

CRM User Forum

February 25, 2025

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Objectives

- Batch Entry Screen filter settings
- Global write-off process
- Reports for Fiscal Audit and 990
- Billing and Acknowledgement Updates
- Contribution Statements
- Council Structure Changes
- Blackbaud Resources
- Questions and Answers



- Before Filter Change

Batch Entry

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

- After Filter Change – 12 uncommitted batch show

Batch Entry

Uncommitted Batches | Committed Batches

Uncommitted batches (12) Add Batch search More

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

Search Columns Clear all filters

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

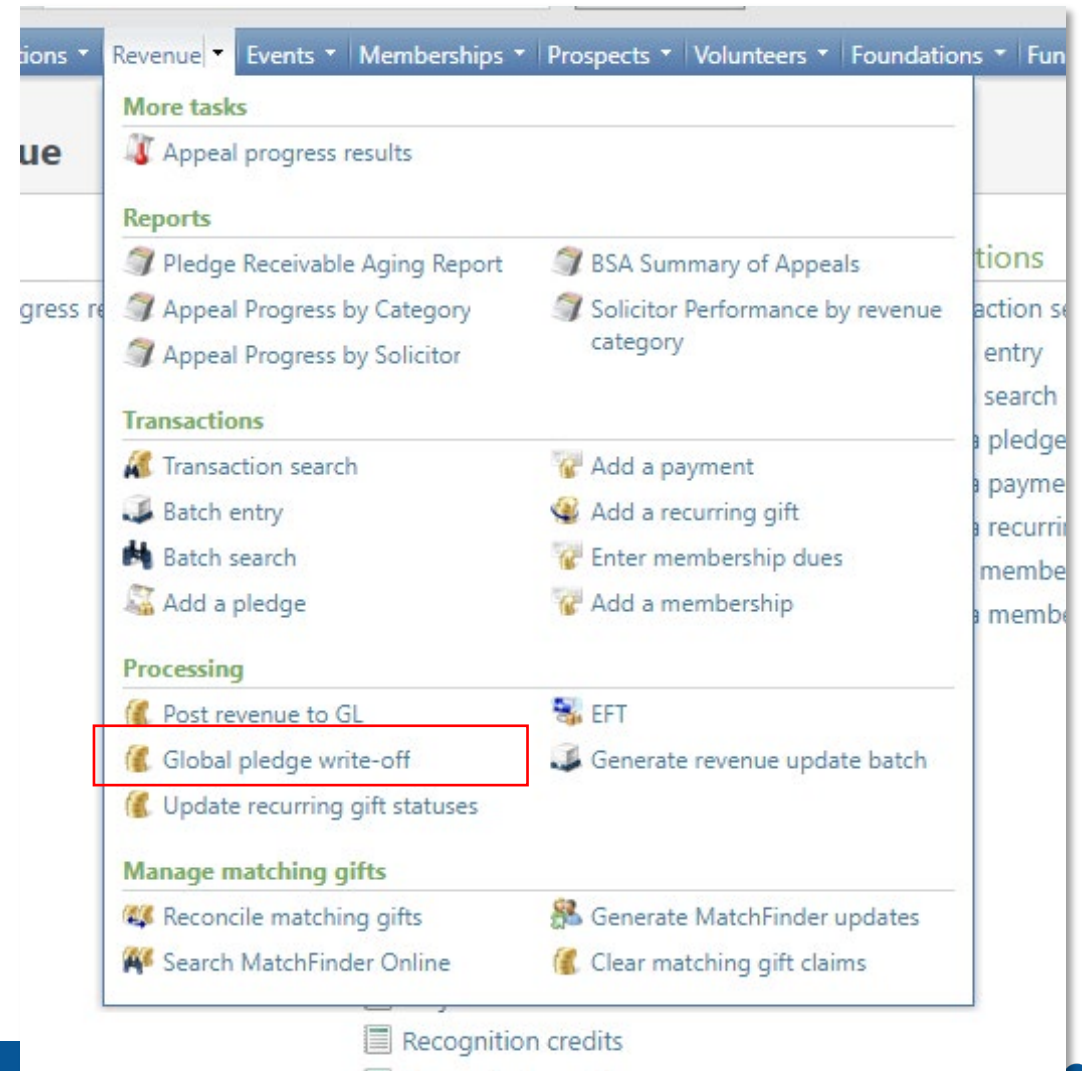
Global Write-off Process

Global Write-off Process

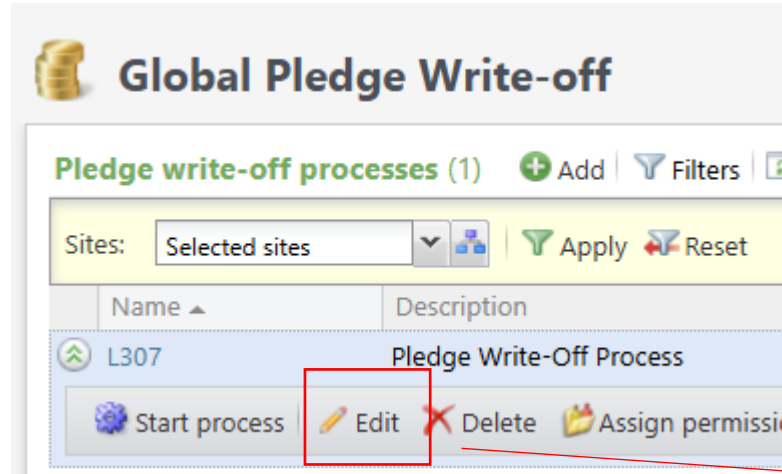
- Should be run yearly
- Run when you no longer want older pledges showing up in your overdue reminder process
- Closes pledge in CRM
- Does not write to PeopleSoft
- Reduces data entry error with mismatched appeals, since pledge payments want to fulfill oldest pledges first
- New Write-Off Job Aid available

