

CRM User Forum

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Objectives

- 2025 Preparing for Year-End
 - Review Uncommitted Batches
 - Recording Future contribution
 - Year End Revenue Check
 - Printing the pledge receivable aging report
- 2026 Activities
 - Setting up 2026 Appeal & Creating 2026 Events
 - Billing and Acknowledgement Updates
 - Updating Recurring gifts
 - Contribution Statements
- Questions - Answers



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 773 uncommitted batches.
- 234 of these batches have added dates before 12/1/25



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

Uncommitted Batches Committed Batches

Uncommitted batches (2) + Add Batch search More

Date range: Last 30 days Sites: All sites ☐ Show only batches with exceptions Apply Reset

Search + Columns Clear all filters

Batch nu...	Batch template	Description	Date add...	Owner
L1292758	zAPTG Local Council Donation Batch	Online Donation for 2025-12-05 for 157	12/5/2025	Donna Scheer
L1293728	zAPTG Local Council Recurring Gift Payment Batch	Online Donation Recurring for 2025-12-09 for 157	12/9/2025	Donna Scheer

- After Filter Change – 12 uncommitted batch show

Batch Entry

Uncommitted Batches Committed Batches

Uncommitted batches (16) + Add Batch search More

Date range: Sites: All sites ☐ Show only batches with exceptions Apply Reset

Search + Columns Clear all filters

Batch nu...	Batch template	Description	Date add...	Owner
L1187248	zAPTG Local Council Recurring Gift Payment Batch	Online Donation Recurring for 2025-01-12 for 157 Robles	1/12/2025	Donna Sch
L1190926	zAPTG Local Council Recurring Gift Payment Batch	Online Donation Recurring for 2025-01-25 for 157 Rosman	1/25/2025	Donna Sch
L1240647	zAPTG Local Council Donation Batch	Online Donation for 2025-06-02 for 157	6/2/2025	Donna Sch



Year End Revenue Check

- 2025 Postdates to 2025 Appeals = CY Inbound Channel
- 2025 Postdates to 2026 Appeals = FY Inbound Channel
- 2026 Postdates to 2025 Appeals = PY Inbound Channel
- 2026 Postdates to 2026 Appeals = CY Inbound Channel

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



Revenue Details Splits Tab

 **Appeal:** **25FOS** - 2025 Friends of Scouting

Description:	FOS	Start date:	9/12/2024
Business unit:		End date:	12/31/2025
Category:	Annual Giving (Friends of Scouting)	Goal:	\$450,000.00
Report code:	2025	Status:	Active
Site:	 	Membership:	

Contributions | **Revenue Details (Splits)** | Designations | Prior Appeal | Solicitor Credits by Group

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and

Constituent equal to: Transaction equal to: ▼

GL Post Date...	D...	R...	Balance	Designation	Inbound Channel
12/15/2025			\$1,500.00	General Balan - Operating	<u>Friends of Scouting</u>
12/12/2025			\$0.00	General Balan - Operating	Friends of Scouting
12/10/2025			\$0.00	General Balan - Operating	Friends of Scouting

2025 appeal. Post Dates of 2025 with Current Year inbound channel as we approach year-end

 **Appeal:** **26FOS** - 2026 Friends of Scouting

Description:	Annual Friends of Scouting	Start date:	12/30/2021
Business unit:		End date:	12/31/2026
Category:	Annual Giving (Friends of Scouting)	Goal:	\$0.00
Report code:	2026	Status:	Active
Site:	 	Membership:	

Contributions | **Revenue Details (Splits)** | Designations | Prior Appeal | Solicitor Credits by Group

Revenue Application Details (Current) - all "splits" for committed pledges, payments, and

Constituent equal to: Transaction equal to: ▼

GL Post Date...	D...	R...	Balance	Designation	Inbound Channel
10/31/2025		V...	\$100.00	General Balan - Operating	<u>FY - Friends of Sc...</u>
5/24/2022			\$100.00	General Balan - Operating	FY - Friends of Sc...

2026 Appeal. Postdates of 2025 with Future Year inbound channel.



Revenue Data Hygiene

The screenshot shows the 'Revenue' application window. It has three main sections: 'More tasks', 'Reports', and 'Transactions'. The 'Revenue Data Hygiene' task is highlighted in red. A 'Site Search' dialog box is open, showing search criteria and a single result for 'Boy Scouts of America'.

