

CRM User Forum

January 21, 2026

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- John Kuehn
- Don Day

Objectives

- Finishing Up 2025
 - Review Uncommitted Batches
 - Recording Future contribution
 - Global write-off process
 - Reports for Fiscal Audit and 990
 - Beginning of year GL transactions

Objectives cont'd

- 2026 Activities
 - Billing and Acknowledgement Updates
 - Updating Recurring gifts
 - Contribution Statements
- Workplace – Viva Engage
- Questions - Answers

Uncommitted Batches

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 757 uncommitted batches.
- 172 of these batches have added dates before 1/1/26

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 – Zero Batches

Batch Entry

Uncommitted Batches | Committed Batches

Uncommitted batches (0) Add Batch search More

Date range: Last 7 days Sites: All sites ☐ Show only batches with exceptions Apply Reset

Columns Clear all filters

Batch number	Batch template	Description	Owner	Status	Date added
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- After Filter Change – 7 uncommitted batch show

Batch Entry

Uncommitted Batches | Committed Batches

Uncommitted batches (7) Add Batch search More

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

Columns Clear all filters

Batch number	Batch template	Description	Owner	Status	Date added
L1246506	LC Import of Pledge Payments Credit Card Scheduled Process	Generated Payment Tra...		1. Data Entry	6/19/2025
L1246965	LC Import of Pledge Payments Credit Card Scheduled Process	Generated Payment Tra...		1. Data Entry	6/22/2025
L1250157	LC Import of Pledge Payments Credit Card Scheduled Process	Generated Payment Tra...		1. Data Entry	7/2/2025

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
 - Pledge payments only
- 2026 Postdates to 2026 Appeals = CY Inbound Channel

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

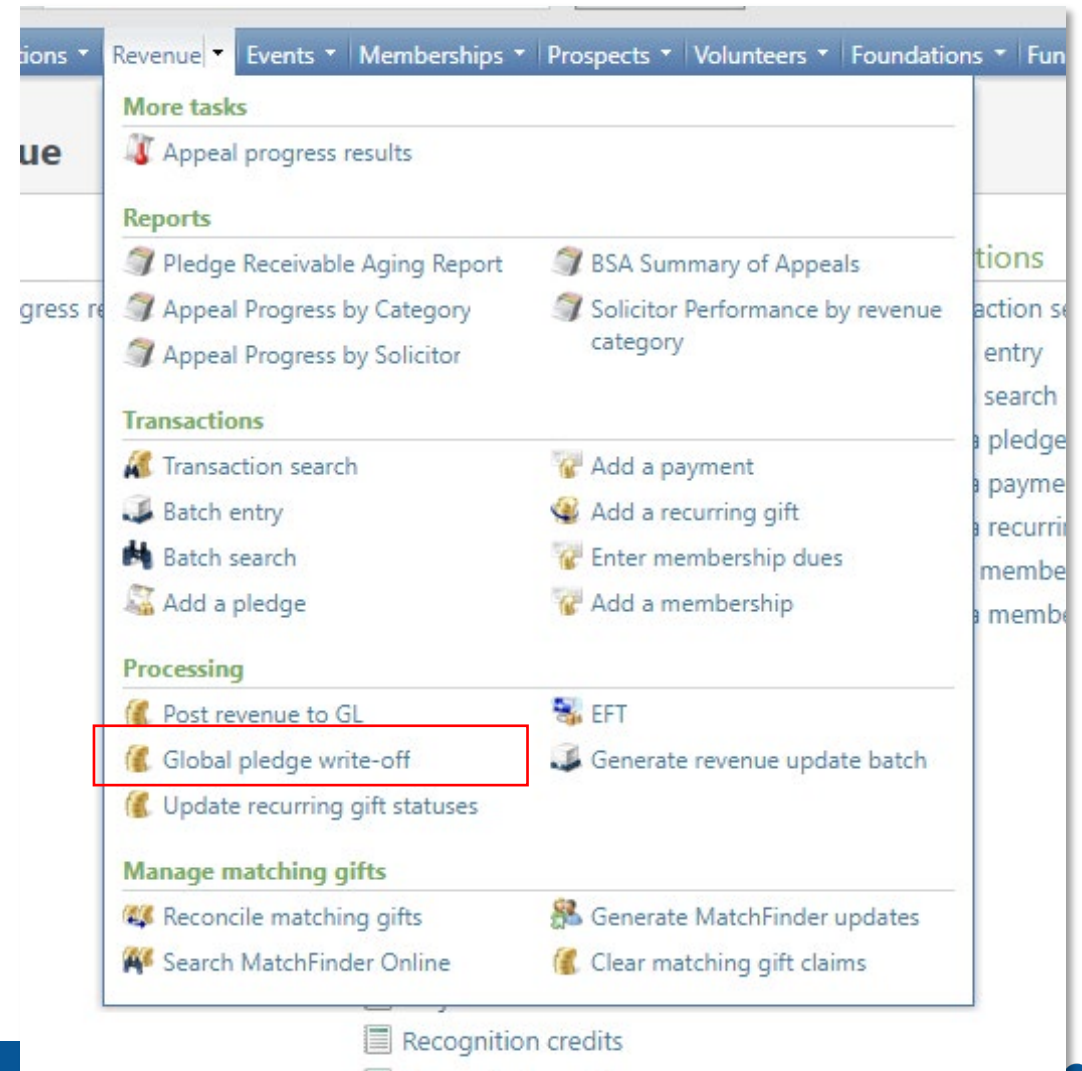
Global Write-off Process

Global Write-off Process

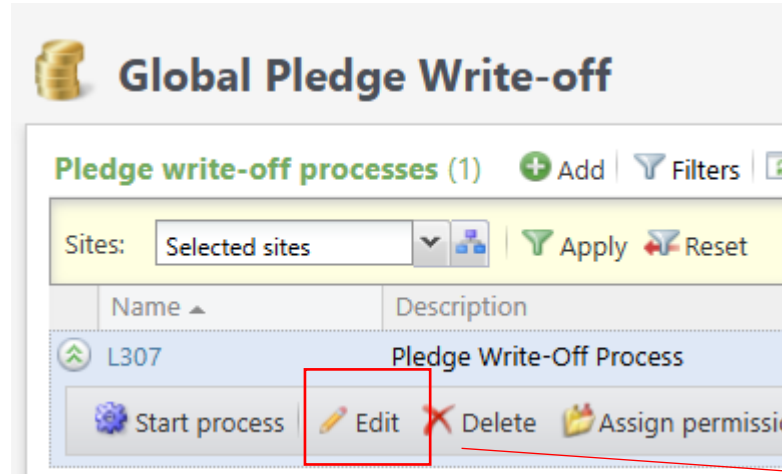
- Should be run yearly
- Run when you no longer want older pledges showing up in your overdue reminder process
- Closes pledge in CRM
- Does not write to PeopleSoft
- Reduces data entry error with mismatched appeals, since pledge payments want to fulfill oldest pledges first