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

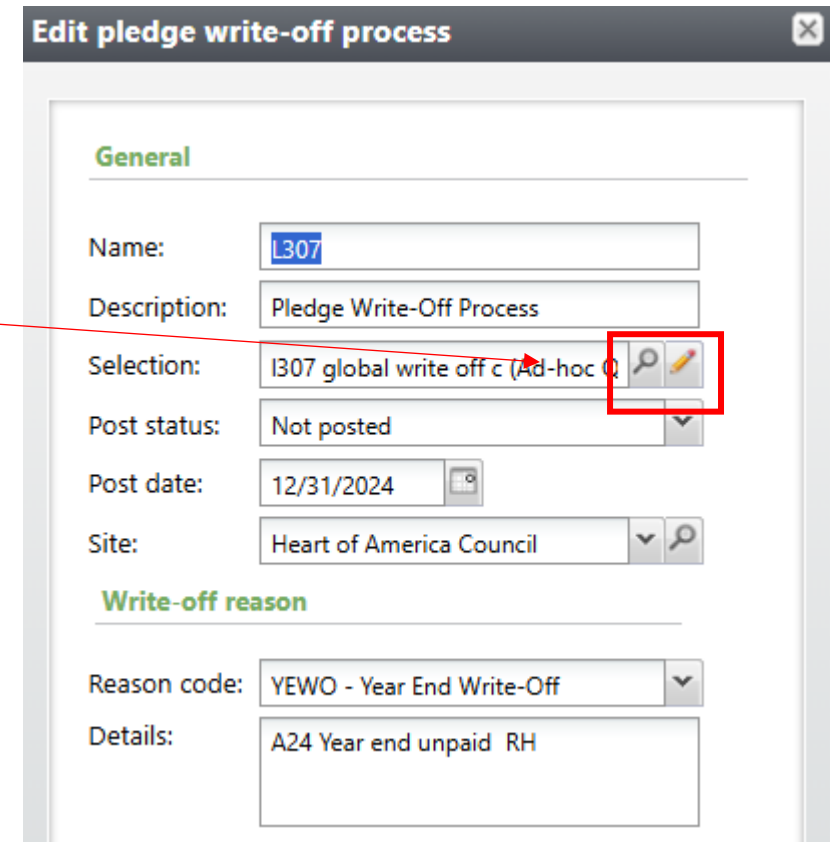
Pledge write-off processes (1) + Add Filters

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:

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.

Include records where:

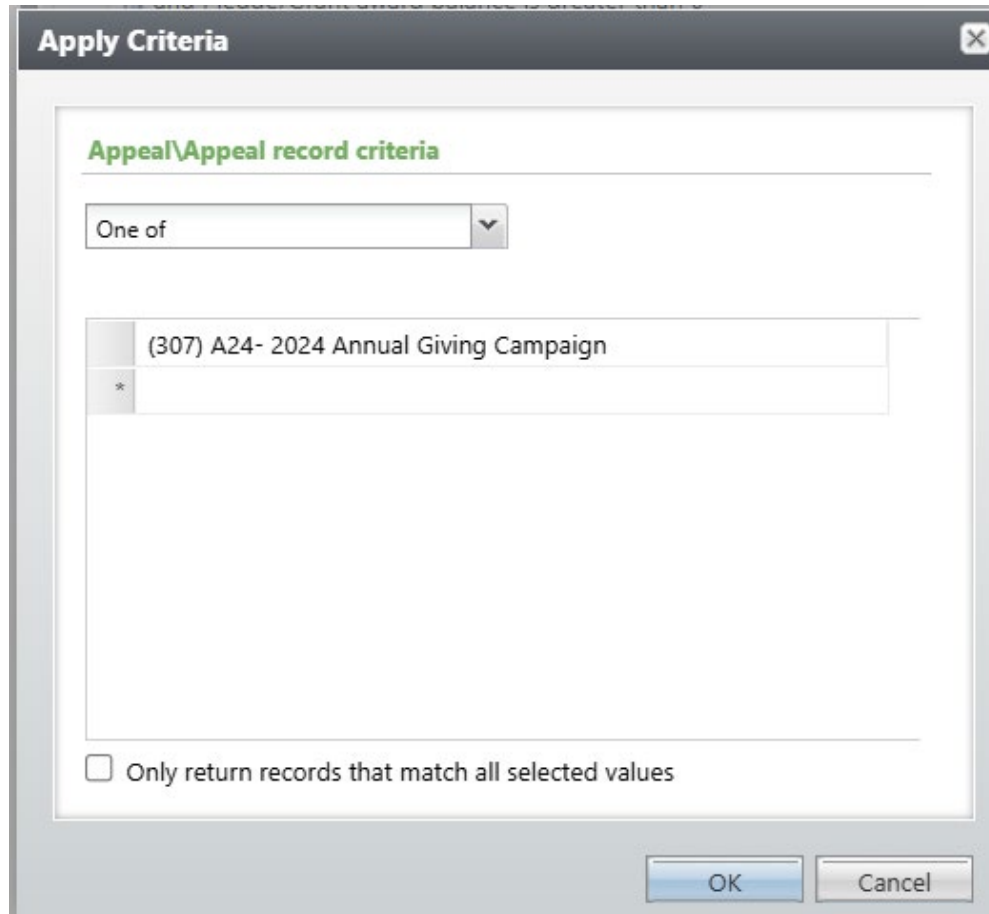
- Appeal\Site\Site ID is equal to 307
- and Appeal\Appeal record is one of (307) A24- 2024 Anr**
- ~~and Pledge/Grant award balance is greater than 0~~
- and Transaction type is equal to Pledge

Results fields to display:

