BLACKBAUD CRM™

Constituent Management

COURSE TYPE

» Technology

MODALITY

» Instructor-Led Event

DURATION

» 3 Hours

DELIVERY METHOD

» Online

» Onsite

PREREQUISITES

» Blackbaud CRM: Fundamentals

COURSE OVERVIEW

Join us for this instructor-led classroom event that discusses constituent records. Creating and maintaining constituent records is vital to an organization's success. In this course, participants learn how to create different constituent records and manage constituent data. This course teaches participants how to add, edit, and update all types of constituent records in the Blackbaud CRM database.

TARGET AUDIENCE

This course is designed for Blackbaud CRM users who are responsible for entering and managing constituent data, such as bio records staff, some gift entry personnel, and other constituent data integrity/governance specialists.

LEARNING OBJECTIVES

- Discuss best practices around adding constituents
- Review constituent search and duplicate checker
- Add individual constituent record
- Define household records
- Discuss household relationships
- Add a household record
- Add an organization, including hierarchy structure with subsidiaries
- Merge organization records
- Add a group and committee records
- Add and remove members of a group, and update group member roles
- Discuss best practices for managing constituent information
- Add and edit a constituent contact and personal information
- Identify and establish relationships between constituents
- Manage mail preferences and solicit codes
- Add constituencies and attributes

Continued on next page

COURSE TYPE

📞 USA 1.800.468.8996 opt. 3

📞 UK +44(0) 141.243.4250

🖥 www.blackbaud.com/training

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LEARNING OBJECTIVES (CONTINUED)

• Decease and inactivate an individual
• Add and remove a spouse
• Remove a member from a household
• Dissolve a household record

VIEW ADDITIONAL INFORMATION

• Registration information
• Blackbaud University policies
• View the complete curriculum for Blackbaud CRM

LEARN MORE ABOUT BLACKBAUD UNIVERSITY