



course Type

- » Technology

MODALITY

- » Instructor-Led Event

DURATION

- » 3 Hours

DELIVERY METHOD

- » Online
- » Onsite

PREREQUISITES

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

COURSE OVERVIEW

Join us for this instructor-led learning event that uncovers how to create and manage your fundraising events in Blackbaud CRM. In this session, we discuss pre-event planning, day of event processing, and post-event reporting and tasks.

TARGET AUDIENCE

This course is designed for those responsible for Event Planning and managing associated event tasks and reporting. Users with foundational knowledge of events will benefit the most from this course.

LEARNING OBJECTIVES

- Navigate to the Events Calendar and search for an event
- Define Event Configuration items
- Add an Event Management template
- Discuss multi-level hierarchy and how to add a multi-level event
- Add and edit an event
- Create, add, view, and run the process to send invitations to invitees
- Define and discuss the anatomy of a registrant record
- Add registrants to an event
- Generate Day of Event reporting, such as seating summary and event profile reports
- Discuss and demonstrate post-event follow-up tasks
- Generate Event Comparison reporting
- Review Event Revenue reporting and currency filtering

VIEW ADDITIONAL INFORMATION

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