



salesforce appexchange



Integrated apps

8M+ installs

## Association Management



- Membership
- Accounting
- Order Processing
- Committees
- Events
- Directories
- Donations
- Certification / Accreditation
- Member Portal
- & more

## Cloud Offerings



pardot



community cloud



marketing cloud



service cloud



sales cloud



Automation



Artificial Intelligence  
(Einstein)



Security



Reports & Dashboards



Business Intelligence



Collaboration



Process Builder



Predictive analytics



API



Mobile

# Salesforce CRM Platform

# Agenda

- ~~Introductions~~
- **What is Trailhead?**
  - Your Trailhead Profile
  - Trails, Modules, & Trailmixes
- **Recommended Trailhead Badges**
  - Business User
  - Admins
  - Basics for Nimble AMS Users



## Additional Resources

- **Q & A**

# Nimble AMS: What is Trailhead?

- **Your Trailhead Profile**
  - Creating an Account via SSO
  - Quick Overview: Homepage
  - Overview: Profile
- **Trails, Modules, & Trailmixes**
  - What are Trails?
  - What are Modules?
  - Badges
  - TrailMixes



Search



Home



My Network



Jobs



Messaging



Notifications



Me



Work

Try Premium for free



**Rob Banwar**

Director of Enterprise Accounts and Sales Enablement at Community Brands

More

Add section

Open to



### Accounts & Contacts Badge

Salesforce Trailhead



### CRM Basics Badge

Salesforce Trailhead



### Data Quality

Salesforce Trailhead



### Donation Management Badge

Salesforce Trailhead



### Fundraising Basics

Salesforce Trailhead

See credential



### Leads & Opportunities Badge

Salesforce Trailhead



### Service Cloud Basics Badge

Salesforce Trailhead

## Trails: follow guided learning paths

Trails are guided learning paths through modules and projects that help you cover the most ground in the shortest amount of time. Consider them your personal game plan for exploring new skills.

Find the right trails for you [Clear filters](#)



Showing 4 trails out of 4

+0 points

Trail

**Employee Onboarding - General**

Excited to get you onboarded! Welcome to the Nimble AMS team!!!

+100 points

Trail

**Spring '21 Release**

Learn everything about Nimble AMS Spring '21 release!

~50 mins

+100 points

Trail

**Summer '21 Release**

Learn everything about Nimble AMS Summer '21 release!

~50 mins

+100 points



Search for modules, trails, and more...



Ajay Singh  
0 badges, 200 points



[Home](#) [Trails](#) [Modules](#) [Trailmixes](#)



Trail

## Spring '21 Release


Learn everything about Nimble AMS Spring '21 release!



+100 POINTS



~50 mins • 0%

Module +100 POINTS



### One Payment - CH (Overview)

Learn information and skills necessary to know what 'One Payment - CH' feature does and it can help Associations.

