

# CRM User Forum

October 21, 2020

Cornelia Ellis – John Kuehn – Don Day



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# Objectives

- Appeals
  - Cleaning up and closing out “this” year
  - Setting up “next” year
- Future Year Transactions
- CRM Report Cookbook
- CRM User “Tools” available on MyBSA
- Questions Answered?

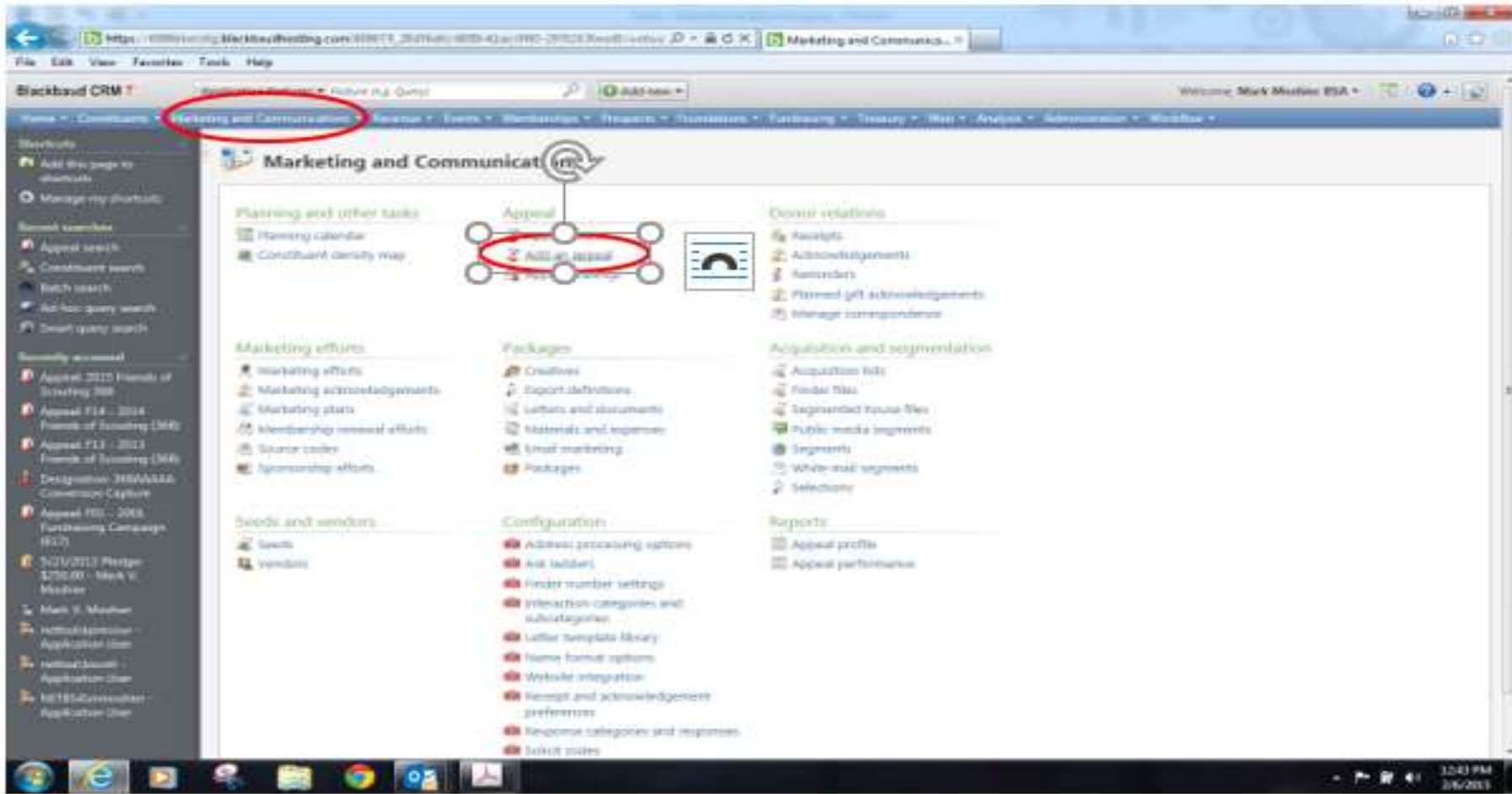


# Creating Appeals



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# Add an Appeal



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# Add an Appeal

**Add an appeal** [X]

Name: (###) Nation's Best Council **1**

Description: What is the reason you are asking for funding? **2**

Category: Annual Giving (Friends of Scouting) **3**


Report code: 2021 **4**

Site: Boy Scouts of America **5**

Start date: 1/1/2021 **6**

End date: 12/31/2021

Goal: \$100,000.00 **7**

 Help



# Assign Designation & Prior Appeal (if one)

Blackbaud CRM™ T Application features ▾ Feature (e.g. Information Library) 🔍 + Add new ▾ Wel

Home ▾ Constituents ▾ Marketing and Communications ▾ Revenue ▾ Events ▾ Prospects ▾ Foundations ▾ Fundraising ▾ Analysis ▾ Administration ▾

## 🔔 Appeal: Nation's Best Fundraising Appeal

Description: We raise more \$\$ than anyone else Start date: 1/1/2020  
Business unit: End date: 12/31/2020  
Category: Other Support Goal: \$100,000.00  
Report code: 2020 Status: Active  
Site: Black Warrior Council Membership:

1 2

Revenue Summary Contributions Payments Balances Revenue Details (Splits) Matching Gift Claims Designations Mailings Documentation Mismatch: Appeals? Solicitor Credits by Group Prior Appeal

**Contributions - posted 8/21/2019** 📄 More ▾

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earliest Contribution
---------------------	--------------------	----------------------	---------------------	-----------------------

**Payments Received - posted 8/21/2019** 📄 More ▾

Payments Received	# of Payments	Average Payment	Most Recent Payment	Mismatch: Appeal?	Mismatch: Inbound Channel?
-------------------	---------------	-----------------	---------------------	-------------------	----------------------------

**Write-offs - will not post (manual PeopleSoft journal entry required)** 📄 More ▾

Loading...

**Outstanding Balances - through 8/21/2019** 📄 More ▾

Total Balances	# Pledges with Balance	Average Balance	Final Installment Due	Mismatch: Appeal?
