



**CRM USER FORUM**

**June 24, 2026**

**John Kuehn – Valerie Eaton – Cornelia Ellis**

# Objectives

- Recording Donor Advised Funds
- Recording Indirect Giving ie: AOL Giving. Workplace giving
- Making appeals inactive
- New Data Hygiene Tool: OLTP Duplicate Cleanup
- Correcting wrong inbound channels
- Questions and Answers

# Donor Advised Fund (DAF's)

- Donor places Monies in fund for charitable purposes
- Donor get tax break at the time of deposit – Letter from financial institution.
- Donor direct the fund to make charitable contributions.
- To Record
  - Place a pledge on Donor Record
  - Add DAF payment into CRM and pay off pledge
  - Add DAF Recognition credit on the payment to the donor

# Pledge/Payment

Main Revenue

Batch  
Save Save and close Export

Constituent  
Solicit codes

Constituent  
Edit Go to

Configuration  
Properties Customize fields

Processes  
Validate Update status Validate addresses (all rows) Update projected totals

Messages  
Set row message Clear row message Clear all Show all

Properties

|   | Constituent  | Lookup ID  | Amount     | Date      | GL post d... | Installment freque... | N... | Install... | S...                                | Appeal                         |
|---|--------------|------------|------------|-----------|--------------|-----------------------|------|------------|-------------------------------------|--------------------------------|
| 1 | Wonder Woman | 8152201... | \$2,500.00 | 6/22/2026 | 6/22/2026    | Single Installment    | 1    | 6/22/2026  | <input checked="" type="checkbox"/> | (PPL) MG26 - 2026 Major Giving |
| * |              |            |            |           |              |                       |      |            | <input type="checkbox"/>            |                                |

Main Revenue

Payment  
Apply

Pledge & recurring gift  
Edit installments Split designations Payment

Credit card reader  
Capture card info

Revenue details  
Tributes Matching gifts Benefits Solicitors Recognitions Business units

Note  
Add note Delete note

Properties

|   | Constituent                            | Lookup ID  | Amount     | Receipt amount | Date      | GL post date |
|---|----------------------------------------|------------|------------|----------------|-----------|--------------|
| 1 | Fidelity Donor Advised Funds - W Woman | 8-62655388 | \$2,500.00 | \$2,500.00     | 6/22/2026 | 6/22/2026    |
| * |                                        |            |            |                |           |              |

Pledge is placed on the constituent who has the DAF. Payment is then added on the DAF and the Revenue Apply Window is used to search for the pledge and assign payment to the pledge on the DAF owner. Reference field could contain DAF Wonder Woman.

Main Revenue

Payment Pledge & recurring gift Credit card reader Revenue details

Apply Edit installments Split designations Payment

Tributes Matching gift Benefits Solicitors Business units

Recognitions

Properties

| Constituent                              | Lookup ID  | Amount     | Rec |
|------------------------------------------|------------|------------|-----|
| 1 Fidelity Donor Advised Funds - W Woman | 8-62655388 | \$2,500.00 |     |

Recognitions

Payment for Fidelity Donor Advised Funds - W Woman

Total amount: \$2,500.00

| Constituent                 | Amount     | Recognition credit ty... | Effective d... |
|-----------------------------|------------|--------------------------|----------------|
| Fidelity Donor Advised F... | \$2,500.00 | Hard credit              | 6/22/2026      |
| Wonder Woman                | \$2,500.00 | Donor Advised Fund       | 6/22/2026      |

Distribute

Help OK Cancel

Apply to commitments for Fidelity Donor Advised Funds - W Woman

Payment amount: \$2,500.00 Apply by: ☒ Amount ☐ Percent

Unapplied amount: \$2,500.00

Search: Designation, constituent name, or any amount column

Date due: From: mm/dd/yyyy To: mm/dd/yyyy

Load commitments Auto apply Apply to row

| Application | Constituent  | Description                         | Balance    | Date due  | Amount due | Applied amount | Applied pe |
|-------------|--------------|-------------------------------------|------------|-----------|------------|----------------|------------|
| Pledge      | Wonder Woman | PFL00111 Friends of Scouting - O... | \$2,500.00 | 6/22/2026 | \$2,500.00 | \$0.00         |            |

