





**CRM USER FORUM**

**May 20, 2026**

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# Objectives

- CRM Hygiene
  - Cleaning up constituent data
  - Deleting un-used queries
- Using CAPs in CRM
- Questions and Answers

# Revenue Data Hygiene

The screenshot shows the 'Revenue' application window. It has three main sections: 'More tasks', 'Reports', and 'Transactions'. The 'More tasks' section includes 'Appeal progress results', 'Daily Revenue Transactions List', 'Gift in Kind List', 'Open Pledge List', 'Recurring Gift List', and 'Revenue Data Hygiene' (which is highlighted with a red underline). The 'Reports' section includes 'BSA Appeal Constituent Export (OLTP)', 'BSA Appeal Constituent Report (OLTP)', 'BSA Appeal Progress Export (OLTP)', 'BSA Appeal Progress Report (OLTP)', 'Pledge Receivable Aging Report', and 'Appeal Progress by Category'. The 'Transactions' section includes 'Transaction search', 'Batch entry', 'Batch search', 'Add a pledge', 'Add a payment', and 'Add a recurring gift'.

Below these sections is a 'Site Search' dialog box. It contains the following fields: 'Site ID' (with a red underline), 'Name', 'Short name', 'Acronym', and 'Site type' (a dropdown menu). There are 'Search' and 'Clear' buttons to the right of the 'Site ID' field. Below the search fields is a table titled 'Results (1 record found)'. The table has columns: 'Site ID', 'Name', 'Short name', 'Acronym', 'Site type', and 'Site path'. The first row of the table is highlighted with a red underline and contains the following data: 'Site ID' (redacted), 'Name' (redacted), 'Short name' (redacted), 'Acronym' (redacted), 'Site type' (Local Council), and 'Site path' (Boy Scouts of A...). At the bottom of the dialog box are 'Help', 'Select' (with a red underline), and 'Cancel' buttons.

We have a set of data lists to help councils more quickly find 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 |               |                 |
| <a href="#">+ Add Attribute</a> <a href="#">Go to Revenue</a> |      |              |          |                  |             |                                    |               |                 |
| 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 |                |                 |                    |                |              |                   |
| <a href="#">Go to Revenue</a> |      |          |                  |               |             |                         |              |                |                 |                    |                |              |                   |
| 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) [\[i\]](#) 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 Group ID | BSAFR Group ... |
|-------------------------------|---------|----------|------------------|---------------|-------------|------------------|--------------|-------------------|-----------------|--------------------|-------------------|----------------|-----------------|
| 8-40                          | Ad...   | \$15.00  | Pledge           | Donation      | 2023        | (U) S23 - 202... | rev-45527856 | Appalachian Trail | Family Division |                    |                   |                |                 |
| <a href="#">Go to Revenue</a> |         |          |                  |               |             |                  |              |                   |                 |                    |                   |                |                 |
| 8-53                          | Alic... | \$51.50  | Payment          | Donation      | 2023        | (U) S23 - 202... | rev-45387371 | Appalachian Trail | Family Division |                    |                   |                |                 |
| 8-40                          | Am...   | \$3.00   | Payment          | Donation      | 2023        | (U) S23 - 202... | rev-45667905 | Appalachian Trail | Family Division |                    |                   |                |                 |
| 8-40                          | Am...   | \$100.00 | Pledge           | Donation      | 2023        | (U) S23 - 202... | rev-45399981 | Appalachian Trail | Family Division |                    |                   |                |                 |
| 8-35                          | Ant...  | \$51.50  | Payment          | Donation      | 2023        | (U) S23 - 202... | rev-45341531 | Appalachian Trail | Family Division |                    |                   |                |                 |
| 8-58                          | Ass...  | \$3.00   | Payment          | Donation      | 2023        | (U) S23 - 202... | rev-45490473 | Appalachian Trail | Family Division |                    |                   |                |                 |
| 8-39                          | Ass...  | \$100.00 | Payment          | Matching gift | 2023        | (U) 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 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 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

Ask for help with these tab - if done incorrectly PeopleSoft may have issues.

# 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)  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                                                                                            | Br   | 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 |      |              |                 |              |                |                  |             |             |        |                  |                      |                     |
| 8-59                                                                                            | 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

| - 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 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          |                            |
| 3-2                                                                                                                                                                                    | N                  | rev-45935733              | \$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.

