search options

Results (69 records found)

Lookup ID	Name	Constituent t...	Address	City	State	ZIP	Email address	Suffix
8-	Kuehn, John	Individual					john.kuehn@...	
8-	Kuehn, John	Individual						
8-	Kuehn, John	Individual						
8-	Kuehn, John	Individual					john.kuehn@...	
8-	Kuehn, John	Individual						

Add the registration by selecting it at the bottom of the screen next to the registrant's name.

A pick list is available. This example picks Green Table Sponsor. Slots for 8 guests appear. The upper right corner shows the cost and the contribution amount. This does not place a pledge in the system.

Add a registrant

Registrant: John Kuehn

☒ Preregistration
☐ Walk-in registration

Total registration fees: \$4,000.00
Receipt amount: \$3,520.00

PackagesSingle Events

LXXX 2025 Scouting Gives Event - Single Events
LXXX 2025 Scouting Gives Event(Sunday, June 15, 2025)

Registration option	Registration fee	Registrants Benefits	
Green Table Sponsor	8 for \$4,000.00	8 Meals	☐ Waive benefits
Red Table Sponsor	\$2,500.00	0 Meals	☐ Waive benefits

Registration option	Registrant	Waive registration fee
Green Table Sponsor	John Kuehn	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
*		☐

Help

SaveCancel

After clicking save, the registration home screen will populate. You can edit the attendees from here as well as complete tasks in the upper left hand corner. We will click edit.

Event: LXXX 2025 Scouting Gives Event

John Kuehn - Event Registrant


john.kuehn@scouting.org

Registrant ID: evreg-10127041

Type: Preregistration

Status: Registered

No. of guests: 7

Total registration fees: \$4,000.00

Total paid: \$0.00

Balance: \$4,000.00

Total receipt amount: \$3,520.00

Payment history:

Registrations

Benefits

Lodging and Travel

Restrictions

Designations

Attributes

Registrations

Edit

John Kuehn
LXXX 2025 Scouting Gives Event (Sunday, June 15, 2025)
Green Table Sponsor

Guest of John Kuehn
LXXX 2025 Scouting Gives Event (Sunday, June 15, 2025)
Green Table Sponsor

Guest of John Kuehn
LXXX 2025 Scouting Gives Event (Sunday, June 15, 2025)
Green Table Sponsor

Guest of John Kuehn
LXXX 2025 Scouting Gives Event (Sunday, June 15, 2025)
Green Table Sponsor

Guest of John Kuehn
LXXX 2025 Scouting Gives Event (Sunday, June 15, 2025)
Green Table Sponsor

If you need to edit the registration or add the guests attending, the fields are available to do this.

Edit registration

Registrant: John Kuehn

☒ Preregistration
☐ Walk-in registration

Total registration fees: \$4,000.00
Receipt amount: \$3,520.00

Packages

Single Events

LXXX 2025 Scouting Gives Event - Single Events
LXXX 2025 Scouting Gives Event(Sunday, June 15, 2025)

Registration option	Registration fee	Registrants Benefits
Green Table Sponsor	8 for \$4,000.00	8 Meals ☐ Waive benefits
Red Table Sponsor	\$2,500.00	0 Meals ☐ Waive benefits

Registration option	Registrant	Waive registration fee
Green Table Sponsor	John Kuehn	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
Green Table Sponsor	(Unnamed guest)	☐
*		☐

Help

SaveCancel

Before we add, you can see that Kuehn is our registrant marked with a Blue Diamond and his guest are below. You can also see that he is the host for his guests. You can also drop the chevron next to the registrant and add the name, mark them as “no show”. In the edit window you can mark them as attended.

LXXX 2025 Scouting Gives Event

Event date: 6/15/2025 Status: Active

Site: Bay-Lakes Council Lookup ID: 8-10003102

Location: M&M Hunting Preserve
2 Winslow Rd
Pennsville, NJ 08070

Room/Unit:

Contact: John Kuehn

Coordinator:

Category: Special Fundraising Event

100%
50%
0%

Event expenses

Expense budget: \$0.00
Agreed expenses: \$0.00
Amount paid: \$0.00
0% of budget

100%
50%
0%

Event capacity

Event capacity: 0
Will attend: 8
Will not attend: 0
0% of capacity

Registrations (8) + Add More

Type: Registrant:

Status: Attended:

Apply Reset

	Registrant	Type	Status	Attended	Online registrant	Balance	Host
☒	Kuehn, John	Preregistration	Registered			\$4,000.00	Kuehn, John
☒	Ellis, Christopher	Preregistration	Registered			\$0.00	Kuehn, John
Edit Delete Mark as							
☒	Guest of John Kuehn	Preregistration	Registered			\$0.00	Kuehn, John
☒	Guest of John Kuehn	Preregistration	Registered			\$0.00	Kuehn, John
☒	Guest of John Kuehn	Preregistration	Registered			\$0.00	Kuehn, John
☒	Guest of John Kuehn	Preregistration	Registered			\$0.00	Kuehn, John

Single Registration

Add a Registrant

Add a registrant

Registrant: Kaci D. Taylor

☒ Preregistration
☐ Walk-in registration

Total registration fees: \$250.00
Receipt amount: \$190.00

PackagesSingle Events

LXXX 2025 Scouting Gives Event - Single Events
LXXX 2025 Scouting Gives Event(Sunday, June 15, 2025)

Registration option	Registration fee	Registrants	Benefits
Green Table Sponsor	8 for \$4,000.00	0	Meals ☐ Waive benefits
Individual Ticket	\$250.00	1	Meals ☐ Waive benefits

Registration option	Registrant	Waive registration fee
Individual Ticket	Kaci D. Taylor	☐
		☐

Help

SaveCancel

This shows that our second registration appears on the list. Because this one does not host guests there is no Blue Diamond next to the name. We now will process the revenue payments.