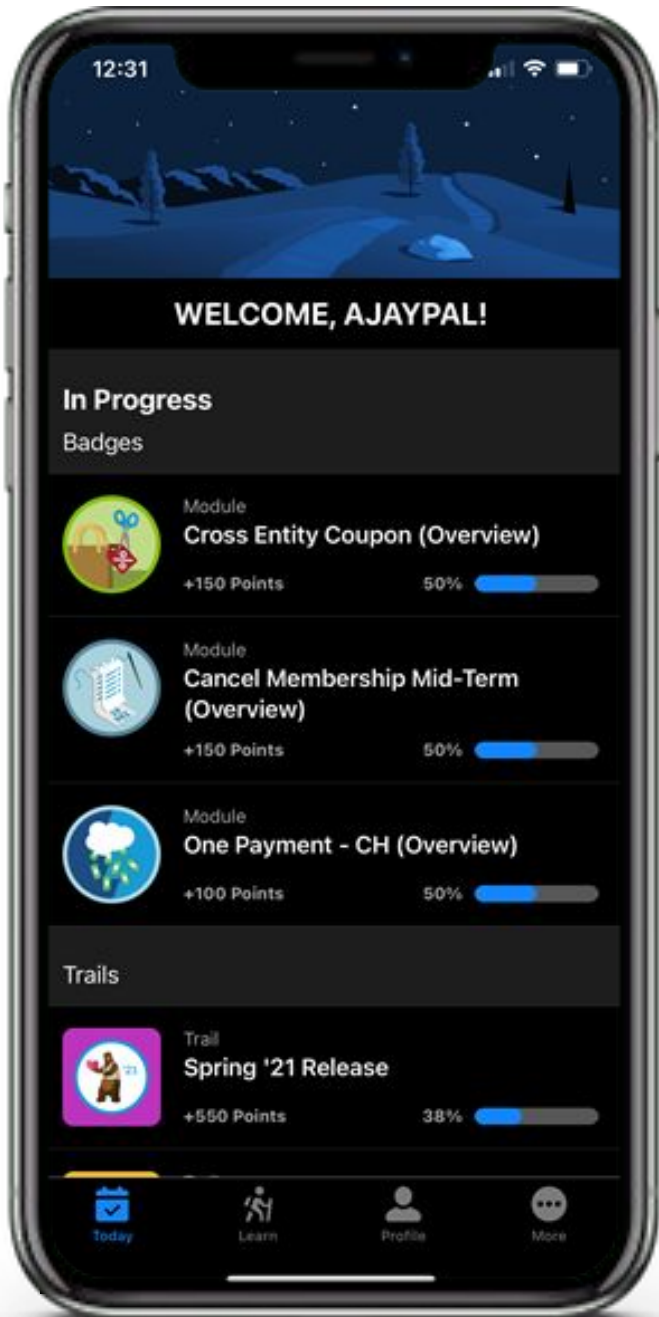
 0% 

**Feature Summary**  
~5 mins [→](#)

**Use Case Assessment**  
~45 mins [→](#)

[^ Hide 2 Units](#)





12:31



WELCOME, AJAYPAL!

In Progress

Badges



Module  
**Cross Entity Coupon (Overview)**

+150 Points 50%



Module  
**Cancel Membership Mid-Term (Overview)**

+150 Points 50%



Module  
**One Payment - CH (Overview)**

+100 Points 50%

Trails



Trail  
**Spring '21 Release**

+550 Points 38%



Today

Learn






Profile

More

# Nimble AMS: Recommended Badges

- **Business Users**
- **Admin Users**
- **Intermediate Admin Users**
  
- **Nimble AMS Trailmix**

# Trailhead: Business User Badges

| Trail Badge   | Trail Name  | Purpose   |
|---|---|---|
|    | <a href="#">CRM for Lightning Experience</a>                      | Get started with navigating Salesforce CRM and personalizing your experience.           |
|    | <a href="#">Accounts &amp; Contacts for Lightning Experience</a>  | Discover how accounts and contacts work together in Salesforce.                         |
|    | <a href="#">Chatter for Lightning Experience</a>                  | Learn how to use Chatter, update your profile, and start collaborating.                 |
|   | <a href="#">Data Quality</a>                                      | Discover strategies for assessing and improving the quality of your data in Salesforce. |
|  | <a href="#">Reports &amp; Dashboards for Lightning Experience</a> | Build real-time reports and charts to visualize key business metrics.                   |



Accounting



Admin



Chapters







Membership



Most Standard Users

# Trailhead: Admin Badges

| Trail Badge   | Trail Name  | Purpose  |
|---|---|--|
|    | <a href="#">UI Customization</a>                                  | Customize your app's user interface without code.  |
|    | <a href="#">Reports &amp; Dashboards for Lightning Experience</a> | Build real-time reports and charts to visualize key business metrics.  |
|    | <a href="#">Data Modeling</a>                                     | Give your data structure with objects, fields, and relationships.  |
|  | <a href="#">Salesforce Release Strategies</a>                     | Learn how Salesforce releases new features and how your company can make the most of them.<br><br><b>NOTE: This badge is within a larger trail for "Prepare for Salesforce Releases". This trail also includes badges for recent Salesforce release.</b> |



Accounting



Admin



Chapters



Membership

# Trailhead: Intermediate Admin Badges



Formulas and Validations



Salesforce1 Mobile Basics



Data Security



User Management



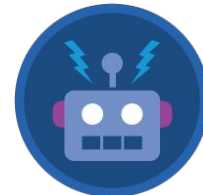
Change Management



Security Basics



Data Management



Process Automation



TRAILHEAD

Search for modules, trails, and more...



Rob Banwar 97 badges, 43,000 points

Today Learn Credentials Community For Companies COVID-19



Delete Edit Share

Trailmix by Rob Banwar

### Introduction to Salesforce - The Basics for Nimble AMS Users

A great way for new Nimble AMS users to become familiar with the basics of Salesforce. Updated for Lightning Experience.