----------------	------------------------	-----------------	-----------------------	-------------------



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# Designations

- Use the LXXX New Designation Form (New Designation)
- Use the LXXX BCRM Event Revenue Form (Special Event)
- Only request new designations for new
- The appeal may change but the designation stays the same




# Future Year Transactions

- ❖ Create Future Year Appeal
- ❖ Create Future Year Event
- ❖ Batch Entry for Pledges, Pledge Payments and Donations, Event Payment – FY Inbound Channel
- ❖ Year End
  - ❖ Check work for Errors
  - ❖ Update Event to Current year category





# Appeal Creation – No Change

 **Appeal: (368) 21CP - 2021 Corporate Pinewood Derby**

Description: 2021 Corporate Pinewood Derby

Start date: 1/1/2021

Business unit:

End date: 12/31/2021

Category: Special Events

Goal: \$0.00

Report code: 2021

Status: Active

Site: Baden-Powell Council

Membership:

Revenue Summary

Designations

Contributions

Payments

Balances

Revenue Details (Splits)

Revenue Details (Write-offs)

Matching

Contributions - posted 10/19/2020

More

Total Contributions	# of Contributions	Average Contribution	Recent Contribution	Earli
---------------------	--------------------	----------------------	---------------------	-------

Payments Received - posted 10/19/2020

More

Payments Received	# of Payments	Average Payment	Most Recent Payment	Misr
-------------------	---------------	-----------------	---------------------	------

Write-offs - will not post (manual PeopleSoft journal entry required)

More

Total Write-offs
------------------

Outstanding Balances - through 10/19/2020

More

Total Balances	# Pledges with Balance	Average Balance	Final Installment Due	Misr
----------------	------------------------	-----------------	-----------------------	------



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# Event Creation – Change Needed

Home • Constituents • Marketing and Communications • Revenue • Events • Prospects • Foundations • Fundraising • Analysis • Administration • Workflow •

Shortcuts

- Add this page shortcuts
- Manage my shortcuts
- Batch Entry
- Constituent search
- Acknowledgements

Recent searches

- Constituent search
- Smart query search
- Batch search
- Event search
- Appeal search