LXXX 2025 Scouting Gives Event

Event date: 6/15/2025

Site: Bay-Lakes Council

Location: M&M Hunting Preserve
2 Winslow Rd
Pennsville, NJ 08070

Room/Unit:

Contact: John Kuehn

Coordinator:

Category: Special Fundraising Event

Status: Active

Lookup ID: 8-10003102

100%

50%

0%

Event expenses

Expense budget: \$0.00

Agreed expenses: \$0.00

Amount paid: \$0.00

0% of budget

100%

50%

0%

Event capacity

Event capacity: 0

Will attend: 9

Will not attend: 0

0% of capacity

Registrations

Options

Designations

Appeals

Event Attendees

Tasks/Coordinators

Speakers

Expenses

Invitations

Documents

Registrations (9)

+

 Add

Type:

Registrant:

Status:

Attended:

Apply

Reset

☐	Registrant	Type	Status	Attended	Online registrant	Balance	Host
☒	Taylor, Kaci D.	Preregistration	Registered			\$250.00	
☒	Kuehn, John	Preregistration	Registered			\$3,500.00	Kuehn, John
☒	Guest of John Kue...	Preregistration	Registered			\$0.00	Kuehn, John
☒	Guest of John Kue...	Preregistration	Registered			\$0.00	Kuehn, John
☒	Guest of John Kue...	Preregistration	Registered			\$0.00	Kuehn, John
☒	Guest of John Kue...	Preregistration	Registered			\$0.00	Kuehn, John
☒	Guest of John Kue...	Preregistration	Registered			\$0.00	Kuehn, John
☒	Guest of John Kue...	Preregistration	Registered			\$0.00	Kuehn, John
☒	Ellis, Christopher	Preregistration	Registered			\$0.00	Kuehn, John

Shortcuts

-  Add this page to shortcuts
-  Manage my shortcuts
-  Add a committee
-  Ad-hoc query search
-  Smart query search
-  Query
-  Batch entry
-  Batch search
-  Merge two constituents
-  Merged constituent search

Recent searches

-  Committee search
-  Constituent search
-  Event search
-  Designation search



Revenue

Transactions

-  Transaction search
-  Batch entry
-  Batch search

Reports

-  Account distribution
-  Adjusted revenue
-  Giving activity
-  Giving detail
-  Giving detail group/household
-  Lockbox reconciliation
-  Giving dynamics
-  Matching gift claim summary
-  Pledge receivables report

Processing

-  Global pledge write-off
-  EFT
-  Generate revenue update batch

Manage matching gifts

-  Reconcile matching gifts
-  Search MatchFinder Online
-  Generate MatchFinder updates
-  Clear matching gift claims

Head to batch entry
under Revenue.

Decide on what type of payment batch you need. This illustrates cash/check payment. The check and registration arrived at the

Add a batch

Batch template: LC Cash/Check Payment

Batch number: <Next available batch number>

Description:

Owner: Dena Travao BSA

☒ Enable auto-save

Projected #: 0

Projected amount: \$0.00

Field options

☐ Override

Help Save Cancel

Batch L1191094

Main

Revenue

Payment



Apply

Pledge & recurring gift



Edit installments



Split designations



Payment

Credit card reader



Capture card info

Revenue details



Tributes



Benefits



Recognitions



Matching gifts



Solicitors



Business units

Note



Add note



Delete note

Properties

	Barcode	Constituent	Lookup ID	Group ID	Amount	Receipt...	Date	GL post date	Depo.
1		John Kuehn	8-18961050		\$4,000.00	\$3,520.00	5/21/2025	5/21/2025	
*									

Look up the donor and put the payment amount in. Then click the revenue tab and click Apply.

Apply to commitments for John Kuehn

Payment amount:

Apply by: ☒ Amount

Unapplied amount: \$0.00

☐ Percent

Search:

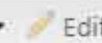
 Apply

 Reset

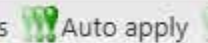
Date due: From:

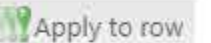
To:

 Add

 Edit

 Load commitments

 Auto apply

 Apply to row

Application	Constituent	Description	Balance	Date due	Amount due	Applied amount	Applied pe
Event registration	John Kuehn	LXXX 2025 Scouting Gives Event	\$4,000.00	6/15/2025	\$4,000.00	\$4,000.00	

The Event Registration will be available to select and apply the money to. The Event Registration is a claim and not a pledge.

Displaying records 1 - 1 of 1

amount	Applied percent	Designation	Other type	Opportu...	Revenue ...	Campaig...

OK

Cancel

Complete the other fields in your batch. I used a generic giving category for all of these and the council as the structure. My event report will show me what they registered for

[illegible]

This slide shows
the Constituents
Payment profile
with the Event
registration.

Details

Original amount: \$4,000.00

Effort:

Finder number:

Appeal: (XXX) SG25 Scouting Gives Sporting Clays

Source code:

Inbound channel: Special Event
Fundraising

Revenue reference:

Application details

Event registration - \$480.00  Go to revenue  Edit

Applied to: [Event registration for John Kuehn: LXXX 2025 Scouting Gives Event](#)

Campaign:

Revenue category: Unrestricted by donor

Solicitors:

Recognition credits: John Kuehn (\$480.00)

Event registration (charitable) - \$3,520.00  Go to revenue  Edit

Applied to: [Event registration for John Kuehn: LXXX 2025 Scouting Gives Event](#)

Designation: 63508521 SG Event - Operating

Campaign:

Revenue category: Unrestricted by donor

Solicitors:

Recognition credits: John Kuehn (\$3,520.00)

This slide shows the GL affected with the payment. 4201 Sponsorships and 4250 Fee Revenue

Details

Attributes

Letters

Documentation

VNE TEST

Benefits

BSAFR

GL Distributions

Tributes

Transaction history by post date

All dates

5/21/2025
Payment

GL distributions (8)