# Pledge Payment Check

- Search for your appeal
- Proceed to Revenue Details Splits tab
- Review on screen or download to excel
- Sort by Lookup ID, transaction (ascending), Application (descending)

| Column  | Sort On     | Order       |
|---------|-------------|-------------|
| Sort by | Lookup ID   | Cell Values |
| Then by | Transaction | Cell Values |
| Then by | Application | Cell Values |

- Looking for donors with pledge balances that have Payment Donations that should be Payment Pledge

# Pledge Payment Check Example

| Constituent    | Date       | Transaction | Application | Split Amount | Total Amount | Pay Method |
|----------------|------------|-------------|-------------|--------------|--------------|------------|
| John Kuehn     | 2/7/2026   | Pledge      | Donation    | \$8,000.00   | \$8,000.00   | None       |
| John Kuehn     | 5/8/2026   | Payment     | Donation    | \$2,000.00   | \$2,000.00   | Check      |
| Cornelia Ellis | 12/23/2025 | Pledge      | Donation    | \$1,000.00   | \$1,000.00   | None       |
| Cornelia Ellis | 4/27/2026  | Payment     | Pledge      | \$500.00     | \$500.00     | Check      |
| Cornelia Ellis | 1/27/2026  | Payment     | Pledge      | \$500.00     | \$500.00     | Check      |

The yellow represent an error that might need to be fixed. There is a pledge for \$8,000 with a balance of \$8,000. Then there is a payment of \$2,000 added as a donation. If this is a pledge payment it should be fixed in an update batch. Currently it overstates contribution by \$2,000 and pledge receivables are also overstated by \$2,000. Live data with names changed for the example.

# Deleting Unused Queries

- Information Library has 27929 Queries
- Many are created for a particular use and then not used again
- We encourage periodic review and deletion.
- Queries will not delete if tied to a business process or used as a selection in another query (Dependencies).
- Configuration queries should not be deleted.
  - Added for you at conversion
  - Can be found if you sort your query list by "Created on". First queries created.

# Deleting Queries

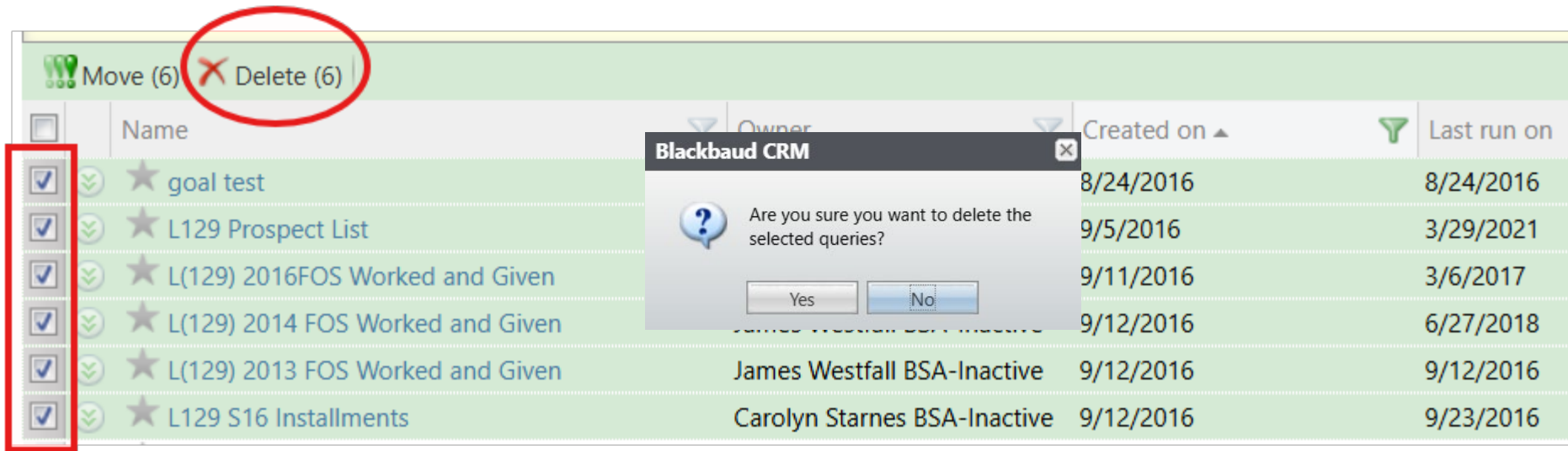
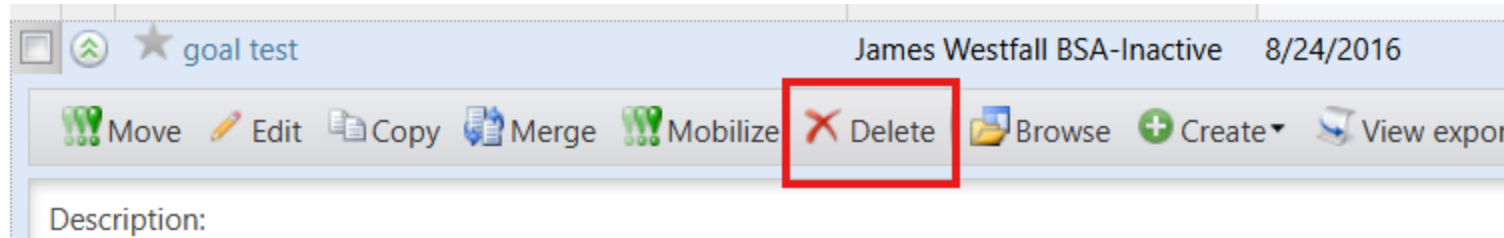
- Prepare your information library view.
- Columns to have visible – Name, Owner, Created on, Last run on, Modified on.
- This allows you to see:
  - If an inactive user created it.
  - When it was created.
  - If it has been recently run and or changed.

