



End User Training User Manual

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Course Objectives

Welcome to Nimble AMS End User training. This course introduces the Nimble AMS system and covers how to access common features and functions. By the end of this course, students will have a solid foundation for using Nimble AMS.

Users will learn how to:

- Understand the basic terminology and navigation
- Understand account and affiliation management
- Understand list views, reports, and dashboards
- Understand order processing and accounting

How Nimble AMS Familiarization & End User Training Works

This course provides an overview of Nimble AMS basic features and familiarizes users with core functions and best practices in using Nimble AMS. It offers a solid background introduction to the basic Nimble AMS framework, defines Nimble AMS specific terminology, and instructs users on how to navigate, view, and enter data by partaking in sample, hands-on exercises.

Course Audience

The focus of Familiarization/End User training can vary depending on the target audience:

For **Implementation** (New) clients, the targeted audience is Subject Matter Experts (SME's) representing departments/functions within their organization that will need to become “familiarized” with Nimble AMS. These users will then apply that understanding to participate more fully in the Discovery phase of the Nimble AMS implementation. The knowledge acquired in this class will help attendees with such tasks as filling out consulting generated workbooks, contributing to scope and requirements meetings, and participating in User Acceptance Training.

For **Go-Live** clients, the goal of the course is to present training to the entire client staff on the finished and fully configured Nimble AMS product. The trainer will learn the specifics of each department’s day-to-day activities, form a client specific agenda, and deliver training that is particular to that function, on that topic. While the manual may not match all their configured areas, the concepts will reinforce best practices and actual instruction will be on their finished, configured system.

For **Live** (Existing) clients, the course provides step-by-step directions and best practice instruction on Nimble AMS that clients can leverage in their various functions. In addition, the course is periodically offered in a “Scheduled” format in Nimble AMS’s Chicago and Tysons offices (or virtually) for new hire, retraining, and upgrade training.

Course Division:

First half - focuses on the basic structure and analytical tools of Nimble AMS: **Navigation, Hierarchy, Terminology, Applications, Items, and Records, List View, Reports, and Dashboard** creation.

Second half - focuses on creating, ordering, and using specific Items (which are often **Products**) such as **Accounts, Memberships, Events, Registrations, Donations, Committees, Orders, Payments, and Basic Accounting**.

Manual Purpose

Nimble AMS Familiarization or End User class attendees receive the Nimble AMS End User Training Manual as a PDF prior to class. This manual functions primarily as a reference guide and is based on data examples found in the Nimble AMS Training org (see below). The manual is NOT for interactive use during the actual course, but as a guide AFTER the Instructor Led Training is completed. The exercises in the guide reflect the steps followed during instruction.

Post-instruction, the manual is valuable as a step-by-step guide to recreate class examples. The guide functions as a valuable reference for procedures such as, “how to set up a new Person Account”, or “how to order a product” or, “how to create a cross filter in a report”. It also strongly reinforces best practices for a strong implementation/improving an existing deployment.

Users should be aware however that while the concepts of each exercise are applicable across any Nimble AMS org, the names/configuration of Records, List Views, Reports, Dashboards, etc. will not reflect the exact ones built in a client’s implementation staging/production Org. Users will have to substitute their own record names/configurations for those used in the manual’s exercises (i.e. Board of Directors Committee, PAC Donation, or Curtis Banks).

Training Org

The Nimble AMS Training Org that users receive as a copy to explore for class is the basis for all data/examples in the Nimble AMS End User manual. The org is designed to reflect, 1) all major **Applications** and **Items** as an introduction to Nimble AMS, and 2) the **Best Practices** that Nimble AMS clients should build into everyday processes whether new or existing clients.

The personal copy the Training org that attendees use in class is accessible to that user for 30 Days from the start of the instruction. Users can continue to use the org in conjunction with the manual to replicate exercises, try existing features, explore areas of interest, etc. The Nimble Training org functions as a bridge to the Client’s Staging org and eventually to their Production org. It reflects both an introduction on how to use Nimble and its capabilities.

At the beginning of each chapter, **Blue Highlighted Sections** provide explanations about how the data is configured in the org for that particular concept – i.e. what Member Types, Event Setup, Committees Names, etc. are being used as examples.

Document Conventions

When attempting exercises of this manual, be aware that **Field Names** or **Targeted Location** will be bolded first, then the **Value** to be entered/selected bolded next. For instance:

- In the **Account Name** field, enter **Curtis Banks**.
- From the **Navigation Bar**, select the **Orders** item.

This convention enables a user, as they grow in experience, to **skim quickly** to the actions of the exercise without needing to review details.

Resources

Nimble AMS Client Training Website: For the most up to date Class Schedule, Class Summaries, Downloadable Class Descriptions, and Contact Forms to inquire about or arrange for training, please visit: <https://nimble-ams-training.communitybrands.com/>.

Nimble AMS Training: Below are short summaries of all Nimble AMS Training offerings. Please visit the website listed above for information that is more comprehensive.

- **Nimble AMS Familiarization/End User:** Attendees understand the basics of Nimble AMS navigation, Accounts, Orders, Payments, Events, Registrations, Donations, and all the major facets of the platform. Basic intro to the Nimble AMS org.
- **Nimble AMS Administrator:** Attendees learn about how focused features of the Salesforce platform leveraged in Nimble AMS and how to apply these configurations.
- **Nimble AMS Administrator II:** Attendees understand how to automate functions in the platform using workflows, approval processes, flows, and change sets.
- **Nimble AMS Accounting:** Attendees partake in an overview of Nimble AMS accounting features and business processes. Best financial practices in Nimble AMS emphasized.
- **Nimble AMS Create:** Attendees provided a detailed look at the creation and maintenance of queries, templates and Create functionality.
- **Nimble AMS Community Hub Administrator** – Attendees understand how to configure and manage Nimble AMS’s Member facing portal; Community Hub & the Lightning Store.
- **Nimble AMS Choice:** Clients approve a specific agenda from any Nimble AMS class and any topic. Instructor will provide sessions covering the topics outlined and class conducted on the client’s org. ONLY for Live clients (no Implementation clients).
- **Nimble AMS Reports & Dashboards:** Clients partake one day of instruction and one day of application on List Views, Reports, and Dashboards. Users learn valuable techniques for building, managing, and distributing advanced examples of each.

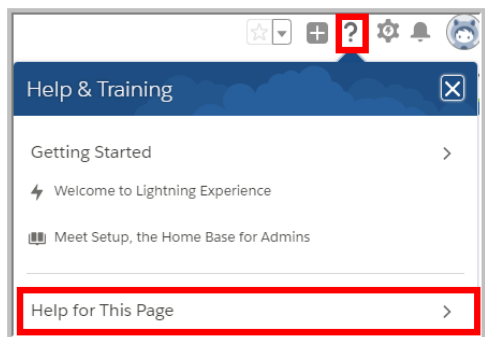
Salesforce Trailheads: As an additional Nimble AMS resource, Salesforce provides a Trailheads service to all clients. Trailheads involve step-by-step instructions on all Salesforce specific functions and are an excellent way of understanding all levels of Salesforce’s capabilities. Users can create a free login in seconds and “be off and learning” before, during, and after a Nimble AMS implementation. Users can compile badges, earn points, and most importantly, understand the foundation of the Nimble AMS platform that is Salesforce.

Trailheads are accessible by navigating to: <https://trailhead.salesforce.com>.



Salesforce Help: Users can also access the comprehensive and valuable Salesforce Help if they become responsible for configuring Nimble AMS elements via the Setup or Service Setup. Help becomes available once a user is involved in an actual Salesforce level setup element, such as configuring a Field, Page Layout, or User account.

Salesforce Help is contextual intelligent and will take the user directly to specific help files dedicated to that topic. Help files are located on any page by accessing the Help icon located in the upper right-hand corner of the page:



Navigation, Terminology & Hierarchy

When users first access Nimble AMS they land on **Home** for a particular **Application** (App) and are able to navigate to that App **Items** and view its associated **Records**. The following section breaks down the unique (bolded) terms listed above and informs the user where in Nimble AMS each is located and how they function.

Navigation Bar

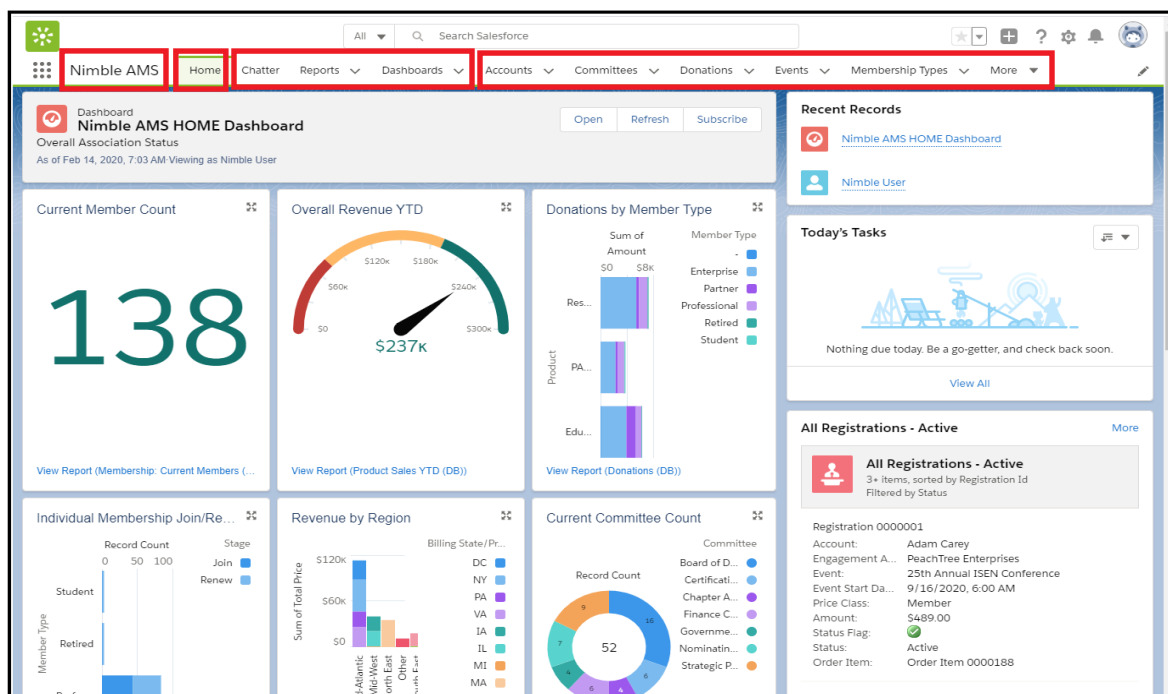
When Nimble AMS opens, users will notice a strip of possible options across the top of the screen; this is Nimble AMS's **Navigation Bar**. The Navigation Bar contains the following distinct sections from **Left to Right**. Each section is explained in detail on the following pages:

Application (App) – the current Application displayed. Users can change from one to another using the App Launcher. **Nimble AMS** in the screenshot below.

Home - The landing page & dashboard that ALL users see when first logging in to Nimble AMS. Home can be configured to differ per Application or by User Group permissions.

Chatter, Reports, Dashboards (CRD) - These three tabs default initially, in the displayed order, for ALL Applications. They enable accessibility to each option from a consistent location, to the right of Home, but can be relocated if desired.

Items – Different Items display depending on the Application selected. In the screen shot below, the Nimble AMS App and Items such as Accounts, Committees, Donations, etc. display. Users can also add individual Items temporarily or permanently to an Apps default Item listing.



Home

When the Nimble AMS opens, users automatically land on the **Home Dashboard**. The Home dashboard serves as a consolidated functional/viewing area that reflects the user's focus, tasks, and data they need to interact with regularly.

The Home dashboard is configurable to reflect two distinct focuses:

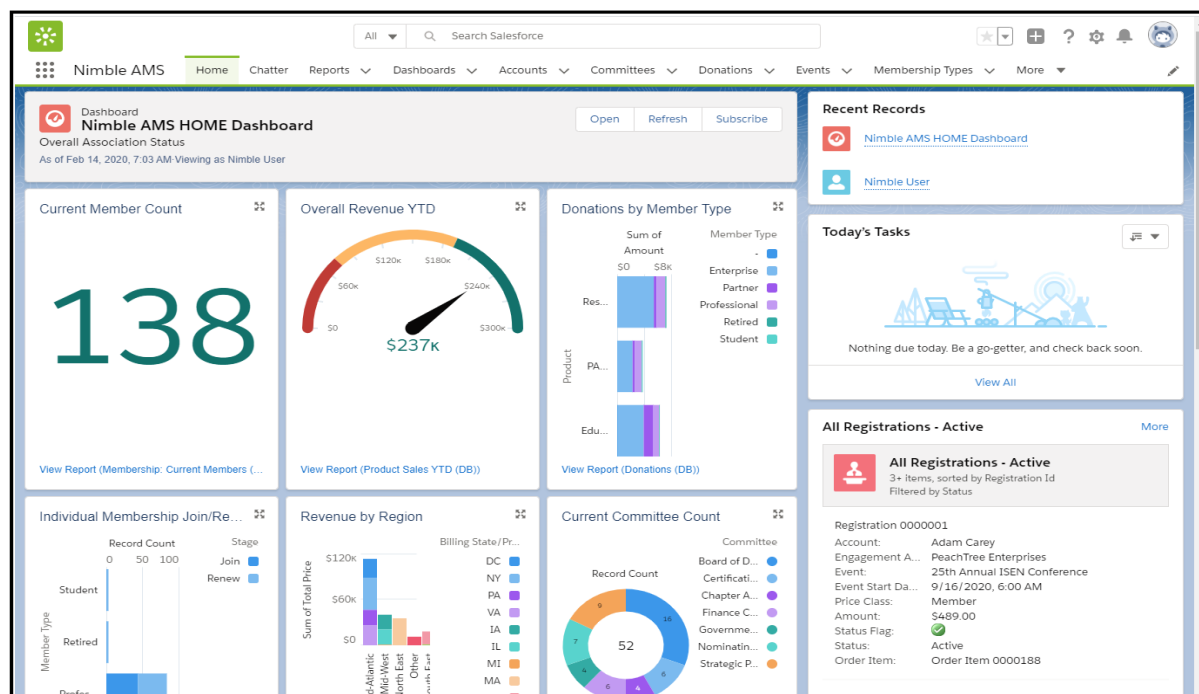
1. The focus of the **Organization** (for example):

- Memberships
- Sales: Revenue & Counts
- Committees
- Events/Registrations

2. The focus of the **Employee**

- Recent Records
- Today's Tasks
- Today's Events

By default, only ONE Home dashboard is configured upon launch. However, additional Application/Profile specific Home dashboards can easily be created by Nimble Administrators.



Applications (Apps) and adding Items

Apps (Applications) are names given to groups of conceptually related Items under a single grouping. Users can select which Apps and Items they wish to display via the App Launcher.

For instance, if a user selects the **Accounts** App, the user will then see Account related Items such as **Memberships, Orders, Donations**, and other items to which a user managing Accounts would need access.

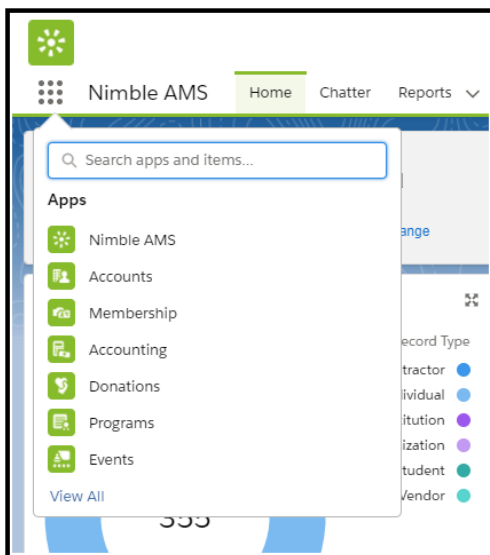
Once an Application displays, it remains permanent along with its associated Items until manually changed via the App Launcher. This is regardless of whether the user logs in/out, shuts down their computer, or accesses Nimble AMS from another device.

Adding Apps

The (upper left) corner of the Nimble AMS **Home** screen, displays both the current Application and its Name.

In this **exercise**, users will change the existing Application to a different selection.

1. Click on the **App Launcher** – multi colored box/waffle icon (upper left).



2. Click on the **Membership** App.
 - Users can also Search for Apps or Items in the Search apps and items box.
3. Observe the results – Users should now see:
 - **Membership** listed to the left of **Home** in the Nav Bar.
 - Different Items displayed to right of the **Dashboards** Item in the Nav Bar.

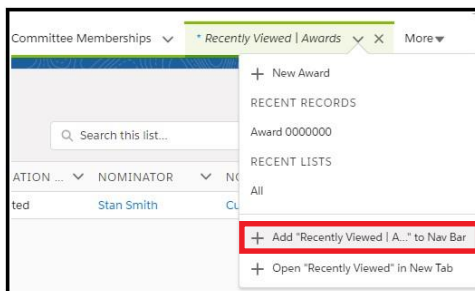
Adding Items

When users open the App Launcher, and click on the **View All** link at the bottom, they will land on a large listing of both Apps – marked by distinct boxes and when scrolling down, multiple blue linked fields in columns sorted alphabetically. These links represent distinct **Items**.

Normally, a user will select an App, and when the App displays, will utilize the accompanying Items. But sometimes a user will need to select an individual item independent of an App. Users can select individual items by clicking on the desired blue link below the listed Apps. Users can then enable the item to be permanent part of the Navigation bar.

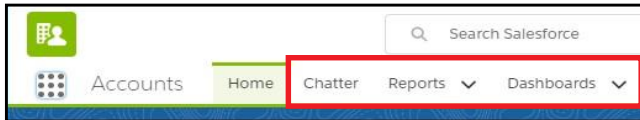
In this **exercise**, users will add the Awards item permanently to their current App:

1. Open the **App Launcher**.
2. Search for and select the **Awards** item.
3. **Awards** will now display as a temporary selection in the **Apps Item** list.
4. Users can click on the dropdown to the right of **Awards** to add the Item permanently.
 - Items permanently added will remain with that App even if the user logs out/back in.



CRD - Chatter, Reports, and Dashboards

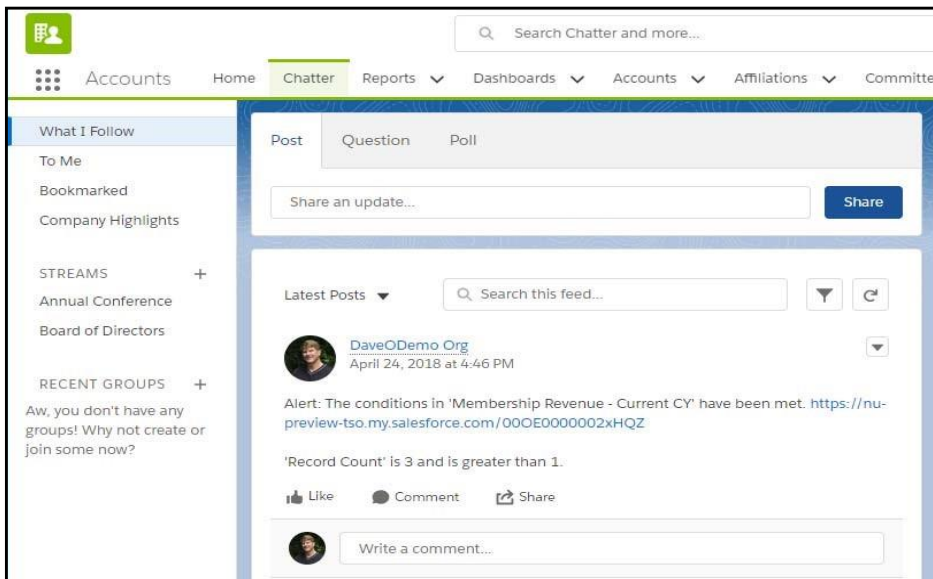
Chatter, Reports, and Dashboards are three items that are by default included in EVERY App. They display initially as the first three items to the right of **Home** on the Navigation bar. They can be moved if desired.



