

CRM User Forum

August 20, 2025

Valerie Eaton

John Kuehn

Objectives

- Credit Card Processing
- Auction Items
- Blackbaud System Update
- Upcoming Topics?
- Question/Answers

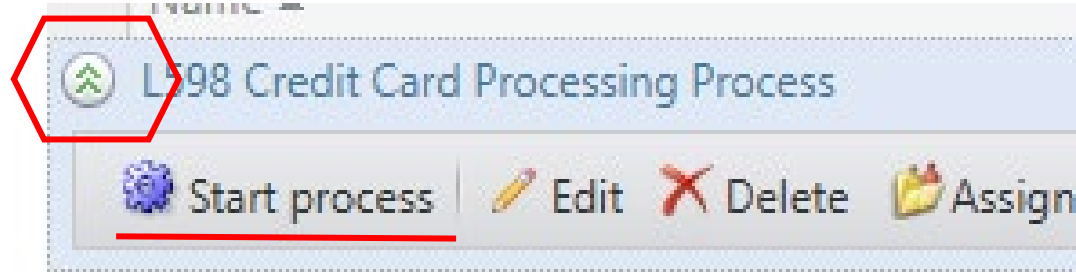
Credit Card Processing

Steps for Success

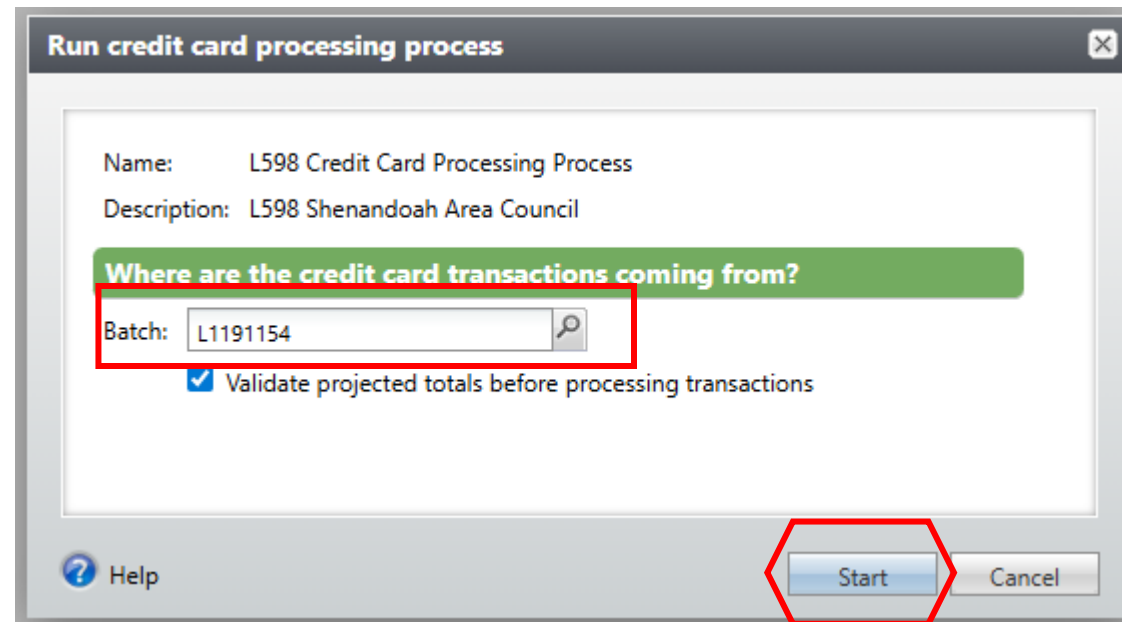
- New batch – completed batch line with credited card information
– **Save and Close batch** – Write down batch number
- **The Authorization code is not 3-4 digits. The security code is never used in Blackbaud.** When BBMS is successful, a 6-digit alpha numeric code is placed in the Authorization Code field.
- LC Import Batch – Open batch, Add Post Date and Inbound Channel- **Save and Close batch**
- Write down batch number
- Go to Credit Card process - Revenue\EFT\Credit Card Processing

