

Managing Memberships

Blackbaud Training

Managing Memberships classroom training is a half-day class that teaches you how to use all aspects of the membership functionality in **The Raiser's Edge** included with the **RE:Member** optional module. We'll cover all aspects of membership management, including setting up membership schemes, adding memberships and dues, renewing and amending existing memberships, creating renewal notices, and running membership reports.

COURSE OBJECTIVES

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

- Describe the components of Membership your organisation uses
- Set up applicable business rules and membership categories in Configuration
- Add memberships from the constituent record and the Membership page
- Record payment of membership dues
- Renew, rejoin, drop, upgrade, and downgrade memberships
- Create a Lapsed Member Report
- Generate renewal notices

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

This class is intended for those who have completed *The Raiser's Edge Essentials* parts I and II or those who are experienced users of the constituent record. Before attending this class, you should be comfortable using **The Raiser's Edge 7** on 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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