Chatter

The Chatter item is the user's internal, social media collaboration home base and gives them instant access to the features of Chatter. Chatter enables users to create and review **Posts**, **Questions**, and **Poll**.

The actions of the Chatter item are home to the **Chatter Publisher**. The publisher also appears initially on the **Home** tab, user **profile** page, **group**, and **record** detail pages.

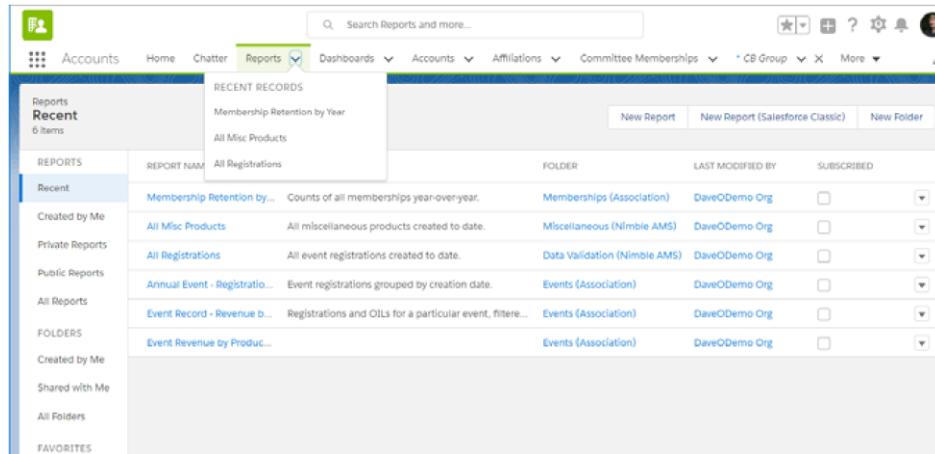


Chatter covered in depth in Chapter 6 of this manual.

Reports

Enables users to quickly select the **Recent Records** (Reports) accessed by clicking on the dropdown to the right of Reports OR access All Reports (across All Apps) by clicking directly on the **Reports Tab**.

Reports are Nimble's most in depth method of pulling data for simple to complex analysis. Both List Views and Reports are extensively reviewed during chapters three and four of this manual.

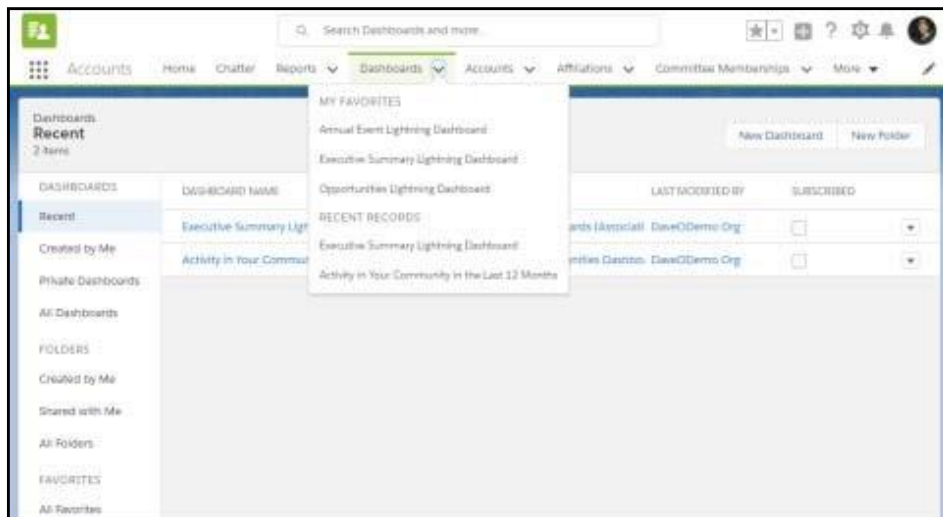


Clicking on any of the left-hand column items will display those groupings/folders of Reports. Users can click on any blue linked Report Names to explore those reports.

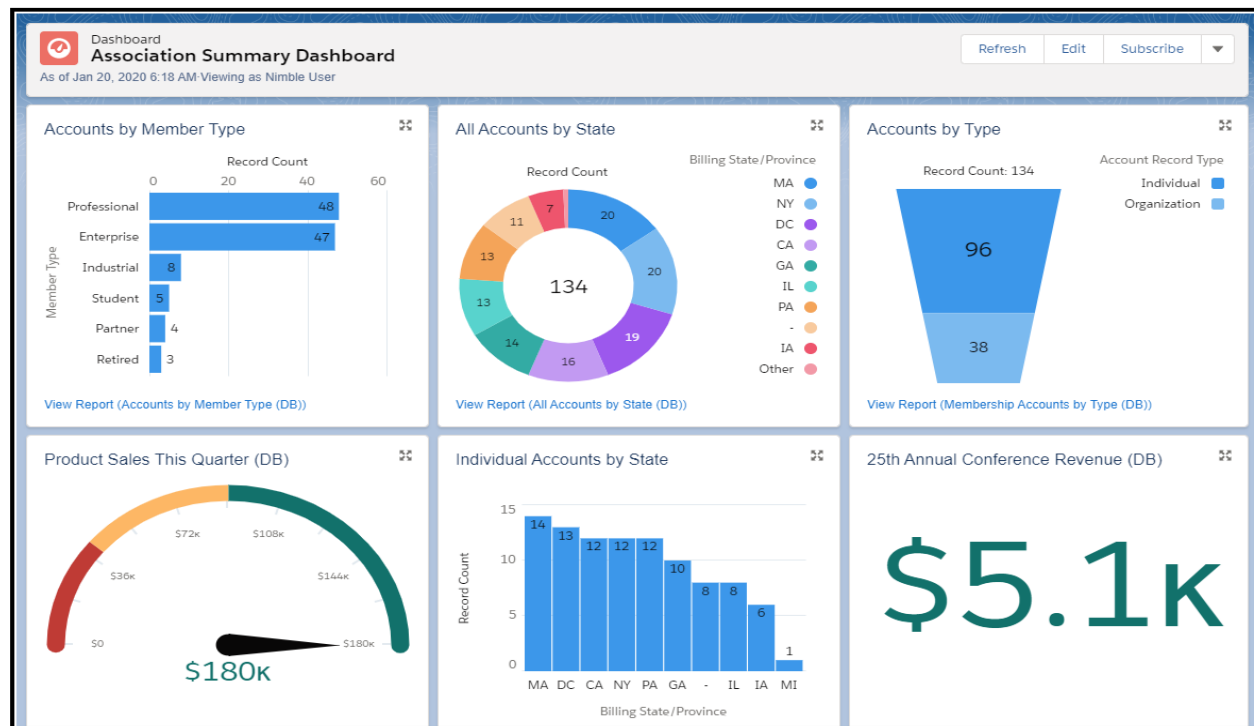
Reports covered in depth in **Chapter 4** of this manual.

Dashboards

Nimble AMS provides users with a Home dashboard when first accessed, but users may require additional dashboards. These dashboards are accessible from this item, if added to Favorites, or if embedded in the Navigation Bar. Dashboards display reports, graphs, compiled data, tasks, news, chatter feeds, etc.



Click on the additional Dashboard link to display the **Association Summary Dashboard**.



Dashboards covered in depth in **Chapter 5** of this manual.

Items and List Views

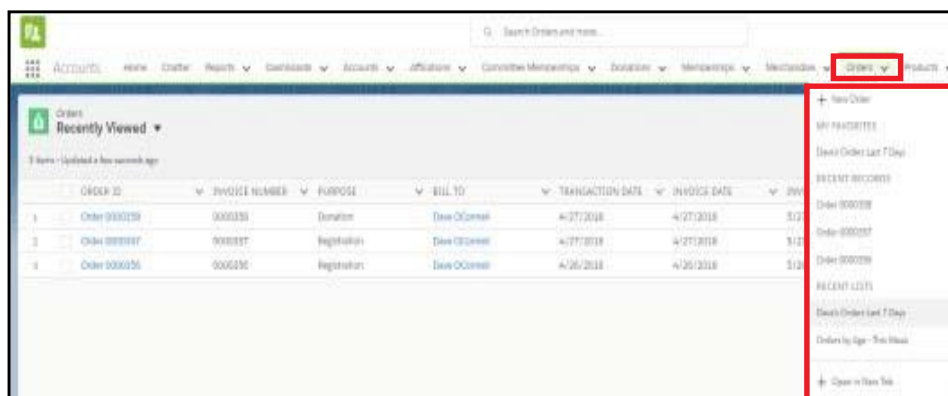
Items

Items represent groups of Records related to a selected App, although, as observed earlier, can be independently selected and associated with any App by an individual user.

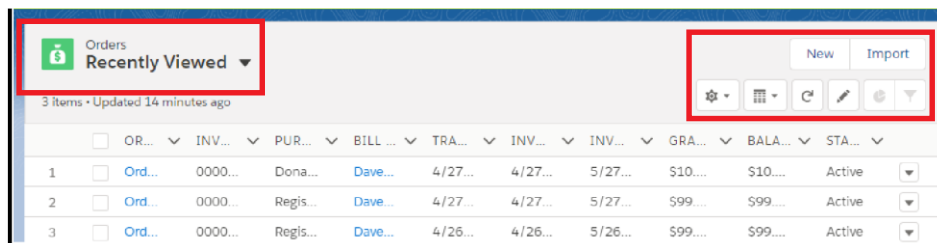
In the screen shot below, the **Accounts** App is active, and the **Orders** item selected. By default, the **Recently Viewed** list view displays in the viewing area.

Users have **Three** main methods for interacting with an Item:

1. Clicking on the dropdown next to the **Orders** item, displays quick actions users can perform such as Opening a **New Order**, accessing **My Favorites**, accessing **Recent Records**, or accessing **Recent Lists**.



2. Clicking on the **Orders** item text (not the dropdown) initially displays the **Recently Viewed** orders list view. Options on the far right are available: **New order**, **Import**, **View Settings**, **In-line Editing**, etc.



3. Clicking on the dropdown to the right of the **Recently Viewed** list view title, displays additional **Orders** list views from **Recent List Views** or from **All Other Lists**. This provides users with a library of possible list views.

List Views

List Views display a specified subset of **Records** from a selected **Item**. List Views are used for **quick actions** such as sending invoices, **bulk changes to records** such as updating the status of multiple event registrants, and **updating records post order** such as adding specific booth numbers to an Exhibitor record. Changes to List Views regardless of the situation are done quickly without having to open each individual record through the **Edit List** function.

It is important to note that List Views only focus on the data contained in **ONE** item. If a user creates a list view of Committee Memberships, they will only be able to see field found on a Committee Membership record; they cannot bring in additional Account fields for instance.

Clicking on the **Recently Viewed** list view displays the set of data/fields configured for this view.

ORDER ID	INVOICE ID	PURPOSE	BILL TO	TRANSACTIONS	INVOICE DATE	INVOICE DUE	BRAND	BALANCE	STATUS
Order 0000356	0000356	Donation	Dave OConnell	4/27/2018	4/27/2018	5/27/2018	\$10.00	\$10.00	Active
Order 0000357	0000357	Registration	Dave OConnell	4/27/2018	4/27/2018	5/27/2018	\$99.00	\$99.00	Active
Order 0000358	0000358	Registration	Dave OConnell	4/27/2018	4/27/2018	5/27/2018	\$99.00	\$99.00	Active

A user can click on a selected row link to access a Record.

For example, if users click on the **Orders** item, it defaults to **Recently Viewed Orders**. They can then click on a specific row to display the Order Record of that row.

RELATED	DETAILS	ORDER	ACTIVITY	CHARTER
Bill To: Dave OConnell Transaction Date: 4/27/2018 Purpose: Donation Entity: International Society for the Exceptionally Gifted Engagement Account	Name: Action Adjustment Date Additional Email Payment URL: https://www.paycomonline.net/v2/verifyPayment?ip=11103000015171&ts=14753486647018468701846870184687	4/27/2018 Party: International Society for the Exceptionally Gifted Product Code: 05-43100 GL Account: 05-43100	4/27/2018 Party: International Society for the Exceptionally Gifted Product Code: 05-43100 GL Account: 05-43100	

Nimble AMS comes pre-loaded with certain list views per Item. The number of views are limited per Item, but they can be cloned, edited and new list views created.

Nimble AMS users should create their desired list views per Item before going live with the system. With permissions, designated users can create personal list views at any time.

Users can replace the default Recently Used list view with any other available list view by pinning the desired one.

List Views covered in depth in **Chapter 3** of this manual.

Accounts

An Account is a collection of information about a Person or Organization record - its Address information, Preferences, associated Orders, Events, Payments, etc.

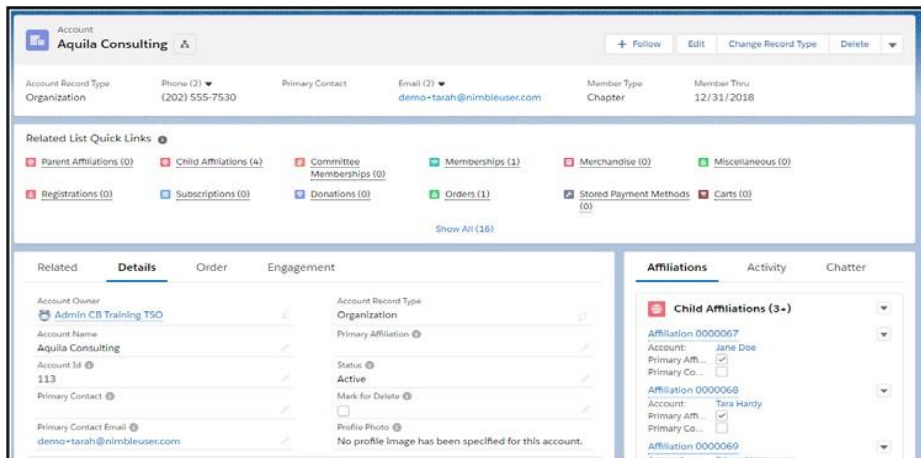
The information contained in an Account displays in sections and is stored in fields. Accounts are the hub of the Nimble AMS system since they are the foundation around which all other transactions, searches, and activity revolve. Accounts can represent Organizations or Individuals, Members or Non-Members, Vendors or Points of Contacts. Any number of Account Record Types are possible and each can have differing layouts with unique sections and fields.

A **Person Account** Record, for example, lists a person’s name, contact information (address, phone number, etc.) and other relevant data about a specific individual.

An **Organization Account** Record, in comparison, lists a company’s name, contact information, the number of employees, and any other data related to the organization.

By clicking on **Accounts**, clicking on the **Recently Viewed** dropdown, and scrolling to the **Organization - All** view, users can see a list of all Organizations in the database.

Clicking on the blue link of the first line under the **Record Name** column takes the user to that **Organization** Record.



Users can then navigate the distinct sections of an Account Record by:

- Vertically Scrolling from one Account **Section** to another under the default **Details** tab
- Clicking on different **Main** Account tab: **Related**, **Details**, **Order**, or **Engagement**
- Clicking on a different **Related** Account tab: **Affiliations**, **Activity**, or **Chatter**

Accounts covered in depth in **Chapter 2** of this manual.

Finding Data

Methods for Finding Data

Records and groups of Records are located and displayed using four distinct methods in Nimble AMS. Each method has a particular purpose and displays results in a unique way:

- **Search:** Searching for **One Record** OR all Records linked to a record.
 - Finding, Opening, Editing item record (Account, Order, Registration, etc.)
 - Analyzing overall engagement of a record by using the magnify glass icon
- **List Views:** Searching for small groups of data (with particular fields) with simple filters and charts, limited to **One Item** for the purpose of editing or taking an action.
 - Editing multiple Accounts or Registrations
 - Sending Order Invoices
 - Updating post Order records: Exhibitors, Sponsorships, Advertising, etc.
- **Reports:** Analyzing/reporting on specific groups of data across **Multiple Items** with numerous complex and flexible tools; default date filtering, result aggregation, multi-grouping, bucketing, complex charting, exporting, subscribing, etc.
 - Current Membership Counts by Member Type
 - All Registrations for Upcoming Events
 - All Open Batches and Transactions
- **Dashboards:** Displaying Charts and **Summarized Data** that leverage existing Reports to display critical department or company wide information. Provide increased Chart complexity, filtering, and functions.
 - Member counts Year over Year
 - Event Revenue and Registrations
 - Sales YTD, MTD, and/or QTD

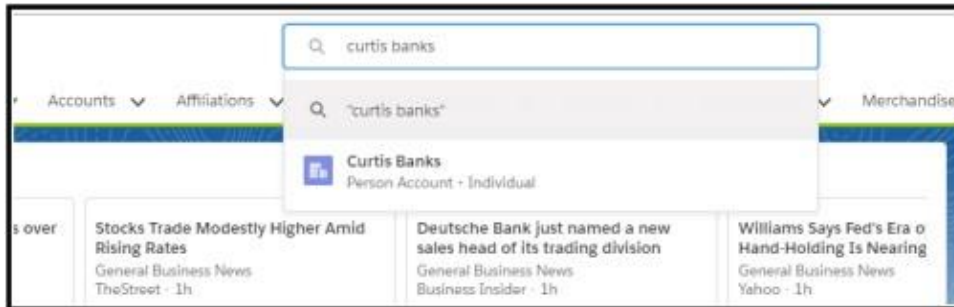
Only **Search** covered in the following section - users will be reviewing List Views, Reports and Dashboards in detail in Chapters 3, 4, & 5.

Using Search

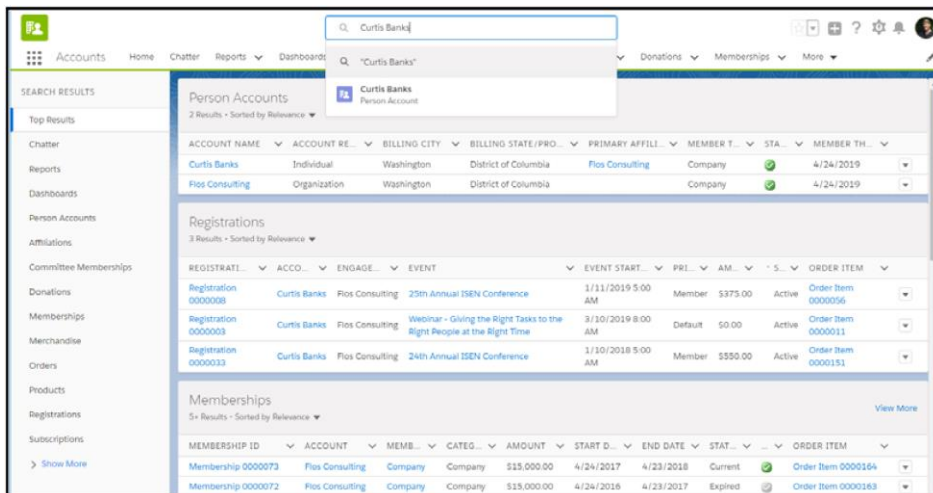
Nimble AMS’s Search function enables users to find specific records immediately for either interaction or analysis. Since Nimble AMS utilizes core Salesforce search functionality, users can also take advantage of wild cards.