Revenue

More tasks

- Appeal progress results
- Daily Revenue Transactions List
- Gift in Kind List
- Open Pledge List
- Recurring Gift List
- Revenue Data Hygiene**

Reports

- BSA Appeal Constituent Export (OLTP)
- BSA Appeal Constituent Report (OLTP)
- BSA Appeal Progress Export (OLTP)
- BSA Appeal Progress Report (OLTP)
- Pledge Receivable Aging Report
- Appeal Progress by Category

Transactions

- Transaction search
- Batch entry
- Batch search
- Add a pledge
- Add a payment
- Add a recurring gift

Site Search

Site ID:

Name:

Short name:

Acronym:

Site type:

Results (1 record found)

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

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

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



Revenue Data Hygiene

Revenue Data Hygiene

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

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

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

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

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

Revenue Data Hygiene

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

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

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

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

The Revenue Missing Solicitor tab will find any revenue with report code 2023-2026 and appeal category of Friends of Scouting that is missing a Solicitor.



Revenue Data Hygiene

- Revenue Data Hygiene

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

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

Name equal to: Report Code equal to: Appeal Name equal to: %2023 BSA Structure equal to: Giving Category equal to:

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

The Revenue Missing BSAFR Group tab will find any revenue with report code 2023-2026 and appeal category of Friends of Scouting that is missing a BSAFR Group.



Revenue Data Hygiene

Revenue Data Hygiene

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

For finding **2024 Report Code** revenue with wrong Inbound Channels - Fund 1 (7) More

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

	Lookup ID	Name	Revenue ID	Amount	Transaction type	Application	GL post date	Report Code	Appeal Name	Inbound channel	Revenue Cat
	8-	We	rev-46106039	\$375.00	Payment	Pledge	11/5/2024	2024	2024 Frie...	FY - Other Dire...	Unrestricted
Go to Revenue											
	8-	Ma	rev-45724212	\$2,000.00	Pledge	Donation	2/20/2024	2024	2024 Frie...	FY - Friends of ...	Unrestricted
	8-	GA	rev-45751776	\$630.00	Payment	Donation	12/19/2023	2024	2024 Frie...	Friends of Sco...	Unrestricted
	8-	Ro	rev-45751775	\$162.00	Payment	Donation	12/19/2023	2024	2024 Frie...	Friends of Sco...	Unrestricted
	8-	B. C	rev-45751774	\$100.00	Payment	Donation	12/19/2023	2024	2024 Frie...	Friends of Sco...	Unrestricted
	8-	Set	rev-45751773	\$612.00	Payment	Donation	12/19/2023	2024	2024 Frie...	Friends of Sco...	Unrestricted

Revenue Data Hygiene

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

Mismatched Appeals - Report Code 2024 (1) More

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

	Transaction type	Application Deta...	Amount	Date	Revenue ID	Appeal Name	Payment's Reve...	Payment's Appe...	Pledge's Revenue...	Pledge's Appea
	Payment	Pledge	\$1,000.00	11/21/2024	rev-46120066	2024 Frie...			rev-46117991	2025 Frie...
Go to Revenue										

Mismatched Appeals - Report Code 2023 (2) More

The Mismatched Inbound Channels tab has two data lists that will find any revenue with report code 2025 in Fund 1 where revenue with a 2024 or 2026 post date has a CY Inbound Channel *or* a 2025 post date and a PY or FY Inbound Channel, and a similar list for 2024 revenue

The Mismatched Appeals tab has two data lists that will find any 2025 or 2024 report code revenue where the appeal of the pledge doesn't match the appeal of the payment



Revenue Data Hygiene

Revenue Data Hygiene

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

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

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

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

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



Revenue Data Hygiene

Management Council 2024 - Revenue Data Hygiene

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

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

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

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

Access:

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

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



Edits on a Revenue Record

Phil H. Anthropy
9/11/2024 Payment: \$25.00

Transaction summary

Details

Benefits

Matching Gifts

Letters

Attributes

Documentation

GL Distributions

Attributes (3)

+ Add

More

Category	Attribute group	Value
Deposit Reference		square
BSA Structure		Council
Giving Category		Auction Gift

Edit

Delete

Phil H. Anthropy
12/30/2024 Payment: \$312.50

Transaction summary

Details

Benefits

Matching Gifts

Letters

Attributes

Documentation

GL Distributions

Tributes

Lockbox

Adjustment History

BSAFR

BSAFR Fields

BSAFR Group ID:

Council AVL Eagle Large Gifts (Lookup ID: 8-40660288)

BSA structure for revenue:

Council

Giving category for revenue:

AVL Eagle Large Gifts

BSAFR solicitor current:

BSAFR presenter current:

BSAFR reporting parent:

Greater Alabama Council 001 (Lookup ID: 8-35347775)

BSAFR reporting level:

Council

BSAFR reporting hierarchy by name:

Greater Alabama Council 001|Council AVL Eagle Large Gifts

BSAFR reporting hierarchy by level:

Council|Council

BSA Structures and Giving Categories can be changed under the Attributes tab at any time. There is a regular process that runs to connect the Reporting Attributes of Payments to match the Reporting Attributes of Commitments they are connected to.