Filters

More

View:

All

Apply

Reset

Account	D.	Debit amount	Credit amo...	Reference
Event registration				
M635-1-1010-510-00	M.	\$480.00		Kuehn-Event registration Payment-Check
M635-1-1010-510-00	M.	\$3,520.00		Kuehn-Event registration Payment-Check
M635-1-4201-852-90	M.		\$3,520.00	Kuehn-Event registration Payment-Check
M635-1-4250-852-90	M.		\$480.00	Kuehn-Event registration Payment-Check

Available Data List



Prepared. For Life.™

Where to find Data Lists

Constituents Tab

- § Interactions List
- § Organization Donor List
- § Employer-Employee Relationships
- § BSA Eagles List Builder
- § BSA Top Prospect List Builder
- § Recognition Programs
- § Volunteer Awards

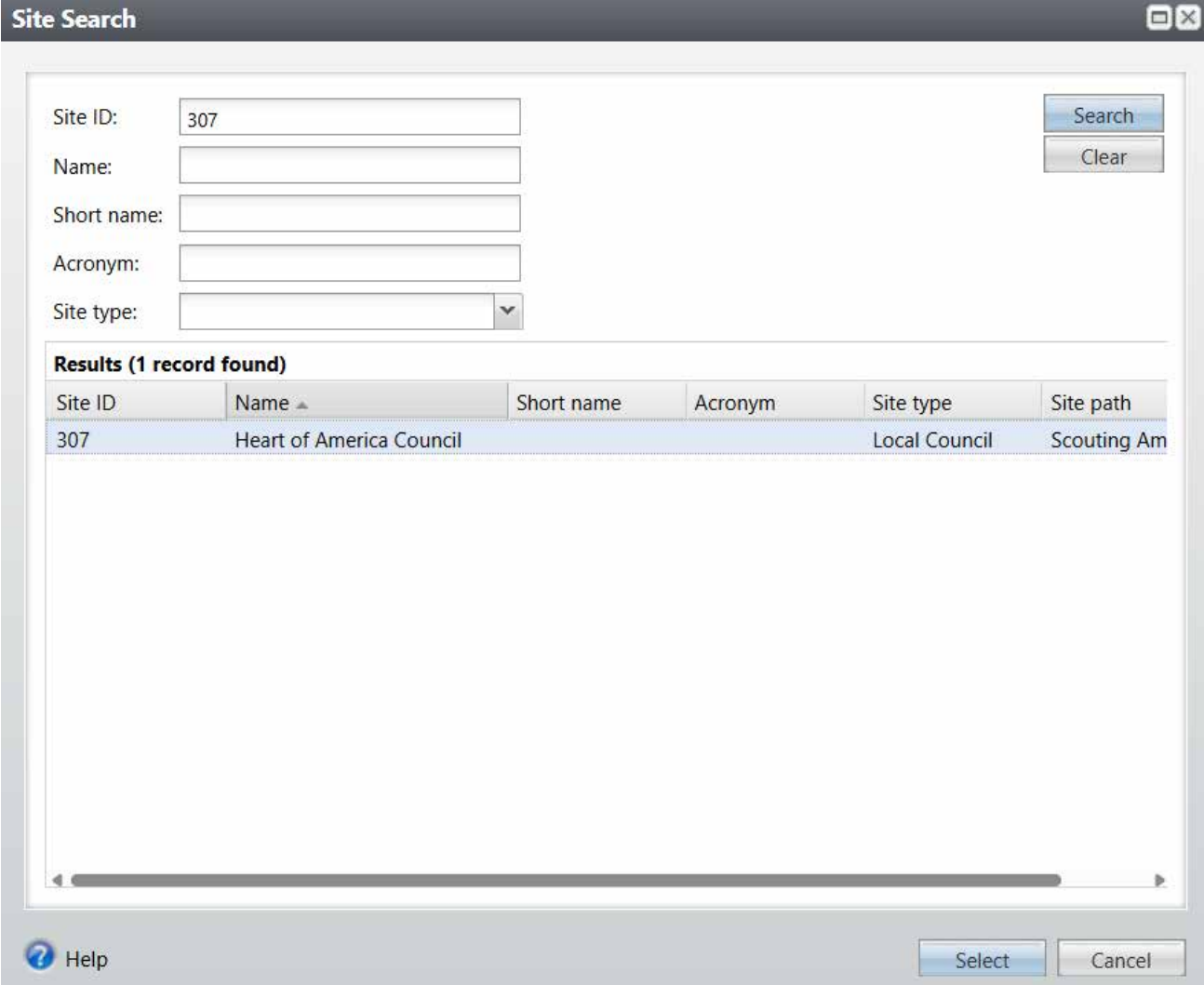
Revenue Tab

- § Appeal progress results
- § Gift in Kind List
- § Recurring Gift list
- § Revenue Data Hygiene
- § Write-offs Data List
- § Daily Revenue Transaction List



Entering a Data List

- Click the data list to enter
- Type your council number in the Site ID field
- Click Search
- Select your council
- Click Select



The screenshot shows a 'Site Search' window with a search form and a results table. The search form includes fields for Site ID (307), Name, Short name, Acronym, and Site type (dropdown). There are 'Search' and 'Clear' buttons. The results section shows 'Results (1 record found)' with a table containing one record for Site ID 307, Name Heart of America Council, Site type Local Council, and Site path Scouting Am. At the bottom are 'Help', 'Select', and 'Cancel' buttons.

Site ID	Name	Short name	Acronym	Site type	Site path
307	Heart of America Council			Local Council	Scouting Am



Interactions List – Provides a list of all interactions and planned steps site secured to your council.