In this **exercise**, users will find information using various records and understand how to view additional related record data.

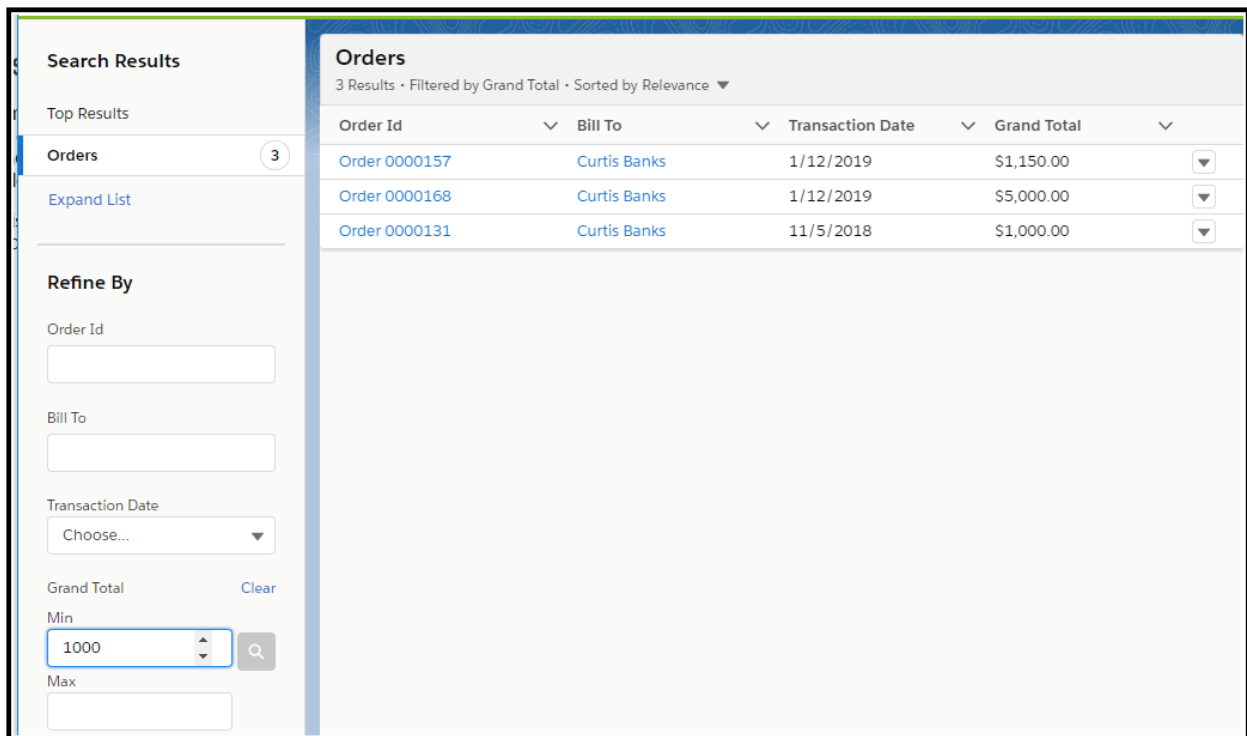
1. In the **Search** box at the top center of the Nimble AMS screen, enter **Curtis Banks**.



2. Select **Curtis Banks** (Person Record - Individual) from the results.
 - Search is NOT Case Sensitive - could enter, “curtis banks”.
3. Curtis Banks **Person Record** displays.
4. Return to **Search** and single click in the box (**Curtis Banks** name should still be present).
5. Select the **Curtis Banks** value with the **Search icon** located before his name.



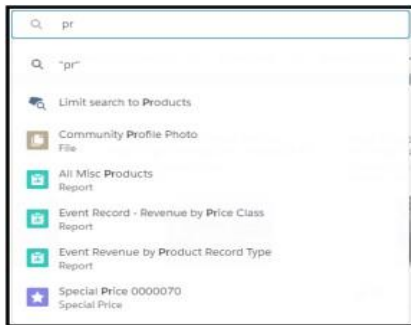
6. **Observe** the common results that display (Scroll to see all):
 - **Person Records** - Including a related Person and Organization Record.
 - **Registrations** - Events/Events that Curtis is attending.
 - **Memberships** - Levels, Records, and Orders of membership.
 - **Orders** - Any products Curtis ordered, including Registrations or Memberships.
 - **Account Memberships** - Accounts, Positions, Start & End Dates, etc.
 - **Affiliations** - Additional Organizations/Companies to whom Curtis is associated.
 - **Donations** - Any donations Curtis has submitted.
7. From the **Search Results** column on the left, click on **Orders**.
 - Search narrowed to **Orders by Curtis Banks**.
8. Under the **Grand Total** area, enter **1000** in the **Min** (Minimum) field.
9. Click the **Search** button – **Displayed Orders** narrowed to minimum of **\$1000.00**.



10. Return to the **Search**.

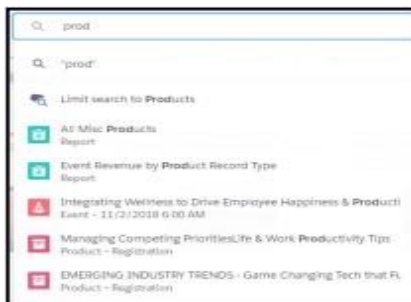
11. In **Search**, enter the letters **p-r-o-d** slowly and observe results for each letter.

- Each combination of letter returns unique results.
- Search returns the top 5 results Event the criteria.
- Search targets the most popular category at the very top - in this case, **products**.



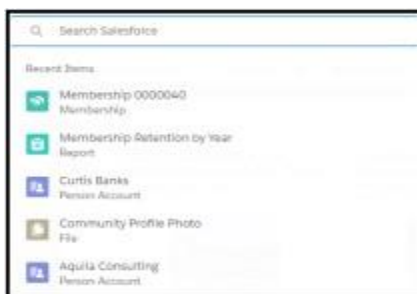
12. **Observe** the results of prod:

- Two Reports
- One Event
- Two Registrations



13. **Clear** the **Search** box.

14. Search displays the **last 5 items** that have been queried.



Wild Cards & Search Operators

Search Wildcards

- Use **SINGLE asterisk (*)** to find items that match zero or more characters at the middle or end of the query:

- *amer
- *smi

Use **TWO asterisks (*)** to find items that **CONTAIN** text within those asterisks:

- *american*
- *smith*

Use an **asterisk** to find items that match **only one character within** an item:

- "fo*d" matches to "food" and "fold".

Use more **specific search terms** to get more relevant results.

- To find occurrences of prospect, including the plural prospects, use "prospect*".

Caution

- Using partial terms like "prosp*" returns unintended matches, like matches for "prosperity" instead of "prospect".
- Search terms that are too general may take longer to return results.
- Leading wildcards (used at the beginning of a search term) are not supported, with the exception of standard lookups.
- Asterisks and question marks used within a search phrase enclosed in question marks (or when the exact phrase is selected in the search scope) function as wildcards. For example, "fo?d" matches to "food" and "fold".

Search Operators

AND - search for items that match all the search terms.

AND NOT - search for items that do not contain the search term.

OR - search for items containing at least one of the search terms.

- AND, AND NOT, and OR must remain in **Caps** to be used.

Additional Search Operators

Parenthesis - Search terms grouped together in parenthesis are evaluated first.

Quotation Marks - Search terms in quotations matches all terms in the order entered.

Combined Multiple Operators - Evaluated in the following order:

1. Parenthesis
2. AND or AND NOT (in order from right to left)
3. OR

Favorites

One of the most useful methods for both navigating to, and displaying of, frequently accessed list views, reports, dashboards, and even specific records within Nimble AMS is the ability to make any of those items **Favorites**.

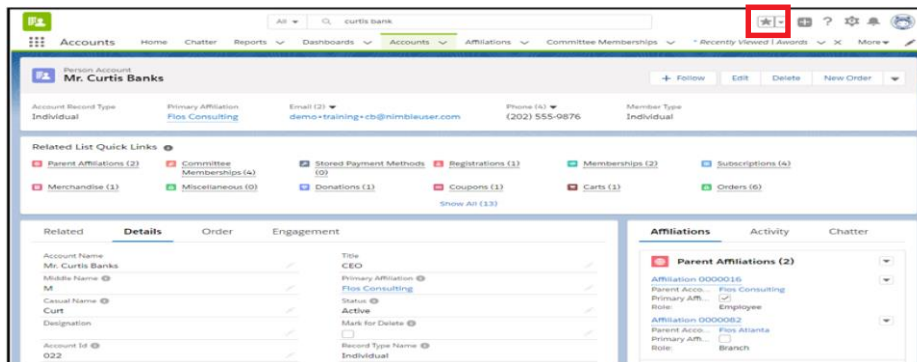
Favorites provide:

- Instant access to the list view, report, dashboard, record, or folder
- Instant interaction with the selected item - the record or item is “opened”
- Shortcuts navigation by putting desired records one-click away

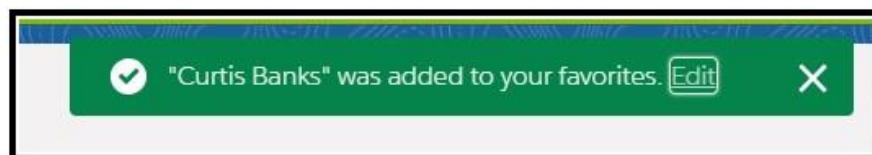
Adding Favorites

In this **exercise**, users will learn how to add a Favorite.

1. In **Search**, enter **Curtis Banks**.
2. Select his **Person** record.
3. Curtis Banks **Persons Record** displays.
4. Click the **Gray Star** button (upper right) - not the dropdown.



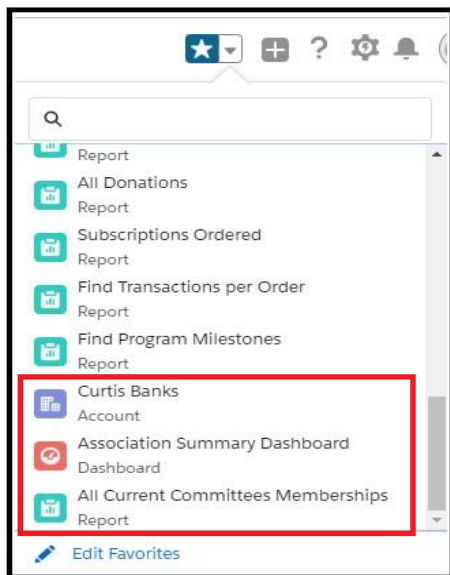
5. **Curtis Banks** added to the **Favorites** dropdown (to the right of Star).
 - Star turns White with a dark **Blue** background.
6. A green **confirmation message** displays in the center of the screen:



Moving & Editing Favorites

In this **exercise**, users will learn how to move and edit Favorites.

1. In **Search**, enter **Association Summary Dashboard**.
2. Select the **Association Summary Dashboard** record.
3. Click on the **Favorites** (Star) button.
4. In **Search**, enter **All Current Accounts Memberships**.
5. Select the **All Current Accounts Memberships (Report)** that displays.
6. Click on the **Favorites** (Star) button.
7. Click on the **Favorites dropdown**.
8. **Scroll** to the bottom of the **Favorites** listing.
9. **Observe** the three Favorites added.



10. Click on the **Edit Favorites**.
11. **Scroll** to the bottom of the **Edit Favorites** List.
12. Click on the **Move** icon (three stacked lines) to left of one of the Favorites.
13. **Drag and Drop** the **Favorite** from the bottom of list to the top.

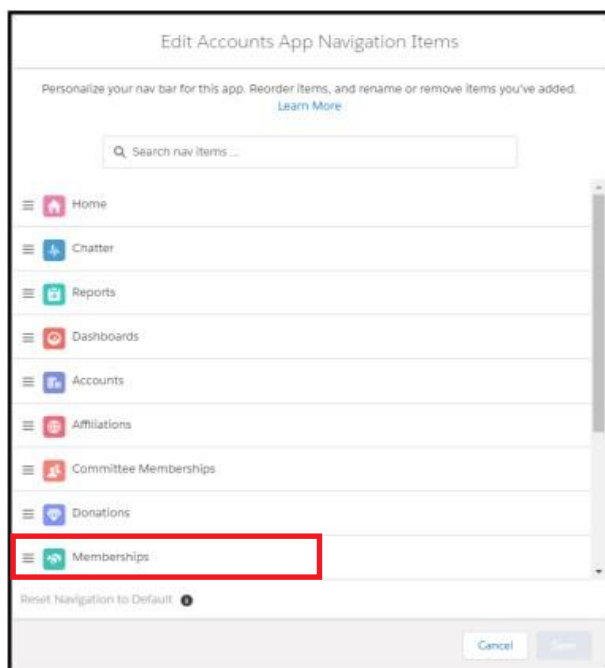
Personalizing the Navigation Bar

Users can also edit the **Navigation Bar** that displays across the top of the screen. The expanding or contracting of choices on this menu can vastly simplify the user’s interaction with the system.

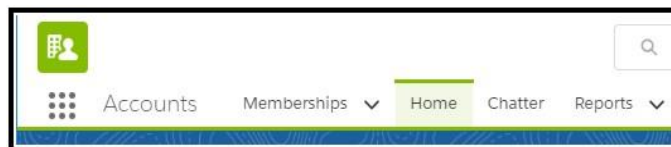
Rearranging Items on the Navigation Bar

In this **exercise**, users will learn how to rearrange items on the navigation bar.

1. Click on the **Pencil** icon (upper right).



2. Click on the **Memberships** item and drag it above the **Home** icon.
3. Click on the **Save** button. Observe the change to the **Menu Bar**.



IMPORTANT NOTE: Item position changes only apply to current Application – e.g. Accounts.

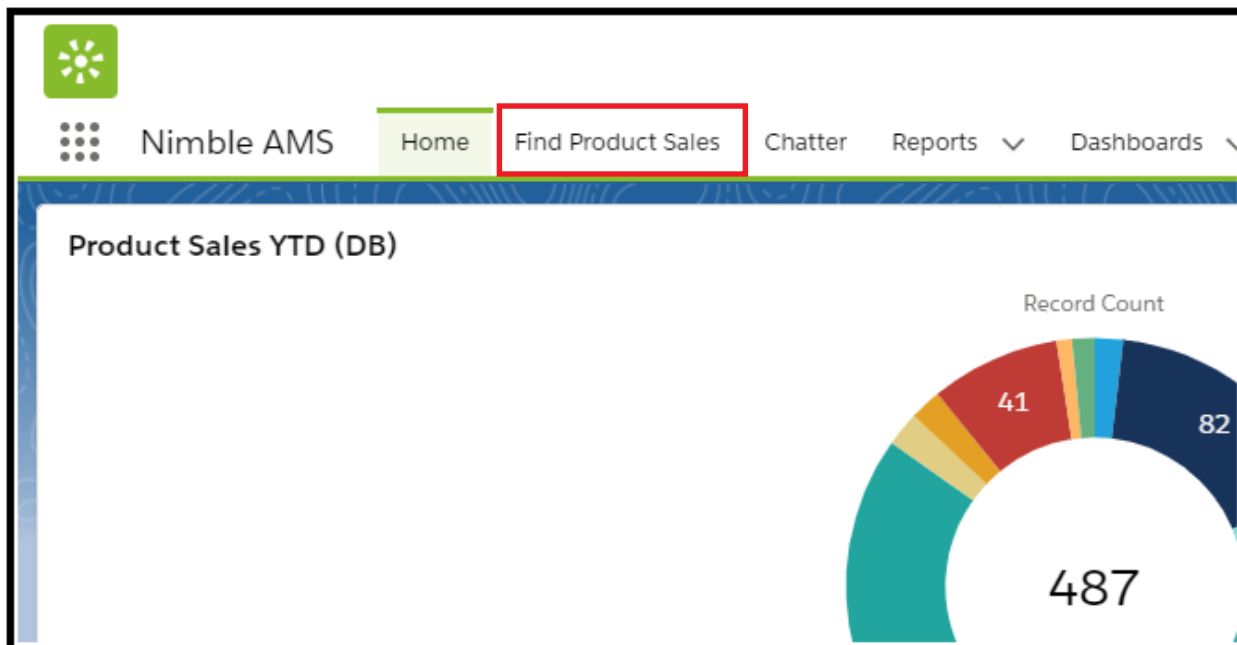
If a different Application selected, Membership would not be visible in that position, in the newly selected App. However, it will remain in that position when user returned to Accounts.

Adding Favorites to the Navigation Bar

Adding specific favorites to the Navigation Bar is perhaps the single easiest method to providing both instant access and a constant visual reminder to the user about the item added. Users can place any amount of list views, reports, records etc. on the Nav bar and make their own personalized list of important items that are always directly in line of sight.

In this **exercise**, users will learn how to add **Favorites** to the navigation bar.

1. Click back on the **Pencil** icon again.
2. Click on the **Add More** Items button in the upper right of pop-up screen.
 - The **Available Items** (upper left) defaults to **Favorites** – leave it selected.
3. Click the **Plus (+)** to left of the **Find Product Sales** Report Favorite.
4. Click on the blue **Add 1 Nav Item** button that displays in lower right hand of screen.
5. Left click and hold the **three horizontal bars (hamburger)** icon to the left of newly added **Find Product Sales** report (at bottom of list).
6. **Drag and drop** the report just below the **Home** item.
7. Click on the **Save** button.



Additional Settings

Nimble AMS has opportunities to personalize/locally configure the system on the user level located at the top right of the screen. In this section users will learn how to:

- Conduct Global Actions
- Access Salesforce Help
- View Personal Settings
- Personalize the Menu Bar

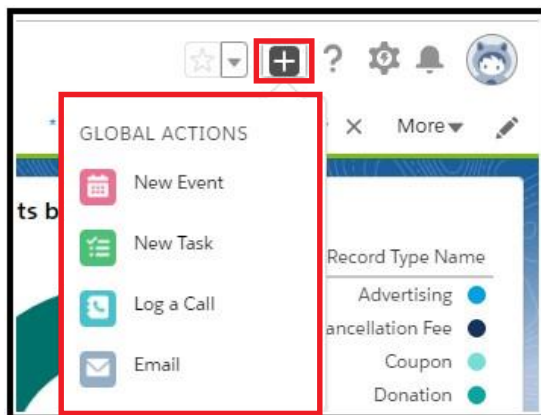
Global Actions

Global Actions enable user's quick creation of new Records across four distinct types:

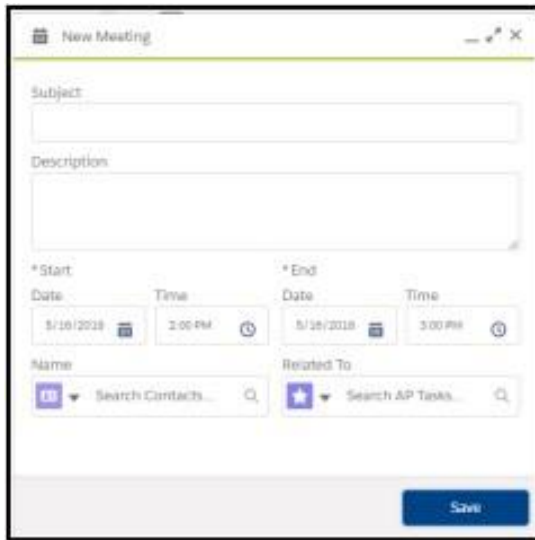
- New Event
- New Task
- Log a Call
- Email

In this **exercise**, users will learn how to use the Global Actions menu.

