

RE Constituent & Gift Data Entry Course Outline

This course provides the basics for data entry personnel or for those who taught themselves and aren't sure of their skills. Part one covers Constituent Data including batch entry and Part two focuses on Gift Data. This is the foundation course for all other courses. A one or two-day class.

Part One: Constituent Data

- ◆ Learn to navigate through RE 7 using the new “shell”, the Raiser's Edge Bar and Pages
- ◆ Enter new individual constituents and new organizations
- ◆ Learn to track relationships for both individual and business constituents
- ◆ Discover how to set up matching gift companies
- ◆ Learn about address options that will keep your mailings effective
- ◆ Discover how attributes can add valuable information about your constituents
- ◆ Learn to use actions to track your organization's contacts with constituents

Part Two: Gift Data

- ◆ Learn the details of entering gift data
- ◆ Understand and work with various gift types
- ◆ Learn to apply Soft Credits
- ◆ Discover how to enter matching gifts
- ◆ Learn how to work with pledges: setting them up, applying payments, and making adjustments

Part Three: Customizing and Getting Help

- ◆ Learn about the Options available to users
- ◆ Discover how to customize your Home Page
- ◆ Explore the support materials available from Blackbaud, Inc.
- ◆ Industry Best practices in database entry and fundraising 101

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