

The Raiser's Edge 7 Essentials for Executives

Blackbaud Training

The Raiser's Edge 7 Essentials for Executives is a basic-level, one-day course designed for executive-level users at your organisation who do not use the programme on a daily basis. In this course, participants will receive a high-level understanding of the programme's functions and features they need to effectively use **The Raiser's Edge 7** to manage their development offices and staff.

COURSE OBJECTIVES

Upon completion of this course, you will be able to:

- Navigate through **The Raiser's Edge 7** using the various menus, buttons, and shortcut options available
- Identify concepts, modules, terminology, and overall functions
- Track cultivation methods and results by retrieving and adding information to constituent records
- Generate reports that allow you to analyse your fundraising efforts

COURSE CONTENT

- **The Raiser's Edge 7 Overview**
 - Navigate through the programme using the various menus, buttons, and shortcut options available
 - Identify concepts and overall functions
- **Basic Records Management**
 - Understand the concept of the "record" and identify the different record types
 - Access and use the Records page
 - Identify and understand individual and organisation records in **The Raiser's Edge 7**
 - Create records for campaigns, funds, and appeals and records for tracking their progress
 - Retrieve biographical information such as gifts, relationships, affiliations, and notes
 - Produce constituent giving histories and graphing gift summaries
 - Use actions to track phone calls, meetings, and personal solicitations
 - Quickly produce follow-up letters, invitations, or welcome letters
- **Reports**
 - Understand the report categories and report types available
 - Use the report parameters screen and processing gift type reports
 - Generate financial reports and statistics that analyse the giving trends of your donors
 - Print key constituent information for cultivation and solicitation purposes
- **Dashboard**
 - Customise the Dashboard
 - Customise each summary panel on a dashboard
 - Identify elements of the Dashboard page and summaries available
- **Business Rules**



- Establish general system preferences
- Define duplicate criteria for individuals and organisations
- Select the preferred name display
- Determine the programme's generation of IDs and batch numbers
- Set system-wide preferences for gifts, constituents, alumni, memberships, and events
- Establish user-defined rules for constituents, gifts, and actions

WHO SHOULD ATTEND

Personnel at your organisation who do not use **The Raiser's Edge 7** on a daily basis but need a high-level understanding of the program functions and features would benefit from this class.

PREREQUISITES AND ADVANCED PREPARATION

Before attending this class, you should be comfortable using a Microsoft Windows operating system.

For on-site training, this course assumes that you have installed **The Raiser's Edge 7** and that your computers meet the Detailed System Requirements listed on the Blackbaud website at www.blackbaud.co.uk.

To purchase a seat in this course, contact a Blackbaud representative at 0845 658 8590 or at training@blackbaud.co.uk.



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