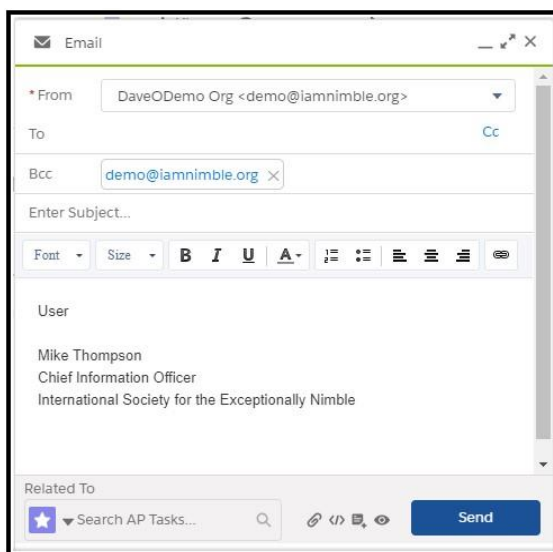
1. Click on the **Global Actions** Plus Sign in the upper right hand corner of the screen.



2. Click on the **New Event** button.



3. Click on the **Close** button (x in upper right-hand corner of Record).
4. **Event** creation will be covered completely in following chapter.
New Task and **Log A Call** perform the same function: a new Record displays for creation.
5. Click on the **Email** button.
6. Users will initially be provided a choice to send email via **Salesforce** or through **Office 365**. If this message displays, choose **Salesforce**.



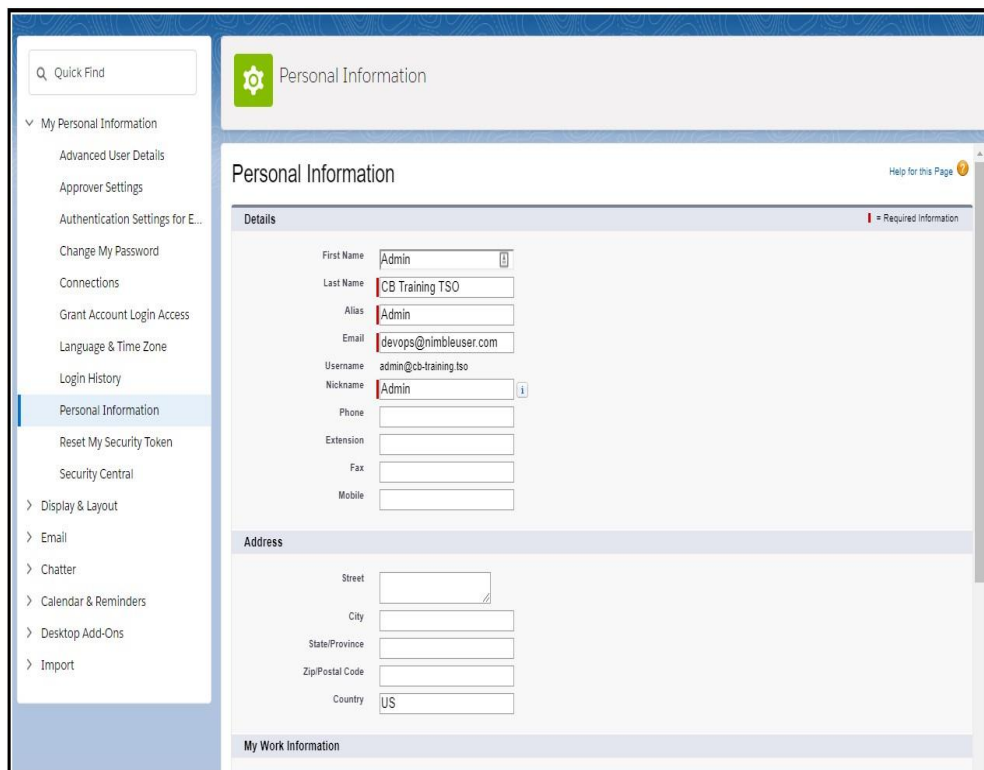
7. Users can Add a Person or Organization Record to the **Related To** field to track links.
8. Click on the **Close** button (x in upper right-hand corner of Record).

Personal Settings

Users can also access their **Personal Profile** or change **Personal Settings**. This area provides users with the ability to log out as well as to change the following:

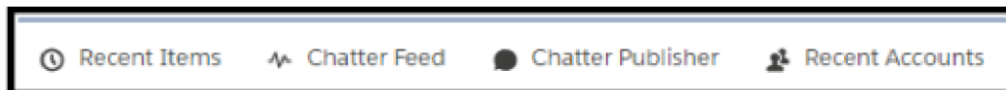
- Personal Information
- Login Preferences
- Overall Security Settings
- Email contact and Chatter preferences
- Access to the Data Import Wizard (under Import)
- Access to Skype for Salesforce (under Office 365)

1. Click on the round **Profile Pic** holder (there may not be an active picture showing) from the upper right-hand corner of the screen.
2. Observe the settings as well as Personal Information can be edited.



Utility Bar

Across the bottom of every screen in Nimble AMS is the Utility Bar. This grouping of four functions enables users to quickly and constantly have access to:



Recent Items: Enables users to see any recently accessed item.

Chatter Feed: Users can access the latest feeds referenced in Chatter.

Chatter Publisher: Enables users to quickly add Post, Question, or Poll to Chatter.

Recent Accounts: Displays all recent Account records accessed.

Personal Setup Best Practices (DO NOW!)

Below are some areas that users should configure/setup immediately when first using Nimble AMS. Most of these actions are quick to implement, very rarely need editing, but can save users valuable time in navigation.

- **Applications** – Users should explore and select THE Application that makes the most sense for their job function. If in a Membership role, select Membership application. If in Finance, select the Accounting application. The Application chosen remains until changed manually.
- **Items** – Explore and select ANY items required, but that do NOT default under the selected Application. For instance, if the Membership app is selected, but a user needs to interface with Committee Memberships - that item is not present under the Membership application - the user should click the App Launcher and add that item permanently.
- **Rearrange Items** – Once all desired items selected, rearrange them in the desired order on the Navigation Bar. If NOT using an Item, move it to the More dropdown. Edit the Nav Bar (Pencil icon) and place the most important items next to Home, from left to right.
- **Favorites** – Once comfortable with which List Views, Reports, and Dashboards most frequently accessed, and are critical to everyday/periodic use, users should Favorite EACH. Setting up Favorites is perhaps the MOST time saving feature in Nimble AMS as it enables quick access to data without having to remember its record name and search for that item.
- **Favorites on Nav Bar** – IF a Favorite is THE List View, Report, or Dashboard that absolutely must be reviewed/used each day, add it to the Navigation Bar. Not only does it save time, it reminds the user by its very centralized visibility to use.
- **Pin List Views** – Under each item used, users should use the Pin option on the most frequently used list view to make it the default. Pinned List views stay pinned regardless of log out or change of Application.
- **Collapse Unused Record Sections** – Especially relevant under Accounts. Account records default when first opened with a large amount of sections that may not be necessary for a particular user's role. If the user's role does NOT require them to view an Account section, simply click on that section and it will collapse. It will then remain collapsed each time any Account record accessed. Users can always expand again if needed.

Navigation Tips & Tricks

Below are some of the more useful tips and tricks that help users move quickly and efficiently in Nimble AMS:

- Use **F11 on keyboard** to display Nimble AMS in full screen browser (the setting is different on a Mac). This enables users, if logged in on a smaller screen, to see areas below that might otherwise be unavailable. Users can utilize the **Alt & Arrow keys** on their keyboard by holding down Alt while clicking the left or right arrow to browse back or forward to locations. Hitting F11 again will restore the previous browser interface.
- Users can use the **Ctrl** button on their keyboard by holding it down and clicking the **left-mouse button** on an **Item** from their Navigation bar to open that Item in a new window.
- Users can use the **Ctrl** button on their keyboard by holding it down and clicking the **left-mouse button** on a linked field on any **Record** or embedded in any **Report** to open that **Item** in a new window. Users can also copy and paste URLs to the same effect.
- Resizing the screen in Nimble AMS will adapt the data displayed to the current size.

CHAPTER

2 Accounts

Objective.....	2.1
Understanding Accounts.....	2.2
Accounts Item.....	2.4
Person Account Record Review.....	2.5
Account (Organization) Record Review.....	2.21
Creating a New Account.....	2.34
Logging Activities.....	2.39
Accounts Reports and Dashboard.....	2.45

Objective

In this chapter, users will:

- Set up an Individual Account
- Set up an Organization Account
- Understand the layout of an Account record
- Understand how to create connections between Accounts

Training Org Conventions

The Training Org contains SIX different Account Types:

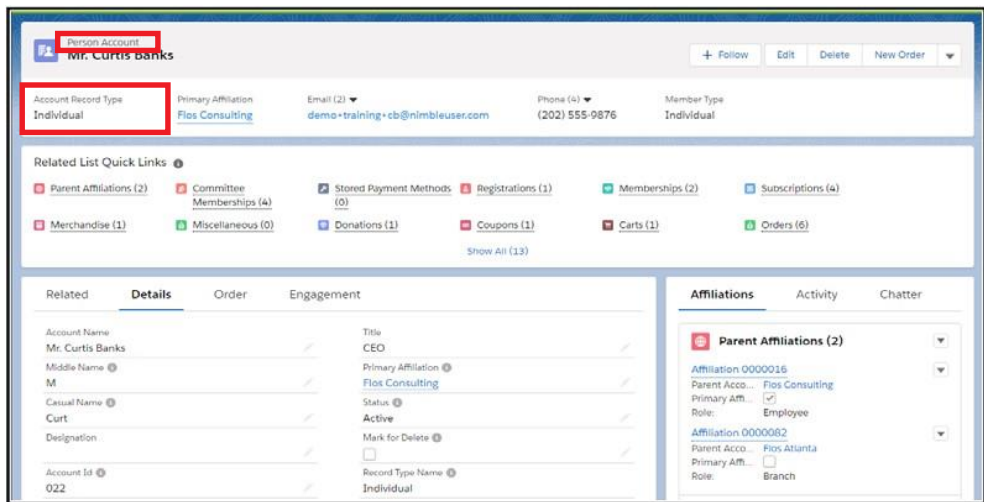
Persons Accounts – **Individual, Student & Consultant**
Accounts – **Organization, Institution, & Vendor**

Understanding Accounts

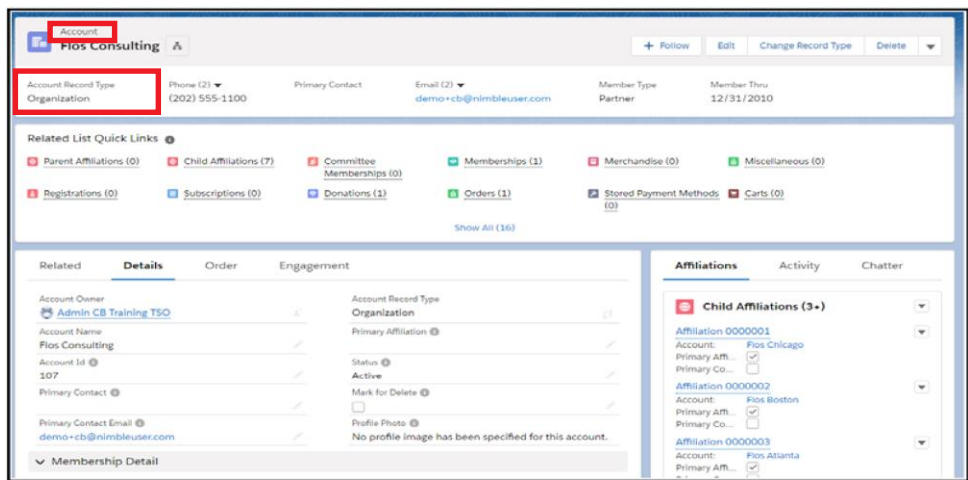
In Nimble AMS, the **Accounts** item consists of two distinct sub-groupings: **Person Accounts** and **Accounts**. Due to Salesforce’s hierarchy on which Nimble AMS resides, it is important to note that Organizational level Accounts (not Person Accounts) are simply known as **Accounts**.

Within Person Accounts/Accounts, different client defined **Account Record Types** can be used.

For instance, **Person Accounts** contain **Account Record Types** that tie to PERSON LEVEL designations: Individual, Contractor, and Student.



While **Accounts** contain **Account Record Types** that tie to COMPANY LEVEL designations: Organization, Vendor, and Institution.



IMPORTANT NOTE: The Account Record Types listed/displayed above are Training Org examples, NOT Stock. Clients can define Names/Layouts of Account Record types they require.

Person Accounts (Individual) and Accounts (Organization) can included as many different **Account Record Types** as a client desires.

Each **Account Record Type** can also have a unique layout: differing fields, sections, and functions. For instance, an **Individual** Person Account record could look quite different from a **Student** Person Account record; an **Organization** Account record could differ from a **Vendor** Account record.

The setup of multiple Account Record Types also enables the **Affiliation** of those Accounts to one another. An Organization Account could have multiple Affiliations to both Person Accounts (Individuals) and Accounts (Organizations). Affiliations can also be assigned from Individual to Individual if desired.

Looking at the List View below of the **Child Affiliations** for Flos Consulting below clearly demonstrates this concept. The user can see both **Individuals**: Curtis Banks and Erica Chang, and **Organizations**: Flos Boston and Flos Rochester.

ACCOUNT	STATUS	RECORD TYPE	ROLE	MANAGER	PHONE	PRIMARY	START DATE
1. Curtis Banks	✓	Organization-to-Individual	Membership	✓	(202) 555-9923 (Home)	✓	8/9/2016
2. Edward Velasquez	✓	Organization-to-Individual					8/3/2014
3. Erica Chang	✓	Organization-to-Individual	Advertising				7/13/2016
4. Aquila Consulting	✓	Organization-to-Organization	Associate				10/22/2017
5. Marcus Stroman	✓	Organization-to-Individual	Billing	✓			
6. Brent Miller	✓	Organization-to-Individual	Billing	✓	(202) 555-9900 (Home)		11/11/2016
7. Cassandra Simmons	✓	Organization-to-Individual			(202) 555-9894 (Home)		10/2/2009
8. Carl Knight	✓	Organization-to-Individual			(202) 555-9933 (Home)		9/2/2011
9. Flos Chicago	✓	Organization-to-Organization	Location				5/31/2002
10. Flos Boston	✓	Organization-to-Organization	Location				5/4/2007
11. Flos Rochester	✓	Organization-to-Organization	Location				8/30/2013
12. Jimmy Gray	✓	Organization-to-Individual			(202) 555-9890 (Home)		8/2/2002
13. Flos Schaumburg	✓	Organization-to-Organization	Location				7/24/2002

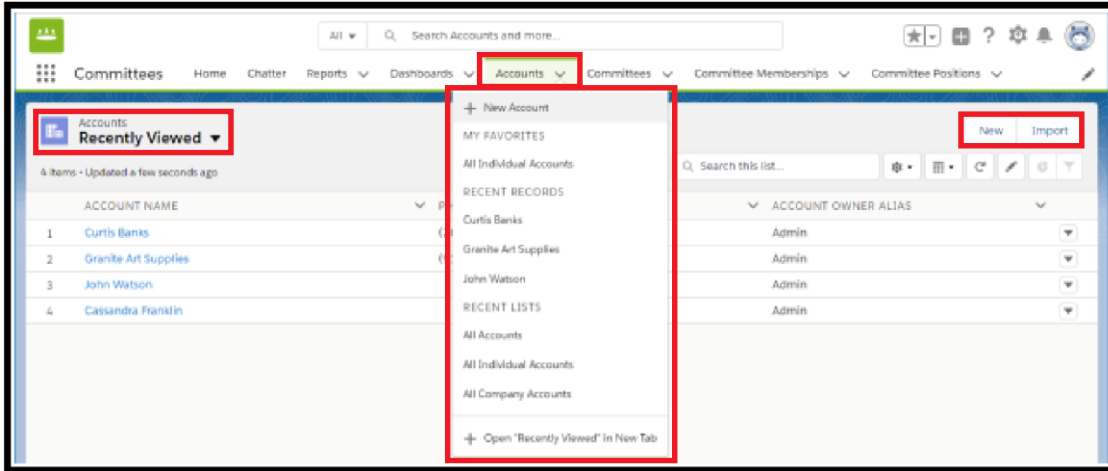
Affiliated accounts display whether the connection is **Organization to Individual, Organization to Organization, or Individual to Individual**.

Affiliation records function as a Join/Link record between two different accounts, and describes the linked record’s relationship. Users will explore this relationship later in the chapter.

IMPORTANT NOTE: Account Record Types do NOT necessarily indicate Membership – For example, an Individual may or may NOT have Professional Membership, or an Organization Account may or may NOT have Enterprise Membership. Membership is transactional and is purchased through the Order process, it is then that it displays on an Account.

Accounts Item

The Accounts item provides several different ways of finding, organizing, and interfacing with either Organization or Individual level accounts.



From the **TOP RIGHT HAND**, **Actions** area, Users can:

- Create a **New Account**
- **Import data to Accounts**

From the **TOP MIDDLE**, **Accounts item drop down**, Users can:

- Create a **New Account**
- Use **Recent Records** to return to a previously accessed Accounts
- Use **Recent Lists** to return to a previously accessed List View of Accounts

From the **TOP LEFT**, **Accounts Recently Viewed drop down**, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

Person Account Record Review

From **Search**, Find and open **Curtis Banks**, Person Account.

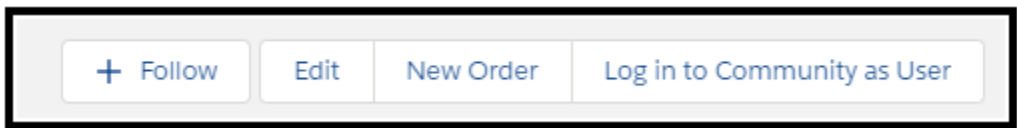
This section will provide an overview of the following for a **Person** Account:

- Basic Navigation
- Action Buttons
- Account Highlights
- Related Quick Links
- Record Page Tabs

Once a Person Account is opened the following areas display:

Action Buttons

Quick action buttons on the upper right enable users to conduct the following operations:



- **+ Follow** - Enables users to see Streams and Feeds the Person is following.
- **Edit** - Opens the record in Edit mode for users to change/add values.
- **New Order** - Creates a new Order for the Person Account.
- **Log in to Community as User** - Enables the Nimble AMS user to act as the selected Person Account to trouble-shoot online situations.

IMPORTANT NOTE: Administrators can change the order/display for all buttons and dropdown options. Administrators can also add specific report buttons such as Report Cards, Account Summaries, etc.

Account Summary

The Account Summary section displays the most often sought after information on an account. In the example below, users can easily view summary info for Curtis Banks.