Recently accessed

- Events
- Marvin Fisher
- Harold Beam
- Baden-Powell Board Mail - S1 (368 BSAFR Group)
- Baden-Powell Board Mail - S1 (368 BSAFR Group)
- Baden-Powell Board Mail - S1 (368 BSAFR Group)

Help

Apply filters Reset filters

### Add an event

#### General

Name: L368 2021 Corporate Pinewood Derby

Description: 2021 Corporate Pinewood Derby

Category: Auction

Sites:

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

Copy options

#### Details

Start date: mm/dd/yyyy Start time: hh:mm AM

End date: mm/dd/yyyy End time: hh:mm AM

#### Location information

Location:

Room/Unit:  Capacity: 0

Contact:

Export

Year

Saturday

03

10

17

24

If the event is for a future year being set up to accept monies in the current year use a FY category. You will then change this on Jan. 1 back to a current year category.

# Future Year - Pledge

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

Set row message

Properties

	Constituent	Lookup ID	Amount	Date	GL post ...	Revenue type	Installment frequency	No. installments
1	Bank of America	8-10092089	\$2,000.00	10/19/2020	10/19/2020	Pledge	Single Installment	1
*								

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

Set row message

Properties

Appeal	Designation	Inbound channel	Revenue category	Giving Category	BSA Structure
(368) 21CP - 2021 Corpor...	36800841 Corporate De...	FY - Special Event Fundr...	Unrestricted by donor	Sponsorship	Baden Powell




Prep




# Future Year Payments – Event Registrations

MainRevenue


Payment

  
Apply







Pledge & recurring gift

  
Edit installments  
  
Split designations  
  
Payment



Credit card reader

  
Capture card info



Revenue details

  
Tributes  
  
Benefits  
  
Recognitions  
  
Matching gifts  
  
Solicitors  
  
Business units

Note


  
Add note  
  
Delete note

Properties




	Constituent	Lookup ID		Amount	Receipt amount	Date	GL post date	Deposit Reference	Revenue type
1	Jack Sherman Toyota	8-10062947		\$2,500.00	\$2,000.00	10/19/2020	10/19/2020		Payment
2	Janice M. Staples	8-11440662		\$500.00	\$475.00	10/19/2020	10/19/2020		Payment
*									

MainRevenue


Payment

  
Apply







Pledge & recurring gift

  
Edit installments  
  
Split designations  
  
Payment



Credit card reader

  
Capture card info

Revenue details

  
Tributes  
  
Benefits  
  
Recognitions  
  
Matching gifts  
  
Solicitors  
  
Business units

Note

  
Add note  
  
Delete note

Properties

Appeal	Designation	Inbound channel	Revenue category	Giving Category	BSA Structure
(368) 21CP - 2021 Corpo...		FY - Special Event Fundr...	Unrestricted by donor	Sponsorship	Baden Powell
(368) 21CP - 2021 Corpo...		FY - Special Event Fundr...	Unrestricted by donor	1 Ticket	Baden Powell



# Future Year - 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, Set row message

Properties

	Constituent	Lookup ID	Amount	Receipt amount	Date	GL post date	Revenue type	Application	Payment
1	Bank of America	8-10092089	\$2,000.00	\$2,000.00	10/19/2020	10/19/2020	Payment	Pledge for Bank of Amer...	Check

Properties

Appeal	Designation	Inbound channel	Revenue category	Giving Category	BSA Structure
(368) 21CP - 2021 Corpo...		FY - Special Event Fundr...		Sponsorship	Baden Powell





# Future Year GL - Payments

Details

Benefits

Matching Gifts

Letters

Attributes

Documentation

GL Distributions

Transaction history by post date

All dates

10/19/2020  
Payment

GL distributions (8)

Filters

More

View: All

Apply

Reset

Account	Description	Debit amo...	Credit amount
Event registration Edit			
L368-1-1001-017-00	L368-1-SPEF-CASH-L3680084...	\$25.00	
L368-1-1001-017-00	L368-1-SPEF-CASH-36800841...	\$475.00	
L368-1-2604-084-00	L368-1-SPEF-DFRV-L3680084...		\$25.00
L368-1-4202-084-91	L368-1-SPEF-FRCY-36800841...		\$475.00
Benefit Edit			
XXXX-X-XXXX-XXX-XX	Bene-f-itlt-emWi-llNotPost-2GL	\$25.00	
XXXX-X-XXXX-XXX-XX	Bene-f-itlt-emWi-llNotPost-2GL		\$25.00