Page 1 of 1

Displaying records 1 - 1 of 1

| Additional applications | Applied amount | Applied percent | Designation | Other type | Opportu... | Revenue ... | Campaig... |
|-------------------------|----------------|-----------------|-------------|------------|------------|-------------|------------|
| *                       |                |                 |             |            |            |             |            |

Help OK Cancel

Picture above shows the apply window open . A load commitment search was used to bring in the pledge we want to use the DAF payment to pay off.. The picture on the left illustrates the DAF payment attached to the pledge. We then opened the recognition window and added a recognition credit to the donor.



# Third Party Giving

- Donor makes a charitable gift via workplace charitable site.
- Workplace Charitable site send a check to your council with report of whom donated what.
- Take report and treat like how a DAF was done in first 3 slides.
- The 3rd party check might be split into multiple lines in the payment batch.
- Lump payment into one line and provide each person a recognition credit for Employee Giving - 1 appeal 1 structure 1 giving category.

# Lump sum 4 donors

One line in the batch for \$1,250. Appeal, Structure and Giving category will all be the same. Then proceed to the Revenue tab and click the Recognitions button. You should give a recognition credit to each person according to what they donated.

The screenshot shows a software interface with a 'Main' tab and a 'Revenue' sub-tab. The 'Revenue' sub-tab has several buttons: 'Payment', 'Pledge & recurring gift', 'Credit card reader', 'Revenue details', and 'Note'. The 'Revenue details' button is highlighted with a red box. Below the buttons, there is a 'Properties' section with a table. The table has columns: 'Constituent', 'Lookup ID', 'Amount', 'Receipt...', 'Date', 'GL post date', and 'Revenue type'. The table contains one row with the following data: 'One Cause', '8-18842189', '\$1,250.00', '\$1,250.00', '6/22/2026', '6/22/2026', and 'Payment'. Below the table, there is a 'Recognitions' dialog box. The dialog box has a title bar 'Recognitions' and a close button. Inside the dialog box, there is a section titled 'Payment for One Cause' with a total amount of '\$1,250.00'. Below this, there is a table with columns: 'Constituent', 'Amount', 'Recognition credit ty...', and 'Effective d...'. The table contains four rows, each with a red box around it. The rows are: 'One Cause' with amount '\$1,250.00' and 'Hard credit'; 'The Flash' with amount '\$500.00' and 'Employee giving cre...'; 'Wonder Woman' with amount '\$250.00' and 'Employee giving cre...'; 'Bat Man' with amount '\$250.00' and 'Employee giving cre...'; and 'Super Man' with amount '\$250.00' and 'Employee giving cre...'. All effective dates are '6/22/2026'. At the bottom right of the dialog box, there is a 'Distribute' button. At the bottom of the main window, there is a 'Help' button and 'OK' and 'Cancel' buttons.

| Constituent | Lookup ID  | Amount     | Receipt... | Date      | GL post date | Revenue type |
|-------------|------------|------------|------------|-----------|--------------|--------------|
| One Cause   | 8-18842189 | \$1,250.00 | \$1,250.00 | 6/22/2026 | 6/22/2026    | Payment      |

| Constituent  | Amount     | Recognition credit ty... | Effective d... |
|--------------|------------|--------------------------|----------------|
| One Cause    | \$1,250.00 | Hard credit              | 6/22/2026      |
| The Flash    | \$500.00   | Employee giving cre...   | 6/22/2026      |
| Wonder Woman | \$250.00   | Employee giving cre...   | 6/22/2026      |
| Bat Man      | \$250.00   | Employee giving cre...   | 6/22/2026      |
| Super Man    | \$250.00   | Employee giving cre...   | 6/22/2026      |