Credit Card Processor

- Drop the Chevron
- Click Start Process



- Type in your batch number (verify the batch number has been typed properly)
- Click Start



Credit Card Processor

- View to see if transaction completed
- Authorization mean success
- Provisional rejections create Retry Batch
- Permanent rejections removes line out of batch

The screenshot displays the 'Recent status' tab of a credit card processor interface. The 'Results report' link is circled in red. Below the tabs, the status is 'Completed' with a green checkmark. The status message is 'Completed'. The transaction was started by 'netbsa\jkuehn' on 8/17/2025 at 2:37:29 PM and ended at 2:37:53 PM, with a duration of 00hr 00min 24s. The server name is 'AZSCUSB'. The number of attempts for these transactions is 'Not appli', and the maximum number of allowed attempts is also 'Not appli'. Below this, the 'Transaction outcomes' section is highlighted with a red box, showing: Payments processed: Authorizations: 1, Rejections: 1, Provisional rejections: 0, and Permanent rejections: 1.

Transaction Number	Commitment Lookup ID	Constituent Name	Last 4 Digits	Transaction Amount	Authorization/Rejection Code	Transaction Outcome
1	None	<u>John Kuehn</u>	1111	\$10.00	441410	Processed batch (batch L1191154)
2	None	<u>Daffy D. Duck</u>	1111	\$10.00	California state law prohibits this transaction. Contact the organization to donate.	Removed for export

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Finish Credit Card batch

- Return to batch entry
- Edit Batch
- Verify authorization codes are in the batch

Name on card	Card number	Expires on	Authorization code
John D Kuehn	*****1111	7/2029	441410

- If codes are missing grab them from the result reports and type them into the correct batch line file
- Save and Close the batch
- Commit the Batch
- Exception batch will be created if authorization code is missing

Retry Batch or Rejections

- Review retry batch - fix and reprocess it.
- Rejections
 - Pull result report to find out why the failure happened
 - Call donor and get corrected card information
 - Verify address on the card
 - Fix donor record
 - Update Pledge or Recurring gift with new Credit Card information.

Auction Items

- Create an Auction
- Add Auction Item
 - This process Create GL
 - Increases Temporary Inventory (1751)
 - Increases Items for Resale (4209)


 Auction: (436) SC25 - 2025 Sportsmens Classic
African Safari Hunt

Details	Donation information
Name: African Safari Hunt	Donor name: Daffy D. Duck
Lookup ID: ITEM-10015316	Donation date: 8/17/2025
Package:	Expiration date:
Designation: 43608501 Sportsmen's Classic - Operating	Value: \$2,500.00
Auction: (436) SC25 - 2025 Sportsmens Classic	Minimum bid: \$0.00
Information	Donated anonymously: No

Auction donation		Edit	
➔ L436-1-1751-850-00	L436-1-SP...	\$2,500.00	Duck-Donation
➔ L436-1-4209-850-90	L436-1-SP...	\$2,500.00	Duck-Donation

Auction Item Purchase

- Decreases account 1571 – Remove the item added
- Increases or Decreases 4209 depending on the action of the purchaser
- Pays More than the Value – 4209 increases 1751 is cleared

Account	Descripti...	Debit amount	Credit amo...	Reference
▲ Auction purchase	 Edit			
➔ L436-1-1001-014-00	L436-1-SP...	\$3,000.00		Woman-Auction purchase Payment-Check
➔ L436-1-1751-850-00	L436-1-SP...		\$2,500.00	Woman-Auction purchase Payment-Check
➔ L436-1-4209-850-90	L436-1-SP...		\$500.00	Woman-Auction purchase gain