+6,800 Points

Completed 4/3/2019



Module

+400 POINTS

#### Trailhead and Trailblazer Community

Learn, earn, and connect with Trailhead and Trailblazer Community.



Completed 4/30/18



Module

+900 POINTS

#### Salesforce Platform Basics

Get introduced to the platform, navigate use cases, and build custom functionality.



Completed 4/30/18



Module

+200 POINTS

#### Salesforce CRM

# Nimble AMS: Additional Resources

- **Salesforce Success Community**
- **Nimble AMS Help Guide**
  
- **Salesforce Events - Dreamforce**



TRAILHEAD

Search for modules, trails, and more...

Today

Learn

Credentials

Community

For Companies

COVID-19



Rob Banwar  
97 badges, 43,100 points



# Trailblazer Community Feed

Connect with fellow Trailblazers. Ask and answer questions to build your skills and network.

Search following...

Filters

Following

Questions

My Activity

My Favorites

Sort

Recent Activity



Ask a question...



Paige Goodstein posted in **\* Trailhead \*** (Originally asked by Paige Goodstein)



Paige Goodstein

## Einstein/Outlook Calendar Sync Creating & Sending new Event Times

For recurring events, where the user is the owner of the Outlook event, several issues occur:

1. duplicates of the event appear in SF (but with different event times)
2. The event is changing its start time at random times
3. The event sends the new start times (that were not made by the user) to all the attendees as a new invite (via Outlook)

Show More



0 likes



0 comments



Share

Today, 4:09 PM



Write a comment...

## Recommended Groups



67,355 members

Trailblazer Community Cove



65,539 members

\* Tableau CRM \*



61,169 members

Admin Trailblazers



## Recommended Topics



2,661 discussing

#Trailhead



1,269 discussing

#TrailblazerCommunity





# Nimble AMS Help

Find Nimble AMS documentation to help you succeed.

## Release Notes



### Getting Started

New to Nimble AMS, or just looking to expand your knowledge? Check out the [Basics](#) or go to [Salesforce Trailhead](#), which is loaded with interactive modules for learning. The better you are at Salesforce, the better you are at Nimble AMS!



### Best Practices

Learn about Nimble AMS best practices, including

## Spring '21 Major Features



### Major Features

Check out about the new features and capabilities in the latest release of Nimble AMS, or head to the [Fixes and Improvements](#) for a full list of every change.

Here's a quick overview

- One Payment for Community Hub
- Cross Entity Coupons
- Cancel Membership Mid-Term
- New API Docs site
- Plus many other [improvements and changes](#).

Find out more on our [Spring 21 Major Features](#) page.

**In This Section**

Donations

Donation Configuration -

Donations Microsite

**Create a Donation Product**

Create an Appeal

Enable Donations in Community Hub


Customize Donations in Community Hub

Donation Management +

[Home](#) > [Donations](#) > [Donation Configuration](#)

# Create a Donation Product

Staff can create a product to use as a stand alone donation option, or to be linked to a membership to be shown during membership join or renewal.

1. In the tab bar, click App Launcher, or in Salesforce Classic, click **+Nimble AMS, Staff View, Button, All Tabs**.
2. Click **Products**.
3. Click **New**.
4. In **Record Type of new record**, select **Donation**.
5. Click **Continue**.
6. Enter information:
  - a. In **Product Name**, enter the name of donation option that is shown in the Staff View and Community Hub order process.
  - b. Optionally, in **Short Name**, enter a short name that identifies the donation option. This is helpful for reporting. This field is required if your association uses Level 2 and Level 3 credit card processing.
  - c. In **Display Order**, enter a number to signify where in the list of products this donation should be displayed. The lower the number, the higher the donation is shown on the list of products.
 

✔ The number should be 0 - 999.  
Consider spacing out your numbers to accommodate future changes in products.  
Avoid:  
Donation 1: **1**, Donation 2: **2**, Donation 3: **3**, Donation 4: **4**  
Better:  
Donation 1: **1**, Donation 2: **5**, Donation 3: **10**, Donation 4: **15**
  - d. If your association uses Level 2 and Level 3 credit card processing, in **Commodity Code**, select the commodity code used to classify the product.
  - e. If your association uses Level 2 and Level 3 credit card processing, **Unit Of Measurement** is populated. Check with your administrator to see if you need to select a different value.
7. Enter description information:
  - a. Optionally, in **Description**, enter a description of the donation which is shown in the Staff View order process.
  - b. Optionally, in **Short Description**, enter a short description shown when making a donation during join or renewal in Community Hub.
8. Enter accounting information:
  - a. In **List Price**, enter the suggested donation amount. This amount is displayed in the Staff View order process and can be changed by staff. When this value matches one of the **Suggested Donation Amounts**, that amount is preselected for constituents.