- Interaction List

Interaction list for your council (18)  More ▾

Is contact report equal to: Is interaction equal to: Deceased equal to: Inactive equal to: Owner equal to: Date on:

	Is contact report	Is interaction	Deceased	Inactive	Added By	Owner	Date	Constituent	Summary ▲	Comment	Category	Subcategory	Status	Completed
✓	No	Yes	No	No	NETBSA'	D	11/6/2023	Ka	...				Completed	Yes
✓	No	Yes	No	No	NETBSA'	D	11/8/2023	Sc					Completed	Yes
✓	No	Yes	No	No	NETBSA'	Ka	11/7/2023	W	ie		Outbound	Stewardship	Completed	Yes
✓	No	Yes	No	No	NETBSA'	D	11/14/2024	M	je		Outbound	Stewardship	Completed	Yes
✓	No	Yes	No	No	NETBSA'	D	11/14/2024	N	i...		Outbound	Stewardship	Completed	Yes
✓	No	Yes	No	No	NETBSA'	D	11/13/2024	St	..		Outbound	Stewardship	Completed	Yes
✓	No	Yes	No	No	NETBSA'	Kr	11/14/2024	Ba			Outbound	Stewardship	Completed	Yes
✓	No	Yes	No	No	NETBSA'	Je	11/14/2024	Ja	n		Outbound	Stewardship	Completed	Yes
✓	No	Yes	No	No	NETBSA'	Kr	11/14/2024	W			Outbound	Stewardship	Completed	Yes
✓	No	Yes	No	No	NETBSA'	El	12/31/2024	M	n		Outbound	Stewardship	Completed	Yes
✓	No	Yes	No	No	NETBSA'	Pe	10/31/2024	D			Outbound	Stewardship	Completed	Yes
✓	No	Yes	No	No	NETBSA'	Ti	11/12/2024	D	..		Outbound	Stewardship	Completed	Yes
✓	No	Yes	No	No	NETBSA'	D	11/6/2023	Th	on				Completed	Yes
✓	No	Yes	No	No	NETBSA'	Zi	11/9/2023	Jo	ey		Outbound	Stewardship	Completed	Yes
✓	No	Yes	No	No	NETBSA'	Zi	11/9/2023	Ri	y		Outbound	Stewardship	Completed	Yes
✓	Yes	Yes	No	No	NETBSA'	Pe	6/21/2023	Br					Completed	Yes
✓	No	No	No	No	NETBSA'	Pe	7/10/2023	Br					Planned	No
✓	Yes	Yes	No	No	NETBSA'	Pe	10/11/2023	Br					Completed	Yes

 Go to constituent  Go to Interaction  Edit Interaction  Go to Step Report  Go to Plan



Organization Donor List – Provides a list of all organizations that have donated in your council.

- Organizational Donor List												
Organization Donor List (67) More												
Giving Years greater than or equal to: 3 Lifetime Giving greater than or equal to: \$100.00 Apply Reset												
Giving Years	Lifetime Givi...	Org ID	Organization	Org Address	Org City	Org State	Org Zip	Phones\Number	Contact ID	Contact Title	Contact FN	Contact MN
		8-	A	P	S		3					
		8-	A	P	P		C					
		8-	E	P	K		6					
		8-	E	1.	A		7		8-		S	
		8-	E	1.	C		2					
		8-	E	2.	Y		1	(7				
		8-	E	5	S		6	(8				
		8-	E	2.	N		5	(6	8-			
		8-	E	3	A		5		8-			
		8-	E	B	Ir		7					
		8-	E	1.	Ir		7		8-			
		8-	E	1.	Ir		7		8-			
		8-	E	P	J.		3	(3	8-			
		8-	C	7	E		1	(7	8-			
		8-	C	2.	Ir		7					
		8-	C	C	P		C					
		8-	C									
		8-	C	4	V		7	(9	8-			
		8-	C	7	Ir		4	(3	8-			
		8-	C	5	V		1					
		8-	C	8	Ir		4	(3	8-			
		8-	C	3.	F		9	(7	8-	Mr		
		8-	C	6	B		C	(2	8-	Mr		
		8-	E	7	S		6	(3	8-	Mr		
		8-	E	3	S		1	(3	8-			



Employee –Employer Relationships – Provides a list of organizations with relationships to individuals and dollars they have given.

- Employer-Employee Relationships					
Employer-Employee Relationships Employer-Employee Relationships Detail Employer-Employee LY Revenue Summary Employer-Employee LY Revenue Detail					
Employer-Employee Relationships (142) 2 More ▾					
Employer Name equal to: Relationship Type equal to: Reciprocal Relationship Type equal to: Apply Reset					
Employer Lookup ID	Employer Name ▲	Relationship Type	Reciprocal Relationship Type	# of Employees	
8	2	Organization	Individual	1	
8	A	Employer	Employee	1	
8	A	Organization	Individual	160	
8	A	Employer	Employee	1	
8	B	Employer	Employee	1	
8	B	Employer	Employee	5	
8	B	Organization	Individual	7	
8	B	Organization	Individual	1	
8	B	Family Foundation	Founder	2	
8	B	Organization	Individual	1	
8	B	Employer	Employee	40	
8	B	Employer	Employee	16	
8	B	Employer	Employee	1	
8	B	Organization	Individual	21	
8	B	Organization	Individual	8	
8	B	Organization	Individual	75	
8	B	Organization	Individual	2	
8	B	Employer	Employee	10	
8	B	Employer	Employee	1	
8	B	Organization	Individual	5	
8	C	Organization	Individual	1	
8	C	Organization	Individual	1	
8	C	Organization	Individual	11	



Eagle List – Provides list of Eagle Scouts awarded by your council or Eagles from other councils that reside in your zip code.

