Blackbaud Online Express User Guide

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Blackbaud Online Express is an innovative tool designed to streamline online fundraising efforts for non-profit organizations, schools, and other entities. This user guide aims to provide a comprehensive overview of its features, functionalities, and best practices to help users maximize their experience and effectiveness with the platform. Whether you are a new user or looking to enhance your skills, this guide will serve as a valuable resource.

Getting Started with Blackbaud Online Express

Before diving into the specifics of using Blackbaud Online Express, it's essential to understand the setup process and the initial steps involved.

1. Creating Your Account

To begin using Blackbaud Online Express, you need to have an account. Follow these steps to create your account:

1. Visit the Blackbaud Online Express website.
2. Click on the "Sign Up" button.
3. Fill in the necessary information, including your organization's name, email address, and other relevant details.
4. Create a secure password and confirm it.

5. Agree to the terms and conditions and click "Submit."

Once your account is created, you will receive a confirmation email. Follow the instructions in the email to activate your account.

2. Setting Up Your Organization Profile

After activating your account, the next step is to set up your organization profile, which includes:

- Organization Name: Clearly state the name of your organization.
- Contact Information: Include an email address and phone number for inquiries.
- Mission Statement: Briefly describe your organization's mission and goals.
- Logo and Branding: Upload your organization's logo and customize branding colors to align with your identity.

Completing your profile will enhance your credibility and make your campaigns more recognizable.

Understanding the Dashboard

The dashboard is your main control center for managing campaigns, tracking donations, and accessing reports. Familiarizing yourself with its features is crucial for efficient navigation.

1. Overview of Dashboard Components

The dashboard is divided into several key sections:

- Campaigns: View all active and past campaigns.
- Donations: Track donation activity and generate reports.
- Reports: Access detailed analytics about your fundraising efforts.
- Settings: Adjust account settings and preferences.

Each section contains various tools that allow you to manage your campaigns effectively.

2. Navigating the Dashboard

To navigate the dashboard:

- Use the sidebar menu to access different sections.
- Click on campaign titles to view detailed information.
- Utilize the search bar to find specific campaigns or reports quickly.

Understanding how to navigate efficiently will save you time and enhance your productivity.

Creating and Managing Campaigns

Creating effective fundraising campaigns is the heart of Blackbaud Online Express. Follow these steps to create and manage your campaigns.

1. Creating a New Campaign

To create a new campaign, follow these steps:

1. Go to the "Campaigns" section on your dashboard.
2. Click on the "Create New Campaign" button.
3. Fill in the required fields, including campaign name, description, and fundraising goal.
4. Set the campaign duration, specifying start and end dates.
5. Choose your campaign type (e.g., peer-to-peer, event-based, etc.).
6. Click "Save" to create your campaign.

2. Customizing Your Campaign Page

Once your campaign is created, you can customize its appearance and content:

- Add Images and Videos: Upload compelling visuals that resonate with your audience.
- Personalize Content: Write engaging descriptions and updates to keep supporters informed.
- Set Donation Levels: Create predefined donation amounts to encourage giving.

Customizing your campaign page enhances engagement and can lead to increased donations.

3. Managing Your Campaign

After launching your campaign, it's essential to monitor its progress:

- Track Donations: Regularly check donation totals and donor information.
- Update Content: Keep your campaign page fresh with updates and news.
- Respond to Donors: Show appreciation by thanking donors through personalized messages.

Effective management helps maintain momentum and encourages donors to continue supporting your cause.

Leveraging Communication Tools

Effective communication is vital for successful fundraising. Blackbaud Online Express offers various tools to engage with your supporters.

1. Email Campaigns

You can create and send email campaigns directly from the platform:

- Segment Your Audience: Use filters to target specific donor groups.
- Design Templates: Choose from pre-designed templates or create your own.
- Track Engagement: Monitor open and click-through rates to gauge effectiveness.

Regularly engaging with your audience through email campaigns keeps your organization top-of-mind and encourages ongoing support.

