



COURSE TYPE

- » Technology

MODALITY

- » Instructor-Led Event

DURATION

- » 1.5 Hours

DELIVERY METHOD

- » Online
- » Onsite

PREREQUISITES

- » Blackbaud CRM: Overview
- » Blackbaud CRM: Core Principles 1
- » Blackbaud CRM: Core Principles 2

COURSE OVERVIEW

Join us for this instructor-led event that covers the flow of data in and out of the system, as well as the tools to analyze and manage data within Blackbaud CRM. In this session, students learn how to navigate the tools for analyzing and managing the flow of data. Learn how to create and review queries, create selections, and organize the Information Library. We wrap up the session by learning how to create and run exports.

TARGET AUDIENCE

This course is designed for those responsible for extracting information from Blackbaud CRM for analysis outside the system. Users who need to group records and analyze this data will also benefit, as will users with foundation knowledge of records and system navigation.

LEARNING OBJECTIVES

- Navigate the Information Library
- Define Ad-hoc Query and Smart Query
- Create an Ad-hoc Query and a Smart Query
- Create Selections, Export and Delete Queries
- Organize Queries with Categories
- Set up Data connection
- Describe the Export process
- Add an Export Process
- Read the Export Status page

VIEW ADDITIONAL INFORMATION

- [Registration information](#)
- [Blackbaud University policies](#)
- [View the complete curriculum for Blackbaud CRM](#)