BLACKBAUD CRM™

Membership Management

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 classroom event that details managing memberships within Blackbaud CRM. Learn about membership program types and how to configure programs and complete administrative tasks to configure appropriate membership programs, levels, add-ons and more. Learn about memberships at the constituent level including adding memberships, collecting membership revenue, terms and renewals, and membership options.

TARGET AUDIENCE

This course is designed for users who are new to Blackbaud CRM. This course focuses on configuration for the Membership Functional Area and should include users who direct membership programs.

LEARNING OBJECTIVES

• Describe the membership workflow
• Describe membership program types
• Add, edit, and delete membership programs
• Navigate the membership program record
• Print membership cards
• Configure membership add-ons
• Manage membership promotions
• Add a single constituent membership
• Add multiple memberships using Membership Dues Batch
• Enter membership dues payments
• Describe terms and renewal options
• Generate membership renewal notices
• Renew, rejoin, transfer, or cancel a membership
• Generate membership reports
• Input membership dues revenue

VIEW ADDITIONAL INFORMATION

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

LEARN MORE ABOUT BLACKBAUD UNIVERSITY