



## Batch and Revenue Processing

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

### COURSE OVERVIEW

Join us for this instructor-led event that covers the core Revenue functionality in Blackbaud CRM. In this session, we discuss revenue and recognition to ensure users can access and interpret revenue related constituent information. Next, we delve into revenue batch entry, revenue adjustments, and reporting. We wrap up the session by adding and managing pledges and matching gift programs.

### TARGET AUDIENCE

This course is designed for those responsible for adding, adjusting, and managing gift revenue. Users with foundation knowledge of processing gifts and revenue will benefit the most from this session.

### LEARNING OBJECTIVES

- Discuss and define the different revenue transaction types
- Search for and view a revenue transaction
- Enter data and validate a batch
- Update and commit a batch
- Run batch entry reports
- Make adjustments to payments that have and have not posted
- Generate and discuss Adjusted Revenue reporting
- Add pledges, pledge write-offs, and recurring gifts
- Associate revenue with tributes
- Define and discuss gifts-in-kind
- Configure matching gift conditions
- Generate Matching Gift Summary reporting

### VIEW ADDITIONAL INFORMATION

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