



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 event, which discusses the specific communications created for revenue transactions in Blackbaud CRM. There are a variety of ways to communicate revenue related information to constituents in Blackbaud CRM. Participants will learn when and how to communicate with constituents, using the revenue communication options available in Blackbaud CRM.

TARGET AUDIENCE

This course is designed for those responsible for revenue communications, such as donor relations and gift entry personnel.


LEARNING OBJECTIVES

- Identify which correspondence to use for a given situation
- Review the constituent's Communications tab
- Review the acknowledgement process
- Change the query criterion associated with the acknowledgement process
- Run an acknowledgement process
- Download output
- Use an export definition
- Merge letters and labels
- Describe the process to generate receipts
- Generate revenue receipts
- Describe the process to write a pledge reminder
- Generate pledge reminders
- Discuss the re-receipt processes
- Describe marketing acknowledgements process
- Run the marketing effort process
- Activate the marketing acknowledgement
- Export the communication to merge
- Tour the Marketing Acknowledgement record

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 USA 1.800.468.8996 opt. 3

 UK +44(0) 141.243.4250

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VIEW ADDITIONAL INFORMATION

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

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