Global Write-off Process

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



Global Write-off Process



Global Pledge Write-off

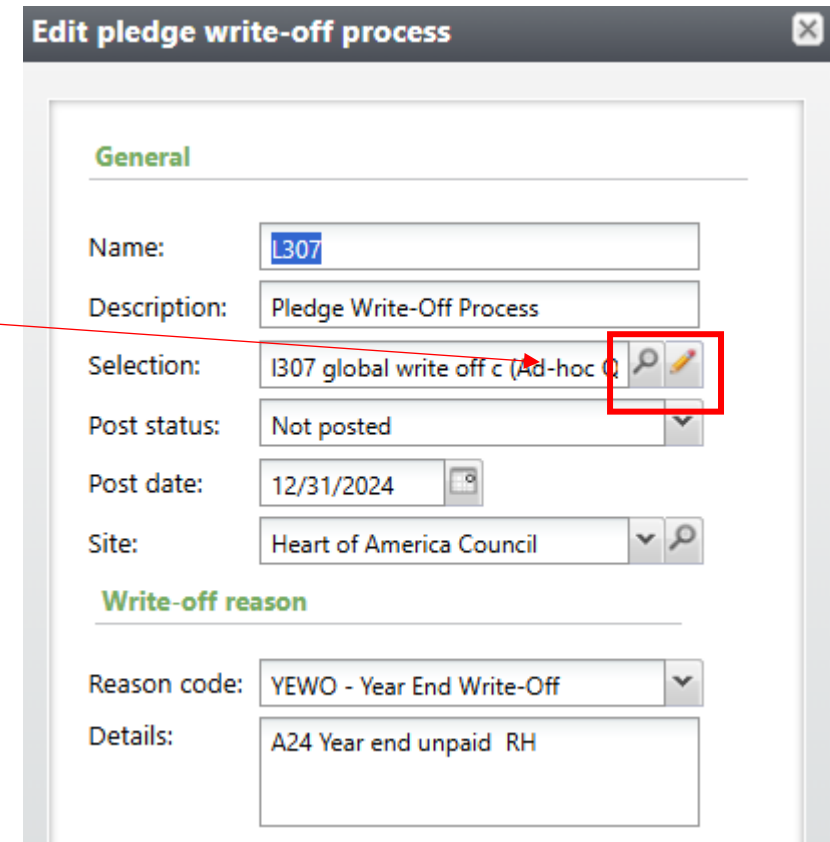
Pledge write-off processes (1) + Add Filters

Sites: Selected sites Apply Reset

Name	Description
L307	Pledge Write-Off Process

Start process Edit Delete Assign permissions

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



Edit pledge write-off process

General

Name: L307

Description: Pledge Write-Off Process

Selection: I307 global write off c (Ad-hoc Q) Search Edit

Post status: Not posted

Post date: 12/31/2024

Site: Heart of America Council

Write-off reason

Reason code: YEWO - Year End Write-Off

Details: A24 Year end unpaid RH

Global Write-off Process

Edit Ad-Hoc Query - I307 global write off c

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

Find field:

Include records where:

- Appeal\Site\Site ID is equal to 307
- and Appeal\Appeal record is one of (307) A24- 2024 Anr**
- ~~and Pledge/Grant award balance is greater than 0~~
- and Transaction type is equal to Pledge

Results fields to display:

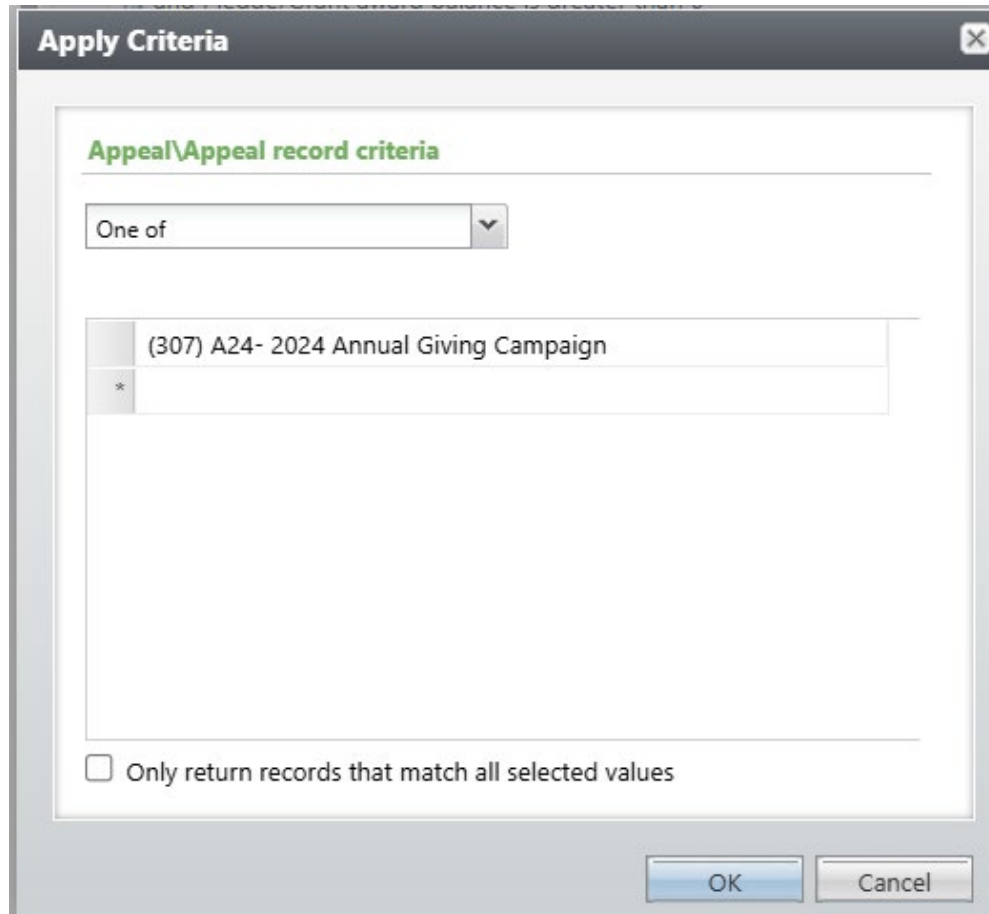
- Date
- Pledge/Grant award balance

The filter to adjust is in the upper right-hand corner. The one highlighted in blue reads '**Appeal Records Is One Of**'. Double click the line to edit the filters. The appeals need to be adjusted to include the appeals you want written off.

You can also use the filter '**Appeal Records Is Not One Of**' to only list appeals that need to be excluded from the write off, depending on your preference.