BSA Eagles Listbuilder

BSA Eagles Listbuilder (500 of 3,926) More

Site: ☒ My Eagles ☐ Nearby Eagles ☐ Include Inactive ☐ Include Deceased

Search < 1 2 3 4 5 ... 17 >

Original Site...	Original Site...	Served By Si...	Served By Si...	My Site	Eagle Looku...	Title	First Name	Last Name	Suffix	Nickname	Address Type	Address	City	State
				Yes	8		B	A			Home	P	M	
				Yes	8		G	A	f					
				Yes	8		A	A			Home	3	Al	
				Yes	8		J	A			Home	2	Sp	
				Yes	8		F	A			Home	1	Vil	
				Yes	8		E	A			Home	1	Su	
				Yes	8		D	A			Home	8	Ta	
				Yes	8		N	A		M	Home	2	Sp	
				Yes	8		N	A			Home	4	Cr	
				Yes	8		S	A			NESA	3	Sp	
				Yes	8		N	A			Home	1	Sp	
				Yes	8		K	A			Home	2	Sp	
				Yes	8		S	A			Home	2	Sp	
				Yes	8		D	A			NESA	1	Sp	
				Yes	8		J	A			Home	1	He	
				Yes	8		J	A			Home	1	Sa	
				Yes	8		B	A		Be	Home	6	Al	
				Yes	8		U	A						
				Yes	8		B	A			Home	3	Sa	
				Yes	8		J	A			NESA	1	Sp	
				Yes	8		J	A			NESA	(	Vil	



Top Prospect List – List of individuals that meet lifetime giving and other criteria which should be reviewed for further cultivation.

BSA Top Prospects Listbuilder

BSA Top Prospects Listbuilder (500 of 5,400) More

Site: Apply Reset

Columns Save list Open list Clear all filters

< 1 2 3 4 5 ... 17 >

	Zip		Email Address...		Email Address...		Age		Date of Birth		Is Active Vol...		Is Eagle		Lifetime Givi...		Lifetime Givi...		Lifetime Soft...		Lifetime Soft...		Lifetime Soft...
8							0				No		No		00		.00		\$0.00		\$0.00		
1			Business Email ...				0				No		No		01		.00		\$0.00		\$0.00		
6							0				No		No		00		.00		\$0.00		\$0.00		
8							0				No		No		00		.00		\$0.00		\$0.00		
8			Business Email ...								No		No		00		.00		\$0.00		\$0.00		
8											No		No		00		.00		\$0.00		\$0.00		
8											No		No		00		.00		\$0.00		\$0.00		
8											No		No		00		.00		\$0.00		\$0.00		
8			Home Email A...								No		No		00		.00		\$0.00		\$0.00		
8			Home Email A...								No		No		00		.00		\$0.00		\$0.00		
8			Home Email A...								No		No		00		.00		\$0.00		\$0.00		
8			Home Email A...								Yes		No		00		.00		\$0.00		\$0.00		
8			Home Email A...								No		No		00		.00		\$0.00		\$0.00		
6			Home Email A...								No		No		00		.00		\$0.00		\$0.00		
8							0				No		No		00		.00		\$0.00		\$0.00		
8							0				No		No		00		.00		\$0.00		\$0.00		
8							0				No		No		00		.00		\$0.00		\$0.00		



Recognition Programs – List of individuals that are connected to a fundraising recognition program.

- Recognition Programs List											
James E. West Fellowship 1910 Society Members Founder Circle Members Second Century Current Gift Members Second Century Deferred Gift Members Good Turn Society Members Visionary											
James E. West Fellows in your council. (264) More											
Deceased equal to: Inactive equal to: City equal to: State equal to: Recogniton Level e											
< 1 2 3 4 5 ... 9 >											
Deceased	Inactive	Lookup ID	First name	Middle name	Last Name	Suffix	Address	City	State	Zip	Email
No	No	8.	H	O	D		M				Busin
No	No	8.	Ja	R	Z		x	x		x	Home
No	No	8.	Ti	O	V		2	C		3	Home
No	No	8.	R	K	T		9	M		8	Home
No	No	8.	A	Ti	C		7	Ti		8	Home
No	No	8.	R	L	F		5	Si		9	Home
No	No	8.	Ti	J	T		1	C		9	Home
No	No	8.	M	F	H		2	C		9	Home
No	No	8.	P	A	J		2	C		9	Home
No	No	8.	D	Ly	F		1	M		9	Home
No	No	8.	A	C	M		P	M		9	Home
No	No	8.	D	D	D		1	Ti		9	Home
No	No	8.	B	P	K		1	B		9	Home
No	No	8.	L	H	P		1	P		9	Home
No	No	8.	K		S		8	C		9	Home



Volunteer Awards – Awards either earned by the individual or granted by the council or district.

- Volunteer Awards List										
Volunteer Award List Constituent Award Training Awards										
Volunteer Award List - These can be found on the awards tab under the "Volunteer Tab" on the constituent record. (290)  More										
Volunteer Award equal to: Silver Beaver Deceased equal to: Inactive equal to:  Apply  Reset										
< 1 2 3 >										
Council #	Council Name	Name	Lookup ID	First name	Middle name	Last Name	Suffix	Address	City	State
		M	8-	M		M		2	V	
		C	8-	C	J	B		8	V	
		Jc	8-	Jc		H		3	Fi	
		A	8-	A	L	V		1	B	
		A	8-	A	C	V		3		
		Ji	8-	Ji	F	Li		1	Si	
		G	8-	G	V	Z		1	B	
		M	8-	M	E	H		8	H	
		C	8-	D	V	H		6	Fi	
		B	8-	Bi	T	V		9	Li	
		V	8-	W	F	Jc		7	B	
		N	8-	N		N		6	B	
		S	8-	Si	J	P		1	C	
		V	8-	W	V	D		8	S	
		D	8-	D	E	R		2	B	
		Ronald E. Mark	8-	Ri	L	M		8	C	



Appeal Progress Results – List provides summary information on appeal setup, contributions, payments