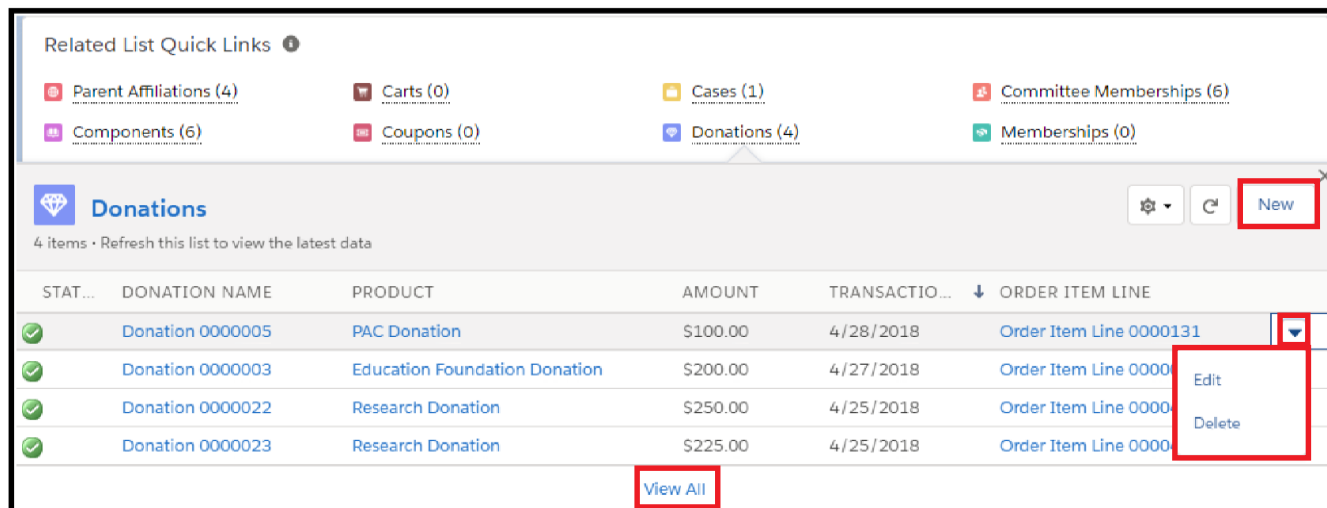
Clients can determine what info should display per record type. Up to 6 fields are included in the summary section – these values are pulled from the record fields located in the Details section.

Account Record Type Individual	Primary Affiliation Fios Consulting	Email demo+training+cb@nimbleuser.com	Phone (202) 555-9876	Account Balance (\$707.00)	Member Type Enterprise
-----------------------------------	--	--	-------------------------	-------------------------------	---------------------------

- Account Record Type
- Primary Affiliation
- Email
- Phone
- Account Balance
- Member Type

Related List Quick Links

With Related List Quick Links, users can float over a category of records tied specifically to the user. Extremely useful for summary of user involvement across all facets of membership and/or engagement.



With Related Lists, Users can:

- Hover over RLQL to see up to 10 related records quickly
- Can Create a **New** record from the list (with permissions)
- Click on a linked record to examine an individual item closer
- Click on **View All** at bottom to see the full list of related records

Some of the more significant RLQLs for persons are:

- **Memberships** – ALL present/past memberships held by the Person Account.
- **Orders** – All Orders submitted by the Person Account.
- **Parent Affiliations** – All Organizations/Individuals to which Person Account is associated.
- **Person Account History** – History of changes to the Account including the value changed, value added, date changed, and who changed.

Person Account Tabs

Across the third section of a Person’s Account Record, and extending into an additional, divided section to the right, users will find **Record Page Tabs**. These store or display additional information about the records relationships and activity. Described below are some of the commonly adopted stock tabs. Additional tabs can be placed on the page.



Details TAB

The **Details** section is the default tab that displays when a Persons Account record is opened. It contains all fundamental data for the accessed account. Data sections/fields can be configured and added/removed by clients through an Administrator license.

The following sections outline some of the common Detail areas typically adopted by clients from Nimble AMS. Significant fields highlighted.

Name and Professional Information

Related	Details	Order	Engagement
Account Name	Mr. Curtis Banks		Title CEO
Last,First Name <small>i</small>	Banks, Curtis		Primary Affiliation <small>i</small> Flos Consulting
Middle Name <small>i</small>	M		Status <small>i</small> Active
Casual Name <small>i</small>	Curt		Mark for Delete <small>i</small> <input type="checkbox"/>
Designation	NCA		Record Type Individual
Account Id <small>i</small>	022		

- **Account ID** - Configurable to match client’s desired format. Can be automated to auto add the next sequential number.
- **Primary Affiliation** - Primary Account to which this account is tied. Can only be ONE Primary affiliation per Account. Usually tied to an Account (Organization) record, but can be tied to a Person Account instead (e.g. Personal contact for a VIP).
- **Status** - Value of **Inactive** would prevent users from ordering from this Account.
- **Is Prospect?** – Indicates Account is a prospective member.

Membership Detail












Membership Detail	
Status Membership Flag	Membership Membership 0000144
Member Type	Professional Join On 6/1/2010
Member	Yes Member Thru 9/30/2020
Lapsed	No Lapsed On 1/1/2021

- **Status Membership Flag** - Indicates if Account membership is Current (green), Future (blue), Pending (yellow), or Expired (gray).
- **Member Type** - Membership Type of the last membership purchased by the Account.
- **Member** - Yes =s possesses current, active membership. Leveraged in creating reports as enables easy filtering of active or, inactive members.
- **Lapsed** – Indicates if lapsed based off latest membership end date plus grace period.
- **Membership** - Membership ID (link) of the Accounts latest membership record.
- **Join On** - Displays FIRST membership record ever associated with this account.
- **Member Thru** – End Date of the Accounts latest Membership record.
- **Lapsed On** - Date generates off latest membership end date plus grace period.

IMPORTANT NOTE: Membership details added to this section ONCE an account purchases membership. This section will ALWAYS contain the LAST membership the account held, even if several years ago.

Memberships CAN be stamped on a Persons account that were actually purchased by an Organization level account. Flow down logic is employed to cover all the Persons under that Organization.

Communication Detail

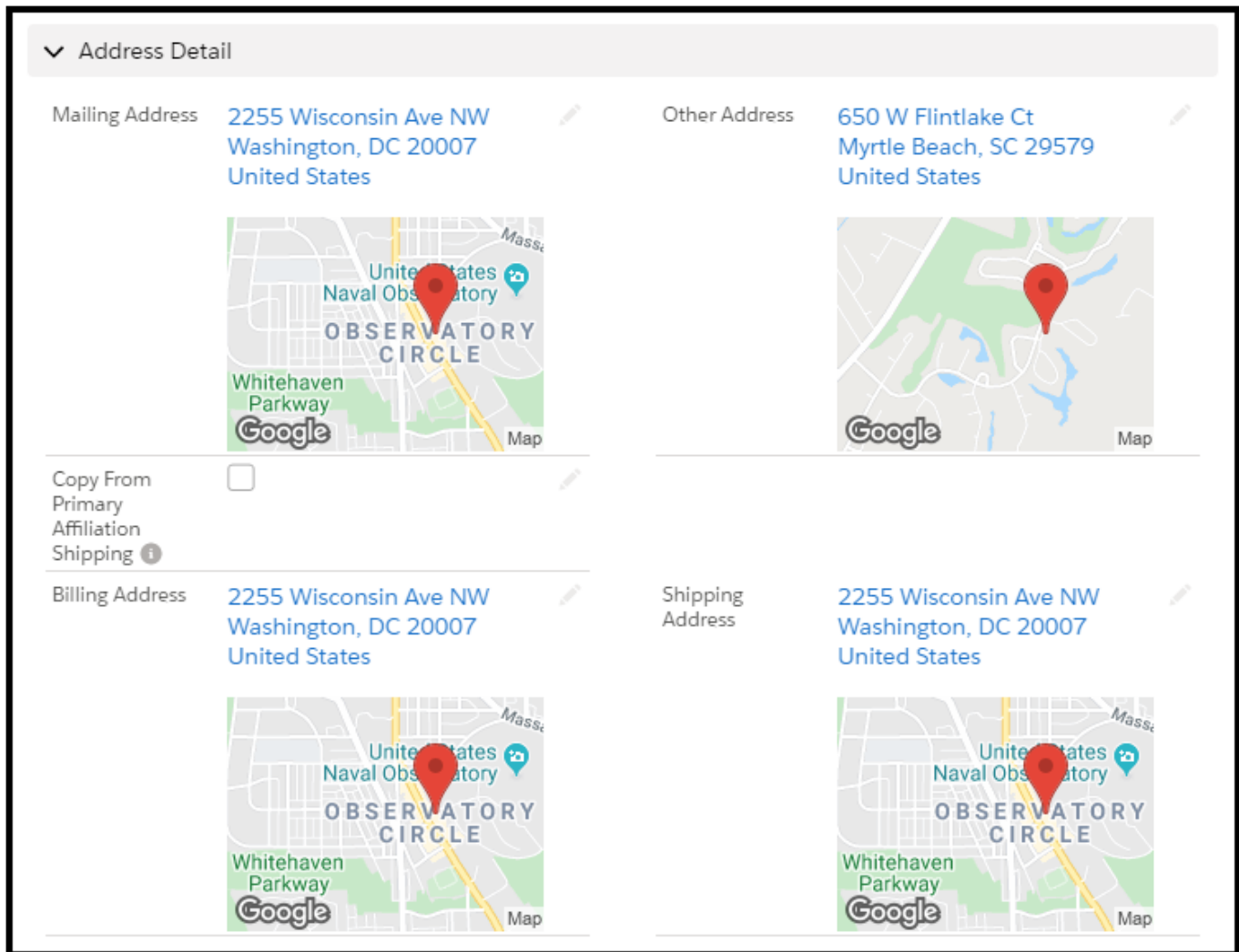
Communication Detail			
Phone	(202) 555-9876 	Email	demo+training+cb@nimbleuser.com 
Mobile	(202) 555-8765 	Other Email 	
Fax		Website	
Home Phone		Do Not Call	<input type="checkbox"/> 
Other Phone		Email Opt Out	<input type="checkbox"/> 

- **Phone/Mobile** - Additional Phone numbers can be added.
- **Do Not Call** - Check indicates user should NOT be called. Can be configured to read Do Not Call Mobile.
- **Email Opt Out** - Check indicates user should NOT be emailed. Can be configured to ANY listed email.

IMPORTANT NOTE: Additional Client specific Opt Outs often added to this section as needed: Directory Opt Out, Committee Request Opt Out, Newsletter Opt Out, etc.

Clients can even add an entirely new section called Opt Outs and list all those checkboxes in that area.

Address Detail



- **Mailing/Other/Billing/Shipping** – Addresses added by lookup/confirmation via Google Maps. Clients can display as many addresses in section as desired.
- **Copy from Primary Affiliation Shipping** – Checkbox that enables users to copy the Person Account’s Primary Affiliation Shipping Address to any designated address.

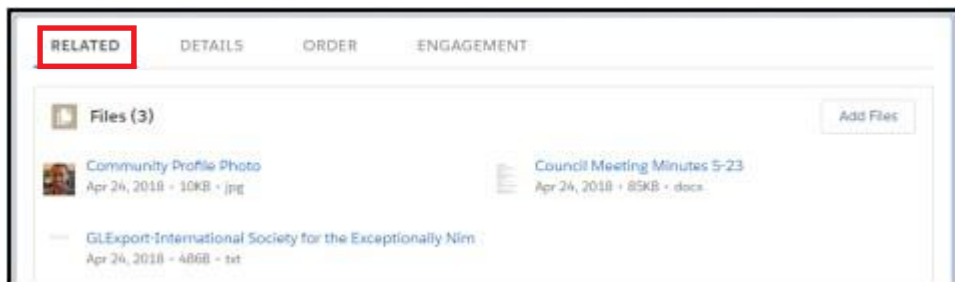
Address Details recordable via Google Maps. Persons Account Billing Address can be configured to inherit directly from the Primary Affiliation if desired.

Financial Detail

Financial Detail			
Account Balance	(\$707.00)		
Account Money Spent	\$3,497.56		
Credit Balance	\$100.00		
Total Affiliate Balance	(\$707.00)		
Total Affiliate Money Spent	\$3,497.56		
Trusted	<input type="checkbox"/>		

- **Account Balance** – Total of all Balance fields on all orders connected to this Account. Only calculated once, at midnight, per day. Manually updateable by clicking on the Calculate Financials link at the bottom of the record.
- **Account Money Spent** - Total of all Grand Total fields on all orders connected to this Account. Only calculated once, at midnight, per day. Manually updateable by clicking on the Calculate Financials link at the bottom of the record.
- **Credit Balance** - Current credit balance on the Account.
- **Total Affiliate Account Balance** - Total of all Grand Total fields on all Primary Affiliates orders connected to this Account. Only calculated once, at midnight, per day. Manually updateable by clicking on the Calculate Financials link at the bottom of the record.
- **Total Affiliate Account Money Spent** – Total of all Grand Total fields on all Primary Affiliates orders connected to this Account. Only calculated once, at midnight, per day. Manually updateable by clicking on the Calculate Financials link at the bottom of record.
- **Trusted** – Checked enables the Person Account to purchase items in Community Hub using the Bill Me option, i.e., they do NOT have to pay at time of order, but are invoiced.

Related TAB: Contains any files that are linked to the record outside of the related demographics of the Details section. Files can be added and/or accessed from this location.



Users should be sensitive regarding the size/type of files added to the system. Salesforce charges clients storage fees if initial storage capacity limits are exceeded. Users should avoid storing multiple, complex files such as photos. Word, PDF, Excel documents should not be problematic.

Order TAB: Displays all Orders related to the Person as well as their open **Carts**, **Coupons**, and **Stored Payment Methods**.

The screenshot shows a user interface with four tabs: RELATED, DETAILS, ORDER (highlighted), and ENGAGEMENT. Below the tabs are four sections:

- Orders (6+)**: A table with 7 rows. The first row is a header with columns: STATUS, ORDER ID, PURPOSE. The data rows are:

STATUS	ORDER ID	PURPOSE
Active	Order 0000047	Registration
Active	Order 0000045	Donation
Active	Order 0000033	Donation
Active	Order 0000039	Merchandise
Active	Order 0000152	Merchandise
Active	Order 0000153	Donation

 A "View All" link is located at the bottom right of this section.
- Carts (0)**: A section with a shopping cart icon and the text "Carts (0)".
- Coupons (0)**: A section with a coupon icon and the text "Coupons (0)".
- Stored Payment Methods (3)**: A table with 3 rows. The first row is a header with columns: ICON, DESCRIPTION, EXPIRATION MONTH. The data rows are:

ICON	DESCRIPTION	EXPIRATION MONTH
	Bank Account ending in 6789	
	VISA ending in 1111	06
	AMEX ending in 0002	10

Carts indicate that an order has been started, but NOT processed into an order. Internally created Carts (done by staff, not members online) that are NOT processed can prevent Batching from happening. If a Cart is indicated on this tab, it should always be examined for resolution.

Stored Payment Methods enables users to quickly review Payment types the Account has saved for use on Orders. Enabled users can update this information.

Engagement: Displays all the possible records a Person can be linked to in a long scrolling list. Each section shows the most recently added records with the option, at the bottom of each list, to View All - which would display the entire list in a List View.

The screenshot shows a software interface with a navigation bar at the top containing tabs: RELATED, DETAILS, ORDER, and ENGAGEMENT. The ENGAGEMENT tab is selected and highlighted with a red box. Below the navigation bar, there are four sections of data:

- Committee Memberships (6):** A table with columns: STATUS FLAG, COMMITTEE MEMBERSHIP ID, COMMITTEE, and COMMITTEE POSITION. It lists six records with various status flags (blue checkmark, green checkmark, grey checkmark) and roles like Board of Directors, Large Firm Consulting SIG, and Managing Partners SIG.
- Donations (4):** A table with columns: STATUS FLAG, DONATION NAME, PRODUCT, and AMOUNT. It lists four records, all with green checkmark status flags, for products like RMC Donation, Education Foundation Donation, and Research Donation.
- Memberships (0):** A section with a green checkmark icon and zero items.
- Merchandise (3):** A section with a red checkmark icon and three items.

Each list section includes a "View All" link at the bottom.

Engagement provides a method by which a user can quickly review the latest records created for the major Items in Nimble AMS for this Account.

Affiliations

Affiliations are linked records that record all the accounts with which a Person is Affiliated. Affiliations can be extremely important and provide flexibility in reporting since users and organizations can be affiliated in many different ways.

An Account can be affiliated with an infinite number of Individual or Organization Accounts BUT; can only have **ONE Primary Affiliation**.

From **Curtis Banks, Affiliations Tab** (right side), click on the link for **Affiliation 000088**.

Name and Professional, and Contact Information

- **Affiliation Id** - Auto generated, sequential ID for the Affiliation.
- **Parent Account** - The Account to which this Persons Account is affiliated.
- **Account** - The Person Account's, Account Name.
- **Role** - Multi select field that enables users to associate pre-defined Roles for an Account. Users could indicate multiple roles for a given Affiliation, for instance a user could be the Employee, Sponsorship Contact, and Advertising Contact. Should NOT be used for critical info; users should add dropdown fields or individual checkboxes instead.
- **Status** -Indicates if Active or Inactive.
- **Primary Affiliation** - Indicates that the Account is Primarily Affiliated to this Parent Account. Can only have ONE Primary Affiliation per Account. Filling out the Affiliation record's Parent Account AND checking this box will stamp/update the Account records, topmost Details area with this information.
- **Is Company Manager** - If box checked AND Primary Affiliation checked, this Account can manage the companies interactions on Community Hub.
- **Primary Contact** - Indicates this Account is Primary Contact for the Parent. This information stamps/updates topmost Details area of the Parent Account record.
- **Do Not Flow Down Address** – When checked, the Parent Accounts Primary Address will NOT overwrite this Childs Address. Defaults to do so as unchecked.
- **Status Flag** – Indicates via Start/End Date whether Affiliation is Active or not.

IMPORTANT NOTE: Additional Client specific radio buttons (boxes) often added to Affiliations: Billing Contact, Membership Contact, Exhibits Contact, Finance Contact etc.

Historical Detail

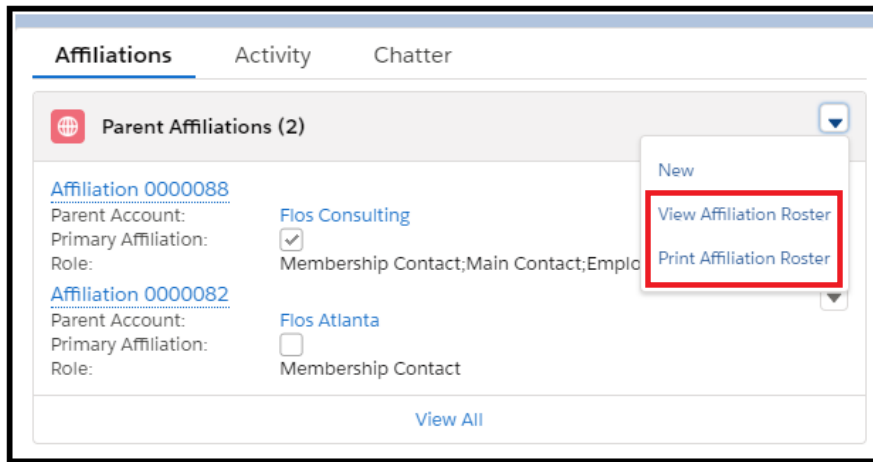
- **Start Date** – Date Account began Affiliation.
- **End Date** - Date Account ended Affiliation; if enabled, could automate record Status being marked as Inactive.
- **Removal Reason** – Dropdown providing reasons for Ending Affiliation relationship.
- **Removal Date** – Date Affiliation was permanently removed.

Affiliation Roster

One commonly implemented option for users is the use of Affiliation Rosters tied through the current Account. Rosters are helpful in determining exact location of Account in hierarchy. Rosters can be printed and distributed easily as well.