- Date
- Pledge/Grant award balance

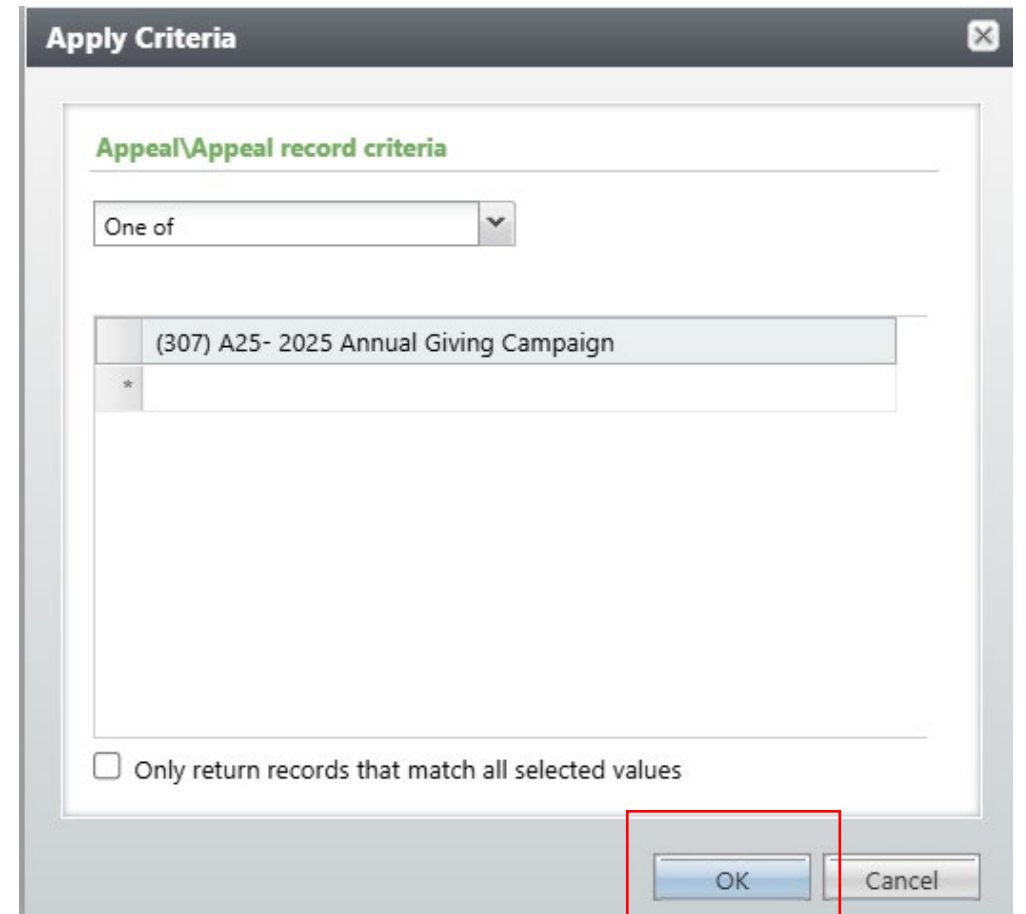
Global Pledge Write-off

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

Global Pledge Write-off

List for Write-offs

Write-Offs for your council. This list includes write-offs on or after 1/1/2018. (92)

Appeal equal to: Constituent Name equal to:

Council #	Appeal	Constituent ID	Constituent Name	Pledge Date ▼
		8:	Be	6/17/2024

 Go to Constituent  Go to revenue  View Details  Delete Write-Off

You can now delete individual write-offs from this list, as well as View Details of the write-off. If you delete any write-offs, notify your accountant/bookkeeper.

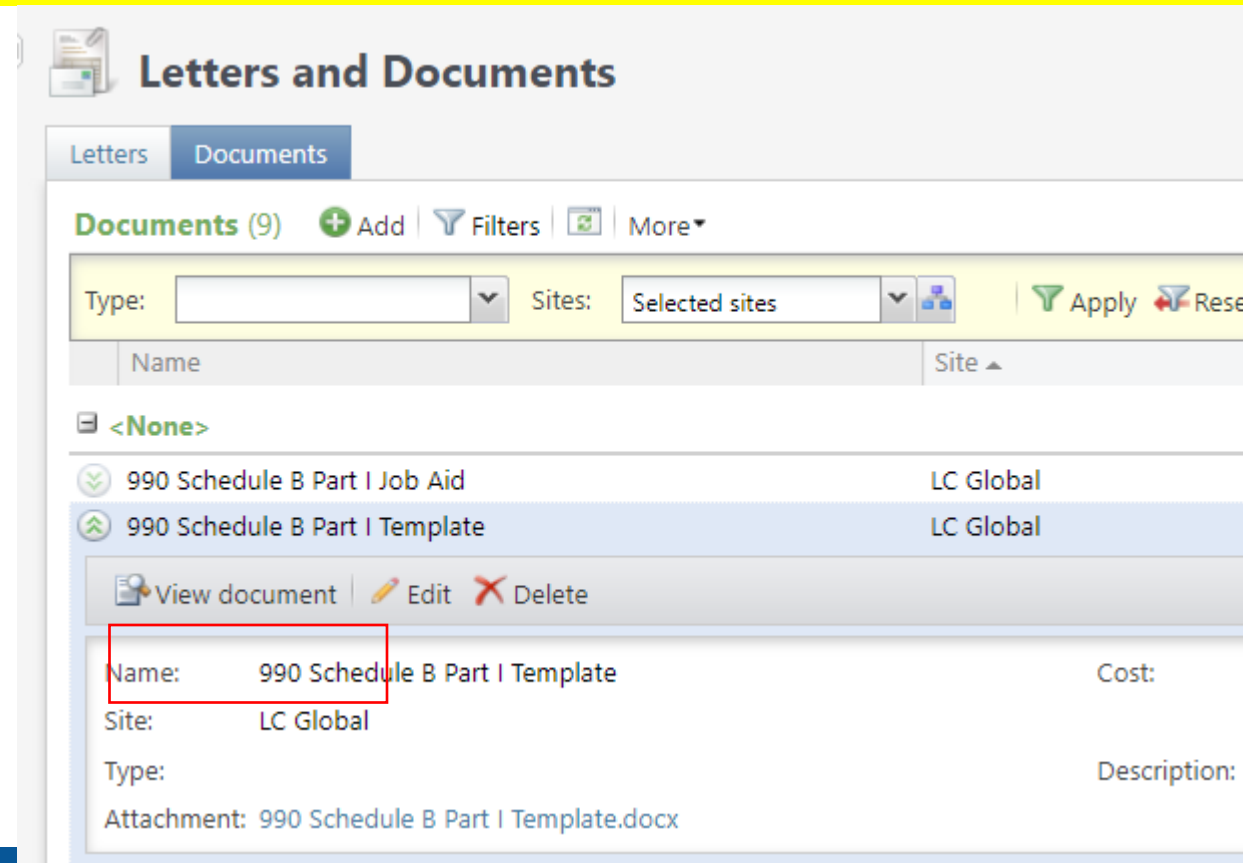
IRS 990

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:

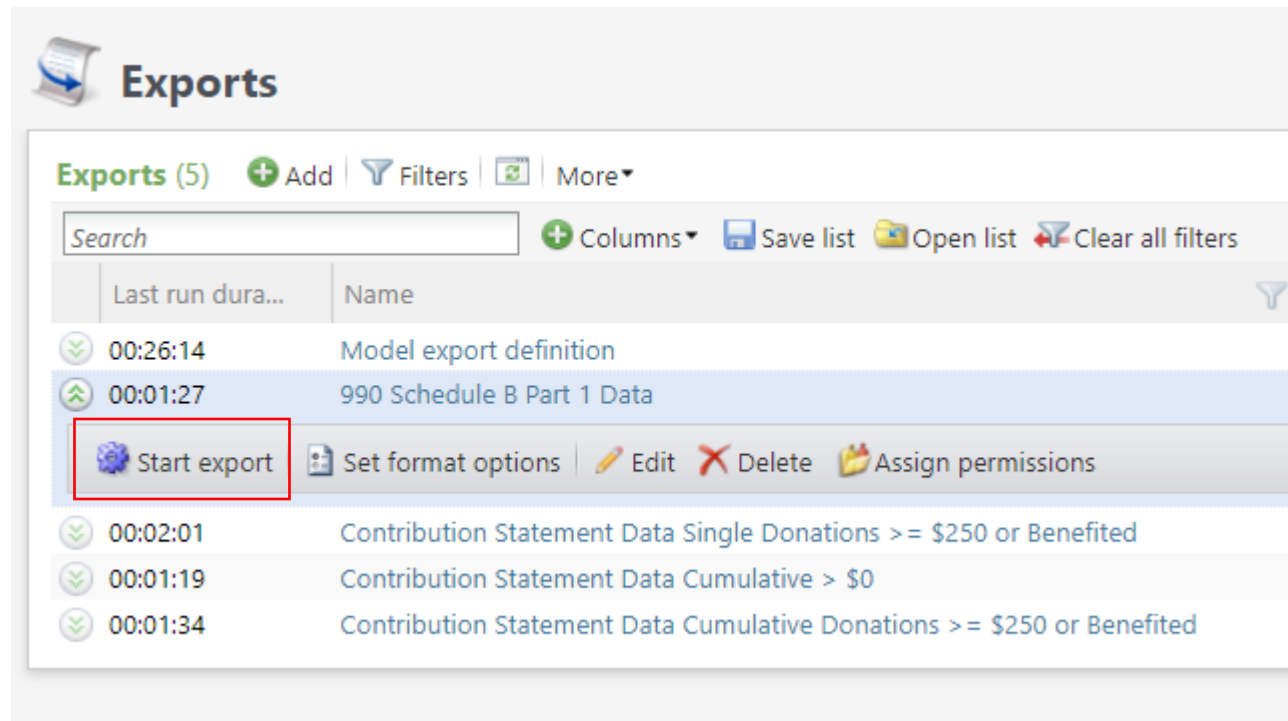
Site: LC Global

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.

The screenshot displays the '990 Schedule B Part 1 Data - Export' interface. At the top, there's a header with a magnifying glass icon and the text 'Export 990 Schedule B Part 1 Data - Export'. Below this, a metadata section shows 'Name: 990 Schedule B Part 1 Data', 'Description: DO NOT EDIT THIS PROCESS - JUST RUN IT', 'Query name\Export definition: 990 Schedule B Part 1 - New', and 'Export type: Ad-hoc Query'. A tabbed interface below has 'Recent Status', 'History', and 'Job Schedules' tabs. The 'Recent status' tab is active, showing a 'Recent status' section with a 'Download output' button (a document icon with a download arrow) highlighted by a red rectangle. Below this, the status is 'Completed' with a green checkmark icon. Further down, a table of details is shown:

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

IRS 990

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

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

IRS 990 – Sample Output

Name of Organization		Employer identification number	
XYZ Council		67-8923983829641	

Part I Contributors 2023

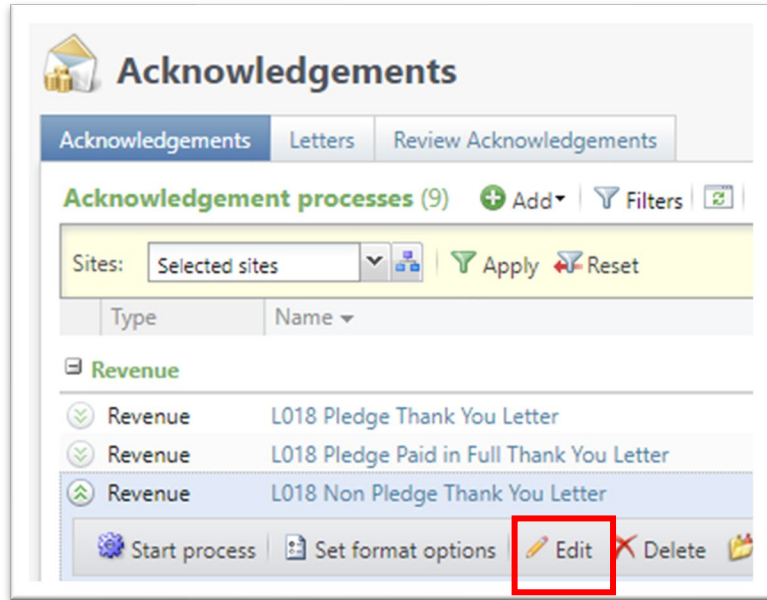
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Sta PO Cor	\$.00	Person
2	Mc PO Eug	\$.00	Person
3	Wil PO Eug	\$ 1.00	Person
4	Bui 195 Eug	\$.00	Person
5	Cha 302 Eug	\$.00	Person
6	Lan 302 Eug	\$.00	Person

Updating Reminders & 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 new appeals