- Appeal Progress Results										
Contribution Summary Payment Summary Write-off & Balance Summary Contributions by Segment Payments by Segment Write-offs & Balances by Segment Appeal Designations										
Contribution Summary (posted 5/20/2025) ... note: View write-off and balance totals on 'Write-off & Balance Summary' tab (187) More										
Active equal to: Report Code equal to: Category equal to: Appeal equal to:										
< 1 2 3 4 5										
	Site ID	Site ...	Report Code...	Category	Active?	Appeal	Total Contributions	Goal	Write-offs?	Balances?
Multi-year										
			Multi-year	Endowment	No		45	1.00	No	No
			Multi-year	Annual Givin...	No		00	1.00	Yes	No
			Multi-year	Annual Givin...	No		62	1.00	No	No
			Multi-year	Annual Givin...	No		52	1.00	No	No
			Multi-year	Annual Givin...	No		25	1.00	No	No
			Multi-year	Annual Givin...	No		60	1.00	No	No
			Multi-year	Other Support	No		00	1.00	No	No
			Multi-year	Other Support	No		00	1.00	No	No
			Multi-year	Annual Givin...	No		02	1.00	No	Yes
			Multi-year	Annual Givin...	No		90	1.00	No	No
2025										
			2025	Other Support	Yes		55	1.00	No	No
			2025	Annual Givin...	Yes		59	1.00	No	No



Gift-in-Kind List – Provides list of donor that have donated items versus cash. List can be downloaded to create thank you letters.

Gift In Kind List

For a GIK list for the current year, select first day of the year and click apply. Then download and remove those not needed. (3) More ▾

GL post date on or after: Apply Reset

Council #	Report Code	Appeal	Gift Date	GL post date	Donor ID	Donor Name	Donor Address	Donor City	Donor State	Donor Zip	GIK I
	2025	(	3/10/2025	3/10/2025	8-	N	11	F		2	
	2025	(	3/10/2025	3/10/2025	8-	N	11	F		2	
	2025	(	3/10/2025	3/10/2025	8-	N	11	F		2	



Recurring Gift List – List provides an access point to quickly update recurrences' appeals and deactivate if not current

Recurring Gifts List										
Recurring list for your council (739)  More ▾										
Constituent Name equal to: Recurring Status equal to: BSA Structure equal to:  Apply  Reset										
< 1 2 3 4 5 ... 25 >										
	Council #	Council	Appeal	Appeal Report ...	Constituent ID	Constituent Name	Recurring Amount	Recurring Freq...	Recurring St	
				2022	8	K	.00	Annually	12/31/2022	
				2022	8	N	.00	Annually	11/23/2022	
				2022	8	Ti	.00	Annually	1/21/2020	
				2022	8	M	.50	Annually	12/4/2021	
				2022	8	B	.00	Annually	11/7/2022	
				2022	8	Si	.00	Annually	2/8/2021	
				2022	8	D	.00	Annually	12/31/2019	
				2022	8	B	.75	Annually	9/20/2022	
				2022	8	H	.25	Annually	7/24/2020	
				2022	8	Jc	.00	Annually	3/2/2020	
				2022	8	A	.00	Annually	2/4/2020	
				2022	8	Jc	.00	Annually	5/25/2020	
				2022	8	A	.50	Annually	12/9/2019	
				2023	8	K	.75	Annually	6/13/2023	
				2024	8	Jc	.00	Annually	10/4/2024	
				2024	8	M	.00	Annually	8/17/2024	
				2024	8	P	.00	Annually	8/5/2024	



Write-Offs List – Provides a list of yearly write-offs with donor information.

List for Write-offs

Write-Offs for your council. This list includes write-offs on or after 1/1/2018. (302) [More*](#)

Appeal equal to: Constituent Name equal to: Date Added on or after: [Apply](#) [Reset](#)

Council #	Appeal	Constituent ID	Constituent Name	Pledge Date	Pledge ID	Pledge Amount	Write-Off Amo...	Details	Date Added
		8-	Mi	11/20/2019	rev-	00	00		1/31/2024
		8-	Fic	1/31/2020	rev-	00	00		1/31/2024
		8-	Mi	11/20/2019	rev-	00	00		1/31/2024
		8-	Ke	8/28/2020	rev-	00	00		1/31/2024
		8-	Mu	8/28/2020	rev-	00	00		1/31/2024
		8-	Kir	8/28/2020	rev-	00	00		1/31/2024
		8-	Ba	8/28/2020	rev-	00	00		1/31/2024
		8-	Th	8/28/2020	rev-	00	00		1/31/2024
		8-	Gle	1/7/2021	rev-	00	00		1/31/2024
		8-	Jas	2/8/2021	rev-	00	00		1/31/2024
		8-	Jas	1/4/2021	rev-	00	00		1/31/2024
		8-	Ma	10/26/2021	rev-	00	00		1/31/2024
		8-	Ke	2/21/2018	rev-	00	00		3/7/2024
		8-	Jar	10/18/2019	rev-	00	00		3/7/2024
		8-	Ele	6/13/2018	rev-	00	00		9/10/2024
		8-	Bo	3/15/2022	rev-	00	00		1/31/2024
		8-	Lo	8/25/2022	rev-	00	00		1/31/2024



Daily Revenue Transaction List – provides a list of transaction entered via batch entry into CRM with donor information.