Details

Benefits

Matching Gifts

Letters

Attributes

Documentation

GL Distributions

Transaction history by post date

All dates

10/19/2020  
Payment

GL distributions (8)

Filters

More

View: All

Apply

Reset

Account	Description	Debit amo...	Credit amount	Ref
<div>Pledge</div> <div>Edit</div>				
L368-1-1001-017-00	L368-1-SPEF-CASH-36800841...	\$460.00		Ban
L368-1-1001-017-00	L368-1-SPEF-CASH-L3680084...	\$1,540.00		Ban
L368-1-1334-084-00	L368-1-SPEF-PAPL-36800841F...		\$460.00	Ban
L368-1-1334-084-00	L368-1-SPEF-PAPL-L36800841...		\$1,540.00	Ban
<div>Benefit</div> <div>Edit</div>				
XXXX-X-XXXX-XXX-XX	Bene-f-itlt-emWi-IINotPost-2GL	\$460.00		Ban
XXXX-X-XXXX-XXX-XX	Bene-f-itlt-emWi-IINotPost-2GL		\$460.00	Ban

The event payment on the left is hitting deferred fees and future year participant with the 91 restriction at the end of the account. The pledge payment on the left is clearing the future year receivable that was added earlier.



# Year End Check

- ❖ Navigate to future year appeal
- ❖ Proceed to the Revenue Details (Splits Tab)
- ❖ Revenue should only have FY Inbound Channel
- ❖ Those with a CY Inbound Channel need correcting



# Sample With Error



## Appeal: (368) 21CP - 2021 Corporate Pinewood Derby

Description: 2021 Corporate Pinewood Derby    Start date: 1/1/2021  
Business unit:    End date: 12/31/2021  
Category: Special Events    Goal: \$0.00  
Report code: 2021    Status: Active  
Site: Baden-Powell Council    Membership:

[Revenue Summary](#)[Designations](#)[Contributions](#)[Payments](#)[Balances](#)[Revenue Details \(Splits\)](#)[Revenue Details \(Write-offs\)](#)[Matching Gift Claims](#)[Mailings](#)[Documentation](#)[Mismatch: Appeals?](#)[Solicitor Cr...](#)

### Revenue Application Details (Current) - all "splits" for committed pledges, payments, and auction donations (10) More ▾

Constituent equal to: Transaction equal to: Application not equal to: GL Post Status equal to: GL Post Date is 

V...	Constituent	Date	T...	A...	Split Amount	T...	Pay M...	G...	GL Post Date	D...	Balance	Designation ▲	Inbound Channel	Revenue Categ...	Giving Category
✓	Jack Sherman Toyota	10/19/2020	P...	E...	\$500.00	\$...	Check	N...	10/19/2020		\$0.00		FY - Special Event Fun...	Unrestricted by...	Sponsorship
✓	Janice M. Staples	10/19/2020	P...	E...	\$25.00	\$...	Check	N...	10/19/2020		\$0.00		FY - Special Event Fun...	Unrestricted by...	1 Ticket
✓	Jock Ewing	10/20/2020	P...	D...	\$2,500.00	\$...	Check	N...	10/20/2020		\$0.00	36800841 Corporate Derby - Operating	Special Event Fundrais...	Event - Adverti...	Ad: Full Page
✓	Jack Sherman Toyota	10/19/2020	P...	E...	\$2,000.00	\$...	Check	N...	10/19/2020		\$0.00	36800841 Corporate Derby - Operating	FY - Special Event Fun...	Unrestricted by...	Sponsorship
✓	Bank of America	10/19/2020	P...	P...	\$1,540.00	\$...	Check	N...	10/19/2020		\$0.00	36800841 Corporate Derby - Operating	FY - Special Event Fun...	Unrestricted by...	Sponsorship
✓	Bank of America	10/19/2020	P...	D...	\$1,540.00	\$...	None	N...	10/19/2020		\$0.00	36800841 Corporate Derby - Operating	FY - Special Event Fun...	Unrestricted by...	Sponsorship
✓	Janice M. Staples	10/19/2020	P...	D...	\$500.00	\$...	None	N...	10/19/2020		\$500.00	36800841 Corporate Derby - Operating	FY - Special Event Fun...	Event - Particip...	1 Ticket
✓	Janice M. Staples	10/19/2020	P...	E...	\$475.00	\$...	Check	N...	10/19/2020		\$0.00	36800841 Corporate Derby - Operatin...	FY - Special Event Fun...	Unrestricted by...	1 Ticket
✓	Bank of America	10/19/2020	P...	P...	\$460.00	\$...	Check	N...	10/19/2020		\$0.00	36800841 Corporate Derby - Operatin...	FY - Special Event Fun...	Unrestricted by...	Sponsorship
✓	Bank of America	10/19/2020	P...	D...	\$460.00	\$...	None	N...	10/19/2020		\$0.00	36800841 Corporate Derby - Operatin...	FY - Special Event Fun...	Unrestricted by...	Sponsorship



