BLACKBAUD CRM™

Fundamentals

COURSE TYPE

» Technology

MODALITY

» Instructor-Led Event

DURATION

» 3 Hours

DELIVERY METHOD

» Online
» Onsite

PREREQUISITES

» None

COURSE OVERVIEW

Join us for this instructor-led course which introduces new users to Blackbaud CRM. Participants learn how to log in to the system, access help records, and how to search for and navigate constituent records. This course emphasizes finding and reading information on constituent record.

TARGET AUDIENCE

This course is designed for new users, and welcomes all levels of experience.

LEARNING OBJECTIVES

- Define Blackbaud CRM
- Log in to Blackbaud CRM and access Help
- Customize the Home page
- Discuss Mobile options
- Identify key system components
- Access functional areas in Blackbaud CRM
- Conduct searches using the Constituent Quick Find search
- Identify constituent record types
- Search for a constituent
- Navigate the Individual Constituent record
- Define and locate constituencies
- Find and read constituent Revenue information
- View Organizations and Individuals on the Relationships tab
- Define Interactions, Documentation, and Communication data
- Locate Revenue information (and other key points)
- Search for and navigate an Organization household records
- Compare and contrast committee and group records

VIEW ADDITIONAL INFORMATION

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

LEARN MORE ABOUT BLACKBAUD UNIVERSITY