BSAFR Group IDs can be changed only with a Revenue Update Values Spreadsheet attached to a ticket through Member Care, processed by the Blackbaud Team.



Edits on a Revenue Record

Phillip Anthropy
11/16/2023 Pledge: \$7,500.00

Transaction summary

Details Installment/Write-off Activity Benefits Recognition Solicitors

Solicitors

Designation/Constituent	Amount
00100001 General Use - Ope...	\$7,500.00
Edit solicitors	

Solicitors can be changed under the Solicitors tab at any time. Payment records do not have solicitor tabs, so you will need to go under Details, then Go to revenue to navigate to the commitment record which will have a Solicitors tab.

Phil H. Anthropy
9/11/2024 Payment: \$25.00

Transaction summary

Details Benefits Matching Gifts Letters Attrib

Details

Original amount: \$25.00 Effort:
Finder number: Appeal: (001) 2
Source code:
Inbound channel: Special Event Fundraising
Revenue reference:

Application details

Donation - \$25.00 [Go to revenue](#) [Edit posted](#)

Designation: 00101161 Sporting Clay Classic - Operating
Campaign:
Revenue category: Unrestricted by donor
Solicitors:
Recognition credits: Gale Anthropy (\$25.00); Phil H. Anthropy (\$25.00)

Phil H. Anthropy > Payment: \$25.00
9/11/2024 Donation: \$25.00

General information

Amount: \$25.00
Date: 9/11/2024
Batch number: L1158553
Acknowledgements: Not acknowledged

Payment information

Payment method: Other
Receipt status: Received
Post date: 9/11/2024
Post status: Posted

Details Solicitors Recognition Campaigns Business units

Solicitors (0)

[Edit solicitors](#) [More](#)

Solicitor	Amount
-----------	--------



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Edits on a Revenue Record

Tasks

- Edit payment
- Edit original amount
- Change constituent on payment
- Edit revenue ID
- Delete payment
- Change receipt preference
- Change Constituent OD

More information

- History
- Revenue and recognition

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Information Library
- Shell Design: Refresh
- SQL Snapshots
- Business Processes
- Global Changes
- ETL refresh status
- Ad-hoc Query: LVVV
- Batch Error 'In Account System "Local Council", the account...does not

12/17/2025 Payment: \$15.00

Edit payment

Constituent: _____ Date: 12/17/2025
Amount: \$15.00 Inbound channel: Direct Mail
☐ Payment is anonymous

Current applications

Application	Description	Applied	Amount d...	Date ...	Balance
Donation	Direct Mail Fundrais...	\$15.00			

Application: Donation Apply by percent Find commitment

Add Applied: \$0.00 Campaigns: <none>
Opportunity: Solicitors: <none>
Designation: Recognition: William Durland
Category:

Payment information Marketing Transaction details

Source code: Effort:
Appeal: Segment:
Package:

To add an Appeal to a Payment that isn't posting, go to the Payment record, then click Edit Payment, click on the Marketing tab, then add the appeal and save. The Payment should post overnight.

Only do this if there is no appeal on a payment. Otherwise, you'll use a revenue update batch.



Edits on a Revenue Record

Tasks

- Add payment
- Edit pledge**
- Edit original amount
- Write-off
- Change constituent on pledge
- Edit revenue ID
- Delete pledge
- Change Constituent OD

More information

- History
- Revenue and recognition

Shortcuts

- Add this page to shortcuts
- Manage my shortcuts
- Information Library
- Shell Design: Refresh
- SQL Snapshots
- Business Processes
- Global Changes
- ETL refresh status
- Ad-hoc Query: LVVV Batch Error 'In Account System "Local Council", the account...does not exist'
- Pseudo-Posting: Edit Selection First

12/17/2025 Pledge: \$75.00

Edit pledge

Constituent:
Finder number:
Amount: \$75.00
Opportunity:
Source code:
Appeal: Friends of Scouting
Designation: - Operating