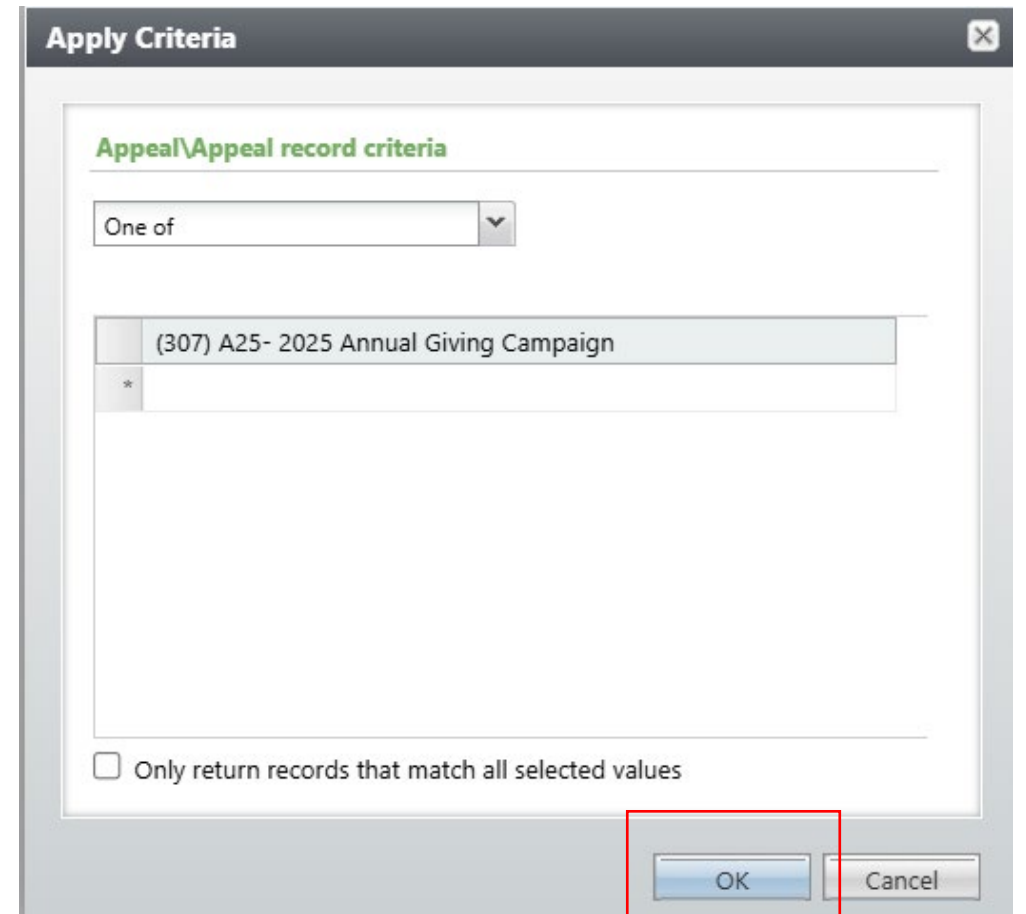
Global Pledge Write-off

BEFORE



The 'Apply Criteria' dialog box shows the 'Appeal\Appeal record criteria' section. A dropdown menu is set to 'One of'. Below it, a list box contains the entry '(307) A24- 2024 Annual Giving Campaign'. At the bottom, there is an unchecked checkbox labeled 'Only return records that match all selected values' and 'OK' and 'Cancel' buttons.

AFTER



The 'Apply Criteria' dialog box shows the 'Appeal\Appeal record criteria' section. A dropdown menu is set to 'One of'. Below it, a list box contains the entry '(307) A25- 2025 Annual Giving Campaign'. At the bottom, there is an unchecked checkbox labeled 'Only return records that match all selected values' and 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red rectangle.

Global Pledge Write-off

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

Select filter and output fields	Set sort and group options	Preview results	Set save options
Results (108 records found)			
Appeal\Name	Pledge/Grant award balance		
(307) A25- 2025 Annual Giving Ca...	\$10.00		
(307) A25- 2025 Annual Giving Ca...	\$20.00		
(307) A25- 2025 Annual Giving Ca...	\$20.00		
(307) A25- 2025 Annual Giving Ca...	\$20.00		
(307) A25- 2025 Annual Giving Ca...	\$24.00		
(307) A25- 2025 Annual Giving Ca...	\$25.00		
(307) A25- 2025 Annual Giving Ca...	\$25.00		
(307) A25- 2025 Annual Giving Ca...	\$25.00		
(307) A25- 2025 Annual Giving Ca...	\$25.00		
(307) A25- 2025 Annual Giving Ca...	\$40.00		
(307) A25- 2025 Annual Giving Ca...	\$50.00		
(307) A25- 2025 Annual Giving Ca...	\$50.00		
(307) A25- 2025 Annual Giving Ca...	\$50.00		
(307) A25- 2025 Annual Giving Ca...	\$50.00		
(307) A25- 2025 Annual Giving Ca...	\$50.00		
(307) A25- 2025 Annual Giving Ca...	\$50.00		
(307) A25- 2025 Annual Giving Ca...	\$50.00		
(307) A25- 2025 Annual Giving Ca...	\$50.00		
(307) A25- 2025 Annual Giving Ca...	\$50.00		
(307) A25- 2025 Annual Giving Ca...	\$50.00		
(307) A25- 2025 Annual Giving Ca...	\$75.00		
(307) A25- 2025 Annual Giving Ca...	\$75.00		

Global Pledge Write-off

 **Global Pledge Write-off**

Pledge write-off processes (1)   More ▾

Name	Description	Select
 L032	Pledge Write-Off Process	L032

 Start process  Edit  Delete  Assign permissions

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

Edit pledge write-off process 

General

Name:

Description:

Selection:  

Post status: ▾

Post date:  **2**

Site: ▾ 

Write-off reason

Reason code: ▾ **3**

Details: **4**

Recognition credits

☐ Reduce recognition credits by proportional amount

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

☐ Do not adjust recognition credits

Output

☐ Create output selection

☐ Overwrite existing selection

Selection name:

 Help

Global Pledge Write-off

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

Global pledge write-off list

 **L307**

Name: L307

Description: Pledge Write-Off Process

Reason code: YEWO - Year End Write-Off

Details: A25 Year end unpaid RH

Selection: I307 global write off c (Ad-hoc Query)

GL post status: Not posted

GL post date: 12/31/2024

Create output selection: No

Output selection name:

Overwrite existing selection: No

Recent status

History

Job schedules

Recent status



Status:  Completed

Status message: Completed

Started by: netbsa\jkuehn

Started: 1/16/2026 8:03:07 AM

Ended: 1/16/2026 8:03:32 AM

Duration: 00hr 00min 25s

Server name: AZSCUSBBCRMSTG1

Total records processed: 123

Number of exceptions: 0

Records successfully processed: 123

Global Pledge Write-off

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



Revenue

More tasks

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

List for Write-offs

Write-Offs for your council. This list includes write-offs on or after 1/1/2018. (123) More

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

Council #	Appeal		Constituent Name	Pledge Date		Pledge Amount	Write-Off Am...	Details			
307	(307)	Annual Giving Campaign		2/26/2024		\$200.00	\$200.00	A25 Year end unpaid			
307	(307)	Annual Giving Campaign		1/18/2024		\$150.00	\$150.00	A25 Year end unpaid			
307	(307)	Annual Giving Campaign		1/31/2024		\$100.00	\$100.00	A25 Year end unpaid			
307	(307)	Annual Giving Campaign		4/24/2024		\$450.00	\$50.00	A25 Year end unpaid			
307	(307)	Annual Giving Campaign		4/16/2024		\$250.00	\$250.00	A25 Year end unpaid			
307	(307)	Annual Giving Campaign		1/29/2024		\$300.00	\$300.00	A25 Year end unpaid			
307	(307)	Annual Giving Campaign		5/10/2024		\$300.00	\$150.00	A25 Year end unpaid			
307	(307)	Annual Giving Campaign		2/6/2024		\$50.00	\$50.00	A25 Year end unpaid			
307	(307)	Annual Giving Campaign		2/6/2024		\$50.00	\$50.00	A25 Year end unpaid			