Daily Revenue Transactions - PLACE A DATE IN THE FILTER

Daily revenue transaction list for your council. For donor contact information download the the list. (124) More ▾

Date Committed is: Committed on or after: Appeal equal to: Designation equal to:

< 1 2 3 4 5 >											
	Council #	Date Committed	Committed	Revenue ID	Batch number	Appeal	Gift Date	Amount	Structure	Giving Category	Inbound Chan...
⊕		5/16/2025 8:55...	5/16/2025 8:55...	rev-	L	(	5/15/2025	00		Special Event F...	
⊕		5/16/2025 8:55...	5/16/2025 8:55...	rev-	L	(	5/15/2025	00		Special Event F...	
⊕		5/16/2025 8:55...	5/16/2025 8:55...	rev-	L	(	5/15/2025	00		Special Event F...	
⊕		5/15/2025 9:08...	5/15/2025 9:08...	rev-	L	(	5/14/2025	00		Special Event F...	
⊕		5/15/2025 9:07...	5/15/2025 9:07...	rev-	L	(	5/15/2025	00		Family Division	Friends of Scou... Tr
⊕		5/19/2025 8:35...	5/19/2025 8:35...	rev-	L	(	5/17/2025	00		Family Division	PY - Friends of ... Pi
⊕		5/16/2025 3:34...	5/16/2025 3:34...	rev-	L	(	5/16/2025	00		Community Di...	Friends of Scou... M
⊕		5/16/2025 3:34...	5/16/2025 3:34...	rev-	L	(	5/16/2025	00		Community Di...	Friends of Scou... M
⊕		5/16/2025 3:35...	5/16/2025 3:35...	rev-	L	(	5/16/2025	00		Family Division	Friends of Scou... A
⊕		5/16/2025 3:35...	5/16/2025 3:35...	rev-	L	(	5/16/2025	00		Family Division	Friends of Scou... A
⊕		5/16/2025 3:35...	5/16/2025 3:35...	rev-	L	(	5/16/2025	00		Family Division	Friends of Scou... A
⊕		5/19/2025 9:04...	5/19/2025 9:04...	rev-	L	(	5/17/2025	00		Family Division	Friends of Scou... Pi
⊕		5/19/2025 9:04...	5/19/2025 9:04...	rev-	L	(	5/17/2025	25		Family Division	Friends of Scou... Pi
⊕		5/19/2025 11:2...	5/19/2025 11:2...	rev-	L	(	5/19/2025	00		Family Division	Friends of Scou... Pi
⊕		5/19/2025 11:3...	5/19/2025 11:3...	rev-	L	(	5/19/2025	00		Family Division	Friends of Scou... Pi



Revenue Data Hygiene List – Provides a series of tabs that can be used to check data entry on a monthly and at year end to review revenue transactions for errors.

Office of Development (NCFD) - Revenue Data Hygiene

← Revenue Missing Revenue Attributes Revenue Missing Solicitor Revenue Missing BSAFR Group Mismatched Inbound Channels

Revenue added this or last calendar year that's not posting correctly (0)  More ▾

Lookup ID	Name	Revenue ID	Date added...	GL post date	GL post status	Transaction type	Application
-----------	------	------------	---------------	--------------	----------------	------------------	-------------

◀

Mismatched Appeals Revenue Not Posting Donor Missing Council Site



Master ID Search Update

BSA Constituent Search by Name or Lookup ID

Name/lookup ID: Address:

Last/Org/Group name: City:

First name: State:

Middle name: ZIP:

Title: Master ID:

Suffix: Phone number:

Lookup ID: Prospect manager:

Site:

Primary business:

Email address:

Constituency:

☐ Match all criteria exactly

Advanced search options

Search in: ☒ Individuals ☒ Organizations ☒ Groups ☒ Households

☐ Check nickname ☒ Only search primary addresses ☐ Only include preferred for fundraising

☐ Check aliases ☐ Include deceased ☐ Display full middle name

☐ Check alternate lookup IDs ☐ Include inactive

☐ Check merged constituents ☐ Include fuzzy search on name

Results (55 records found)

Lookup ID	Name	Nickname	Constituent type	Address	City	State	ZIP	Email address	Phone	Site name	Pref fundraising	Master ID	Primary business	Date of birth	Deceased	Inactive	Middle name	Title	Suffix	Prospect manager
1	T		Individual		B	A	2		B	U		A			No	No				
1	1		Individual		V	T	7	d	G	B		A	E		No	No		Mr		
1	1		Individual		I	T	7			V		A			No	No				
1	1		Individual		B	A	2		G	S		A			No	No				
1	1		Individual		V	T	7	si	G	U		A			No	No		Mr		
1	1		Individual							G		A			No	No		Mr		
1	1		Individual		B	N	2	W		H		A			No	No		Mr		
1	1		Individual		A	T	7			E		A			No	No				
1	1		Individual							A		A			No	No				
1	1		Individual		B	N	2		G	S		A			No	No				
1	1		Individual		B	N	2		G	S		A			No	No				
1	1		Individual		V	T	7	SI	G	B		A	E		No	No		Mr		
1	1		Individual		V	T	7	SI	G	C		A	E		No	No		Mr		
1	1		Individual		A	T	7			T		A			No	No				
1	1		Individual		B	N	2			N		A			No	No				
1	1		Individual		H	T	7			C		A			No	No		Mr		
1	1		Individual						K	C		A			No	No				
1	1		Individual		V	N	0		G	V		A			No	No				
1	1		Individual		B	N	2			U		A			No	No		Mr		
1	1		Individual		D	N	2			A		A			No	No		Mr		



Prepared. For Life.™

Master ID Search Update

BSA Constituent Search by Name or Lookup ID

Name/lookup ID: Address:

Last/Org/Group name: City:

First name: State:

Middle name: ZIP:

Title: Master ID:

Suffix: Phone number:

Lookup ID: Prospect manager:

Site: Match all criteria exactly: ☐

Primary business:

Email address:

Constituency:

Advanced search options

Search in: ☒ Individuals ☒ Organizations ☒ Groups ☒ Households

☐ Check nickname ☒ Only search primary addresses ☒ Only include preferred for fundraising