Date: 12/17/2025
Inbound channel: FY - Friends of Scouting
Effort:
Benefits: <none>
Reference:
Revenue category: Temporarily restricted by donor
Subtype: Pledge Receivable
☐ Pledge is anonymous

Installments

Pledge balance: \$75.00
Next installment date: 12/17/2025
Frequency: Single installment
Installment amount: \$75.00
No. installments remaining: 1

Date	Amou...	Recei...	Applied
12/17/2...	\$75.00	\$75.00	\$0.00

Edit installment designations

Options

☒ Send reminders
☐ Do not acknowledge

Post status: Not posted
Post date: 12/17/2026

Help Save Cancel

To correct a GL Post Date on an item that isn't posting, go to the revenue record, then click Edit Payment/Pledge/Etc, correct the Post Date and save. The revenue should post overnight.

Only do this if the GL Post Date is far in the future and it needs to post. Otherwise, you'll use a revenue update batch.



Pledge Receivable Aging Report



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Pledge Receivable Aging Report

- Shows the detail and total amount of the council's outstanding pledges.
- The Pledge amount, Pledge balance, Current due and Past due
- Give constituents' information – name, phone number, constituent's ID
- Separated by BSA Structure & Giving Categories and gives a total.
- Only posted transactions are included in this report.



Pledge Receivable Aging Report

- Click on Revenue at top
- Under Reports click Pledge Receivable Aging Report
- Click in the BSA Organization
- Click Report Code: (Year)
- Click Appeal: (Appeal name)
- Click View Report





Pledge Receivable Aging Report

BSA Organization

Council

Report Code

2025

Appeal

2025 Friends of Scouting



1

of 24



100%



Find

Next

Run Date: 12/17/2025

Pledge Receivable Aging Report

Page 1 of 24

Run Time: 7:22:16

001-Greater Alabama Council

Selection Options:

BSA Organization:

Council

Report Code:

2025

Appeal:

2025 Friends of Scouting

Giving Category:

ALL

Appeal:

2025 Friends of Scouting

BSA Structure:

Arrowhead

Giving Category:

Community

Constituent Name	Pledge Date	Pledge Amount	Pledge Balance	Current Due	Past Due		
					30+	60+	90+
Christopher	19-Nov-24	250.00	19.00	0.00	0.00	0.00	19.00
Phone No:							
Community Total:		250.00	19.00	0.00	0.00	0.00	19.00
Arrowhead Total:		250.00	19.00	0.00	0.00	0.00	19.00

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Creating a New Appeal



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Creating 2026 Appeal

- Create all FY appeals at the same time
- Mirror the Appeal name from this year when creating 2026 appeals
- (XXX) (Council number in title)
- Marketing & Communications > Add an Appeal
- Remember to use FY inbound channels with monies applied to 2026 appeals with 2025 postdates.



Add an Appeal

- Add Prior Appeal and Designation
- On the Designations tab set a default
- Prior Appeal will sync to reports overnight

The image displays two side-by-side screenshots of a web application interface, likely for managing appeals and designations. Both screenshots show a navigation bar with tabs: Contributions, Revenue Details (Splits), Designations, and Prior Appeal.

Left Screenshot (Prior Appeal tab):

- The **Prior Appeal** tab is active.
- Below the tab, there is a section titled **Prior Appeal** with an **Edit** button (pencil icon) highlighted by a red box.
- Below this, there is a section titled **Prior Year Appeal History** with a **More** dropdown menu.
- A table is visible with columns: PY1 Year, PY1 Appeal, PY1 Description, PY2 Year, and PY2 Description. The first row shows: 2025, (092) A25 - 202..., 2025 Peach of a..., 2024, and (09...

Right Screenshot (Designations tab):

- The **Designations** tab is active.
- Below the tab, there is a section titled **Designations (1)** with an **Edit list of appeal designations** button (pencil icon) highlighted by a red box.
- Below this, there is a table with columns: Designation and Default designation. The first row shows: 09200111 P - Operating and a green checkmark.
- Below the table, there is a section titled **Benefits (0)** with a **View benefits catalog** button, an **Add** button, and a **More** dropdown menu.
- A table is visible with columns: Level and From.