- Pays Less than Value – 4209 decrease 1751 is cleared

Account	Descripti...	Debit amount	Credit amo...	Reference
▲ Auction purchase	 Edit			
➔ L436-1-1001-014-00	L436-1-SP...	\$2,000.00		Woman-Auction purchase Payment-Check
➔ L436-1-4209-850-90	L436-1-SP...	\$500.00		Woman-Auction purchase loss
➔ L436-1-1751-850-00	L436-1-SP...		\$2,500.00	Woman-Auction purchase Payment-Check

Auction Items Year End

- Donors of Auction items should receive a letter thanking them for the item they donated. The donor assigns a dollar value for tax purposes.
- Auction items that have not sold need to be addressed.
- If item is unsold
 - Reduce the value of the item to zero
 - This will remove value from Temp Inventory and reduce 4209
 - Item will still show on the Donor Record
- If you plan to use in a FY year. Change the value and the appeal during the next year to add it back to a future year event.

Blackbaud System Updates

Blackbaud System Updates

- August 22 - 3:00 PM the CRM will be moved to AWS. System will be down over the weekend.
- September
 - Service Pack 38 Update
 - FROGz Replacement
 - Single Sign-on
 - Microsoft Outlook Addin
 - Master ID
 - Service Pack 40 testing and validation – Non-Production

Request an upcoming Topic

- We would like to present topics that are relevant to you.
- What are topics that you would like covered?
- Add them to the Chat or Email them to john.kuehn@scouting.org

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/>

The screenshot displays the Microsoft Teams application interface. On the left, the 'Chat' sidebar is active, showing a list of recent conversations. The 'Pinned' section at the top of the sidebar lists a chat with 'Don Day (You)' where the user has typed 'You: need csops1 4...'. Below this, the 'Recent' section lists several other contacts, including Michael Coughlin, Jennifer Wills, SR, and DB. A red arrow originates from the 'DB' contact in the 'Recent' list and points towards the main chat window. The main chat window shows a conversation with 'Don Day (You)' dated '0/23/2023 8:10 AM'. The chat history includes a pinned message, a message from Don Day (You) saying 'You: need csops1 4...', and several messages from other users including Michael Coughlin, Jennifer Wills, and SR. A red arrow points from the 'DB' contact in the 'Recent' list to the chat conversation.

Activity

Chat

Teams

Calendar

Calls

OneDrive

Andy

...

Apps

Chat

...

≡

✍

Don Day

▼ 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

Activity

Chat

Teams

Calendar

Calls

OneDrive

Andy

Viva Engage

...

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

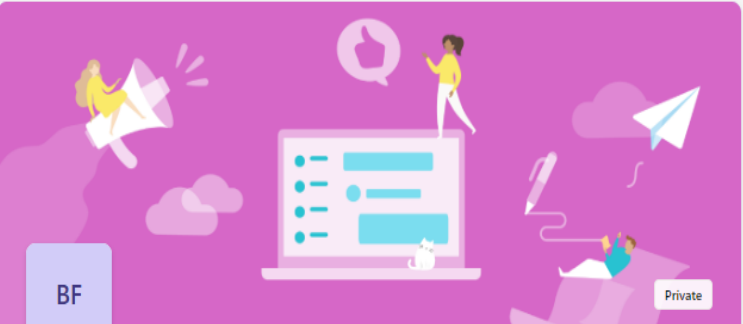
AC Accounting Specialists & Cont...

S Support Center News and Ann...

000-Scouting U Fundraising Es...

PS Professional Staff

<



BF

BBCRM User Forum

BBCRM User Forum

Conversations About Files Events

Share thoughts, ideas, or updates

Discussion Question Praise Poll

All conversations v Recent posts v



Don Day

Thu at 12:19 PM

Seen by 6 ...

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

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

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

COUNCIL SUPPORT

[Council Management Support](#)



[Council Funding and Finance](#)



CRM Resources

CRM Process Videos

CRM (Blackbaud) User Forum Presentations

[Report Cookbook \(for OLTP\) 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.

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

September 17, 2025
10:00 am & 2:00 pm CST

Questions & Answers