In this **exercise**, users will open the Affiliation Roster from Curtis Banks Account:

1. Under **Affiliations** (right hand tab), click on the **Parent Affiliations (2)** dropdown.
2. Select **View Affiliation Roster**.



3. The **Flos Consulting Roster** displays.

Account Name	Role	Primary Affiliation	Employees	Join On	Status Membership Flag	Billing City	Billing State/Province
Flos Consulting			1,300	6/1/2010	✓	Washington	DC
Flos Atlanta	Branch	✓	300	2/1/2013	✓	Atlanta	GA
Flos Boston	Branch	✓	350	6/1/2010	✓	Boston	MA
Flos Chicago	Branch	✓	400	6/1/2010	✓	Chicago	IL
Banks, Curtis	Membership Contact; Main Contact; Employee	✓		6/1/2010	✓	Fairfax	VA
Chang, Erica	Employee	✓		6/1/2010	✓	Washington	DC
Knight, Carl	Employee	✓		6/1/2010	✓	Washington	DC
Miller, Brent	Main Contact; Employee	✓		2/1/2015	✓	Washington	DC

4. Users can contract or expand the various associated branches.
 - The Persons associated directly with the Corporate level org display **BELOW** the other listed branches – see Curtis Banks in the screenshot above.
 - Users can expand/contract the branches to see the Persons tied to those organizations.

Activity

Activity logging and display enables users to conduct the following operations directed at the person and update, edit, and track them under this tab:

- Create a New Task
- Create a New Meeting
- Log a Call
- Email

The screenshot shows a web interface for creating an activity. At the top, there are three tabs: 'AFFILIATIONS', 'ACTIVITY' (which is selected), and 'CHATTER'. Below the tabs is a header with four buttons: 'New Task', 'New Mee...', 'Log a Call', and 'Email'. The form contains several input fields: 'Subject', 'Due Date', '*Assigned To' (with a dropdown menu showing 'DaveODemo Org'), 'Name' (with a dropdown menu showing 'Curtis Banks'), and 'Related To' (with a dropdown menu showing 'Curtis Banks'). A blue 'Save' button is located at the bottom right of the form.

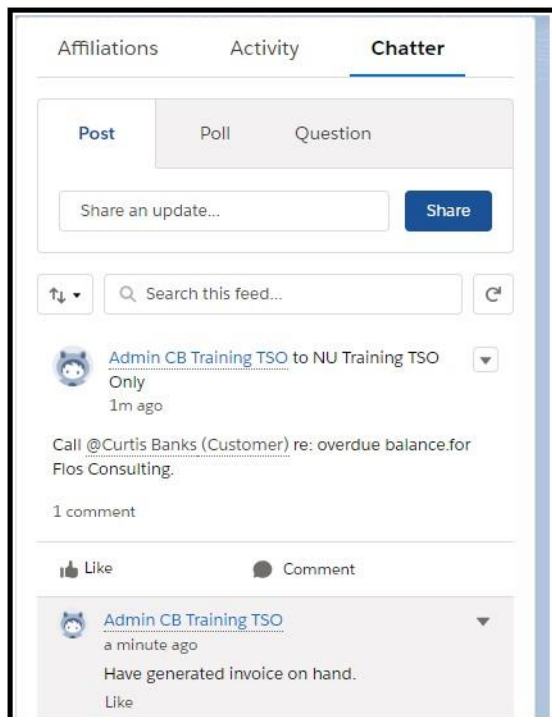
Each activity has its own distinct form, which, when saved, is logged as part of a scrolling **Activity Timeline** located below the creation section. This Activity Log displays both **Next Steps** for each logged Activity and **Past Activity** that has occurred.

The screenshot shows an 'Activity Timeline' section. At the top right, there are icons for a dropdown menu, a refresh icon, and a button labeled 'Expand All'. Below this is a 'Next Steps' section with a 'View Steps' button. The 'Next Steps' list includes: 'Attend XYZ Committee Meeting' (May 31), 'Discussion re: speaker status at upcoming XYZ M...' (8:00 AM | May 29), 'Call from Membership' (Apr 27), and 'Send New Member Packet' (Apr 27). Below the 'Next Steps' is a 'Past Activity' section. The 'Past Activity' list includes: 'Conference Followup' (6:43 AM | Dec 16, 2019), 'Call' (May 29), and 'Re: XYZ Conference' (7:40 AM | Today). At the bottom right of the 'Past Activity' section is a 'Load More Past Activities' button.

Chatter

Tracks and enables creation of **Posts**, **Questions**, and **Polls** regarding the person accessed. It is a useful way of monitoring all activity for that person as well as interacting with ongoing discussions regarding some aspect of their record.

There are two sections to a Persons, Chatter area; the **top area** enables the creation of a new Post, Question, or Poll - depending on the tab selected, the **bottom area** enables the user to see the ongoing Chatter feed for that person.



Account (Organization) Record Review

Due to Salesforce’s hierarchy on which Nimble AMS resides, it is important to note that Organizational level Accounts (not Person Accounts) are simply known as **Accounts**.

From **Search**, Find and open **Flos Consulting**, Organization Account.

Reminder: **Accounts** contain **Company level records** such as Organization, Vendor, Firm, University, Hospital, etc. NOT Person level information – those are found in Person Account level records.

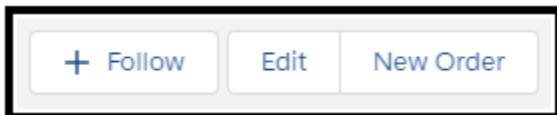
This section will provide an overview of the following for an Account:

- Basic Navigation
- Action Buttons
- Account Highlights
- Related Quick Links
- Record Page Tabs

Once an Account is opened the following areas display:

Action Buttons

Quick action buttons on the upper right enable users to conduct the following operations:



- **+ Follow** - Enables users to see Streams and Feeds the Person is following.
- **Edit** - Opens the record in Edit mode for users to change/add values.
- **New Order** - Creates a new Order for the Person Account.

IMPORTANT NOTE: Administrators can change the order/display for all buttons and dropdown options. Administrators can also add specific report buttons such as Report Cards, Account Summaries, etc.

Account Summary

The Account Summary section contains the most critical information regarding the account. In the example below users can easily view summary info for **Fios Consulting**.

Clients can determine what info should display per record type. Up to 6 fields can be added to the summary section – these values are pulled from the record fields located in the Details section.

Account Record Type	Phone	Primary Contact	Primary Contact Email	Account Balance	Member Type
Organization	(202) 555-1100	Curtis Banks	demo+training+cb@nimbleuser.com	\$10,000.00	Enterprise

- Account Record Type
- Phone
- Primary Contact
- Primary Contact Email
- Account Balance
- Member Type

Related List Quick Links

With Related List Quick Links, users can float over a category of records tied specifically to the user. Extremely useful for summary of user involvement across all facets of membership and/or engagement.

The screenshot shows a 'Related List Quick Links' window with a navigation bar at the top containing categories: Parent Affiliations (0), Child Affiliations (7), Committee Memberships (0), Memberships (3), Merchandise (0), and Miscellaneous (0). The 'Child Affiliations' category is selected, displaying a table with 7 items. The table has columns for Affiliation Id, Account, Primary A..., Primary Con..., Is Company..., Role, and Status Flag. A 'View All' link is located at the bottom of the table.

	Affiliation Id	Account	Primary A...	Primary Con...	Is Company ...	Role	Status Flag
1	Affiliation 0000001	Fios Chicago	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Branch	<input checked="" type="checkbox"/>
2	Affiliation 0000002	Fios Boston	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Branch	<input checked="" type="checkbox"/>
3	Affiliation 0000003	Fios Atlanta	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Branch	<input checked="" type="checkbox"/>
4	Affiliation 0000016	Curtis Banks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Membership Contact;Employee	<input checked="" type="checkbox"/>
5	Affiliation 0000017	Carl Knight	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Employee	<input checked="" type="checkbox"/>
6	Affiliation 0000018	Erica Chang	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Employee	<input checked="" type="checkbox"/>
7	Affiliation 0000019	Brent Miller	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Main Contact;Employee	<input checked="" type="checkbox"/>

With Related Lists, Users can:

- Hover over RLQL to see up to 10 related records quickly
- Can Create a **New** record from the list (with permissions)
- Click on a linked record to examine an individual item closer
- Click on **View All** at bottom to see the full list of related records

Some of the more significant RLQLs for persons are:

- **Memberships** – ALL memberships ever held by the Account.
- **Orders** – All Orders submitted by the Account.
- **Child Affiliations** – All Child Accounts and Accounts of which the Account is the Parent.
- **Account History** – History of changes to the Account including the value changed, value added, date changed, and who changed.

Account Tabs

Across the third section of an Account Record, and extending into an additional, divided section to the right, users will find **Record Page Tabs**. These store or display additional information about the records relationships and activity. Described below are some of the commonly adopted stock tabs. Additional ones can be placed on the page.



Details

The **Details** section is the default tab that displays when an Account record opened. It contains all fundamental data recorded for the accessed person. Data sections/fields can be configured and added/removed by Clients through an Administrator license as needed.

The following sections outline some of the common, segmented Detail areas typically adopted by clients from Nimble AMS. Significant fields highlighted.

Name and Primary Information

Related	Details	Engagement	News
Account Owner	Admin CB Training TSO		Account Record Type Organization
Account Name	Flos Consulting		Primary Affiliation
Account ID	107		Status Active
Primary Contact	Curtis Banks		Mark for Delete <input type="checkbox"/>
Primary Contact Email	demo+training+cb@nimbleuser.com		Profile Photo No profile image has been specified for this account.
			Is Prospect? <input type="checkbox"/>

- **Account ID** - Configurable to match client’s desired format. Can be automated to auto add the next sequential number.
- **Primary Contact AND Primary Contact Email** – Person/Email at Organization that receives key info on behalf of Account. Can only be updated by creating an Affiliation marked as Primary Contact which will update this field with the Account information.
- **Primary Affiliation** - Primary Account to which this account is tied. Can only be ONE Primary affiliation per Account. Can accept Person Account (Individual) to Account (Organization) or Person Account to Person Account affiliations.
- **Is Prospect?** – Indicates Account is a prospective member.

Membership Detail

Membership Detail	
Status Membership Flag i	<div style="display: flex; align-items: center;"> ✔ <div style="flex-grow: 1;"> Membership i Membership 0000147 ✎ </div> </div>
Member Type i	Enterprise
Member i	Yes
Lapsed i	No
	<div style="display: flex; align-items: center;"> Join On i 6/1/2010 ✎ </div>
	<div style="display: flex; align-items: center;"> Member Thru i 12/31/2020 </div>
	<div style="display: flex; align-items: center;"> Lapsed On i 4/1/2021 </div>

- **Status Membership Flag** - Indicates if Account membership is Current (green), Future (blue), Pending (yellow), or Expired (gray).
- **Member Type** - Membership Type of the last membership purchased by the Account.
- **Member** - Yes =s possesses current, active membership. Leveraged in creating reports as enables easy filtering of active or, inactive members.
- **Lapsed** – Indicates if lapsed based off latest membership end date plus grace period.
- **Membership** - Membership ID (link) of the Accounts latest membership record.
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Financial Detail

Financial Detail			
Account Balance	(\$707.00)		
<small>i</small>			
Account Money Spent	\$3,497.56		
<small>i</small>			
Credit Balance	\$100.00		
<small>i</small>			
Total Affiliate Balance	(\$707.00)		
<small>i</small>			
Total Affiliate Money Spent	\$3,497.56		
<small>i</small>			
Trusted	<input type="checkbox"/>		
<small>i</small>			

- **Account Balance** – Total of all Balance fields on all orders connected to this Account. Only calculated once, at midnight, per day. Manually updateable by clicking on the Calculate Financials link at the bottom of the record.
- **Account Money Spent** - Total of all Grand Total fields on all orders connected to this Account. Only calculated once, at midnight, per day. Manually updateable by clicking on the Calculate Financials link at the bottom of the record.
- **Credit Balance** – Current credit balance on the Account.
- **Total Affiliate Account Balance** - Total of all Grand Total fields on all Primary Affiliates orders connected to this Account. Only calculated once, at midnight, per day. Manually updateable by clicking on the Calculate Financials link at the bottom of the record.
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Engagement: Displays all the possible records a Person can be linked to in a long scrolling list. Each section shows the most recently added records with the option, at the bottom of each list, to View All - which would display the entire list in a List View.

The screenshot shows a software interface with a navigation bar at the top containing tabs: RELATED, DETAILS, ORDER, and ENGAGEMENT. The ENGAGEMENT tab is selected and highlighted with a red box. Below the navigation bar, there are four sections of data:

- Committee Memberships (6):** A table with columns: STATUS FLAG, COMMITTEE MEMBERSHIP ID, COMMITTEE, and COMMITTEE POSITION. It lists six entries with various status flags (blue checkmark, green checkmark, grey checkmark) and roles like 'Immediate Past Chair', 'Chair', 'Member', and 'Vice Chair'.
- Donations (4):** A table with columns: STATUS FLAG, DONATION NAME, PRODUCT, and AMOUNT. It lists four entries, all with green checkmarks, for products like 'RMC Donation', 'Education Foundation Donation', and 'Research Donation'.
- Memberships (0):** A section with a green checkmark icon and the text 'Memberships (0)'. It is currently empty.
- Merchandise (3):** A section with a red checkmark icon and the text 'Merchandise (3)'. It is currently empty.

Each section has a 'View All' link centered below the list of records.

Engagement provides a method by which a user can quickly review the latest records created for the major Items in Nimble AMS for this Account.

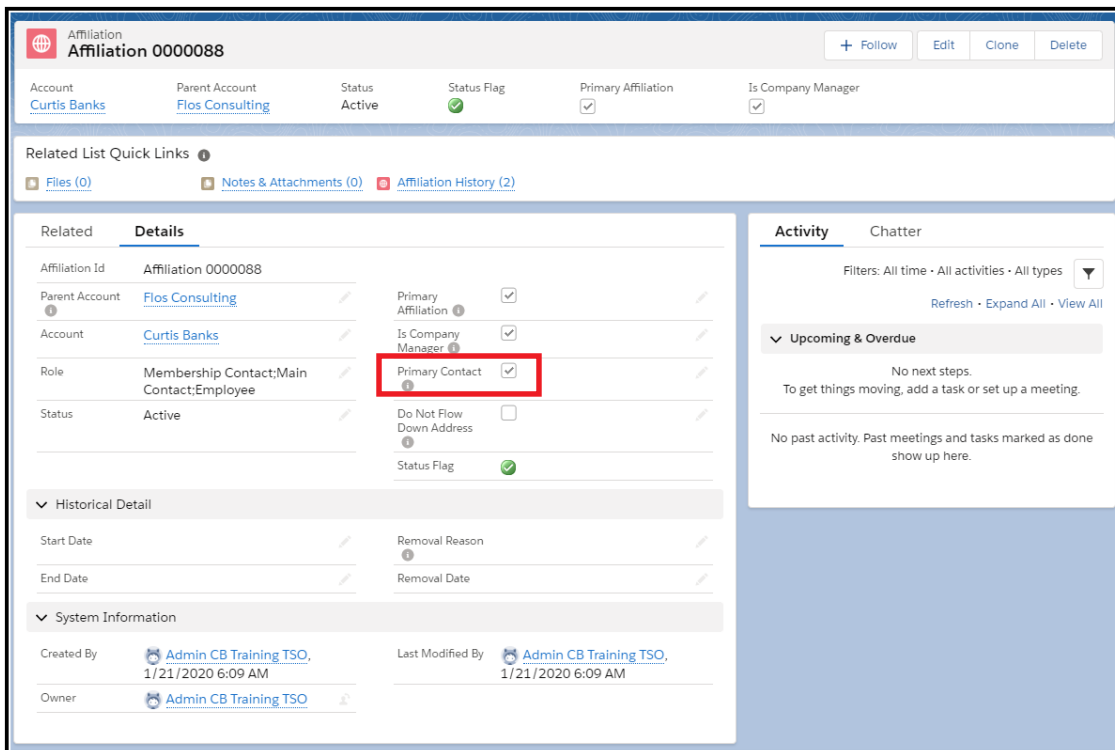
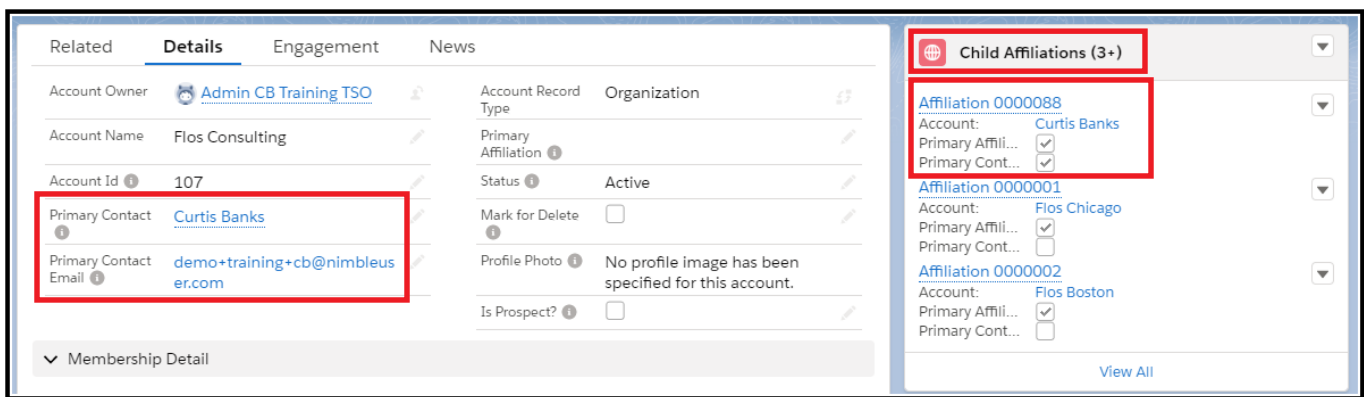
News: Link to Twitter Feed.

Child Affiliations

An Account can be affiliated with an infinite number of Child Individual or Organization Accounts. An Account can also in turn be a child of Primary Affiliation, but can only have ONE Primary Affiliation.

An Account also has ONE Primary Contact. The primary contact, indicated by a checkbox on a Child Affiliation, auto-fills the Primary Contact and Primary Contact Email fields on the Account record under the Details section. Embedding these two fields from the Affiliation record into the Account record ensure ease of reporting on that information.

From **Flos Consulting**, **Child Affiliations Tab** (right side), click link for **Affiliation 0000088**.



Name and Professional, and Contact Information

- **Affiliation Id** - Auto generated, sequential ID for the Affiliation.
- **Parent Account** - The Account to which this Persons Account is affiliated.
- **Account** - The Person Account's, Account Name.
- **Role** - Multi select field that enables users to associate pre-defined Roles for an Account. Users could indicate multiple roles for a given Affiliation, for instance a user could be the Employee, Sponsorship Contact, and Advertising Contact. Should NOT be used for critical info; users should add dropdown fields or individual checkboxes instead.
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- **Primary Contact** - Indicates this Account is Primary Contact for the Parent. This information stamps/updates topmost Details area of the Parent Account record.
- **Do Not Flow Down Address** – When checked, the Parent Accounts Primary Address will NOT overwrite this Childs Address. Defaults to do so as unchecked.
- **Status Flag** – Indicates via Start/End Date whether Affiliation is Active or not.