2. Social Media Integration

Blackbaud Online Express allows you to share your campaigns on social media platforms:

- Share Buttons: Add social media sharing buttons to your campaign pages.
- Post Updates: Regularly share updates and success stories on your social media channels.
- Create Events: Promote fundraising events through social media to reach a broader audience.

Utilizing social media enhances your campaign's visibility and can lead to increased donations.

Analyzing Your Campaign Performance

To improve future campaigns, it is essential to analyze performance data from past efforts.

1. Accessing Reports

Blackbaud Online Express provides various reporting features:

- Donation Reports: Analyze total donations, donor demographics, and trends over time.
- Campaign Performance: Review the success of each campaign based on set goals.
- Engagement Metrics: Evaluate email campaign performance and social media engagement.

Regularly reviewing these reports helps identify successful strategies and areas for

improvement.

2. Making Data-Driven Decisions

Use the insights gained from your reports to make informed decisions:

- Adjust Strategies: Modify your approach based on what has worked well or poorly.
- Set Realistic Goals: Use past data to inform your fundraising goals for future campaigns.
- Enhance Engagement: Identify which communication methods have the highest engagement rates and focus on those.

Making data-driven decisions will enhance your overall fundraising strategy.

Best Practices for Using Blackbaud Online Express

To maximize your effectiveness with Blackbaud Online Express, consider the following best practices:

- **Be Consistent**: Regularly update your campaigns and communication to keep supporters engaged.

- **Engage Your Donors**: Personalize your interactions and show appreciation for donations.

- **Utilize Resources**: Take advantage of Blackbaud's support and training resources for further learning.

- **Test Campaigns**: Experiment with different strategies and analyze results to find what resonates with your audience.

By following these best practices, you can ensure that your campaigns are effective and that your organization continues to thrive.

Conclusion

Blackbaud Online Express is a powerful tool for non-profit organizations looking to enhance their online fundraising efforts. By following this user guide, you can create, manage, and analyze campaigns effectively, ensuring that you maximize your impact. With the right strategies and practices, you can engage your supporters and achieve your fundraising goals with confidence.

Frequently Asked Questions

What is Blackbaud Online Express?

Blackbaud Online Express is a web-based platform that allows organizations to create and manage online donation forms, event registrations, and peer-to-peer fundraising campaigns.

How do I set up my account in Blackbaud Online Express?

To set up your account, visit the Blackbaud Online Express website, select 'Sign Up,' and follow the prompts to create your account using your organization's credentials.

Can I customize the donation forms in Blackbaud Online Express?

Yes, you can customize donation forms by adding your organization's branding, choosing colors, and modifying the content to match your fundraising goals.

What payment methods does Blackbaud Online Express support?

Blackbaud Online Express supports various payment methods, including major credit cards, debit cards, and in some cases, electronic checks and ACH transfers.

Is there a mobile-friendly option for Blackbaud Online Express?

Yes, Blackbaud Online Express is designed to be mobile-responsive, allowing donors to easily make contributions or register for events from their mobile devices.

How can I track donations made through Blackbaud Online Express?

You can track donations by accessing the reporting tools within Blackbaud Online Express, where you can view transaction history and generate financial reports.

What kind of support is available for Blackbaud Online Express users?

Blackbaud offers various support options, including a comprehensive user guide, online tutorials, and customer support through phone or email.

Can I integrate Blackbaud Online Express with other

Blackbaud products?

Yes, Blackbaud Online Express can integrate with other Blackbaud solutions, such as Blackbaud CRM and Blackbaud Luminate Online, to streamline your fundraising efforts.

What security measures does Blackbaud Online Express have in place?

Blackbaud Online Express employs industry-standard security measures, including SSL encryption, to protect donor information and ensure secure transactions.

How do I access the user guide for Blackbaud Online Express?

You can access the user guide for Blackbaud Online Express by visiting the Blackbaud support website and navigating to the documentation section for Online Express.

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