Add an Appeal

Add an appeal [X]

Name: (092) A26 - 2025 Peach of an Athlete

Description: 2026 Meach of an Athlete

Split evenly Split fully

Category: Special Events

Report code: 2026

Site: Atlanta Area Council

Start date: 1/1/2026

End date: 12/31/2026

Goal: \$0.00

? Help Save Cancel

Name ▲	Description
(092) A25 - 2025 Peach of an Athlete	2025 Peach of an Athlete
(092) COD25 - Capital Other Direct	2025 Capital Other Direct
(092) CS25 - 2025 Campership	2025 Campership
(092) E25- 2025 Endowment	2025 Endowment
(092) G25 - 2025 Corporate Classic Golf	2025 Corporate Classic Golf
(092) M25 - 2025 Metro Classic Golf	2025 Metro Classic Golf
(092) OOD25 - Operating Other Direct	2025 Operating Other Direct

1. Add Name
2. Add Description
3. Add Category
4. Add Report Code (Appeal Year)
5. Site will default to your site
6. Add Start date - Logic
7. End date is last day of next year



Adding a FY Event

- Create all repeat events at the same time
- Follow naming conventions from 2025 to 2026
- Use the copy feature when creating
- Update appeals and registration option
- Submit your Event Revenue mapping sheet
- Events > Add New



1. Mirror naming and description from previous year
2. Add dates and location
3. Copy items from last year
4. Pick correct category
 1. If processing monies in 2025, pick "FY" Category
 2. If not processing monies in 2025 pick non-FY Category
5. Update options and dates with correct information when known

Add an Event

Add an event

General

Name: L004 Corporate Classic Golf 2026
Description: Corporate Golf Classic 2026
Category:
Sites:
☐ Event is an auction
☐ Do not show event on calendar
☒ Event allows designations on fees

Details

Start date: 6/17/2026 Start time: hh:mm AM
End date: 6/17/2026 End time: hh:mm AM

Location information

Location: The Athelstan Club
Room/Unit: Capacity: 150
Contact:

Copy from event

Copy from: L004 CORPORATE CLASSIC GOLF 20

☒ Copy tasks
☒ Copy preferences
☒ Copy lodging options
☒ Copy designations

☒ Copy expenses
☒ Copy invitations
☒ Copy job occurrences
☐ Copy team structure

☒ Copy registration options
☒ Copy invitees
☐ Copy team members

- Auction
Cultivation/Recognition (no revenue)
Distinguished Citizens Dinner
Friends of Scouting (no registration revenue)
Golf
Special Fundraising Event
Sporting Clays
FY - Auction
FY - Distinguished Citizens Dinner
FY - Golf
FY - Special Fundraising Event
FY - Sporting Clays



Updating Reminders and Acknowledgements



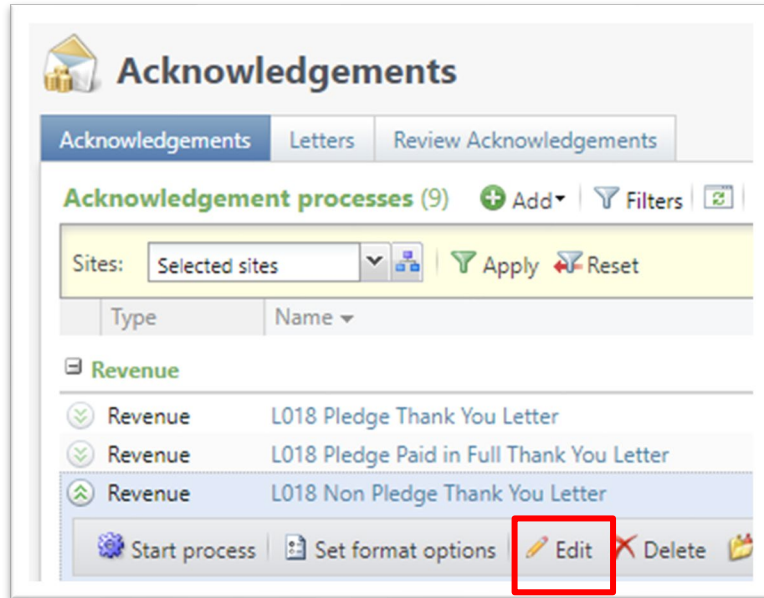
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Update Reminders & Acknowledgements

- Drop Chevron
- Click Edit
- Find Selection and click the pencil next to it
- Edit the Selection if needed
 - Add 2026 Appeal report Code
 - Or add name of new appeal