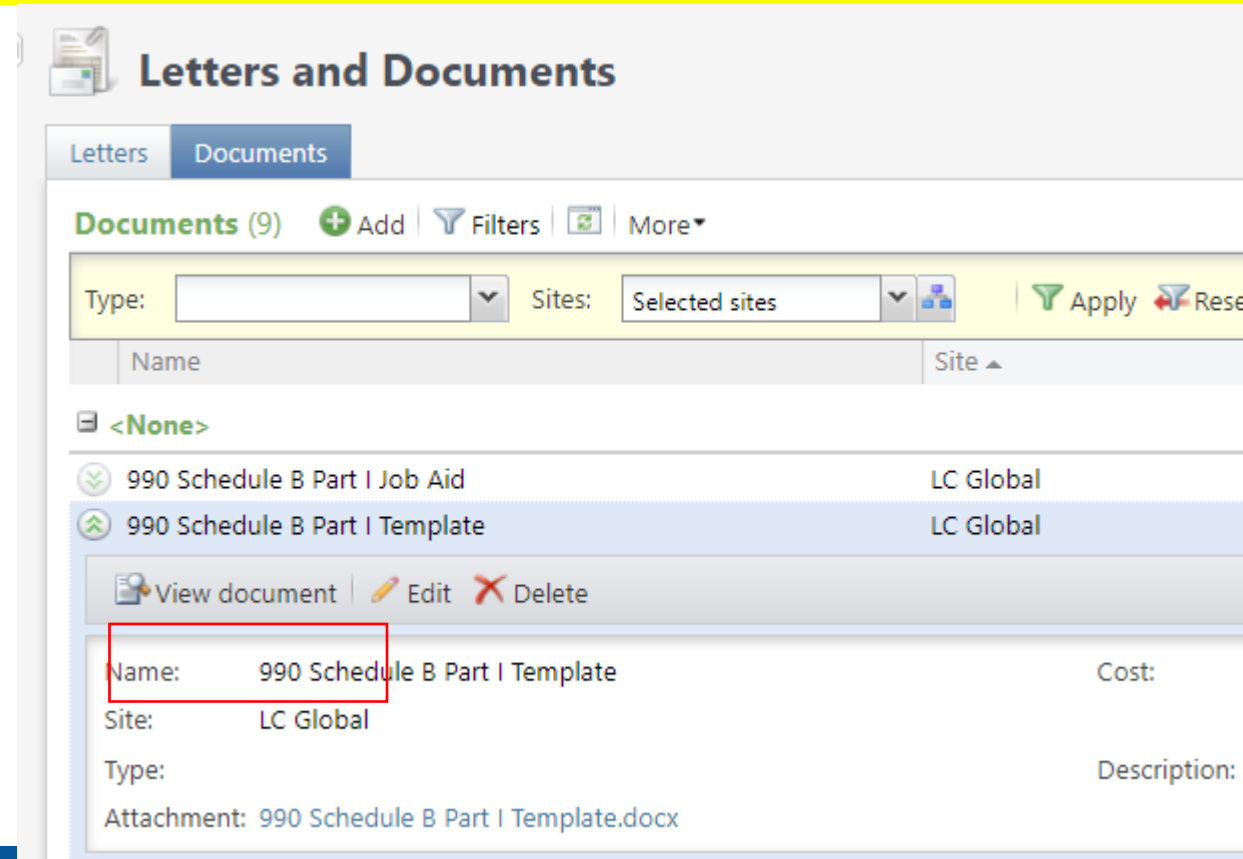
Audit Reports & IRS 990

IRS 990

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

IRS 990

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



Letters and Documents

Letters Documents

Documents (9) + Add Filters More

Type: Sites: Selected sites Apply Reset

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

View document Edit Delete

Name: 990 Schedule B Part I Template Cost:

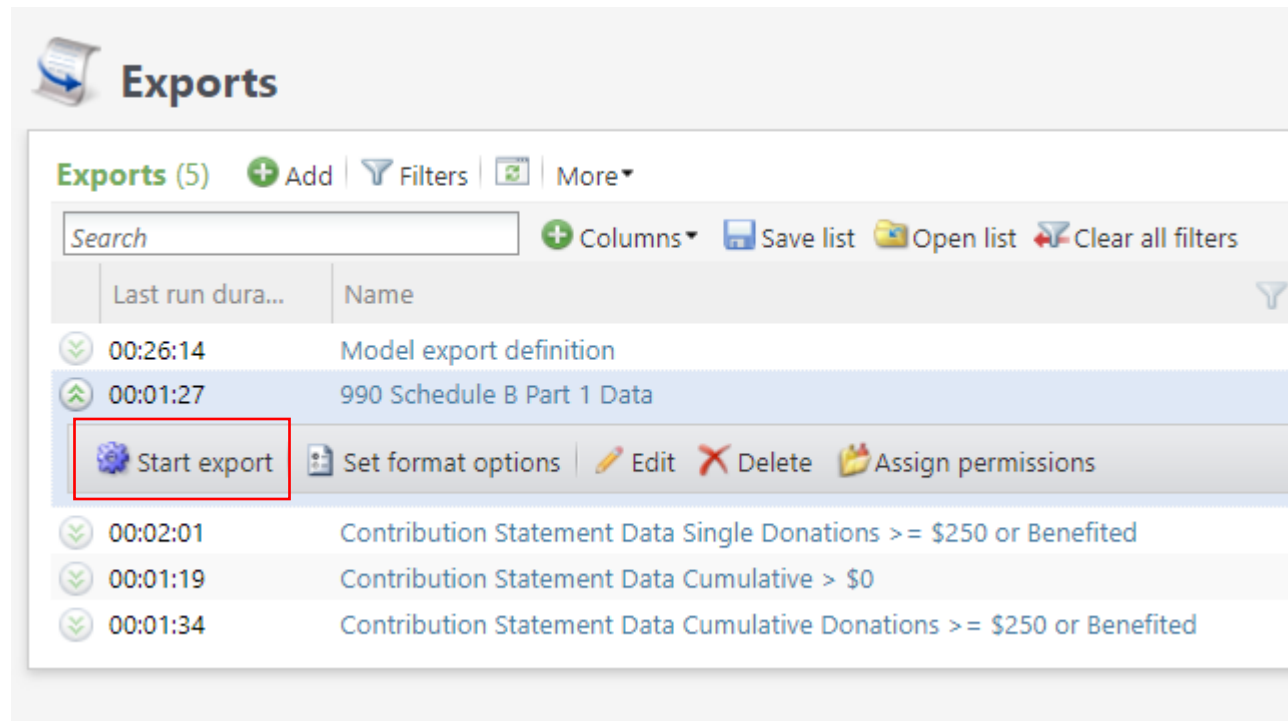
Site: LC Global

Type: Description:

Attachment: 990 Schedule B Part I Template.docx

IRS 990

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



Exports

Exports (5) + Add Filters More

Search Columns Save list Open list Clear all filters

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

IRS 990

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

 Export

990 Schedule B Part 1 Data - Export

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

Recent Status

History

Job Schedules

Recent status

 Download output ▾ 

Status:

 Completed

Status message:

Completed

Started by:	netbsa\chowens	Server name:	AZSCUSBBCRMPD1
Started:	2/16/2024 2:06:16 PM	Total records processed:	23
Ended:	2/16/2024 2:07:44 PM	Number of exceptions:	0
Duration:	00hr 01min 28s	Records successfully processed:	23

IRS 990

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

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

IRS 990 – Sample Output

Name of Organization		Employer identification number	
XYZ Council		67-8923983829641	

