

**Intended audience**

This course is for Database Administrators, Business Analysts, Prospect Researchers and anyone who manages constituent relationships, mines for prospect potential, selects constituents for inclusion in events, campaigns, or mailings. Gift processing supervisors responsible for resolving donor concerns, and development managers responsible for producing reports would also gain great advantage from attending this advanced level course.

**Prerequisite**

Before attending this course participants should have completed *RE Basics Part 2*

**Class Objectives**

- Troubleshoot problems with Query, Export, Import, and Mail.
- Complex Querying
- Use Import to create new records, update existing records, and extract data
- Discuss address and "Head of household" processing
- Create conditional mail merges and segmented mailings
- Create complex Exports to use with other programs
- Review the benefits of standard statistical and demographic reports
- Learn when to use Query, Import, Export, and Mail

**Class Content****Query**

- Use complex Queries to group data
- Combine operators to filter criteria
- Filter summary criteria fields
- Merge queries
- Review Query processing, identify reasons for duplicate results, and how to avoid duplicates

**Import**

- Analyze how import works and create a pre-import checklist
- Import records in to RE
- Use Import to update existing records
- Create Import files that will be used in other applications
- Identify common problems, and learn helpful tips, tricks, and hints.

**Mail**

- Learn all about Address/Head of Household processing
- Optimize addresses
- Use MS Word to prepare conditional mail merges
- Avoid duplicate mailings with great segmentation
- Use tips and tricks to avoid common mailing problems

**Export**

- Discover when to use each Export format
- Learn the significant differences between flat and relational style exports
- Control the output of exports using filter criteria of one-to-many and summary fields
- Master Export, understand common problems and how to overcome them.

**Choosing the Right Process**

- Review the strengths of Query, Import, Export, and Mail.

**Efficiency and Organization**

- Set up your Home page to access and organize frequently used Records, Queries, and Reports.
- Look at only the data you care about, using custom views
- Standardize and simplify data processing by using Business Rules
- Take advantage of statistical and demographic reports

**Instructors**

Each of our instructors is a Certified Fundraising Executive (CFRE) with over 5-years experience in teaching development professionals how to advance their organizations and their careers by leveraging the power of The Raiser's Edge.

**Book a course**

(613) 259-9968



training@fionabrownconsulting.com