Acknowledgements



Acknowledgements

Acknowledgements Letters Review Acknowledgements

Acknowledgement processes (9) + Add Filters

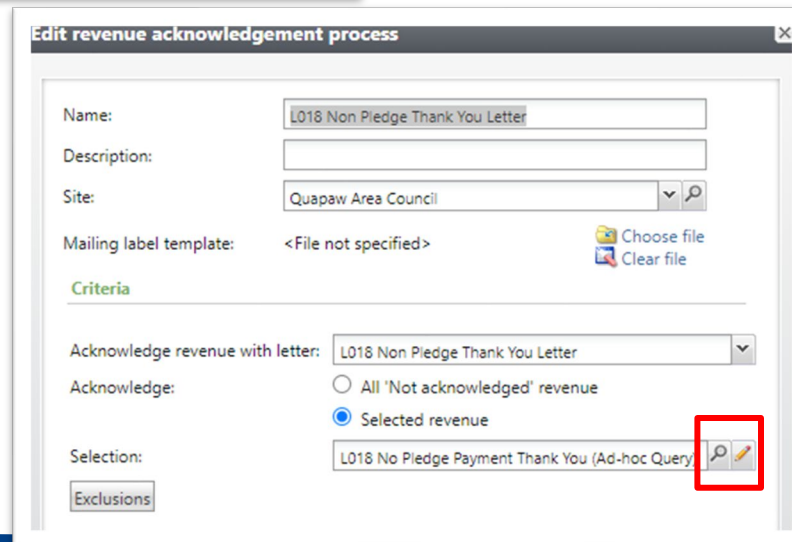
Sites: Selected sites Apply Reset

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



Edit revenue acknowledgement process

Name: L018 Non Pledge Thank You Letter

Description:

Site: Quapaw Area Council

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

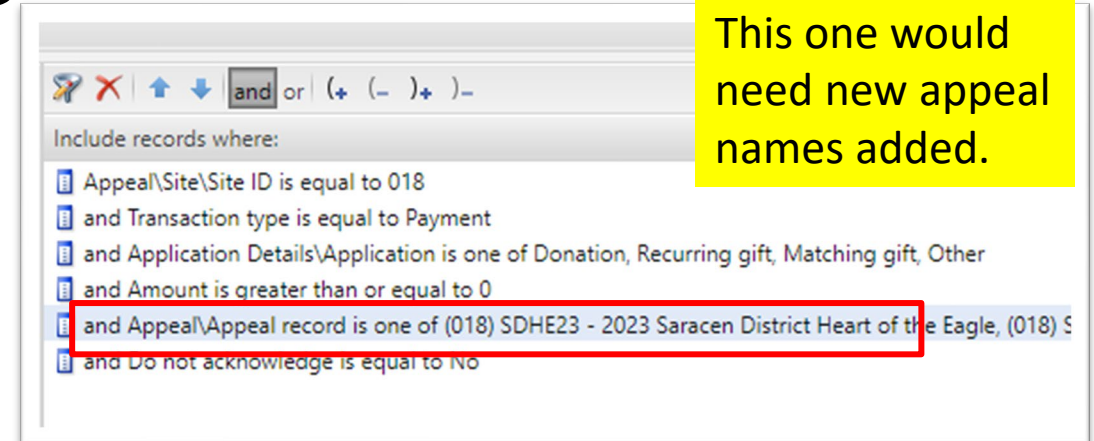
Criteria

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**

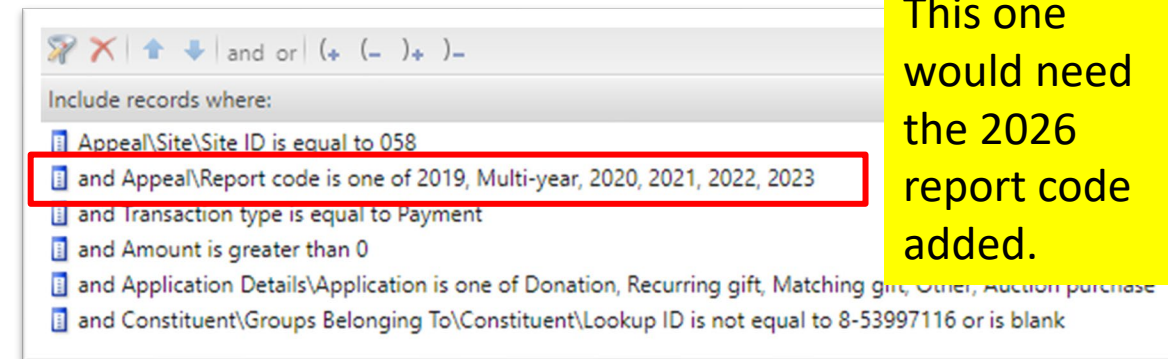
Exclusions



Include records where:

- Appeal\Site\Site ID is equal to 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.