**dreamforce**  
← NATIONAL PARK →



<https://www.salesforce.com/dreamforce/>



# Next Steps



# Nimble AMS: Bookmark These!

- **Salesforce Trailhead**
  - <https://trailhead.salesforce.com>
- **Salesforce Success Community**
  - <https://success.salesforce.com>
- **Nimble AMS Help**
  - <https://help.nimbleams.com>



TRAILHEAD

Sign Up

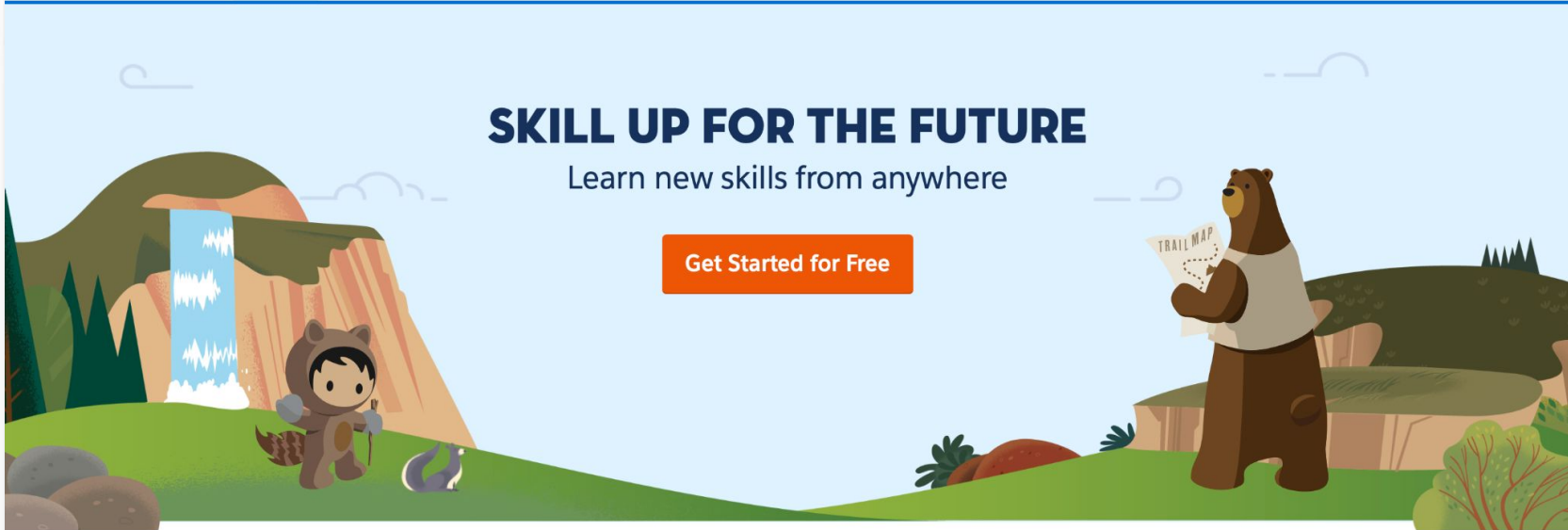
Log In

- Home
- Learn ▾
- Credentials ▾
- Community ▾
- For Companies ▾
- COVID-19 ▾

# SKILL UP FOR THE FUTURE

Learn new skills from anywhere

Get Started for Free



## TRAILHEAD IS THE FUN WAY TO LEARN

Learn In-Demand Skills





## Let's get started, Trailblazer!

How do you want to sign up?



Salesforce

Or



[Log In](#)







Search for modules, trails, and more...



Rob Banwar  
97 badges, 43,100 points

Today Learn Credentials Community For Companies COVID-19



+1,100 POINTS

Trail

### Get Started with Trailhead

Earn badges, have fun, and build your career on Salesforce.



Completed



Module

+400 POINTS

### Trailhead and Trailblazer Community

Learn, earn, and connect with Trailhead and Trailblazer Community.



Completed 9/9/21

Get Started with Trailhead and Trailblazer Community

~5 mins



Find Your Way Around

~5 mins



Build Your Network with Trailblazer Community



*Thank You*