Acknowledgements



Acknowledgements

Acknowledgements Letters Review Acknowledgements

Acknowledgement processes (9) + Add Filters

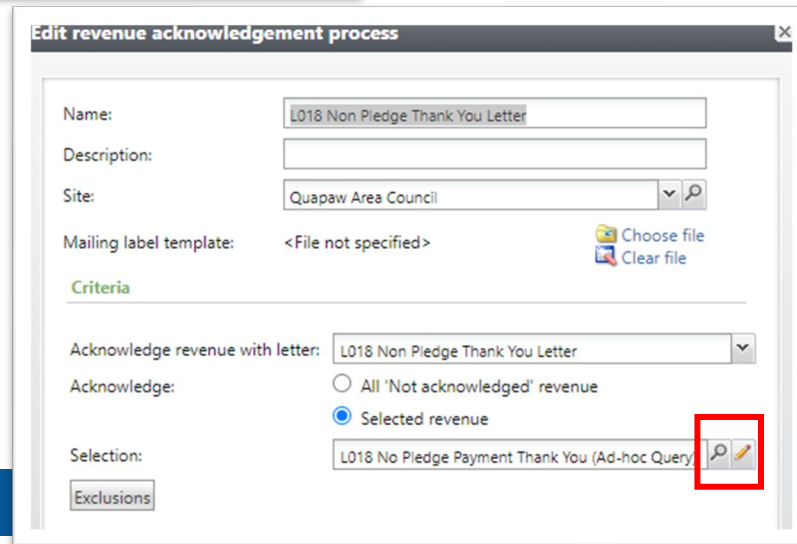
Sites: Selected sites Apply Reset

Type Name

Revenue

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

Start process Set format options **Edit** Delete



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

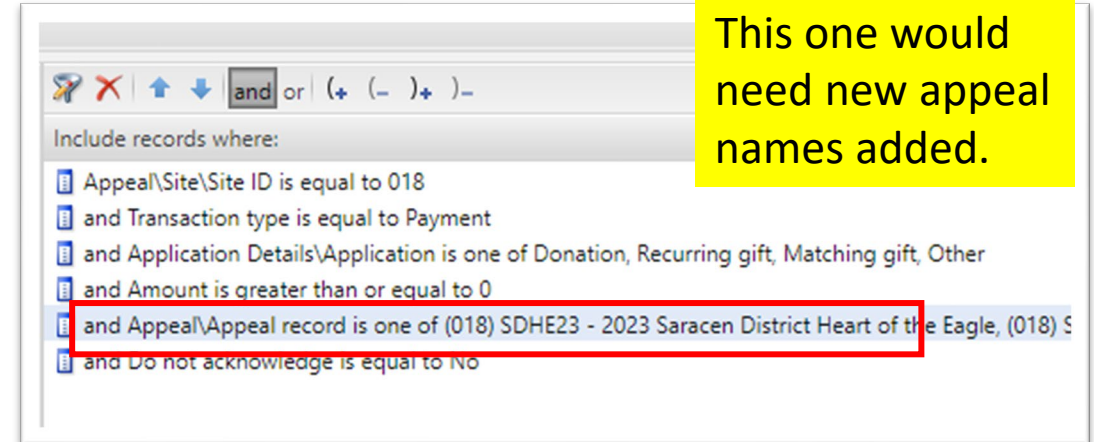
Criteria

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**

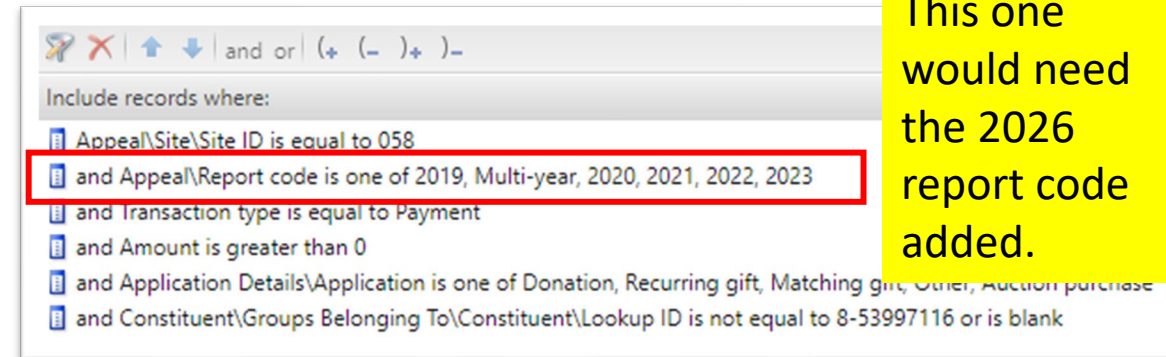
Exclusions



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.

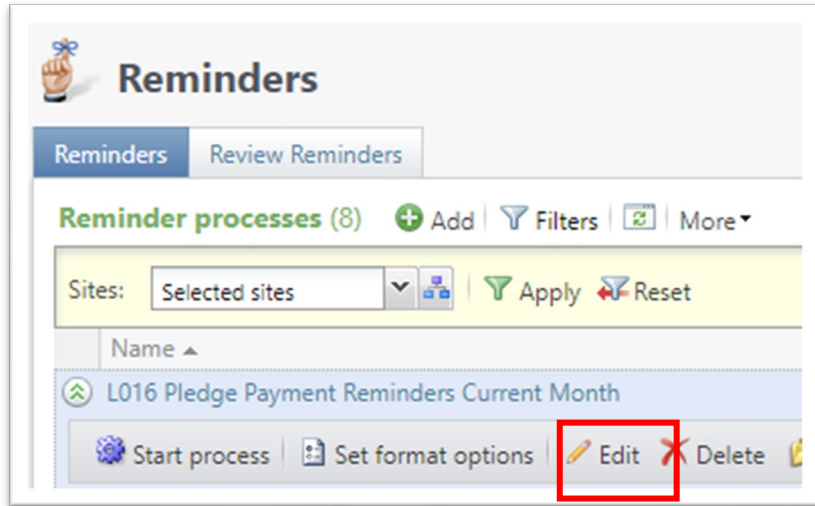


Include records where:

- 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

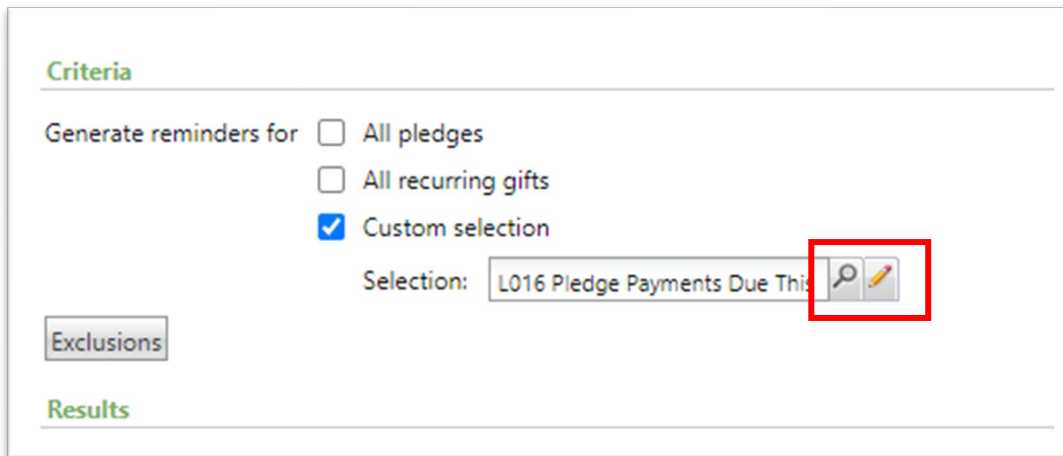
Reminder processes (8) + Add | Filters | More ▾

Sites: Selected sites | Apply | Reset

Name ▲

L016 Pledge Payment Reminders Current Month

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



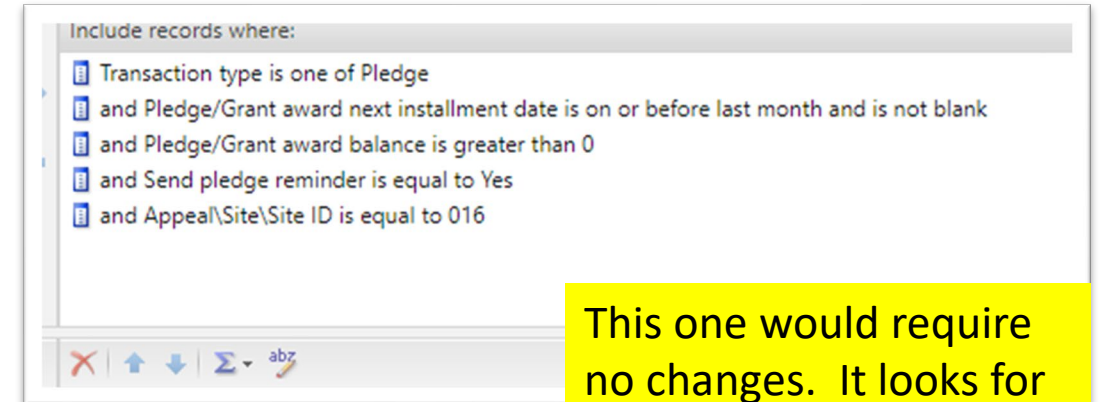
Criteria

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

Selection: L016 Pledge Payments Due This Month

Exclusions

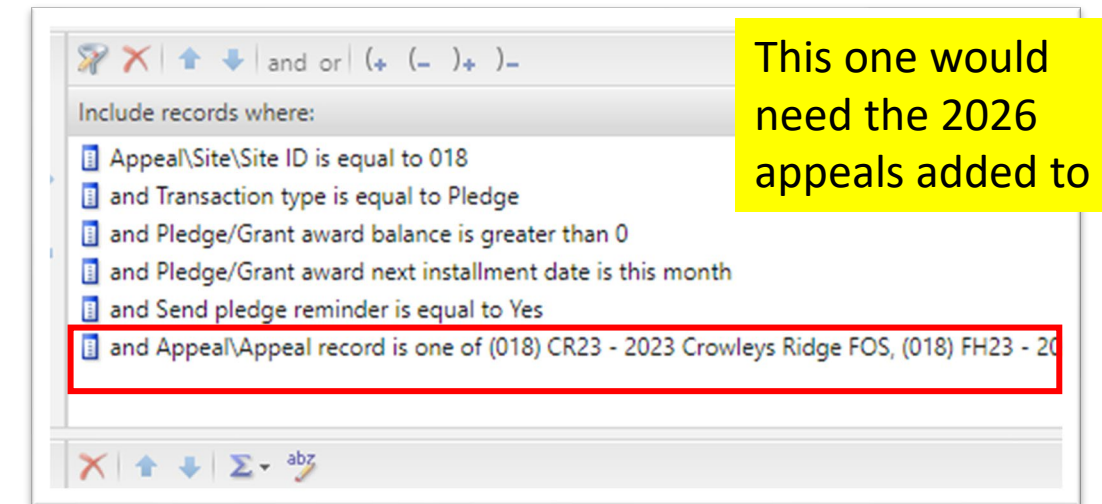
Results



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:

- 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.

Contribution Statements

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](#)

