

The Raiser's Edge Essentials Part 1

Blackbaud Training

The Raiser's Edge 7 Essentials – Part 1 is a course designed for the person responsible for entering and maintaining constituent and gift information in **The Raiser's Edge 7**. You will learn about the essentials of **The Raiser's Edge 7** and managing records for individuals, organisations and gifts.

COURSE OBJECTIVES

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

- Navigate through **The Raiser's Edge 7**
- Identify concepts, modules, terminology and overall functions
- Add, track, and manage information about your constituents and gifts
- Enter multiple constituents and gifts using Batch

COURSE CONTENT

- **The Essentials**
 - Navigate through the programme using the various menus, buttons, and shortcut options available
 - Identify concepts and overall functions
 - Access and use the Home page
- **Basic Records Management**
 - Understand the concept of the “record” and identify the different record types
 - Access and use the Records page
- **Individual Records**
 - Create individual constituent records and define biographical, mailing, relationship and miscellaneous information
 - Add and edit various constituent data including business, education, relationship and canvasser information
- **Organisation Records**
 - Create organisation constituent records and define matching gift information
 - Add organisation employees, contacts and other professional relationships
- **Gifts**
 - Add, edit, and delete various gift types, such as cash gifts, stock gifts, and gifts-in-kind
 - Enter gift records and associate gifts with campaigns, funds, and appeals
 - Enter pledges and recurring gifts and apply payments to them
 - Adjust gifts due to inaccurate data entry or currency discrepancies
 - Define user options for gift entry
- **Batch**



- Enter multiple constituent records and large volumes of gift information using a spreadsheet data entry form
- **Configuration**
 - Evaluate table entries and learn how to clean them up
 - Build and organise addressee/salutation formulas
 - Set up attributes
 - Establish letter templates
 - Configure international address formats
 - Select business rules that will make your organisation run smoothly

WHO SHOULD ATTEND

This course is designed for data entry personnel.

PREREQUISITES AND ADVANCED PREPARATION

Before attending this course, you should be comfortable working in a Microsoft Windows environment. For onsite training, this course assumes that you already have **The Raiser's Edge 7** and that your computers meet the Detailed System Requirements listed on the Blackbaud Web site 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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