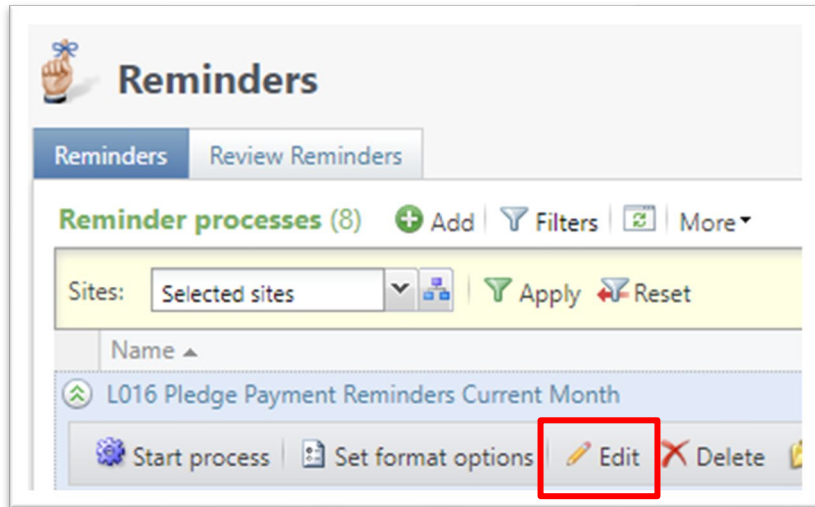
Include records where:

- 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 2026 report code added.



Reminders



Reminders

Reminders | Review Reminders

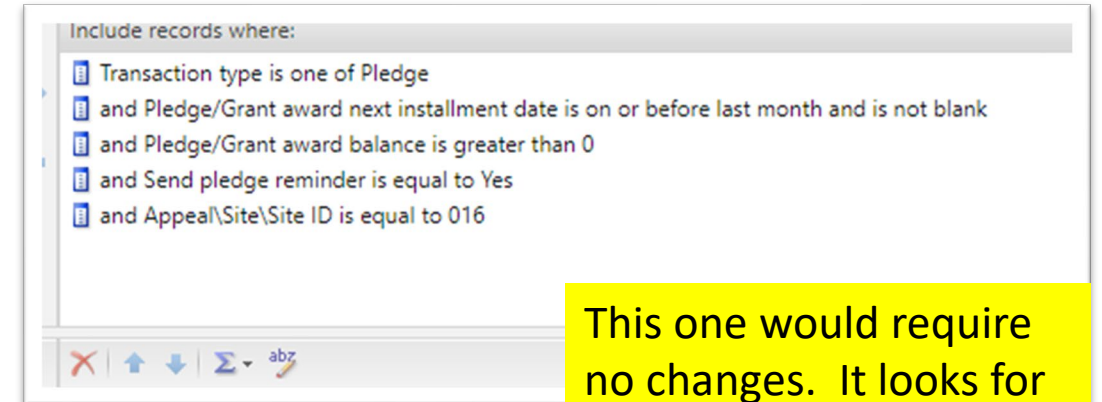
Reminder processes (8) + Add | Filters | More ▾

Sites: Selected sites | Apply | Reset

Name ▲

L016 Pledge Payment Reminders Current Month

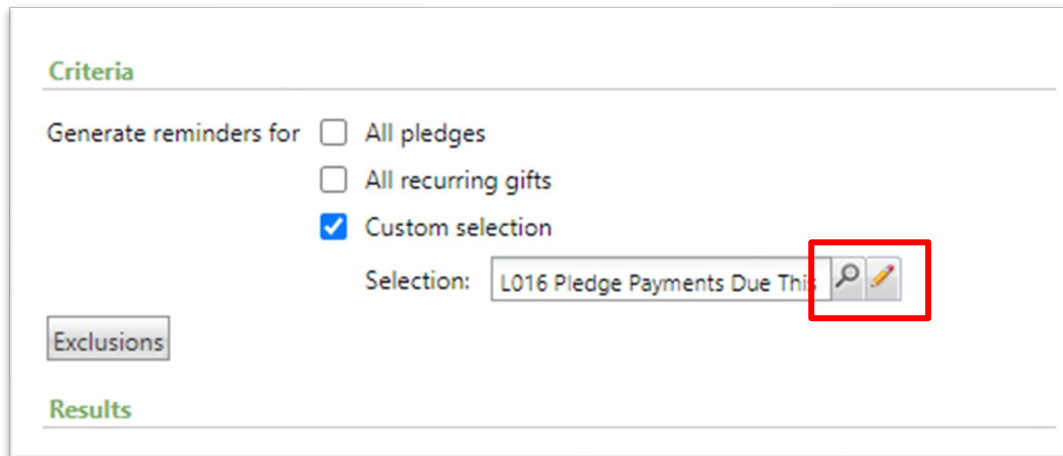
Start process | Set format options | **Edit** | Delete



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.



