



101 Training Agendas

Session 1 - Administration

- 1. Overview of Exceed! Premier*
- 2. Security Setup*
- 3. Data Maintenance & Integrity*
- 4. Year-End Processing*
- 5. Duplicate Checking*
- 6. Global Code Replacement*
- 7. Global Prospect Delete*
- 8. Archiving*
- 9. Codes*

QUESTIONS

Session 2 - Constituent Management

- 1. Overview of the Master Biographical Module*
- 2. Adding, Editing and Deleting Records*
- 3. Setting Up Reminders (Actions)*
- 4. User Defined Fields (and the More Bio tab)*
- 5. Bio Defaults*
- 6. Searching*
- 7. Recent & Favorite Bio's*
- 8. Reporting*
- 9. Mailings*

QUESTIONS

Session 3 - Gifts and Pledges

- 1. Overview of Gifts and Pledges Module*
- 2. Searching*
- 3. Adding, Editing and Deleting Gifts*
- 4. Entry Detail Tab*
- 5. Gift Codes*
- 6. Memberships*
- 7. Pledges*
- 8. Additional Features*
- 9. Reports*

QUESTIONS