# Soft Credit = Recognition Credits

- ❖ Used to give others credit for revenue received from a person or organization.
- ❖ These can be added during batch entry or can be added after batch is committed.
- ❖ Recognition Credits can be pulled by query in order to acknowledge this support i.e. United Way Donor Designated Dollars.
- ❖ Spouse credit and Household credit are created when a spouse is added or household is created.



# Recognition Credits Available

Revenue Recognition Credit Type Code table entries (18) [+ Add](#) [Filter](#)

☐ Include inactive? [Apply](#) [Reset](#)

Description	Active	Sites ▲
Consolidated federal credit	Yes	All sites
Day Giving Credit	Yes	All sites
Donor Advised Fund	Yes	All sites
Donor Challenge Credit	Yes	All sites
Employee giving credit	Yes	All sites
Estate gift credit	Yes	All sites
Family foundation credit	Yes	All sites
Family Member	Yes	All sites
Hard credit	Yes	All sites
Household credit	Yes	All sites
Matching gift - volunteer hours	Yes	All sites
Matching gift credit	Yes	All sites
Organization to organization credit	Yes	All sites
Owner credit	Yes	All sites
Soft credit	Yes	All sites
Spouse credit	Yes	All sites
United Way credit	Yes	All sites



# Example in Batch

Constituent	Lookup ID	Amount	Date	GL post date	Revenue type
United Way of Wyandot...	8-12209950	\$1,000.00	10/20/2020	10/20/2020	Payment

Check number	Appeal	Designation	Inbound channel
00555	(307) U20 United Way Campai...	30700001 NO NAM - Opera...	United Way - Donor Des...

Add your revenue into batch. This is United Way funds that were given by donors and designated to our council. The United Way sent a note with the money on who the donors are. Remember the amount allocated may not be the amount given once the United Way takes their fee. This is indirect giving. Money is given to an entity and then they process a check and send it to the BSA.

es

Main **Revenue**

Payment Pledge & recurring gift Credit card reader Revenue details Note

Apply Edit installments Split designations Payment Capture card info Tributes Matching gifts Add note Delete note

Benefits Solicitors Business units **Recognitions**

Properties

1 \*

**Recognitions**

Payment for United Way of Wyandotte Co-Donor Designation

Total amount: \$1,000.00

Constituent	Amount	Recognition credit t...	Effective d...
United Way of Wyandot...	\$1,000.00	Hard credit	10/20/2020
John Kuehn	\$250.00	United Way credit	10/20/2020
Robert J. Hamlin	\$250.00	United Way credit	10/20/2020
Carter G. Kuehn	\$250.00	United Way credit	10/20/2020
Jock Ewing	\$250.00	United Way credit	10/20/2020
*			

Distribute ▼

Help OK Cancel



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# Revenue Tips

- ❖ Donor gets the hard credit. Normally this follows “who” sent the check.
- ❖ Recognition Credits do not have to be fully allocated
- ❖ Credits are a way to identify indirect contributions
- ❖ Acknowledgements to these donors would thank them for supporting Scouting via the United Way. No need to thank donor for a specific amount of money.