☐ Check aliases ☐ Include deceased ☐ Display full middle name

☐ Check alternate lookup IDs ☐ Include inactive

☐ Check merged constituents ☐ Include fuzzy search on name

Hide advanced search options

Results (3 records found)

Lookup ID	Name	Nickname	Constituent type	Address	City	State	ZIP	Email address	Phone	Site name	Pref fundraising	Master ID	Primary business	Date of birth	Deceased	Inactive	Middle name	Title	Suffix	Prospect manager
B-	F		Individual	1					1	1	BSA	44			No	No				
B-	F		Group												No	No				
B-	L		Group												No	No				

Help

Select Cancel



Prepared. For Life.™

Master ID Search Update

BSA Constituent Search by Name or Lookup ID

Name/Lookup ID:

Last/Org/Group name:

First name:

Middle name:

Title:

Suffix:

Lookup ID:

Sites:

All sites

Primary business:

Email address:

Constituency:

Address:

City:

State:

ZIP:

Master ID:

0

Phone number:

Prospect manager:

Search

Clear

☐ Match all criteria exactly

Advanced search options

Search in:

☒ Individuals

☒ Organizations

☒ Groups

☒ Households

☐ Check nickname

☒ Only search primary addresses

☒ Only include preferred for fundraising

☐ Check aliases

☐ Include deceased

☐ Display full middle name

☐ Check alternate lookup IDs

☐ Include inactive

☐ Check merged constituents

☐ Include fuzzy search on name

Hide advanced search options

Results (3 records found)

+ Add

Loo...

Name

Nick...

Con...

Add...

City

State

ZIP

Ema...

Phone

Site ...

Pref ...

Mas...

Prim...

Date...

Dec...

Inac...

Mid...

Title

Suffix

Pros...

Help

Select

Cancel



Prepared. For Life.™

Master ID Search Update

BSA Constituent Search by Name or Lookup ID

Name/Lookup ID:

Last/Org/Group name:

First name:

Middle name:

Title:

Suffix:

Lookup ID:

Sites:

All sites

Primary business:

Email address:

Constituency:

Address:

City:

State:

ZIP:

Master ID:

0

Phone number:

Prospect manager:

Search

Clear

☐ Match all criteria exactly

Advanced search options

Search in:

☒ Individuals

☒ Organizations

☒ Groups

☒ Households

☐ Check nickname

☒ Only search primary addresses

☒ Only include preferred for fundraising

☐ Check aliases

☐ Include deceased

☐ Display full middle name

☐ Check alternate lookup IDs

☐ Include inactive

☐ Check merged constituents

☐ Include fuzzy search on name

Hide advanced search options

Results (3 records found)

+ Add

Lookup ID	Name	N...	Cons...	Address	City	State	ZIP	Email address	Phone	Site ...	Pref.
8	T		Indivi...	1			20				
8	L		Group								
8	F		Group								

Help

Select

Cancel



Prepared. For Life.™

Viva Engage on Teams

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



- Activity
- Chat
- Teams
- Calendar
- Calls
- OneDrive
- Andy
- ...
- Apps

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 a red arrow pointing to it from the left sidebar.

Wednesday, July 12, 2023

8:10 AM

Microsoft Word document preview.

Wednesday, November 1, 2023

8:10 AM

Microsoft Word document preview.

Tuesday, November 14, 2023

8:10 AM

Microsoft Word document preview.

Microsoft Word document preview.

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

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

Members • 7

Info

Pinned

CRM Resource Page o...

Community resources

SharePoint library

SharePoint site

OneNote

Planner

Create live event



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



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 \(for OLTP\) Scouting America Appeal Progress & Appeal Constituent Reports](#)

2025

January 2025 User Forum – [Slide Deck](#) – [recording](#)

– Year-End 2024 Tasks – 2025 New Year Tasks – Contribution Statements

February 2025 User Forum – [Slide Deck](#) – [recording](#)

– Potential batch changes – Closing Out 2024

March 2025 User Forum – [Slide Deck](#) – [recording](#)

April 2025 User Forum – [Slide Deck](#) – [recording](#)

– Master ID – IRS 990 – Updating Appeals & Special Events – Viva Engage

Member Care

- Call 972-580-2489
- <http://membercare.scouting.org> or
- <http://supportcenter.scouting.org>
- Create a work order 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

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 (Business Operations)



BSA Applications (Scouting Programs)



Email, Communication & Collaboration



Network Services

Blackbaud

Blackbaud CRM is a cloud based Constituent Relationship Management platform. It facilitates the management of contacts, prospects, reporting and the recording of

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

Payroll

ADP is the provider for BSA Local Council payrolls. Check here if you

PeopleSoft Financials

Peoplesoft is the financial application used by councils for fiscals and human

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.

* 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

Enter your answer

5. Constituent ID

Please provide the Constituent ID applicable

Enter your answer

6. Appeal

Please provide the name of the Appeal if applicable

1. **Description** *

A brief description of your problem.

Enter your answer

2. **Application** *

If you are needing assistance with an application, please enter application below (Example: Blackbaud, Peoplesoft, Membership, Adobe, etc.) (optional)

Enter your answer

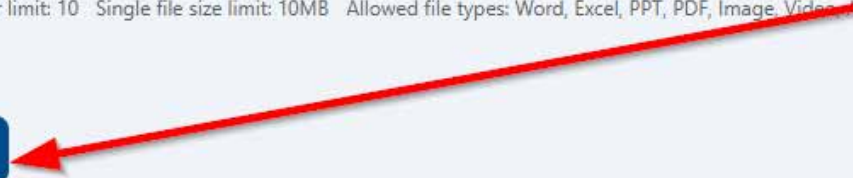
3. **Attachment(s)** (Non-anonymous question)

(optional)

 Upload file

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

Submit



Next Forum

June 18, 2025

10:00 am & 2:00 pm CST



Prepared. For Life.™

Questions & Answers



Prepared. For Life.™