

The Raiser's Edge Essentials Part II

Blackbaud Training

The Raiser's Edge 7 Essentials – Part II is a course that builds upon the concepts introduced in the basic-level courses. This course covers some of the powerful features of **The Raiser's Edge 7®** that enable you to query and extract data for reporting, mailings, and use in other software applications as well as more advanced features.

COURSE OBJECTIVES

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

- Produce simple and complex queries
- Generate simple and complex export files
- Create and apply Action Tracks
- Discuss and produce pre-formatted reports in **The Raiser's Edge 7**

COURSE CONTENT

- **Record Structure**
 - Become familiar with record structure and the links between records
- **Query**
 - Decipher query types and operators
 - Create simple and complex queries and format query results
 - Merge queries
 - Define Query options
- **Mail**
 - Prepare labels and donor acknowledgement letters
- **Reports**
 - Identify report categories in The Raiser's Edge 7
 - Run canned reports, such as the Gift Detail and Summary report
- **Dashboard**
 - Identify available Dashboard summaries and elements of the Dashboard page
 - Customise the Dashboard page and summary panels
- **Export**
 - Understand export types and formats
 - Define output criteria groups and field formatting
- **Global Add**
 - Globally add appeals to constituent records to track who received them
 - Globally add actions to track who received a particular communication
 - Globally send e-mails to constituents



WHO SHOULD ATTEND

This course is designed for data entry personnel.

PREREQUISITES AND ADVANCED PREPARATION

Before attending this course, you should have completed one of the following Blackbaud training courses:

- *The Raiser's Edge 7 Essentials – Part I*
- *The Raiser's Edge 7 Essentials for Version 6 Users*
- *Implementing The Raiser's Edge 7*
- *Converting to The Raiser's Edge 7 from Version 6*

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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