# Acknowledgements & Reminders



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# Acknowledgements and Reminders

- Why do my Donor relation processes stop working?
  - There may be a bad selection attached that needs to be updated
  - The Job Schedule may conflict with another therefore it does not complete
  - The selection on the letter, the assign letter process and the acknowledgment process is not the same.
- The person who created the business process is no longer employed
  - The business process needs assigned roles to let it run
  - A terminated creator has been stripped of permission in CRM
  - Business processes can be assigned to a service account



# Acknowledgements and Reminders

- The “Add” button has been removed from:
  - Reminders
  - Assign Letter Process
  - Acknowledgement Process
- If you would like to add a new process, please create a ticket with Member Care.
- You can still edit your processes to bring in the correct revenue to remind and acknowledge.
- You can still add new letter for acknowledgement that then can be added to existing assign letter processes and acknowledgement processes.



# Report Cookbook

- 2 custom reports that can generate a variety of reporting information:
  - Revenue>Reports>BSA Appeal Constituent Report (OLTP)
  - Revenue>Reports>BSA Appeal Progress (OLTP)
- Report parameters...
  - Offer flexibility
  - Can be confusing
- New tool: Report Cookbook
  - Visual ‘recipes’





### Example:

Current Year Appeal Progress  
by BSA Structure Compared  
to Last Year at the Same Time

Don't be afraid to experiment!

## BSA Appeal Progress Report (OLTP)

Site: Atlanta Area Council Report Code: 2020

Annual Appeal(s): (092) OOD20 - Operating Other Direct (092) R20 - 2020 Eagle Scout Recognition (092) S20 - 2020 Friends of Scouting (092) TM20 - 2020 Tributes & Memorial)

Multi-year Appeal(s): All (092) C08 - Tradition Meets Tomorrow Campaign (092) C15 - Keller Carlock Pavillion (092) C19 - Igniting Leaders Capital Campaign

☐ Only include multi-year appeal revenue for: 2020

Include Breakdown Other

☐ Include All ☒ Include Prior Year 1 Giving ☐ Include Prior Year 2 Giving ☐ Include Prior Year 3 Giving ☒ Include Basic Giving Stats ☐ Include BSAFR Group Goals ☒ Include Year-Over-Year Comparisons ☐ Include Lapsed Donor Opportunity Amounts ☐ Lapsed Donor Recapture Rate Goal %: 50 ☐ Include Donor Status Stats ☐ Included Worked/Unworked Stats ☐ Include Current Year Constituent Appeal/Response (Worked) Info ☐ Include Current Year \$0 Pledge (Worked) Info

Include Breakdown Other

☐ Breakdown by All ☒ Break Down by BSA Structure ☐ Break Down by Giving Category ☐ Break Down by Solicitor ☐ Break Down by Revenue BSAFR Group

Include Breakdown Other

As of Date:  ☒ Adjust As of Date for Prior Years



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# CRM User “Tools” in MyBSA

- CRM Resources
- CRM User Guide
- Learn Blackbaud CRM (self-study)





## Home Page

Home

Membership

Program

Funding

ScoutNET

Knowledge Base

Home

BSA News

Resources

### My Information ?

[My Profile](#)  
[E-mail](#)

### Support ?

[Change My Password](#)  
[IOI Pay Customer Service and Technical Support](#)  
[Member Care Calendar](#)  
[National Council Organization Chart](#)  
[National Council Telephone Directory](#)  
[New User Form](#)  
[Online Support Center](#)

### Fundraising

[Blackbaud CRM](#)  
[Blackbaud CRM Resources](#)  
[Blackbaud CRM User Guide](#)  
[Learn Blackbaud CRM \(self-study\)](#)  
[Scouting Gives Log-in](#)  
[Scouting Gives User Guide](#)  
[MatchFinder Matching Gifts Search](#)

### Journey to Excellence

[Journey to Excellence](#)

### Voice of the Scout

[Summary Report](#)

### Diversity & Inclusion

[Resources](#)

### National Council News Update

#### For the latest official BSA news:

- [www.BSArestructuring.org](http://www.BSArestructuring.org): For more information and ongoing updates about the BSA
- [Workplace](#): Connect, communicate, and collaborate with fellow employees on the BSA
- [Scouting Wire](#): News and feature stories for employees and volunteers (with a weekly [Scouting Newsroom](#): The official media newsroom of the BSA.
- [Bryan on Scouting](#): The official blog of *Scouting* magazine.

