



### 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](#)

 USA 1.800.468.8996 opt. 3

 UK +44(0) 141.243.4250

 [www.blackbaud.com/training](http://www.blackbaud.com/training)

[LEARN MORE ABOUT BLACKBAUD UNIVERSITY](#) 

This Course Abstract is for informational purposes only. Blackbaud makes no warranties, express or implied, in this summary. The information contained in this document represents the current view of Blackbaud, Inc., on the items discussed as of the date of this publication. All product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc. © 2019 Blackbaud, Inc.