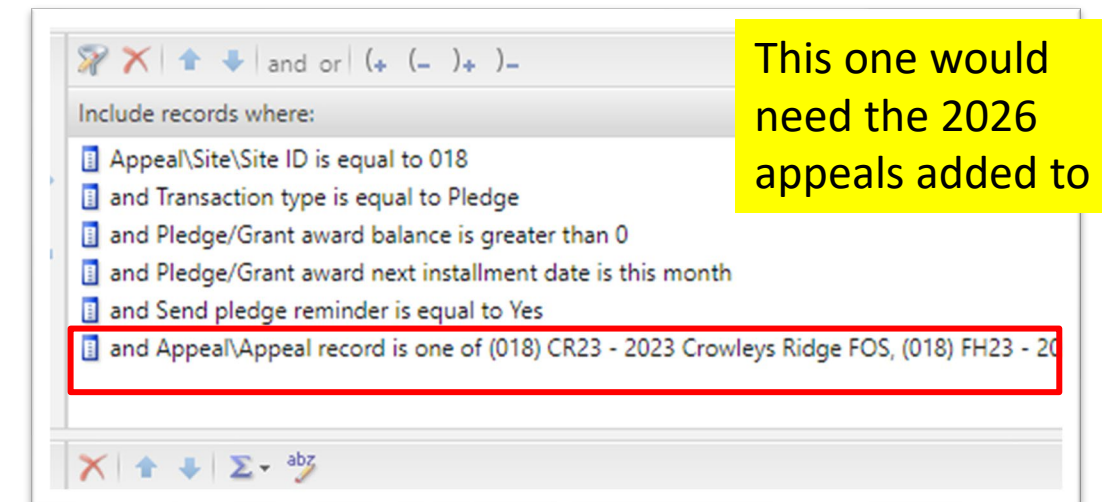
Criteria

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

Selection: L016 Pledge Payments Due This Month

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 2026 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 (278)  More ▾

Constituent Name equal to: Recurring Status equal to: Active ▾ BSA Structure equal to: ▾  Apply  Reset

	Cou...	Council	Appeal ▾	Appe...	Constituent ID	Constituent Name	Recurring Amo...	Recurring Frequency	Recurring Start D	
	023	Golden Gate Are...	(041) 2025 Friends of Scouting Appeal	2025			\$85.00	Monthly	4/15/2024	
	023	Golden Gate Are...	(041) 2025 Friends of Scouting Appeal	2025			\$42.00	Monthly	5/15/2024	
	023	Golden Gate Are...	(041) 2025 Friends of Scouting Appeal	2025			\$25.00	Monthly	8/30/2024	
	023	Golden Gate Are...	(041) 2025 Friends of Scouting Appeal	2025			\$85.00	Monthly	2/15/2019	
	023	Golden Gate Are...	(041) 2025 Friends of Scouting Appeal	2025			\$85.00	Monthly	2/27/2019	
	023	Golden Gate Are...	(041) 2025 Friends of Scouting Appeal	2025			\$17.00	Monthly	2/28/2022	

 Go to Constituent  Go to revenue  Edit Status

This council will need to click **Go to Revenue** and then edit the recurrence and change it to the 2026 Appeal. If the recurrence needs to be adjusted from active to terminated or lapsed, you can do this by clicking **Edit Status**.



Contribution Statements

- Sent to donors in January
- Export files will be ready to run January 2, 2026.
- All payments for 2025 need to be entered before file generation
- Print and read Job Aid (Updated 2023).
 - Located MyBSA \ CRM User Guides \ Marketing and Communication \ Contribution Statements.
 - CRM \ Marketing & Communications \ Packages \ Letters & Documents \ Documents
 - January 2026 CRM Forum will detail process



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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Other

- Master ID rollout
 - Constituent Record > Consolidated View tab is live
 - Constituents > MasterID Constituent Search is live
 - Training continues 1.15.26, same content as previous sessions on 12.4.25 and 12.15.25
 - Constituent and Batch search changes go live





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



Next Forum

January 21, 2026
10:00 am & 2:00 pm CT



Questions & Answers



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