### The BSA Game Plan

The [The BSA Game Plan](#) is available for download to share internally with your team.





## Blackbaud CRM User Guide

Click the links below to learn more about fundraising.

### Home

- ▶ 4.0 Glossary of Terms

### Constituents

- ▶ Add an Individual
- ▶ Add an Interaction
- ▶ Add a Constituency to a Constituent
- ▶ Add a Group-Household Relationship
- ▶ Add a Member
- ▶ Add a Note/Attachment/Media
- ▶ Add BSAFR Group
- ▶ Add an Individual Relationship
- ▶ Add an Organization's Contact
- ▶ Add/Remove a Spouse Relationship
- ▶ Changing a Constituent Site Security
- ▶ Constituent Reports
- ▶ Constituent Search
- ▶ Updating WealthPoint
- ▶ Planned Gift
- ▶ Recognition Credits Report
- ▶ Volunteer Set up
- ▶ Matching Gifts
- ▶ Wealth and Ratings Wealthpoint

### Marketing and Communications

- ▶ Acknowledgements & Reminders
- ▶ Add an Appeal
- ▶ Appeal Setup
- ▶ Billing Statements

### Revenue

- ▶ Add a Cash or Check payment or donation
- ▶ Add a Credit Card Payment or Donation
- ▶ Add a donor challenge
- ▶ Add a Pledge
- ▶ Add a Pledge with Credit Card
- ▶ Adding a recurring gift batch
- ▶ Adjusted Revenue
- ▶ Batch Workflow
- ▶ Credit Card Best Practices
- ▶ Credit Card Processing
- ▶ Future year and prior year
- ▶ Gift in Kind Batch
- ▶ GL Revenue
- ▶ Hierarchy and Designations
- ▶ Pledge installment schedule change
- ▶ Recognition Credit
- ▶ Stock Revenue Batch
- ▶ Summary of Appeal Report
- ▶ Transaction Search
- ▶ Tributes

### Events

- ▶ Add an Event
- ▶ Auction Setup
- ▶ Event Revenue set up
- ▶ Event Revenue Setup Request
- ▶ Event Invitation and Registration

### Reports

- ▶ Appeal Organization Structure Report
- ▶ Appeal Progress by Category Report
- ▶ Appeal Progress by Solicitor Report
- ▶ Appeal Revenue Data List
- ▶ Constituent Reports
- ▶ Entering a Goal to a Group
- ▶ IRS 990 Schedule B
- ▶ Pledge Receivable Aging Report
- ▶ Appeal Profile
- ▶ Account Distribution
- ▶ Reconcile PeopleSoft to Blackbaud
- ▶ Solicitor Performance Report

### Analysis

- ▶ Additional Pledge Cards
- ▶ Appeal mailing
- ▶ Copy/Edit an existing query
- ▶ Folder Management
- ▶ O-Data Lists
- ▶ Query Aid
- ▶ Query Tips and Tricks
- ▶ Smart Query
- ▶ Three year history query
- ▶ LXXX Appeal All Const 3 Year Hist
- ▶ Unpaid Donor Query
- ▶ Unworked Constituents List
- ▶ Working with LXXX Queries



### **Blackbaud Product Documentation**

[Blackbaud CRM 4.0 Documentation](#)

[CRM 4.0 Data Sheet](#)

### **BSA Training Materials**

[Acknowledgements and Reminders](#)

[Adding a Unit Committee](#)

[Appeal Setup Presentation](#)

[Auction Data Entry](#)

[Batch Entry and Deposit Reference](#)

[BBMS Presentation](#)

[Benefits in CRM](#)

[Blackbaud Terminology](#)

[BSAFR Pledge Card Brief](#)

[Checking your Blackbaud Training Status](#)

[Constituent Reports](#)

[Constituent Site Security & Searches Presentation](#)

[Contribution Statements and 990 Schedule B](#)

[Creating and Dissolving Households](#)

[Credit Card Best Practices Presentation](#)

[Credit Cards Processing](#)

[Foundation Functional Area](#)