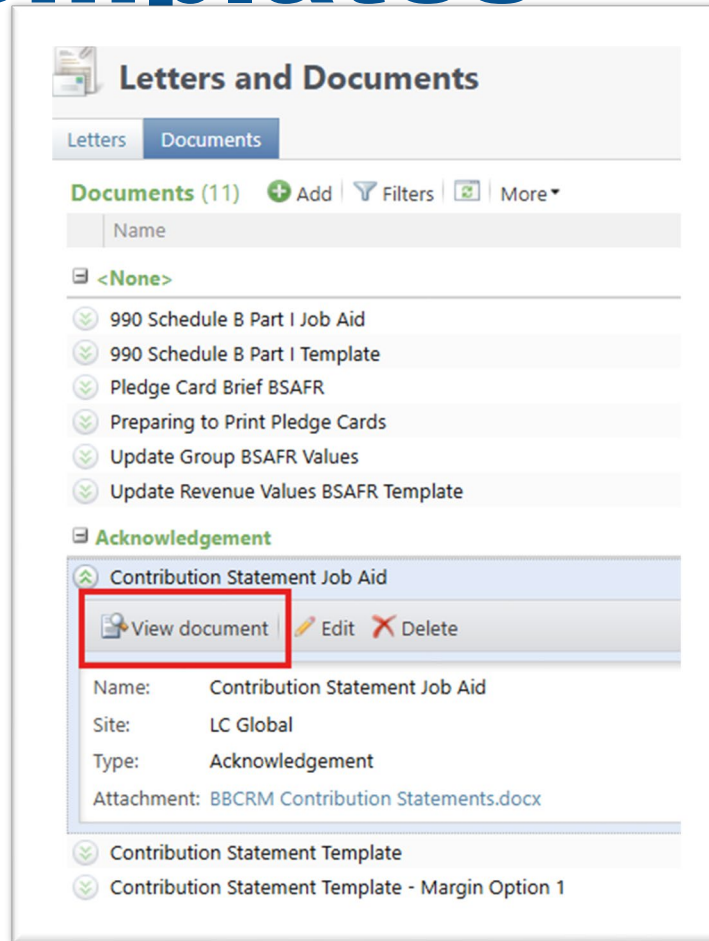
[Print Unit Pledge Cards](#)

[Billing Reminders](#)

Contribution [Statements](#)

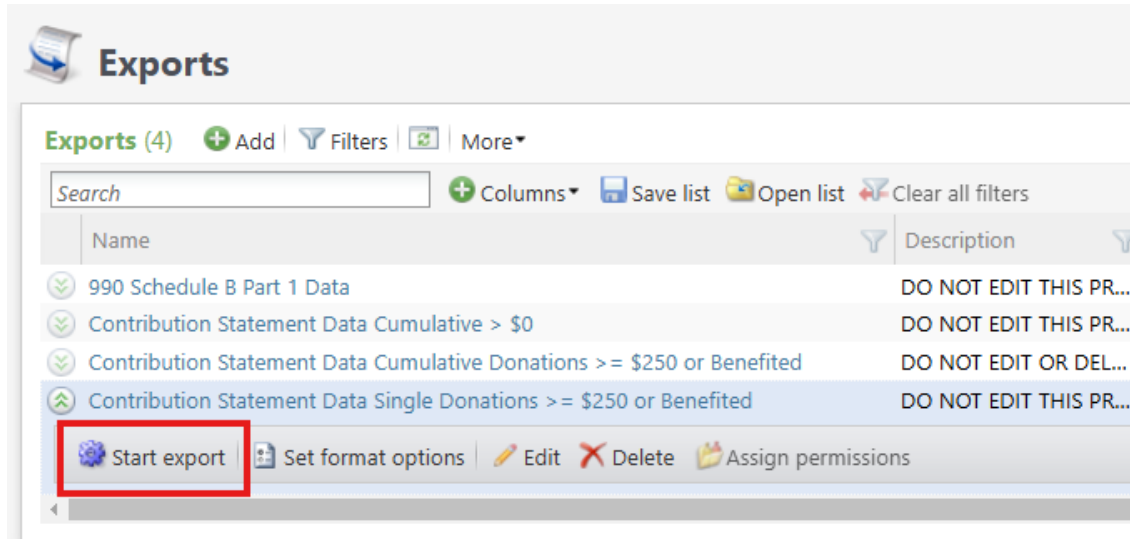
[Running Acknowledgements](#)

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.

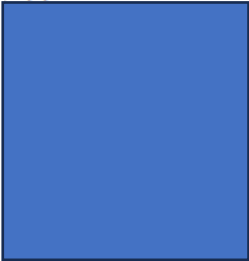
Contribution Cumulative >= \$250 will send a statement to donors whose summed payments are \$250 or greater.

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.
6. If you use the event function correctly, 90% of the three columns will have values in them.

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
PO
Ly

Dear ,

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

Date	Amount Paid	Appeal Name	Benefit Value	Net Contribution
4/12/2024	250.00		0.00	250.00
10/10/2024	2,000.00		0.00	2,000.00
4/12/2024	750.00		100.00	650.00
		Benefit: Meal(s) and Fees		
4/12/2024	750.00		250.00	500.00
		Benefit: Meals(s) and Green Fees		
1/22/2024	5,000.00	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

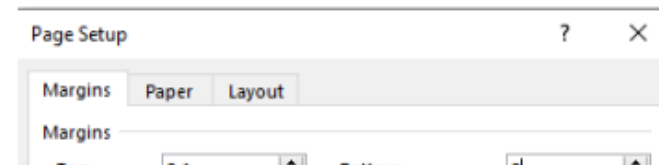
These gifts types thank for an item not a dollar amount.

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



Council Structure Changes

What cause a Structure Change

- Council merges with another
- Council shrinks the number of districts
- Council updates district names
- Council realigns same districts

FR reporting issues from a structure change

- BSA Structure drop down has wrong options in it
- Reporting history does not align
- BSA Constituent Appeal report has duplications
- BSA Constituent Progress Report OLTP yearly comparison
- Batch entry using Group IDs can cause errors

FR Fixes

- Update BSAFR Groups so BSA Structure is updated on the groups
 - **Cleans reporting structure**
 - **Updates groups for future use in batch entry**
- Update current appeal BSAFR Snapshots
 - **Corrects batch entry**
- Update prior BSA Structure attribute on pledges and payment on past appeals – you decide how far back
 - **Corrects reporting issues**
- Merge FOS appeals – Merged councils

How to update

- Manually update if small number of changes.
 - BSAFR Tab on Groups
 - BSAFR Snapshot Tab on Groups
 - Attribute tab on revenue records
- **Create a ticket and request support**
- There is no need to stop data entry in the current year while prior records are updated.

Workplace ~ Viva Engage (Teams)

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

Link Viva Engage to Teams

The screenshot displays the Microsoft Teams interface. On the left sidebar, the 'Apps' icon (a plus sign in a square) is highlighted with a red arrow. The main chat window shows a conversation with 'Don Day (You)'. A message from 'Don Day (You)' contains a link to a Viva Engage post. The link is highlighted with a red box, and a red arrow points from the 'Apps' icon in the sidebar to this link. The Viva Engage post is titled 'How to use the Viva Engage app' and includes a description of the app's features. The chat window also shows a list of pinned chats and a recent chat list at the bottom.