Part I Contributors 2023

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

PeopleSoft Transactions

Need to be done PeopleSoft

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

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

Contribution - Pledges

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

Accounts

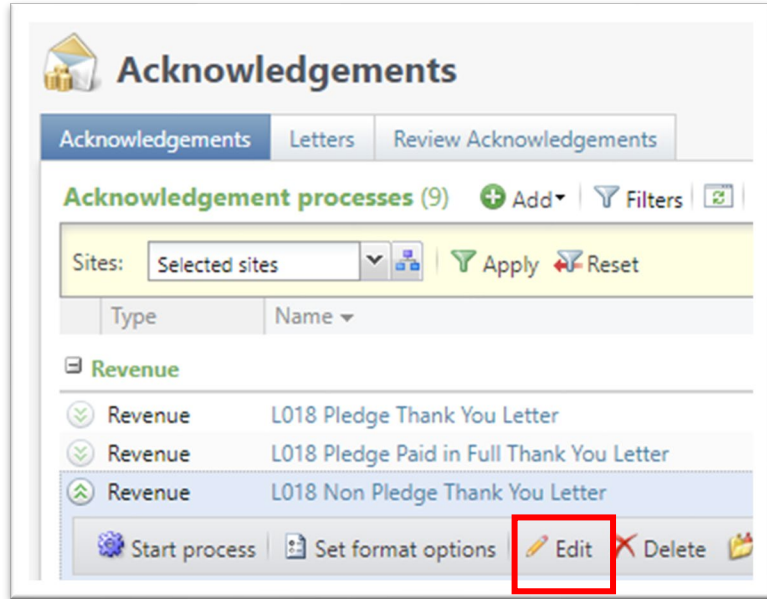
- 1321 is your Contributions Receivable Prior year account. This is populated with pledges you expect to be paid late after you close your books (GJ from 1301). If you write-off all pledges this will have a zero balance.
- 4002 is your Contributions-FOS Prior Year account. Dollars are move to here if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

Updating Reminders and Acknowledgements

Update Billing Reminders & Acknowledgements

- Drop Chevron
- Click Edit
- Find Selection and click the pencil next to it
- Edit the Selection's filters if needed
 - Add 2026 Appeal report Code
 - Add names of 2026 appeals

Acknowledgements



Acknowledgements

Acknowledgements Letters Review Acknowledgements

Acknowledgement processes (9) + Add Filters

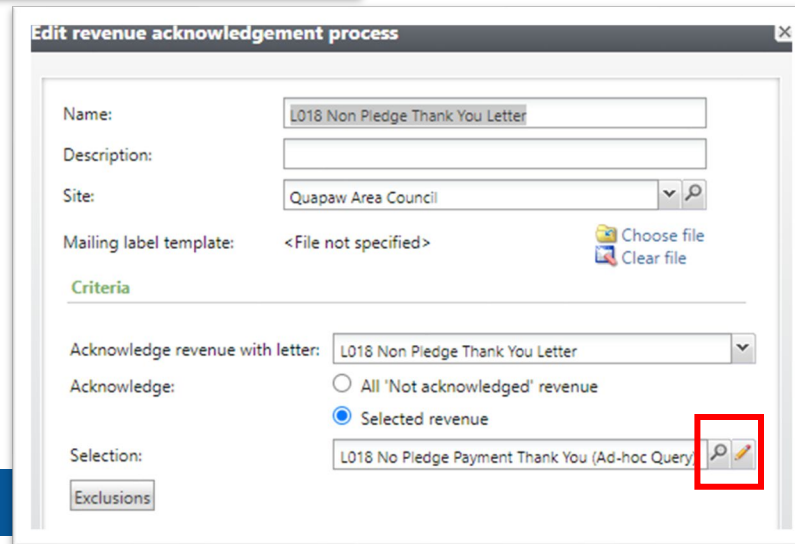
Sites: Selected sites Apply Reset

Type Name

Revenue

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

Start process Set format options Edit Delete



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

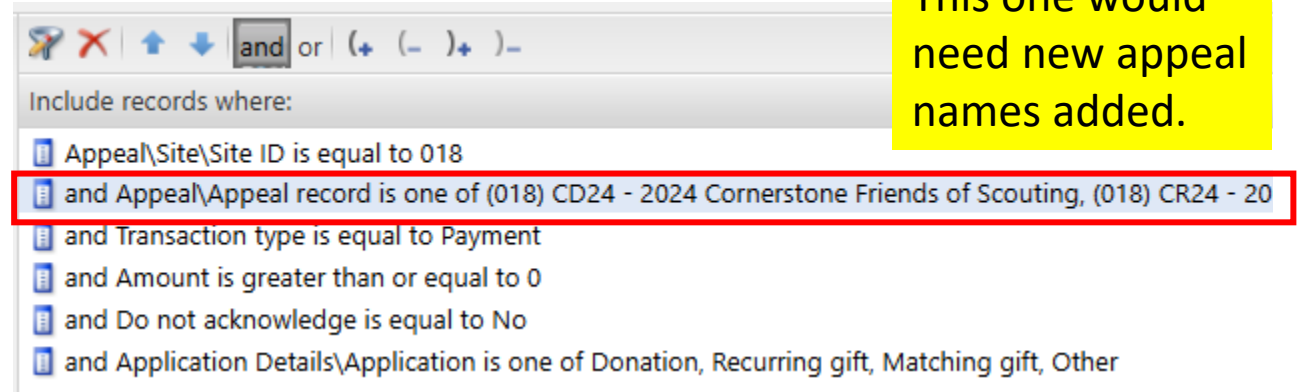
Criteria

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

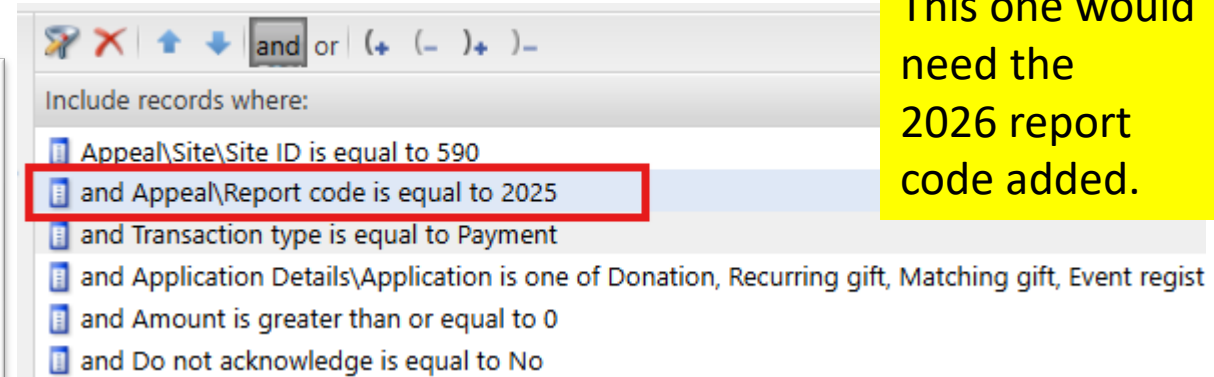
Exclusions



Include records where:

- Appeal\Site\Site ID is equal to 018
- and Appeal\Appeal record is one of (018) CD24 - 2024 Cornerstone Friends of Scouting, (018) CR24 - 20
- and Transaction type is equal to Payment
- and Amount is greater than or equal to 0
- and Do not acknowledge is equal to No
- and Application Details\Application is one of Donation, Recurring gift, Matching gift, Other

This one would need new appeal names added.

