



## Wealth and Ratings for Project Team Training

### COURSE TYPE

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- » Technology

### MODALITY

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- » Instructor-Led Event

### DURATION

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- » 1.5 Hours

### DELIVERY METHOD

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- » Online
- » Onsite

### PREREQUISITES

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- » Blackbaud CRM: Prospect Management for Project Team Training

### COURSE OVERVIEW

This instructor-led learning event teaches students about the Wealth and Ratings view in Blackbaud CRM. Participants learn how to screen records for wealth, confirm and reject wealth data, create queries based on wealth information, build and manage Research lists, and create and apply Wealth capacity formulas.

### TARGET AUDIENCE

This course is designed for those responsible for prospect research at their organization. Users with foundation knowledge of navigation, records, and Prospect Management will benefit from this course.

### LEARNING OBJECTIVES

- Search the external prospecting database
- Identify data sources
- Wealth screen individuals and groups
- Review wealth data
- Define confidence levels
- Build wealth based queries
- Create Research lists
- Manage records in Research lists
- Create and apply Wealth capacity formulas

### VIEW ADDITIONAL INFORMATION

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