Link Viva Engage to Teams

The image illustrates the steps to link Viva Engage to Microsoft Teams. It is divided into three main sections:

- Left Pane (Teams Interface):** Shows the Microsoft Teams sidebar. The 'Apps' icon (a plus sign in a square) is highlighted at the bottom. A search bar is visible with the text 'Search for Viva Engage'.
- Middle Pane (App Search Results):** Displays a grid of available apps. The 'Viva Engage' app, represented by a green circular icon, is highlighted. Other visible apps include Approvals, Planner, Avatars, Word, Whiteboard, Stream, Help, and OneNote.
- Right Pane (Viva Engage Interface):** Shows the Viva Engage web interface. The 'BBCRM User Forum' is selected under the 'Communities' section. The forum page displays a header with the community name, a 'Private' status indicator, and tabs for 'Conversations', 'About', 'Files', and 'Events'. Below the header, there are options to 'Share thoughts, ideas, or updates' using Discussion, Question, Praise, or Poll. A post by 'Don Day' is visible, dated 'Thu at 12:19 PM', with the text 'Workplace is being discontinued by Facebook so welcome to the new CRM User Forum'.

Blackbaud Resources

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Council Assessments

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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 2024
[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 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

Blackbaud Resources

<https://boyscouts.sharepoint.com/sites/000-BlackbaudUserGuide/SitePages/Blackbaud-CRM-User-Guide.aspx>

Blackbaud User Guide

[MasterID](#)[Yearly Tasks](#)[Batch Error List Search](#)

Quick Links

 BBCRM Production

 BBCRM Training

 [Open a Help Ticket](#)

 BBCRM User Forum

 Other CRM Resources

Support Documents

 New Designation Request Form

 Event Revenue GL Request Form

Next User Forum

February 25th, 2026 - 10AM / 2PM CST
- Email Don.Day@scouting.org to sign up!

MasterID

[Back to top](#)

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

MasterID is a unique identification number ("identifier") that will be used to connect duplicate records for a constituent in the Blackbaud CRM.

MasterID Video Training

[See all](#)

+ New

...

All Documents

⌵

ⓘ

 Name

⌵

MasterID PDF Training

[See all](#)

+ New

...

All Documents

⌵

ⓘ

 Name

⌵

Scouting  America

Blackbaud Resources

Batch Error Search List

Batch L1234567x1

Main Revenue

Batch Constituent Co

Save Save and close Export Solicit codes Ed

Properties

	Constituent	Lookup ID	Amount
1	John Smith	8-12345678	\$1,234.00

What does this batch error mean?!!?

Have a batch error? Click the little red X to see the error message. On this page, press Ctrl + F on your keyboard, then start slowly typing in the red error message to find the solution in this list!

What does this batch err 1/2 ^ v X

If your error message isn't listed or if additional help is required, please open a ticket with Member Care with the batch number, error message, and 'This error is not listed in the Batch Error Search List' so that we can troubleshoot and add it here!

Open a Help Ticket

Batch Error Search List

[Back to top](#)

- **Arithmetic Operation Resulted in Overflow**
 - The maximum number of installments on a pledge can be 150. There are likely extra installments from conversion that can be removed, but the council will need to work around this.

Overview

Blackbaud CRM is a cloud-based Constituent Relationship Management platform. It facilitates the management of contacts, prospects, reporting and the recording of fundraising activities. It can be accessed via the following link: [Blackbaud CRM](#)

Request Support

- [Open A Request](#) - To add a current employee as a user within Blackbaud.
- [Open A Request](#) - If adding a new employee, Blackbaud access can be requested during this process.
- [Open A Request](#) - To report a problem or request troubleshooting in Blackbaud.

* Required

Blackbaud



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

4. Constituent Name

Please provide the name of the Constituent if applicable

Enter your answer

5. Constituent ID

Please provide the Constituent ID applicable

Enter your answer

6. Appeal

Please provide the name of the Appeal if applicable

1. **Description** *

A brief description of your problem.

Enter your answer

2. **Application** *

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

Enter your answer

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

(optional)

 Upload file

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

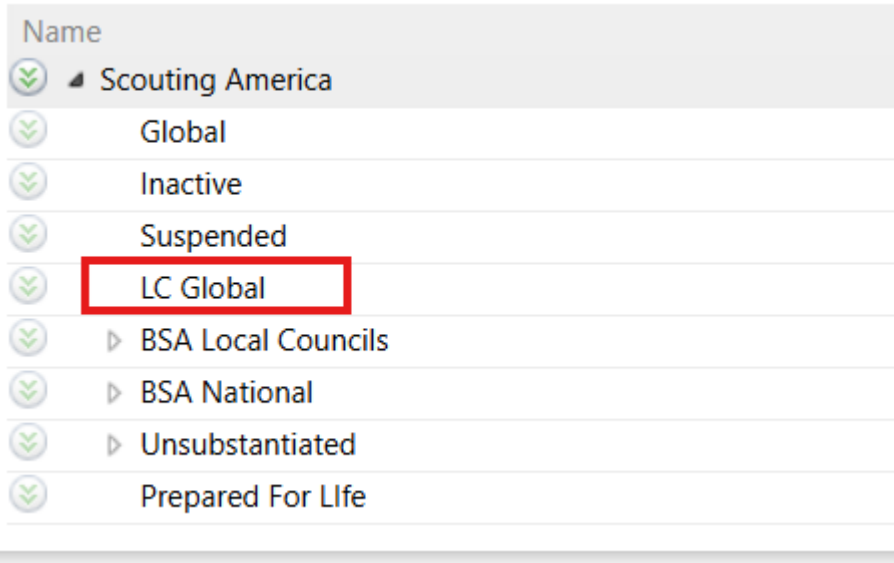
Submit

Member Care

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

Other Items

- CRM down for SQL Update
 - 2/27/26 at 11:00 PM till 2/28/26 11:00 AM
- Site Tree Change
 - LC Global moved above BSA Local Council
 - Affects Local Admins who might add roles to employees.



Next Forum

March 18, 2025

10:00 am & 2:00 pm CT

Questions & Answers