IMPORTANT NOTE: Additional Client specific radio buttons (boxes) often added to Affiliations as needed: Membership Contact, Exhibits Contact, Finance Contact etc.

Historical Detail

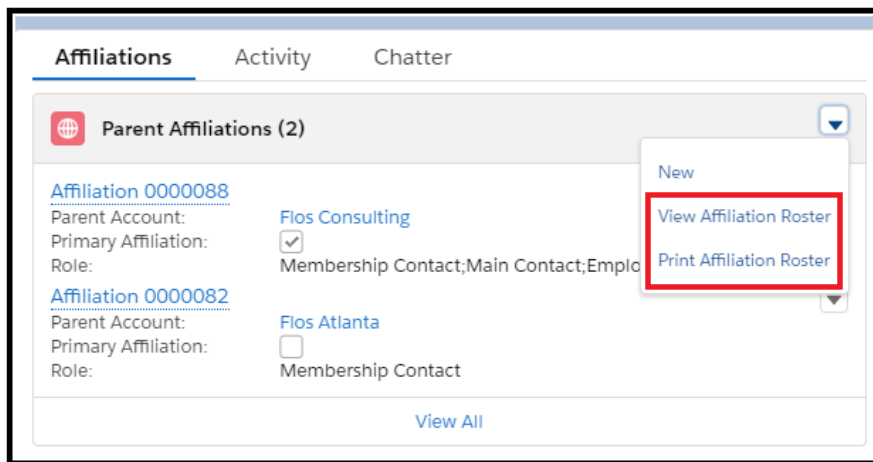
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- **Removal Reason** – Dropdown providing reasons for Ending Affiliation relationship.
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Affiliation Roster

One commonly implemented option for users is the use of Affiliation Rosters tied through the current Account. Rosters are helpful in determining exact location of Account in hierarchy. Rosters can be printed and distributed easily as well.

In this **exercise**, users will open the Affiliation Roster from Curtis Banks Account:

1. Under **Affiliations** (right hand tab), click on the **Parent Affiliations (2)** dropdown.
2. Select **View Affiliation Roster**.



3. The **Flos Consulting Roster** displays.

The screenshot shows the 'Flos Consulting Roster' as of 02/15/2020. It includes the NimbleAMS logo and contact information for the International Society for the Exceptionally Nimble. The table below lists various accounts and their associated roles and affiliations.

Account Name	Role	Primary Affiliation	Employees	Join On	Status	Membership Flag	Billing City	Billing State/Province
Flos Consulting			1,300	6/1/2010	✓		Washington	DC
Flos Atlanta	Branch	✓	300	2/1/2013	✓		Atlanta	GA
Flos Boston	Branch	✓	350	6/1/2010	✓		Boston	MA
Flos Chicago	Branch	✓	400	6/1/2010	✓		Chicago	IL
Banks, Curtis	Membership Contact; Main Contact; Employee	✓		6/1/2010	✓		Fairfax	VA
Chang, Erica	Employee	✓		6/1/2010	✓		Washington	DC
Knight, Carl	Employee	✓		6/1/2010	✓		Washington	DC
Miller, Brent	Main Contact; Employee	✓		2/1/2015	✓		Washington	DC

4. Users can contract or expand the various associated branches.
 - The Persons associated directly with the Corporate level org display BELOW the other listed branches – see Curtis Banks in the screenshot above.
 - Users can expand/contract the branches to see the Persons tied to those organizations.

Activity

Activity logging and display enables users to conduct the following operations directed at the person and update, edit, and track them under this tab:

- Create a New Task
- Create a New Meeting
- Log a Call
- Email

The screenshot shows a web form for creating an activity. At the top, there are three tabs: 'AFFILIATIONS', 'ACTIVITY' (which is selected), and 'CHATTER'. Below the tabs is a sub-header with four buttons: 'New Task', 'New Mee...', 'Log a Call', and 'Email'. The form contains several input fields: 'Subject', 'Due Date', '*Assigned To' (with a dropdown menu showing 'DaveODemo Org'), 'Name' (with a dropdown menu showing 'Curtis Banks'), and 'Related To' (with a dropdown menu showing 'Curtis Banks'). A blue 'Save' button is located at the bottom right of the form.

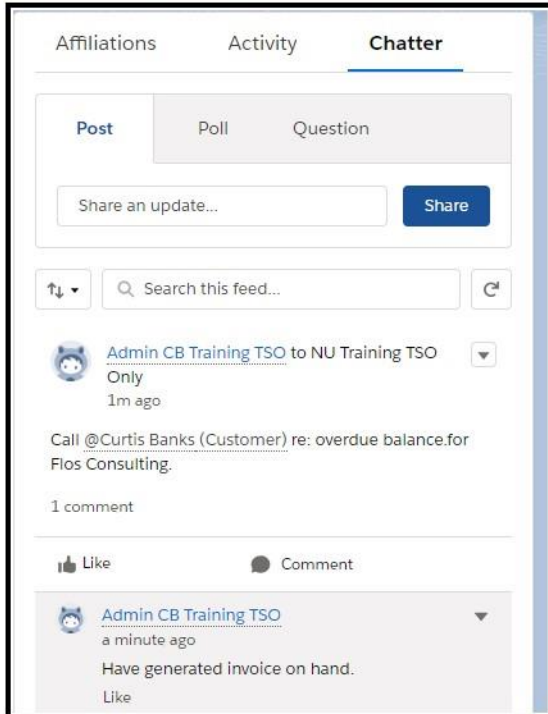
Each activity has its own distinct form, which, when saved, is logged as part of a scrolling **Activity Timeline** located below the creation section. This Activity Log displays both **Next Steps** for each logged Activity and **Past Activity** that has occurred.

The screenshot shows the 'Activity Timeline' section. It has a title 'Activity Timeline' and a dropdown menu for 'Expand All'. Below the title, there are two main sections: 'Next Steps' and 'Past Activity'. The 'Next Steps' section contains four items, each with a green checkmark icon, a task name, a description, and a date. The 'Past Activity' section contains three items, each with a blue envelope icon, a task name, a description, and a date. At the bottom right of the 'Past Activity' section, there is a 'Load More Past Activities' button.

Chatter

Tracks and enables creation of **Posts**, **Questions**, and **Polls** regarding the person accessed. It is a useful way of monitoring all activity for that organization as well as interacting with ongoing discussions regarding some aspect of the record.

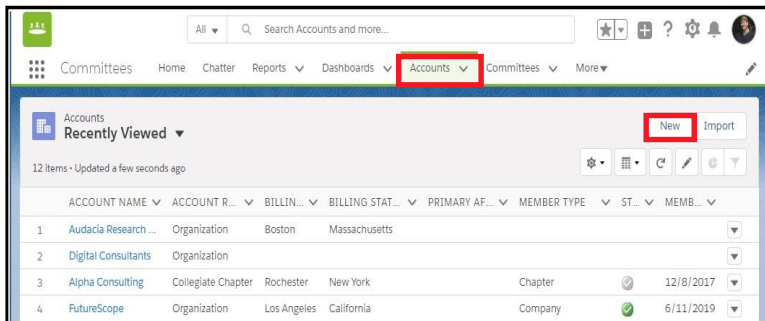
There are two sections to an Accounts, Chatter area; the **top area** enables the creation of a new Post, Question, or Poll - depending on the tab selected, the **bottom area** enables the user to see the ongoing Chatter feed for that organization.



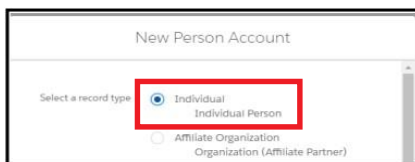
Creating a New Account

In this **exercise**, users will learn the steps to creating a new Individual Account and linking it to an Organization Account. Users will explore and add some of the features discussed previously.

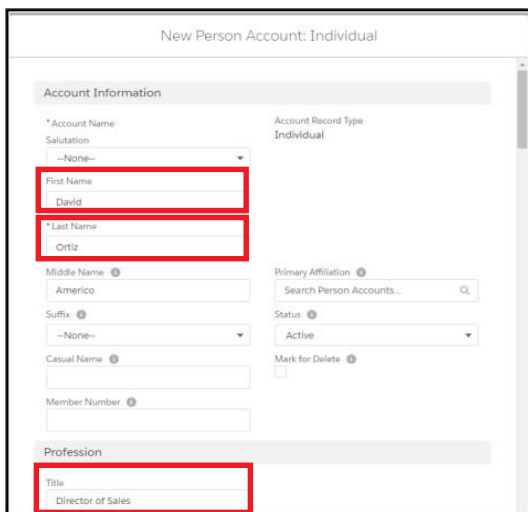
1. Click on the **Accounts** tab from the **Navigation Bar**.
2. Click on the **New** button.



3. Select the **Individual** radio button.

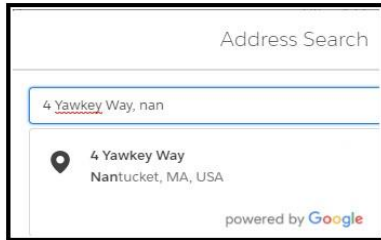


4. Fill out the **First Name** field with a **desired value**.
5. Fill out the **Last Name** field with a **desired value**.
6. In the **Title** field, enter **Director of Sales**.



7. Scroll down to the **Address** section.

8. Enter a familiar **Number & Street** into the **Mailing Address** field that contains the **Google Address Search** dialog box.
9. Once the address comes up identified, select it.
 - The **City, State,** and **Zip** should auto complete.



10. Select the **Copy Mailing to Billing** check box.
11. Select the **Copy Mailing to Shipping** check box.

The screenshot shows the 'Address' form with the following details:

- Primary Address:** Billing
- Copy From Mailing To Other:**
- Mailing Address:** Q Search Address
- Other Address:** Q Search Address
- Mailing Country Code:** United States
- Other Country Code:** --None--
- Mailing Street:** 4 Yawkey Way
- Other Street:**
- Mailing City:** Boston
- Mailing State/Province Code:** Massa...
- Other City:**
- Other State/Province Code:** --None--
- Mailing Zip/Postal Code:** 02215
- Other Zip/Postal Code:**
- Mailing Address Last Modified:** Date and Time fields
- Other Address Last Modified:** Date and Time fields
- Copy From Mailing To Billing:**
- Copy From Mailing To Shipping:**
- Billing Address:** Q Search Address
- Shipping Address:** Q Search Address

12. Scroll to the bottom of the form and **Save** the record.

IMPORTANT NOTE: Each client implementing Nimble AMS selects not only which fields to include on a form (in this case, the Persons Account form), but also which fields are required. The above exercise is simply an example of one fully configured form flow.

13. From the saved record, click on pencil icon (it will appear when floating over the field) to the right of the **Primary Affiliation** field.

14. Select from one of the **Organization** level accounts that displays - i e., **Flos Consulting**.

The screenshot shows a web form with tabs for 'RELATED', 'DETAILS', 'ORDER', and 'ENGAGEMENT'. The 'DETAILS' tab is active. The form contains several fields: 'Account Name' (required), 'Salutation' (dropdown), 'First Name' (text), 'Last Name' (required), 'Middle Name', 'Suffix' (dropdown), 'Casual Name', and 'Member Number'. The 'Primary Affiliation' field is highlighted in yellow and has a dropdown menu open. The dropdown menu shows a search bar with 'boston re' entered, a search icon, and a list of results: 'Boston Red Sox' (highlighted with a red box) and '+ New Account'. At the bottom of the form are 'Cancel' and 'Save' buttons.

15. Click on the **Save** button at the bottom of the screen.

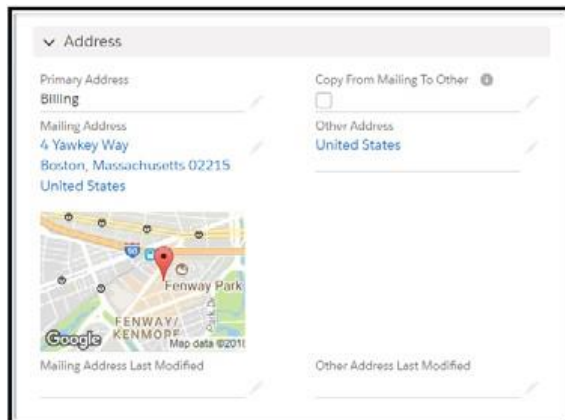
16. Observe the **Organization** just selected is now in the **Primary Affiliation** field.

17. The **Primary Affiliation** will also be listed under the **Affiliations** tab on the right side of the record.

- Users also have the option of selecting a **New Person Account** from the screen above if the desire was to create an entirely new Person or Organization account.

18. Scroll down to the **Address** section.

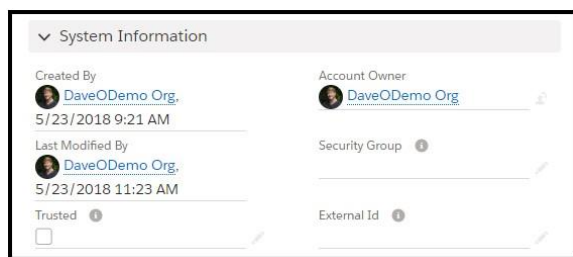
19. Observe the **Google map** display of the addresses.



20. Scroll down to the bottom of the record.

21. Observe the **System Information** section.

- It contains a **Name** and **Date** Stamp for **Created By**, **Last Modified By**, and the **Account Owner**.



22. Observe the **Account Links** section at the very bottom of the record.



Users can manage **duplicates** from Nimble AMS as well:

- If a duplicate is detected - users will receive an alert at the top of the screen.
- If permitted, users can also merge duplicate records.
- Administrators can edit/add to the duplicate check rules as needed.

23. Click back on the **Home** dashboard.

Logging Activities

Activity logging and display enables users to conduct the following operations directed at the person and update, edit, and track them under this tab:

- Create a New Task
- Create a New Meeting
- Log a Call
- Send an Email

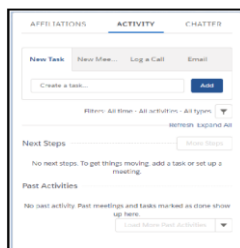
In this section, users will understand how to create and track each of those activities.

New Task

1. **Re-open** the record just created.
 - Type the name in **Quick Search**
 - Use the **Accounts, Recently Viewed** view
2. Click on the **Edit** button.



3. Observe the **Edit Person Account** box that displays.
4. Click on the **Save** button.
5. Click on the **Activity** section on the right.



6. Click in the **Create a Task** field.
7. Select **Send Quote** in the **Subject** lookup.
8. Select the next **Friday** for the **Due Date**.

9. The system automatically defaults the following fields:

- **Assigned To:** logged in user
- **Name:** the current record
- **Related To:** any related record

The screenshot shows a 'New Task' form with the following fields and values:

- Subject:** Send Quote
- Due Date:** 6/22/2018
- Assigned To:** VADemoDaveO Org
- Name:** David Ortiz
- Related To:** David Ortiz

A red box highlights the 'Save' button at the bottom right of the form.

10. Click on the **Save** button.

11. The **Task** becomes logged in the **Next Steps** area.

The screenshot shows the 'ACTIVITY' tab with the following sections:

- Next Steps:** A task card for 'Send Quote' due on 'Jun 22'. The card includes a checkmark icon, a checkbox, and the text 'You have an upcoming Task with David Ortiz'. A red box highlights this section.
- Past Activities:** A section with the text 'No past activity. Past meetings and tasks marked as done show up here.' and a 'Load More Past Activities' button.

New Meeting

1. Click on the New Meeting Tab.
2. Select **Meeting** from the **Lookup** choices.
3. Enter **Review YTD Order History** in **Description** field.
4. Select the next **Monday** as the **Start Date**.
5. Leave **2:00** in the **Time** field.
6. Keep both the default **End Date** and **Time**.
7. Leave the default values in the **Name** and **Related To** fields.

The screenshot shows a 'New Meeting' form with the following details:

- Subject:** Meeting
- Description:** Review YTD Order History
- * Start:** Date: 6/25/2018, Time: 2:00 PM
- * End:** Date: 6/25/2018, Time: 3:00 PM
- Name:** David Ortiz
- Related To:** David Ortiz
- Save** button is highlighted in red.

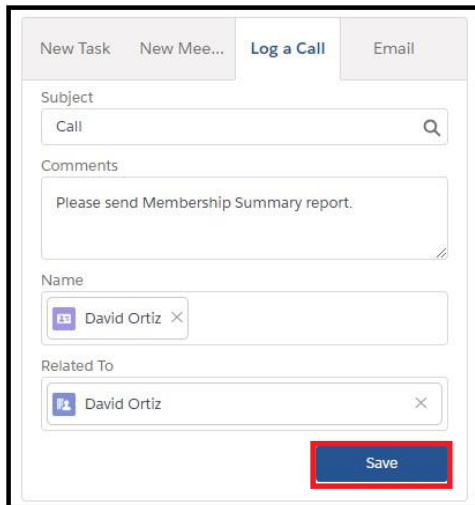
8. Click the **Save** button.
9. The **Meeting** becomes logged in the **Next Steps** area.

The screenshot shows the 'Next Steps' area with the following details:

- Next Steps** header with a 'More Steps' button.
- Task 1: Send Quote (Jun 22), with a note: 'You have an upcoming Task with David Ortiz'.
- Task 2: Meeting (2:00 PM | Jun 25), with a note: 'You have an upcoming Meeting with David Ortiz'. This task is highlighted with a red box.

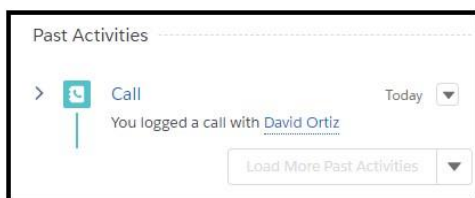
Log a Call

1. Click on the **Log a Call** Tab.
2. Call defaults in the **Subject** field.
3. Enter **Please send Membership Summary report** in **Description** field.
4. Leave the default values in the **Name** and **Related To** fields.



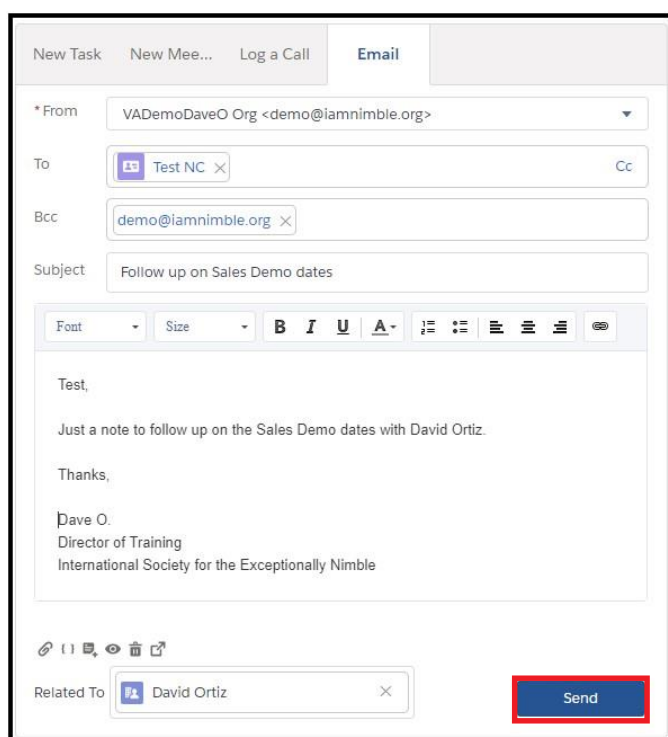
The screenshot shows a CRM interface with four tabs: 'New Task', 'New Mee...', 'Log a Call', and 'Email'. The 'Log a Call' tab is selected. Below the tabs are four input fields: 'Subject' (containing 'Call'), 'Comments' (containing 'Please send Membership Summary report.'), 'Name' (containing 'David Ortiz'), and 'Related To' (containing 'David Ortiz'). A blue 'Save' button is located at the bottom right of the form, highlighted with a red border.