[Future and Prior year Inbound Channels](#)

[Gift In Kind Batch Presentation](#)

[Global Write-Off Presentation](#)

[Marking Individuals Deceased](#)

[Matching Gifts II Presentation](#)

[Matching Gifts Presentation](#)

[Matching Gifts II Presentation](#)

[Matching Gifts Presentation](#)

[Misc Batch Types Presentation](#)

[Planned Gifts Presentation](#)

[Pledge Card Presentation](#)

[Pledge Installment Schedule Changes Presentation](#)

[Pledge Installment Schedule Changes Updated](#)

[Pledges with Credit Cards Presentation](#)

[Preparing to Print Pledge Cards](#)

[Queries and Folders Presentation](#)

[Recognition Programs Presentation](#)

[Reconcile PeopleSoft to Blackbaud](#)

[Recognition Credits](#)

[Reconciliation](#)

[Reminders Process Presentation](#)

[Special Event Data Entry](#)

[Special Event Set Up](#)

[Special Event Registration and Revenue Presentation](#)

[Special Event Setup Presentation](#)

[Stock Revenue Batch Presentation](#)

[Tributes](#)

[Wealth and Ratings](#)

### **Blackbaud Setup Documents**

[Barcode Scanner Specifications](#)

[Blackbaud Merchant Services Checklist](#)

[Designation Request sheet](#)

[Event Revenue Setup Request](#)



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Library ▾

What would you like to learn today?



My Profile ▾

CONTENT ▾

ANALYTICS ▾



FEATURED COURSE

# 2020 Course Listing

Revised 2020 Course Listing as of August 14, 2020

Explore



You have 1 past due compliance assignment. [Go to compliance now.](#)



## My Assignments

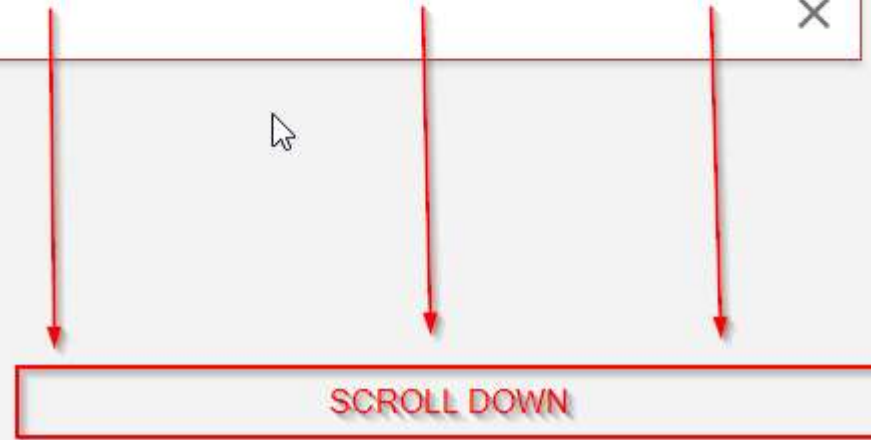
[View Compliance](#)



COMPLIANCE ASSIGNMENTS PAST DUE

**Launch Compliance Training**

Your required training will be in your learning plan



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CONTENT ▾

ANALYTICS ▾

## Blackbaud Training [Edit Skills >](#)




COURSE

**Blackbaud CRM: Prospect Management**

BoyScoutsofAmerica







VIDEO

**VILT Marketing and Communication**

Scouting U







VIDEO

**VILT CRM Information Library (Includes Export,**

Scouting U






VIDEO

**VILT Credit Card Process Credit Card**

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## BSA Diversity and Inclusion [Edit Skills >](#)





## Council Support

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# Council Funding and Finance

Funding a Council and assuring proper financial management are among the primary responsibilities of the Council Board. The material presented in this Section provides tools for performing these critical functions. This is designed to be used by both Volunteers and Council staff.

[Financial Planning](#)[Funding the Council](#)[Council Administration](#)[Local Council Financial Audits](#)[Back Office Business Solutions](#)[BSA-COVID-19 Financial Resources](#)[www.scouting.org/financeimpact](http://www.scouting.org/financeimpact)



# Next Forum

November 18, 2020  
10:00 am & 2:00 pm CT