| <input type="checkbox"/> | Name                                                    | Owner                        | Created on... | Last run on | Modified on |
|--------------------------|---------------------------------------------------------|------------------------------|---------------|-------------|-------------|
| <input type="checkbox"/> | ★ goal test                                             | James Westfall BSA-Inactive  | 8/24/2016     | 8/24/2016   | 10/19/2016  |
| <input type="checkbox"/> | ★ L129 Prospect List                                    | James Westfall BSA-Inactive  | 9/5/2016      | 3/29/2021   | 5/27/2021   |
| <input type="checkbox"/> | ★ L(129) 2016FOS Worked and Given                       | James Westfall BSA-Inactive  | 9/11/2016     | 3/6/2017    | 5/27/2021   |
| <input type="checkbox"/> | ★ L(129) 2014 FOS Worked and Given                      | James Westfall BSA-Inactive  | 9/12/2016     | 6/27/2018   | 5/27/2021   |
| <input type="checkbox"/> | ★ L(129) 2013 FOS Worked and Given                      | James Westfall BSA-Inactive  | 9/12/2016     | 9/12/2016   | 5/27/2021   |
| <input type="checkbox"/> | ★ L129 S16 Installments                                 | Carolyn Starnes BSA-Inactive | 9/12/2016     | 9/23/2016   | 9/20/2016   |
| <input type="checkbox"/> | ★ L129 Payment for Campaign Progress Report (EOM)       | Carolyn Starnes BSA-Inactive | 9/26/2016     | 2/13/2018   | 12/8/2016   |
| <input type="checkbox"/> | ★ L129 WMY Thank You Pledges Paid in Full               | Carolyn Starnes BSA-Inactive | 10/31/2016    |             | 12/8/2016   |
| <input type="checkbox"/> | ★ L129 KR Payment Thank You Letter Assignment           | Carolyn Starnes BSA-Inactive | 10/31/2016    |             | 11/20/2025  |
| <input type="checkbox"/> | ★ L129 KR Pledge Acknowledgement Letter Assignments     | Carolyn Starnes BSA-Inactive | 10/31/2016    |             | 11/20/2025  |
| <input type="checkbox"/> | ★ L129 Endowment Constituent List (2013-2016) \$1,000 + | Carolyn Starnes BSA-Inactive | 11/8/2016     |             | 11/8/2016   |
| <input type="checkbox"/> | ★ L129 S17 FOS By Solicitor                             | Carolyn Starnes BSA-Inactive |               |             |             |
| <input type="checkbox"/> | ★ L129 Ma-Ka-Ja-Wan Alumni                              | Rich White BSA-BSA           |               |             |             |
| <input type="checkbox"/> | ★ L129 Payment for Campaign Progress Report (Today)     | Carolyn Starnes BSA-Inactive |               |             |             |
| <input type="checkbox"/> | ★ L(129) 2017FOS Worked and Given                       | Carolyn Starnes BSA-Inactive |               |             |             |
| <input type="checkbox"/> | ★ L129 Campaign Progress Report 2017 FOS (Today)        | Carolyn Starnes BSA-Inactive |               |             |             |
| <input type="checkbox"/> | ★ L129 Write-offs                                       | Carolyn Starnes BSA-Inactive |               |             |             |
| <input type="checkbox"/> | ★ L129 Board Members                                    | Carolyn Starnes BSA-Inactive |               |             |             |
| <input type="checkbox"/> | ★ L129 Appeal Donations                                 | Carolyn Starnes BSA-Inactive |               |             |             |
| <input type="checkbox"/> | ★ L129 2018 Board Giving Detail                         | Carolyn Starnes BSA-Inactive |               |             |             |