# 4 donor 4 structures

| Constituent | Lookup ID  | Amount   | Receipt... | Date      | GL post date | Revenue type | Application | Payment meth... | Check number |
|-------------|------------|----------|------------|-----------|--------------|--------------|-------------|-----------------|--------------|
| One Cause   | 8-18842189 | \$500.00 | \$500.00   | 6/22/2026 | 6/22/2026    | Payment      | Donation    | Check           | 666          |
| One Cause   | 8-18842189 | \$250.00 | \$250.00   | 6/22/2026 | 6/22/2026    | Payment      | Donation    | Check           | 666          |
| One Cause   | 8-18842189 | \$250.00 | \$250.00   | 6/22/2026 | 6/22/2026    | Payment      | Donation    | Check           | 666          |
| One Cause   | 8-18842189 | \$250.00 | \$250.00   | 6/22/2026 | 6/22/2026    | Payment      | Donation    | Check           | 666          |

| Appeal                         | Designation                              | Inbound channel      | Revenue category      | Giving Category | BSA Structure  |
|--------------------------------|------------------------------------------|----------------------|-----------------------|-----------------|----------------|
| (PPL) MG26 - 2026 Major Giving | PFL00111 Friends of Scouting - Operating | Friends of Scouti... | Unrestricted by donor | C Community     | 01 Monroe      |
| (PPL) MG26 - 2026 Major Giving | PFL00111 Friends of Scouting - Operating | Friends of Scouti... | Unrestricted by donor | C Community     | 01 Stanford    |
| (PPL) MG26 - 2026 Major Giving | PFL00111 Friends of Scouting - Operating | Friends of Scouti... | Unrestricted by donor | C Community     | 02 Discovery   |
| (PPL) MG26 - 2026 Major Giving | PFL00111 Friends of Scouting - Operating | Friends of Scouti... | Unrestricted by donor | C Community     | 01-Thunderbird |

One line for each donor. Check number is the same. 4 lines equal the amount of the check. Different structures. Each line would have one recognized person on it.

Payment



Apply

Pledge & recurring gift

Edit installments

Split designations

Payment

Properties

|   | Constituent | Lookup  |
|---|-------------|---------|
| 1 | One Cause   | 8-18842 |
| 2 | One Cause   | 8-18842 |
| 3 | One Cause   | 8-18842 |
| 4 | One Cause   | 8-18842 |
| * |             |         |

Edit installments

Split designations

Payment

Capture card info

Tributes

Benefits

★ Recognitions

Matching gifts

Solicitors

Business units

Add note

Delete note

| Constituent | Lookup ID  | Amount    | Receipt... | Date      | GL post date | Revenue type | Applic |
|-------------|------------|-----------|------------|-----------|--------------|--------------|--------|
| One Cause   | 8-18842189 | \$500.... | \$500.00   | 6/22/2026 | 6/22/2026    | Payment      | Pledge |

Payment method...

Check

Check

Check

Check

Recognition Dialog

Payment for One Cause

Total amount: \$500.00

|   | Constituent | Amount   | Recognition credit ty... | Effective d... |
|---|-------------|----------|--------------------------|----------------|
|   | One Cause   | \$500.00 | Hard credit              | 6/22/2026      |
|   | The Flash   | \$500.00 | Employee giving cre...   | 6/22/2026      |
| * |             |          |                          |                |

Distribute▼

Help

OK

Cancel

# Adding an employer

1. Proceed to constituent record
2. Click the relationship tab
3. Click add an Organization
4. Fill in the appropriate blanks.
5. If the employer matches, click the box that indicates that.

**Add a relationship**

Relationship information | Employment and contact information

Related organization:  
Justice League

**Relationship**

The Flash is the:  
Employee

Justice League is the:  
Employer

Start date: 6/1/2026

End date: mm/dd/yyyy

**General**

☒ This is the primary business for The Flash

☒ The organization will match contributions for this relationship

☐ This replaces the relationship with:

**Recognition credits**

☐ Apply to The Flash for revenue from Justice League

Recognition credit type: [dropdown]

Recognition credit match percent: 100.00

☐ Apply to Justice League for revenue from The Flash

Recognition credit type: [dropdown]

Recognition credit match percent: 100.00

**Comments**

Save Cancel

Help

# Inactivate appeals

- Reduces what's returned in an Appeal Search.
- Reduces the number of source codes sent to Every Action
- Can be done in bulk on the Appeal Progress Results datalist
- Use the Appeal Data Integrity tab
- Revenue \ More Tasks \ Appeal Progress Results
- It will request your site before the list opens for you.