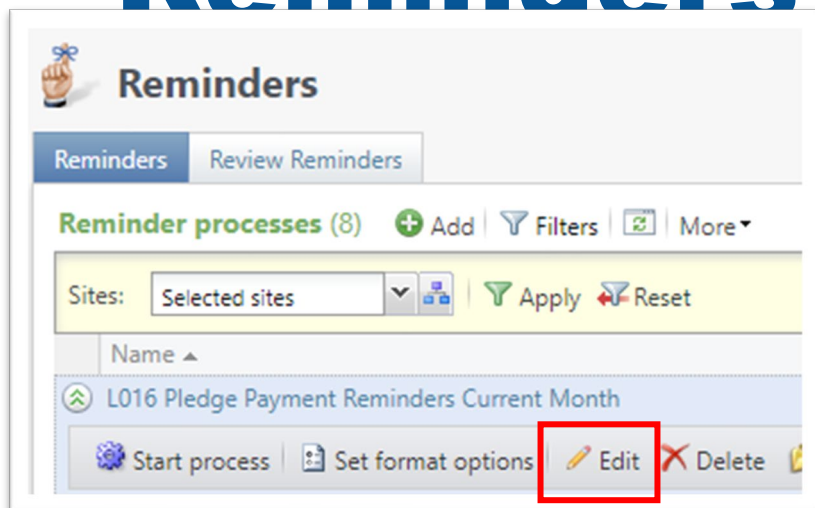


Include records where:

- Appeal\Site\Site ID is equal to 590
- and Appeal\Report code is equal to 2025
- and Transaction type is equal to Payment
- and Application Details\Application is one of Donation, Recurring gift, Matching gift, Event regist
- and Amount is greater than or equal to 0
- and Do not acknowledge is equal to No

This one would need the 2026 report code added.

Reminders



Reminders

Reminders | Review Reminders

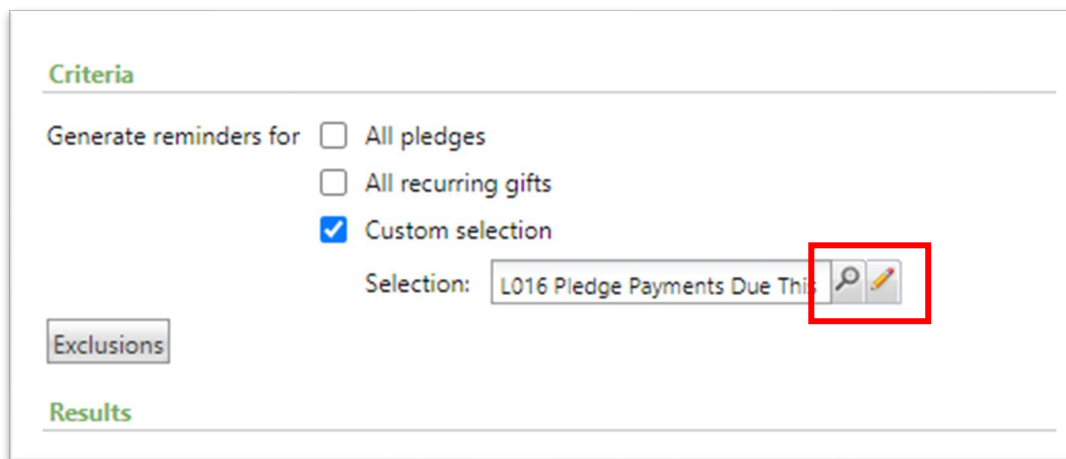
Reminder processes (8) + Add Filters More

Sites: Selected sites Apply Reset

Name ▲

L016 Pledge Payment Reminders Current Month

Start process Set format options Edit Delete



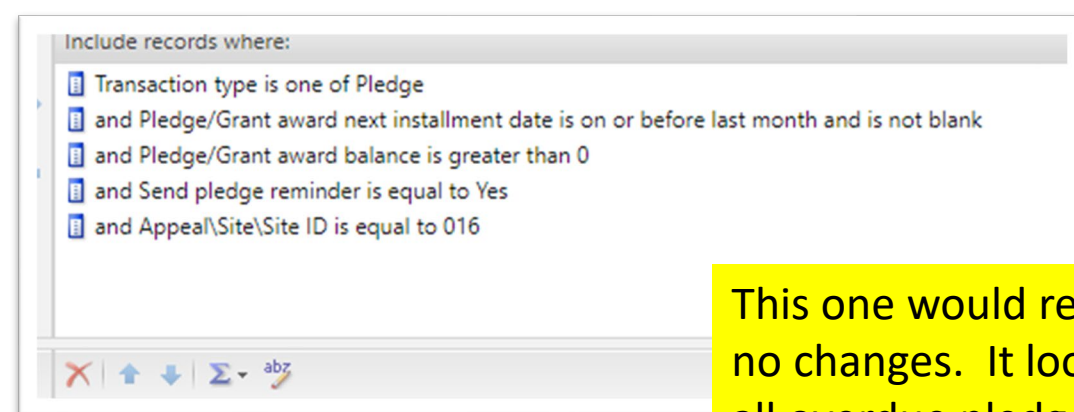
Criteria

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

Selection: L016 Pledge Payments Due This

Exclusions

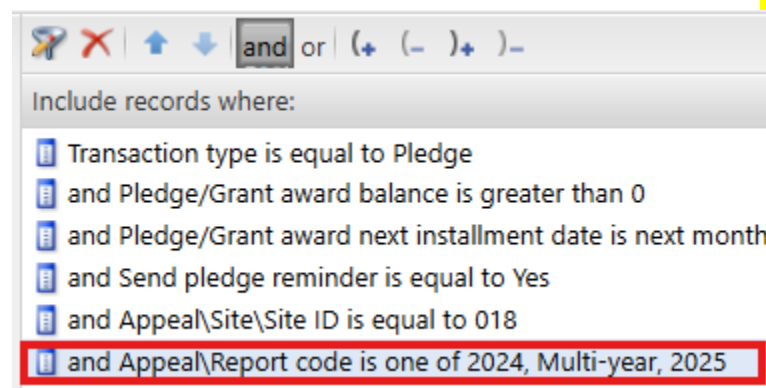
Results



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

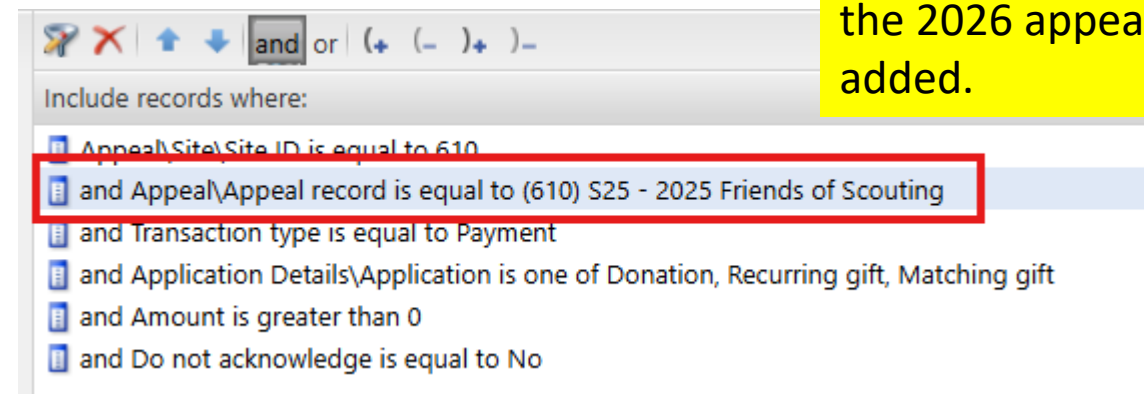
This one would require no changes. It looks for all overdue pledges.



Include records where:

- Transaction type is equal to Pledge
- and Pledge/Grant award balance is greater than 0
- and Pledge/Grant award next installment date is next month
- and Send pledge reminder is equal to Yes
- and Appeal\Site\Site ID is equal to 018
- and Appeal\Report code is one of 2024, Multi-year, 2025

This one would need 2026 report coded added



Include records where:

- Appeal\Site\Site ID is equal to 610
- and Appeal\Appeal record is equal to (610) S25 - 2025 Friends of Scouting
- and Transaction type is equal to Payment
- and Application Details\Application is one of Donation, Recurring gift, Matching gift
- and Amount is greater than 0
- and Do not acknowledge is equal to No

This one would need the 2026 appeals added.

