



### COURSE TYPE

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» Technology

### MODALITY

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» Instructor-Led Event

### DURATION

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» 3 Hours

### DELIVERY METHOD

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» Online

» Onsite

### PREREQUISITES

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» Blackbaud CRM: Fundamentals

### COURSE OVERVIEW

Join us for this instructor-led classroom event that delves into event management in Blackbaud CRM. The Events functionality in Blackbaud CRM allows you to manage the events your organization hosts. In this course, participants learn how to manage one-time events and multi-level events, from planning to end-of-event wrap-up activities.

### TARGET AUDIENCE


This course is designed for those responsible for Event Management, such as Event Coordinators and Volunteer Coordinators.

### LEARNING OBJECTIVES

- Describe the events process
- Navigate the Events Calendar
- Access an event from a constituent record
  - Search for and add an event
- Navigate the Event record
- Discuss multi-level hierarchy and how to add a multi-level event
- Define and demonstrate how to add designations and appeals
  - Add an event coordinator, registration options, and preferences
- Discuss how online event registration forms interact with Blackbaud CRM
- Create an invitation, and add invitees
- View and run the process to send invitations to invitees
- Add an event registrant and guests
- Review the anatomy of a registrant record
- Add a registrant to a multi-level event

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### LEARNING OBJECTIVES (CONTINUED)

- Add an event expense, speaker, and event documentation
- View volunteer job schedules for an event
- Manage and update Attendance
- Configure Event Seating Layout and manage registrant seating assignments
- Generate Event reports
- Discuss Post Event communications

### VIEW ADDITIONAL INFORMATION

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

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