Process = Review queries by "Created on" date and queries created by inactive user. If not ran for a few years, consider removing. Several older queries have been replaced by the **BSA Appeal Constituent Export (OLTP)** or a download from the **Revenue Detail (Splits)** tab on an appeal.

# Delete single or in bulk

You can delete one query or multiple queries depending on your preferences. Drop the chevron for a single query or check the boxes for multiples.



# Query that does not delete

L(129) 2016FOS Worked and Given James Westfall BSA-Inactive 9/11/2016

Move Edit Copy Merge Mobilize Delete Browse Create View exports

Description:

|                 |                 |                         |              |                                       |
|-----------------|-----------------|-------------------------|--------------|---------------------------------------|
| Created by:     | NETBSA\jwestfal | Created on:             | 9/11/2016    | OData: <a href="#">Get OData link</a> |
| Modified by:    | NETBSA\jkuehn   | Modified on:            | 5/27/2021    |                                       |
| Record type:    | Constituent     | Source view:            | Constituents |                                       |
| Selection type: | Dynamic         | Show in query designer: | Yes          |                                       |

Prevent delete reason: The ad-hoc query could not be deleted because there is one or more dependencies.

This query is a selection and is used within another query. If you can find the later query that is looking for unworked and delete that query this query will then delete. **Create a ticket for support – we can help remove those queries depended on processes or other queries.**

# Constituent Hygiene

- Address Validation
- Correct Capitalization

# Adding an Address

| Personal                                                             | Primary contact                                                                      |
|----------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| Last name: <input type="text" value="Kuehn"/>                        | Address type: <input type="text" value="Home"/>                                      |
| First name: <input type="text" value="John"/>                        | Country: <input type="text" value="United States"/>                                  |
| Middle name: <input type="text"/>                                    | Address: <input type="text" value="4112 Twin Creeks"/>                               |
| Title: <input type="text" value="Mr"/> Title 2: <input type="text"/> | City: <input type="text" value="Fort Worth"/>                                        |
| Suffix: <input type="text"/> Suffix 2: <input type="text"/>          | State: <input type="text" value="TX"/> <input type="checkbox"/> Omit from validation |
| Nickname: <input type="text"/>                                       | ZIP: <input type="text" value="76244"/> <input type="button" value="Validate"/>      |
| Maiden name: <input type="text"/>                                    | <input type="checkbox"/> Do not send mail to this address                            |
| Marital status: <input type="text"/>                                 |                                                                                      |

| Personal                                                             | Primary contact                                                                      |
|----------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| Last name: <input type="text" value="Kuehn"/>                        | Address type: <input type="text" value="Home"/>                                      |
| First name: <input type="text" value="John"/>                        | Country: <input type="text" value="United States"/>                                  |
| Middle name: <input type="text"/>                                    | Address: <input type="text" value="4112 Twin Creeks Dr"/>                            |
| Title: <input type="text" value="Mr"/> Title 2: <input type="text"/> | City: <input type="text" value="Fort Worth"/>                                        |
| Suffix: <input type="text"/> Suffix 2: <input type="text"/>          | State: <input type="text" value="TX"/> <input type="checkbox"/> Omit from validation |
| Nickname: <input type="text"/>                                       | ZIP: <input type="text" value="76244-7521"/> <input type="button" value="Validate"/> |
| Maiden name: <input type="text"/>                                    | <input type="checkbox"/> Do not send mail to this address                            |
| Marital status: <input type="text"/>                                 |                                                                                      |

When adding a address place in the information that you have. I would encourage the use of Mr., Ms., or Mrs. if you know. This provides for a formal name in the system. Once the address is completed, click Validate before you save. This CASS certifies the address. If you do not want it to Cass certify, check the omit button.