## Jayhawk Area Council (197) - Appeal Progress Results

← Appeal Data Integrity

Contributions by Segment

Appeal Designations

Contribution Summary

Payment Summary

Write-off &

Appeal Data Integrity ... STEPS: (1) Filter/Sort/Group to find Appeals missing data (2) Click chevron to edit Appeal re

Active equal to:

Appeal equal to:

Report Code equal to:

| <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                         | Missing A Field... | Active? | Appeal                               | Goal         | Prior Appeal                         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|---------|--------------------------------------|--------------|--------------------------------------|
| <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                         | Yes                | Yes     | (197) ED25 - 2025 Eagle Scout Dinner | \$0.00       | (197) ED24 - 2024 Eagle Scout Dinner |
| <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                         | Yes                | Yes     | (197) CS24 Camperships               | \$5,000.00   |                                      |
| <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                         | Yes                | Yes     | (197) ED24 - 2024 Eagle Scout Dinner | \$0.00       | (197) ED23 - 2023 Eagle Scout Dinner |
| <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                         | Yes                | No      | 2020 FOS Mailings                    | \$230,000.00 |                                      |
| <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                         | Yes                | Yes     | (197) C05 - 2005 Clays               | \$0.00       |                                      |
|  Go to appeal  Edit appeal  Edit prior appeal  Mark inactive |                    |         |                                      |              |                                      |
| <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                         | Yes                | Yes     | (197) C06 - 2006 Clays               | \$0.00       | (197) C05 - 2005 Clays               |
| <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                         | Yes                | No      | (197) C09 - Sporting Clays           | \$0.00       | (197) C06 - 2006 Clays               |
| <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                         | Yes                | Yes     | (197) C96 - 1996 Capital Campaign    | \$263,000.00 |                                      |

If appeals are in red, you should edit and fix before making them inactive. Drop the chevron and click edit. Add a report code and an appeal category. The one highlighted would need a 2005 report code and a Special Event category.

Active equal to:   Appeal equal to:

 Mark inactive (3)

| <input type="checkbox"/>            | Missing A Field...                                                                           | Active?    | Appeal                               |
|-------------------------------------|----------------------------------------------------------------------------------------------|------------|--------------------------------------|
| <input checked="" type="checkbox"/> |  Yes        | Yes        | (197) ED25 - 2025 Eagle Scout Dinner |
| <input checked="" type="checkbox"/> |  Yes        | Yes        | (197) CS24 Camperships               |
| <input checked="" type="checkbox"/> |  Yes        | Yes        | (197) ED24 - 2024 Eagle Scout Dinner |
| <input type="checkbox"/>            |  Yes        | No         | 2020 FOS Mailings                    |
| <input type="checkbox"/>            |  <b>Yes</b> | <b>Yes</b> | <b>(197) C05 - 2005 Clays</b>        |

You can  
time. It  
recom

You can inactivate in mass or one at a time. **It is suggested to leave the most recent 5 years active.** This will make creating a query with appeal information faster in you need to do this.

# OLTP Duplicate Cleanup

- Some councils have duplicate constituents which both have revenue affecting the OLTP report.
- The OLTP Duplicate Cleanup tab under Revenue Data Hygiene will show all revenue affecting the OLTP report connected to constituents who are linked together, where the revenue is not linked to the constituent marked preferred for fundraising.

# OLTP Duplicate Cleanup

The screenshot shows the 'Revenue' section of the OLTP system. A 'Site Search' dialog box is open, displaying search criteria and results. The 'Revenue Data Hygiene' link is highlighted in the 'More tasks' list. The 'Site Search' dialog has fields for Site ID, Name, Short name, Acronym, and Site type. The results table shows one record found for a Local Council named 'Boy Scouts of A...'. The 'Select' button at the bottom is highlighted.

