

**Overview**

A two-day class for those responsible for entering and maintaining constituent and gift information. Participants will learn how to manage records for individuals, organizations, and gifts.

**Class Objectives**

- Navigate through The Raisers Edge
- Identify concepts, modules, terminology, and overall functions
- Add, track, and manage information about constituents and gifts
- Enter multiple constituents and gifts using Batch

**Class Content****The Essentials**

- Navigate using menus, buttons, and shortcut options
- 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 constituent data including business, education, relationship and solicitor information

**Organization Records**

- Create Organization records and define matching gift information
- Add organization 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

**Instructors**

Each of our instructors has over 5-years experience in teaching use of The Raiser's Edge.

**Book a course**

(613) 259-9968



[training@fionabrownconsulting.com](mailto:training@fionabrownconsulting.com)