The lower box shows the changes from the certification.

# Fixing Capitalization

- Find the Constituent with name to update
- Click pencil to edit
- Correct the name with proper capitalization
- Click a different field on the form - capitalization will revert.
- Correct capitalization a second time and save.

# Fixing constituent names

 **Kpmg - Llc**

Organization      Lookup ID: 8-15220012

Constituencies: Committee member

Organization Information  Addresses



Industry  
Employees: 0  
Subsidiaries: 0  
Parent

 **KPMG - LLC**

Organization      Lookup ID: 8-15220012

Constituencies: Committee member

Organization Information  Addresses



Industry  
Employees: 0  
Subsidiaries: 0  
Parent

How do I correct an organization name when it should be in Caps, or part of the name should be in Caps?

# Fixing constituent names

**Edit organization information**

Name:

Industry:

No. of employees:

No. of subsidiaries:

Website:

☐ This is a primary organization

Edit box opens. Capitalize like it should be.

**Organization information**

Name:

Industry:

No. of employees:

No. of subsidiaries:

Website:

☐ This is a primary organization

Click somewhere else on the form. It will revert to non-capitalization

**Edit organization information**

Name:

Industry:

No. of employees:

No. of subsidiaries:

Website:

☐ This is a primary organization

Correct the name and save. It will keep the capitalization.

# EveryAction

- Replacing Scouting Gives
- Council onboarding currently in groups upon request
- Batch assignee will get a revenue batches and CUB batches
- CUB = Constituent Update Batch
  - If no errors - commit batch
  - If duplicate identified – match to correct record
  - If address, phone or email error clear line or check as primary
    - Address already exist – delete address in address field
    - Must have primary address – check primary box in address field

# 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 messages and a 'Recent' section at the bottom.

# Link Viva Engage to Teams

The image is a composite screenshot illustrating the integration of Viva Engage with Microsoft Teams. On the left, the Microsoft Teams interface is shown with the 'Apps' tab selected. A search bar at the top of the app list contains the text 'Search for Viva Engage'. The Viva Engage app icon, a green cube, is highlighted. Below it, other apps like Approvals, Planner, Avatars, Word, Whiteboard, Stream, Help, and OneNote are visible. A 'Get more apps' button is at the bottom. On the right, the Viva Engage application is open. The top navigation bar includes 'Home', 'Don Day', and a 'New post' button. The main content area shows the 'BBCRM User Forum' with a purple header image. Below the header, there are tabs for 'Conversations', 'About', 'Files', and 'Events'. A post by 'Don Day' is visible, titled 'Workplace is being discontinued by Facebook so welcome to the new CRM User Forum'. The right sidebar shows forum details: 'Members • 7', 'Info', 'Pinned' (CRM Resource Page o...), and 'Community resources' (SharePoint library, SharePoint site, OneNote, Planner). A 'Create live event' button is at the bottom of the sidebar.

# Blackbaud Resources

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**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 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](https://www.scouting.org/financeimpact)

# Blackbaud Resources



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## 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

# 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
-  Open a Help Ticket
-  BBCRM Forum Recordings
-  Every Action Resources

### Support Documents

-  New Designation Request Form
-  Event Revenue GL Request Form

### Next User Forum

April 15th, 2026 - 10AM / 2PM CST  
- Email [Don.Day@scouting.org](mailto:Don.Day@scouting.org) to sign up!

## MasterID

[Back to top](#)

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

MasterID Video Training

[See all](#) MasterID PDF Training

[See all](#)

# 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.

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

\* 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

# Member Care

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

# Next Forum

June 17, 2026

10:00 am & 2:00 pm CT

# Questions & Answers



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