**Revenue**

**More tasks**

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

**Reports**

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

**Transactions**

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

**Site Search**

Site ID:

Name:

Short name:

Acronym:

Site type:

**Results (1 record found)**

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

**Help** **Select** **Cancel**

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.

# OLTP Duplicate Cleanup

- 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

OLTP Duplicate Cleanup

For finding any revenue where the donor is part of a linked set and is not the preferred record. Councils should use LC Revenue Update Batches to move this revenue to the preferred donor record so

Search

Columns

Save list

Open list

Clear all filters

< 1 2 >

| Appeal                   | RevenueID | TransactionType | Application | MasterID | DonorLookupID | DonorName | PreferredLookupID | PreferredName |
|--------------------------|-----------|-----------------|-------------|----------|---------------|-----------|-------------------|---------------|
| 2022 Friends of Scouting | rev-4     | Pledge          | Donation    | 4        | 8-57          | K. H.     | 8-39              | R. K. H.      |
| 2022 Friends of Scouting | rev-4     | Payment         | Donation    | 4        | 8-57          | M. B.     | 8-38              | M. D. B.      |
| 2023 Friends of Scouting | rev-4     | Payment         | Donation    | 4        | 8-57          | M. B.     | 8-38              | M. D. B.      |
| 2023 Friends of Scouting | rev-4     | Pledge          | Donation    | 4        | 8-57          | K. H.     | 8-39              | R. K. H.      |
| 2023 Friends of Scouting | rev-4     | Payment         | Donation    | 2        | 8-38          | S. B. H.  | 8-40              | S. H.         |
| 2024 Friends of Scouting | rev-4     | Payment         | Donation    | 3        | 8-40          | J. B.     | 8-39              | J. E. B.      |

Each revenue ID will be listed, along with the current donor lookup ID and name, and the preferred lookup ID and name for that master ID set.

# OLTP Duplicate Cleanup

Navigation: |< < 29 of 67

|      |   |   |
|------|---|---|
| 8-57 | H | K |
| 8-35 | H | R |

From the earlier slide, K. H. and R. K. H. are the same person. On the OLTP report, it's easy to overlook that unless you check the Sort by Last/First name box or are familiar with the constituent. We can see that there are revenue items listed on both records, and an unworked list would likely show K. H. as unworked and R. K. H. as worked.

Navigation: |< < 29 of 67 > >| Refresh 100% Find | Next

|          |                     |      |         |        |        |         |                     |      |          |        |        |          |                     |      |          |          |        |          |
|----------|---------------------|------|---------|--------|--------|---------|---------------------|------|----------|--------|--------|----------|---------------------|------|----------|----------|--------|----------|
| \$450.00 | Scouting            | 2026 | \$0.00  | \$0.00 | \$0.00 | \$0.00  | Scouting            | 2025 | \$100.00 | \$0.00 | \$0.00 | \$100.00 | Scouting            | 2024 | \$350.00 | \$30.00  | \$0.00 | \$320.00 |
|          | Friends of Scouting |      |         |        |        |         | Friends of Scouting |      |          |        |        |          | Friends of Scouting |      |          |          |        |          |
| \$300.00 | Scouting            | 2026 | \$50.00 | \$0.00 | \$0.00 | \$50.00 | Scouting            | 2025 | \$0.00   | \$0.00 | \$0.00 | \$0.00   | Scouting            | 2024 | \$250.00 | \$250.00 | \$0.00 | \$0.00   |
|          | Friends of Scouting |      |         |        |        |         | Friends of Scouting |      |          |        |        |          | Friends of Scouting |      |          |          |        |          |

# OLTP Duplicate Cleanup

- To move revenue from one constituent to another:
- For current year (open period) revenue:
  - Go to Revenue>Batch Entry>Add, create an LC revenue update batch
  - Add desired revenue transactions to the batch, change the constituent to the desired constituent
  - If you wish to have the adjustment go to GL:
    - Enter the adjustment reason: Transfer
  - If you do not wish to have the adjustment go to GL:
    - Enter the adjustment reason: XferClosed
  - Commit the batch
- For prior year (closed period) revenue with a Post status of “Posted”:
  - Go to Revenue>Batch Entry>Add, create an LC revenue update batch
  - Add desired revenue transactions to the batch, change the constituent to the desired constituent
  - Enter the adjustment reason: XferClosed
  - Set the 'Adjustment Post Date' field to the last day of the year for that revenue.
    - (2025 revenue should be set to 12/31/2025)
  - Commit the batch

# Inbound Channels

How can you tell if you are using an appropriate Inbound Channel?

