**Blackbaud Intermediate (201)**

1. CRM Navigate
2. CRM Functional Areas
3. CRM Explorer Bar
   1. Task
   2. Shortcuts
   3. Recent Searches
   4. Recently accessed
4. Constituent types
5. Personalization for you
6. Constituencies
   1. What they are
   2. How they generate
   3. Can be council personalized
7. Prospect Managers
   1. What is a Prospect Manager
   2. How do I become one
   3. How is it used in the system
      1. Solicitor during batch entry
      2. Gift Plan Manager
8. Prospect Functional area
9. My Fundraiser Page
   1. Fundraising Tabs
   2. Go through the different tabs on for a fundraiser
   3. Organizational Hierarchy
10. Prospects
    1. What is a prospect
    2. How do I create one
    3. What shows up on a prospect page
    4. Have them add 5 prospects to themselves as fundraisers
11. Wealth and Rating
    1. How to access
    2. How to use
    3. How to review returned data
    4. Extend Relationships
    5. Link Tank
    6. Have the research their five prospects
12. Moves Management
    1. Prospects
    2. Fundraisers
    3. Creating a Prospect Plan on each of their 5 prospects
    4. Filing a contact report
       1. Pending
       2. Contact method
    5. Fundraiser Page
    6. Major giving management
13. Planned Giving
    1. Location
    2. When to use
    3. How to use it
14. Prospect List Creation
    1. Show where it lies
    2. Have them create a list of 5 prospects
    3. Have them jump and wealth screen
15. CRM Mobile / Fundraiser on the go.
    1. How to download and what they show
16. Reports VS Queries
    1. Discuss types
    2. Explore Information Library
    3. Talk about folder
    4. Explore query Generator
    5. Explore LXXX folder
    6. 5 year list
17. Development workspace
    1. Location
    2. How it can be used
    3. What shows on it
18. Interaction Data List
    1. Location
    2. How it can be used
    3. How you can use it with other staff members
19. Volunteer Award and Recognitions
    1. Location
    2. What populates
    3. What are the uses of these list
20. BSA Recognition programs
    1. Location
    2. What populates on them to generate list
    3. How to review someone recognition level
21. Consolidated View
22. Constituent Hygiene
23. Donor Challenge Example
24. Benefit Catalog
25. Export Definitions
26. Prospect Plan templates
27. Stewardship Plan templates
28. Prospect Plan analysis
29. Prospect Plan follow-up
30. Workplace and Engage