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 (265)



More ▾

Constituent Name equal to:

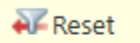
Recurring Status equal to:

Active

BSA Structure equal to:



Apply



Reset

	Cou...	Council	Appeal	Appe...	Constituent ID	Constituent Name	Recurring Amo...	Recurring Frequency	Recurring Start Date
	023	Golden Gate Are...	(023) Recurring Gifts 2025	2025	8-1	Thor	\$25.00	Monthly	1/2/2018
	Go to Constituent								
	Go to revenue								
	Edit Status								
	Change Appeal								
	023	Golden Gate Are...	(023) Recurring Gifts 2025	2025	8-1	Mich	\$300.00	Biweekly	10/20/2017
	023	Golden Gate Are...	(023) Recurring Gifts 2025	2025	8-1	Gret	\$20.00	Monthly	11/5/2024
	023	Golden Gate Are...	(023) Recurring Gifts 2025	2025	8-1	Jeffr	\$25.00	Monthly	3/2/2019
	023	Golden Gate Are...	(023) Recurring Gifts 2025	2025	8-1	Marl	\$23.00	Monthly	5/2/2024
	023	Golden Gate Are...	(023) Recurring Gifts 2025	2025	8-1	Isa	\$100.00	Monthly	5/2/2025
	023	Golden Gate Are...	(023) Recurring Gifts 2025	2025	8-1				10/31/2024
	023	Golden Gate Are...	(023) Recurring Gifts 2025	2025	8-1				12/21/2025

This council will need to click **Change Appeal** 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 by end of January.
- Export files 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

CRM and MyBSA

 **Letters and Documents**

Letters Documents

Documents (9)  Add  Filters  More

Type: Sites: Selected sites  Apply  Reset

Name	Site
 <None>	
 990 Schedule B Part I Job Aid	LC Global
 990 Schedule B Part I Template	LC Global
 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](#)

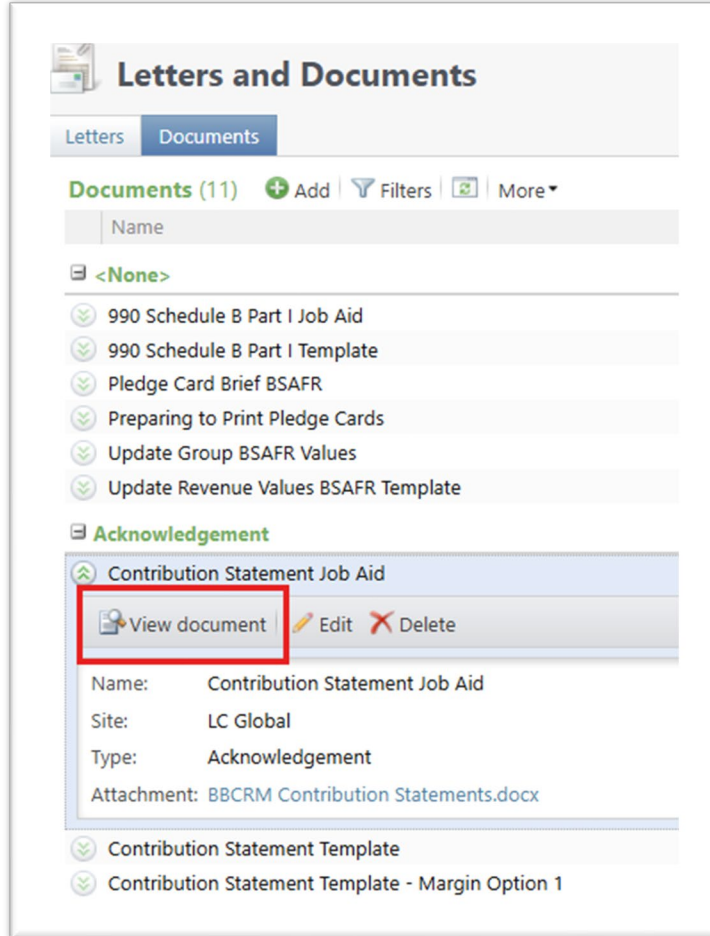
[Print Unit Pledge Cards](#)

[Billing Reminders](#)

Contribution [Statements](#)

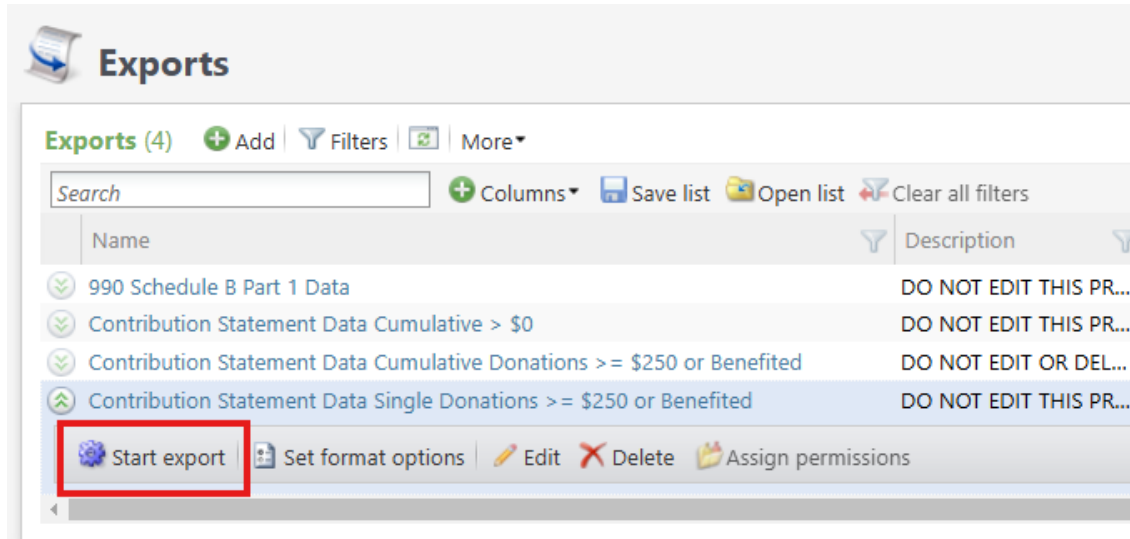
[Running Acknowledgements](#)

Statements Documentation and Templates



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

Contribution Statement Exports



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

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

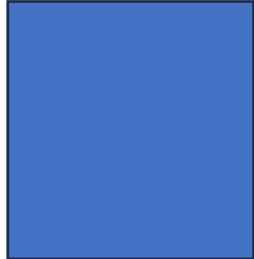
Contribution Cumulative >= \$250 will send a statement to donors whose summed payments are \$250 or greater.

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

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

Minimum requirement

Statement Export Sheet - Update

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

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

Contribution Template Updates

Word Options

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

☒ Properties follow chart data point ⓘ

Show document content

☐ Show background colors and images in Print Layout view
☐ Show text wrapped within the document window
☒ Show drawings and text boxes on screen
☐ Show bookmarks
☐ Show text boundaries
☐ Show crop marks
☒ Show field codes instead of their values

Field shading: When selected ▾

☐ Use draft font in Draft and Outline views

Name: Courier New ▾

Size: 10 ▾

Font Substitution...

☐ Expand all headings when opening a document ⓘ

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

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

Contribution Directory Merge

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

Statement Final Output

Ja
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Ly

Dear ,

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

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

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

The benefit descriptions are present.