Compare the GL Post Date field to the Appeal.

Is the year of the GL Post Date the same as the Appeal?

2026 GL Post Date + 2026 Appeal = CY Inbound Channel

Is the Appeal in a Future year?

2025 GL Post Date + 2026 Appeal = FY Inbound Channel

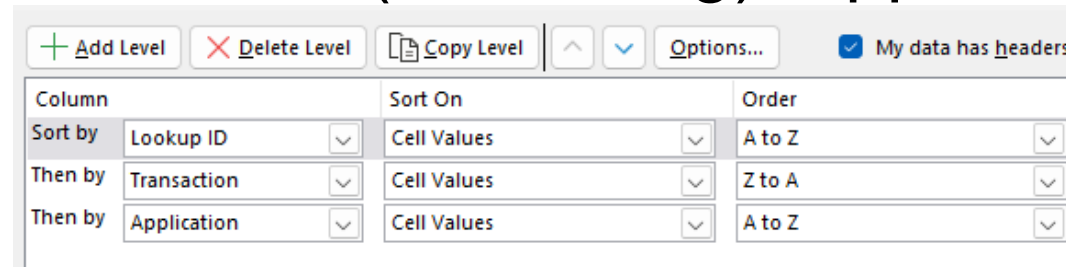
Or a Prior Year?

2027 GL Post Date + 2026 Appeal = PY Inbound Channel

(Pledge Payment Only)

# 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.

# 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 red arrow points from the 'Apps' icon in the sidebar to a Viva Engage link in the chat history. The link is titled 'Viva Engage' and includes a description: 'Viva Engage is a new way to connect with your team. It's a place where you can share ideas, ask questions, and get help from your colleagues. It's a great way to stay connected and get the most out of your team.' The chat history also shows other messages, including a link to 'Viva Engage' and a message about 'Viva Engage'.

# Link Viva Engage to Teams

The image illustrates the integration of Viva Engage with Microsoft Teams. On the left, the Microsoft Teams interface is shown with the Viva Engage app highlighted in the 'Apps' section. A search bar at the top of the app list contains the text 'Search for Viva Engage'. The right pane displays the Viva Engage application, which includes a search bar, navigation tabs (Home, Don Day), and a list of communities. The 'BBCRM User Forum' is selected, showing a post by Don Day about the discontinuation of Workplace by Facebook and the transition to the new CRM User Forum.

**Teams App List:**

- Activity
- Chat
- Teams
- Calendar
- Calls
- OneDrive
- Andy
- Apps

**Viva Engage Interface:**

- Search in Engage
- Home
- Don Day
- Explore
- Communities
- Storylines
- Favorites
- Communities
- BBCRM User Forum
- Accounting Specialists & Cont...
- Support Center News and Ann...
- 000-Scouting U Fundraising Es...
- Professional Staff

**BBCRM User Forum Post:**

- Share thoughts, ideas, or updates
- Discussion
- Question
- Praise
- Poll
- All conversations
- Recent posts
- Don Day
- Thu at 12:19 PM
- Workplace is being discontinued by Facebook so welcome to the new CRM User Forum

**Right Pane:**

- Members • 7
- Info
- Pinned
- CRM Resource Page o...
- Community resources
- SharePoint library
- SharePoint site
- OneNote
- Planner
- Create live event

# Blackbaud Resources

**BOY SCOUTS OF AMERICA**

JOIN USGIVESHOPMY.Scouting.org



**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



BOY SCOUTS OF AMERICA

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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

July 22, 2026

10:00 am & 2:00 pm CT

# Questions & Answers