

Prerequisite

Before attending this course participants should have completed *RE Basics - Part 1*

Overview

This three-day class builds upon the concepts introduced in *RE Basics Part 1*. This class covers Querying and Exporting data for custom reporting, mailings, and use in other software applications as well as more advanced features.

Class Objectives

- Build a variety of Queries
- Generate export files
- Discuss and produce canned reports in The Raisers Edge 7
- Export data to create custom Crystal Reports for Blackbaud
- Create basic standard and custom reports using Crystal Reports

Class Content**Record Structure**

- Become familiar with record structure and the links between records

Basic Records Management

- Understand the concept of the "record" and identify the different record types

Query

- Decipher query types and operators
- Create simple and complex queries and format query results
- Merge queries
- Define Query operators

Mail

- Prepare labels and donor acknowledgement letters

Reports

- Identify report categories in RE
- Run standard reports

Export

- Understand export types and formats
- Define output criteria groups and field formatting
- Export data for use with Crystal Reports and in third-party applications
- Run canned reports

Instructors

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

Book a course

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