The benefit value and net contributions are now showing correctly

Items not in Contribution Statement

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

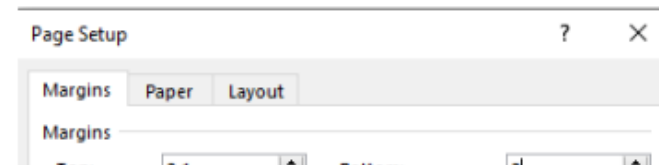
These gifts types thank for an item not a dollar amount.

Contribution Statement Common Issues

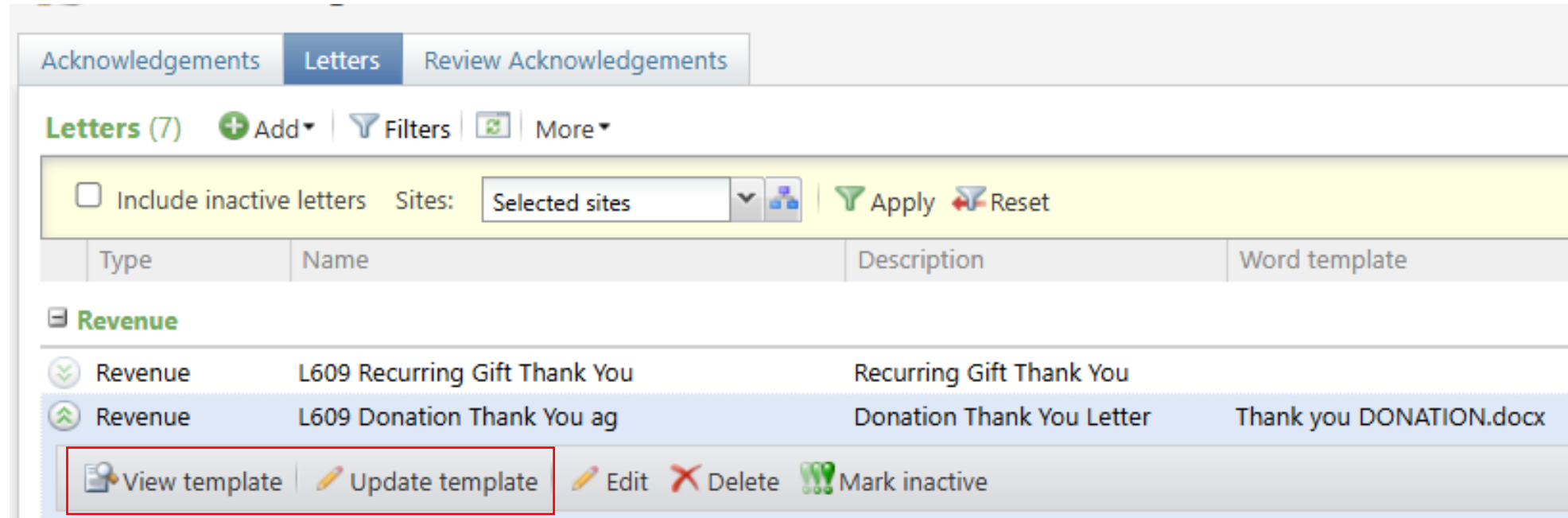
- The Contribution Job Aid has a list of common issues and steps to resolve them on page 6

Common Issues

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



Acknowledgement Templates



The screenshot shows a web interface for managing acknowledgement templates. At the top, there are three tabs: "Acknowledgements", "Letters" (which is selected), and "Review Acknowledgements". Below the tabs, there is a section for "Letters (7)" with options to "Add", "Filter", and "More". A filter bar includes a checkbox for "Include inactive letters", a "Sites" dropdown menu set to "Selected sites", and "Apply" and "Reset" buttons. Below this is a table with columns: "Type", "Name", "Description", and "Word template". The table has two rows under the "Revenue" category. The first row is "Revenue" with "L609 Recurring Gift Thank You" and "Recurring Gift Thank You". The second row is "Revenue" with "L609 Donation Thank You ag" and "Donation Thank You Letter", with a "Word template" of "Thank you DONATION.docx". Below the table, there is a row of action buttons: "View template" (highlighted with a red box), "Update template", "Edit", "Delete", and "Mark inactive".

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

View template | Update template | Edit | Delete | Mark inactive

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

Reminder Template

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

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

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

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

Workplace ~ Viva Engage (Teams)

- Viva Engage is part of Microsoft Teams
 - Access via Teams
 - Access via web at <https://engage.cloud.microsoft/>

Chat

▼ 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 Ann...
- 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 Forum

Members • 7

Info

Pinned

CRM Resource Page o...

Community resources

- SharePoint library
- SharePoint site
- OneNote
- Planner

Create live event

 Blackbaud User Guide

Blackbaud User Guide

[MasterID](#)[Yearly Tasks](#)

Quick Links

 [BBCRM Production](#) [Open a Help Ticket](#) [Other CRM Resources](#) [BBCRM Training](#) [BBCRM User Forum](#)

Support Documents

 [New Designation Request Form](#) [Event Revenue GL Request Form](#)

Next User Forum

January 21st, 2025 - 10AM / 2PM CST
- Email Don.Day@scouting.org to sign up!

Next MasterID Training

January 15th, 2025 - 2PM CST
- <https://us06web.zoom.us/j/4195284414>
- [Previous Recording](#)

MasterID

[Back to top](#)

MasterID tools are available in Blackbaud Production as of 12/04/2025

MasterID is a unique identification number

MasterID Video Training

...

 All Documents[See all](#)

MasterID PDF Training

...

 All Documents[See all](#)



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



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[Council Business Practices](#)

[Council Fiscal Management and Training](#)

[Journey to Excellence](#)

[Council Funding and Finance](#)

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

CRM Resources

CRM Process Videos

CRM (Blackbaud) User Forum Presentations

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

2022

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

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

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

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

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

* Scouting Gives Setup

2021

Member Care

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



Welcome to the National IT Service Catalog

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

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

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

News and Announcements

	10/1/2024, 4:25:22 PM National and Council Mandatory Cybersecurity Training Please be on the lookout for an email from Scouting University regarding Cybersecurity training. Click this announcement for more details.
	10/1/2024, 3:19:06 PM National and Council

IT Online Service Catalog

 I am a National Employee

 I am a Council Employee

Service Categories



Accounts & Passwords



BSA Applications (Business Operations)



BSA Applications (Scouting Programs)



Email, Communication & Collaboration



Network Services



Security Services



Hardware & Software

Welcome to the National Online Support Center Service Catalog.

This service catalog is a detailed list of services provided by the Information Services Group.

Each service will have the following information:

- A brief description
- How to request support
- Links to additional knowledge or training
- Highlighted Frequently Asked Questions

To go directly to the knowledge base, [click here](#).

If there is something we can do to make this service catalog better, please let us know; [click here](#).

[All Council Services](#)

Service Categories

 Accounts & Passwords

 BSA Applications
(Operations)

 BSA Applications
(Program)

 Email, Communication &
Collaboration

 General Assistance

 Network Services

 Security Services

 Hardware & Software

How Many Accounts or Profiles

Accounts & Passwords

Change Display Name or Email Address

Accounts & Passwords

Disable or Remove Your Account

Accounts & Passwords

Powered by BSA eSage

Accounts & Passwords

Mailbox, Calendar or Group Access

Email, Communication & Collaboration

Email Forwarding / Auto Reply

Email, Communication & Collaboration

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

February 18, 2026
10:00 am & 2:00 pm CT

Questions & Answers