5. Click the **Save** button.
6. The **Call** becomes logged in the **Past Activities** area.



Email

1. Click on the **Email** Tab.
2. Leave the **From** field defaulted to the **User**.
3. Enter **Test** in the To field and select the **Test NC** record that displays.
4. Leave the **Bcc** field defaulted to the selected demo **User**.
5. Enter **Follow up on Sales Demo dates** in the **Subject** field.
6. Enter **Test, “Just a note to follow up on Sales Demo. Thanks”**, in the **Content** area of the email.



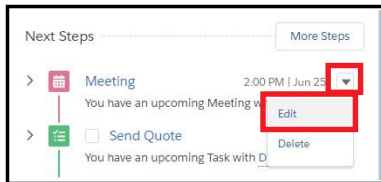
7. Click the **Send** button.
8. The **Email** is sent and becomes logged in the **Past Activities** area.



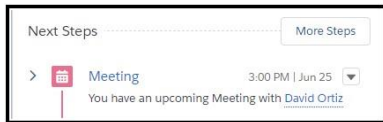
Editing an Activity

- Users have option of editing an Activity at any time. Editing levels differ depending on activity.
- Task OR Call - users can Edit Comments, Change Date, Create Follow up Task, Change Status, Change Priority, Edit entire record, or Delete.
- Meeting - users can Edit or Delete.
- Email - users can Delete (but only Activity log item; email itself has been sent) In this exercise, users will edit the Meeting they just added.

1. Click on logged **Meeting** drop down under the **Next Steps** section.
2. Select **Edit**.

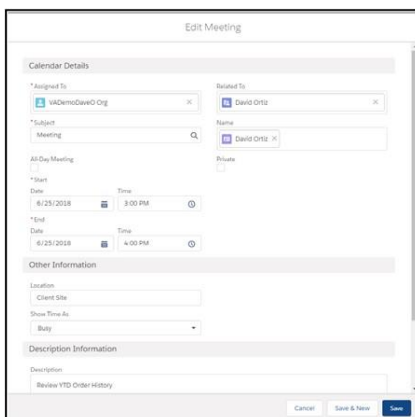


3. Change the **(Start) Time** field value to **3:00 PM**.



- This automatically adjusts the **(End) Time** field value to **4:00 PM**.

4. Enter **Client Site** in the **Location** field.



5. Click the **Save** button.
6. The **Meeting** becomes updated in the **Next Steps** area.

Accounts Reports and Dashboard

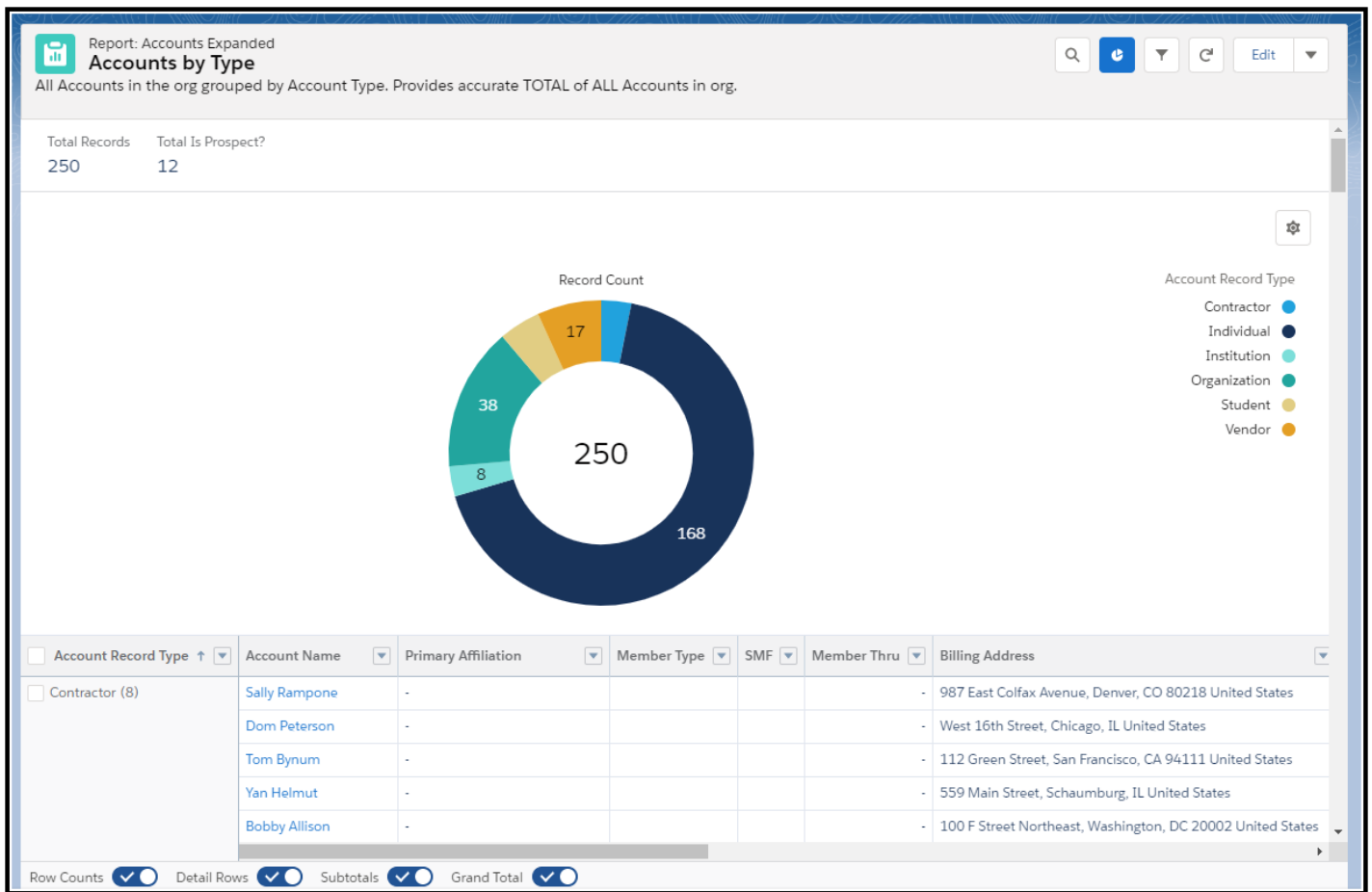
Accounts Reports

To run an Accounts report

1. Click Favorites.
2. Click on the **Accounts by Type** report.

Tip: If the report returns more than 2,000 records, only the first 2,000 are displayed. To see a complete view of the report, click **Export Details**.

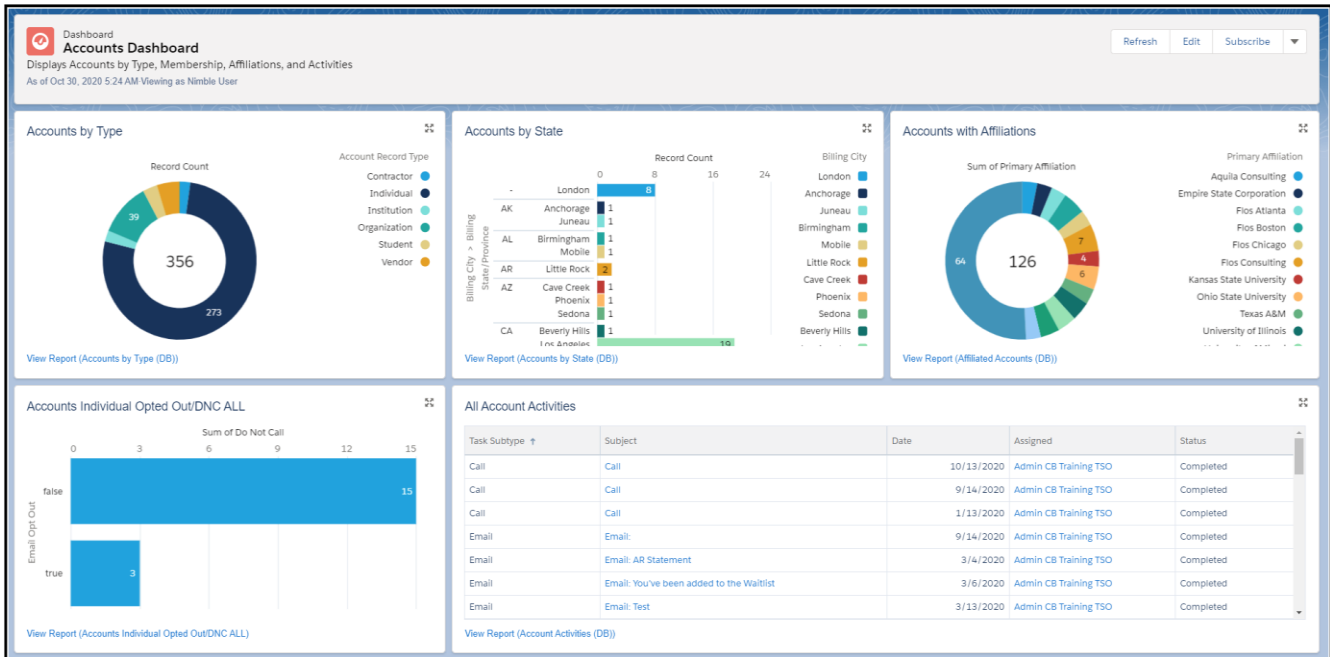
Accounts by Type



Accounts Dashboard

To display the Accounts dashboard:

1. Click the **Dashboards** tab.
2. Click on the **All Dashboards** section.
3. Click the **Accounts** Dashboard.



The **Accounts Dashboard** presents Accounts in 5 distinct reports:

- **Accounts by Type** – All Accounts by Account Record Type regardless of Account level or Membership.
- **Accounts by State** – All Accounts broken down by Billing State.
- **Accounts with Affiliations** – All Account organized by association to a Parent Affiliation.
- **Accounts Individual Opted Out/DNC** – All Individual Accounts that have opted out of being called as a means of contact.
- **All Account Activities** – All Account associated Events, Tasks, Calls, or Emails.

CHAPTER

3 List Views

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Understanding List Views.....	3.2
Existing List Views	3.3
Editing List Views.....	3.9
New List Views	3.11
List Views Best Practices.....	3.22

Objective

In this chapter, users will learn how to:

- Use Existing List Views
- Understand the Basic Features of a List View
- Create List Views
- Leverage List Views with Actions

Understanding List Views

List Views are configurable lists of records on every Item in Nimble AMS. They are used to display small, focused sets of information based on applied filters and selected fields.

List Views predominant use in Nimble AMS is for taking an action on some or all of the data displayed in the list view. Chief among these actions is the **Edit List** feature that enables users to update groups of records simultaneously.

Other **commonly executed actions** depend on the specific item. Users can generate bulk invoices (Orders), update meeting registrations (Registrations) or committee memberships (Committee Memberships), and, where enabled, send emails (Accounts).

List Views can be used/created/shared for any item (table of records) in Nimble AMS. Examples of areas where list views used most often:

- Accounts
- Membership
- Orders
- Payments
- Committee Memberships
- Registrations
- Products

Below is a list of **abilities/limitations** for all List Views:

- Enable editing of record fields (Non-transactional) in bulk.
- Enable actions to records such as Invoicing, Updating Status, Emailing (if enabled).
- Limited to a single Item, and that Item's fields. For instance, if a person creates a view under the Accounts item, ONLY Account fields are available for filtering/display.
- Initially display only 50 records; users must scroll to end of the List View to display 50 additional records - Total amount of records will NOT display beyond 2000.
- Useful for actions, NOT analysis.

Nimble AMS items come with a large assortment of stock list views. Existing list views are clone-able and editable by their owners, can be shared with other users, and any permitted user can create new ones. This chapter will take users through how to use, create, and edit list views.

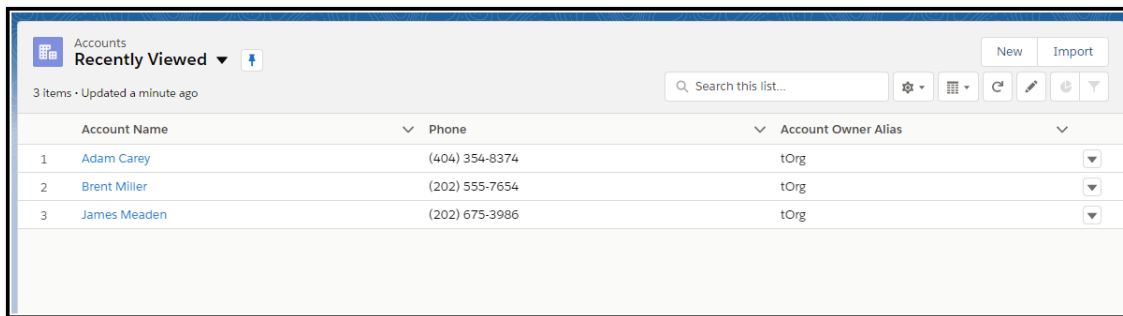
Existing List Views

Some users will only need to USE existing List Views, not CREATE new ones; this section will outline how to use stock, existing List Views of Nimble AMS.

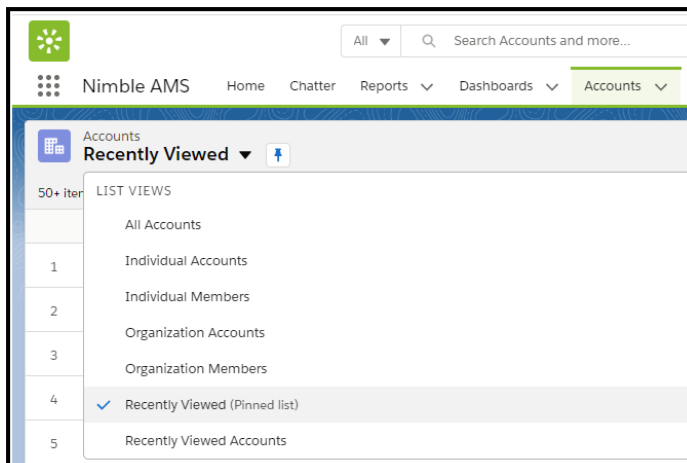
OPENING AN EXISTING LIST VIEW

In this **exercise**, users will navigate existing list views under the **Accounts** item to understand the basic available features of all list views.

1. From the **Navigation** bar, click the **Accounts** tab.
 - This displays the default **Recently Viewed** view of Account records (upper left).



2. Next to **Recently Viewed**, click on the **Select List View** dropdown.
 - Every Item contains a **Select List View** dropdown with available **List Views**.
3. Once a user creates, uses, or accesses shared list views, they will compile in the following sections:
 - **Shared** - views shared by an Administrator
 - **Owned** - views from the logged in user

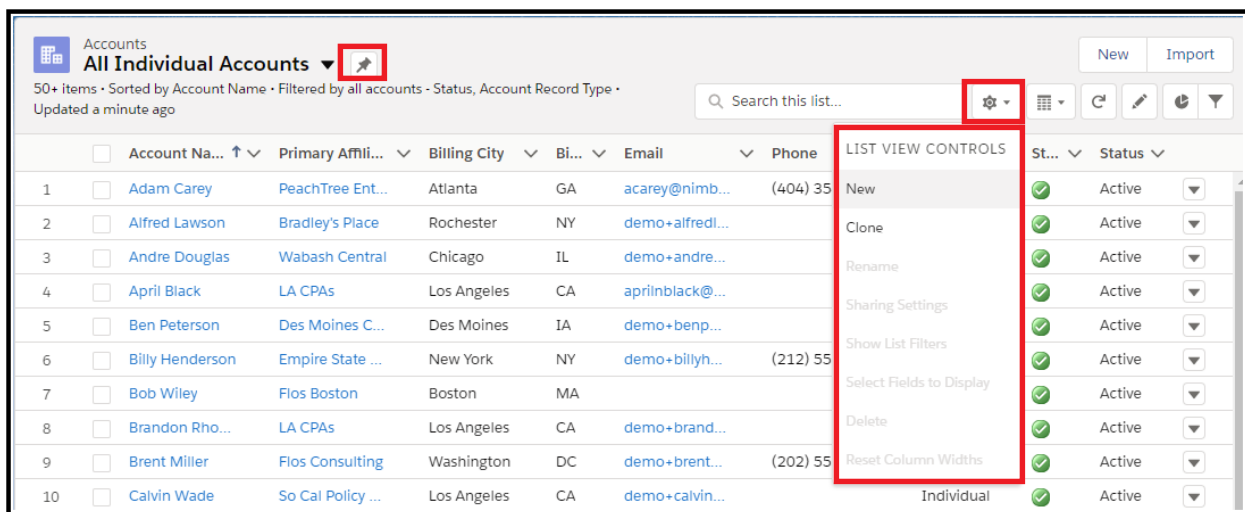


4. Click on the **All Individual Accounts** list view from the dropdown.
5. Click the angled stickpin icon to right of **All Individual Accounts** title, to **Pin** the List View.
 - Users can **Pin** one list view per item; Recently Viewed list initially defaults as pinned.
6. Click on the **List View Controls** (gear icon to right) - Only **New** and **Clone** are available.

IMPORTANT NOTE: Only List View Owner has permissions to edit. End Users cannot edit:

- 1) Shared, “Stock” Nimble list views controlled by licensed Administrator level users
- 2) List views created by Administrators (or fellow End Users) that have been Shared.

However, ALL List Views CAN be Cloned and then edited for personal use by End Users.



7. On the right side of the screen, observe the **List View Options** area.



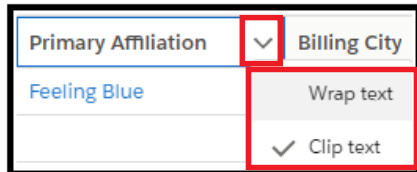
- **List View Controls** - Creation of New View/Configuration of Existing View.
- **Display As** - Enables view owner to display data as Table or Kanban chart.
- **Refresh** - Refreshes the data in the view.
- **Edit List** - Users can edit data in the view.
 - Accounts require one **Record Type** filter for Individual OR Organization.
 - Users cannot In Line Edit from an item’s **Recently Viewed** List View.
- **Show Charts** – Enables users to view List View data in a pre-configured chart.
- **Show Filters** - Enables users to view (but NOT edit) the List View’s filters.

8. Click on the **Account Name** column header - enables sorting of column; clicking again will change from **Ascending** to **Descending Sort** (indicated by arrow).

- Users can ONLY sort by one column at a time in List Views.

9. To the right of the **Primary Affiliation** column header, click on the dropdown arrow.

- Users can **Clip** or **Wrap** text.



10. Click on the **dividing line** between column headers.

11. Users can **expand/contract** the column size (similar to Excel).

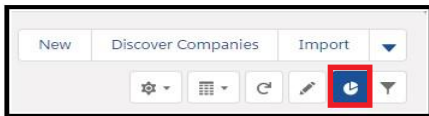
CHARTS

When a user opens an existing list view, a Chart may display if previously created. Users can temporarily change the Chart type/display options, or create a New Chart if desired.

Charts are the best method in using List Views to quickly find out the total number of records in the List View without having to scroll.

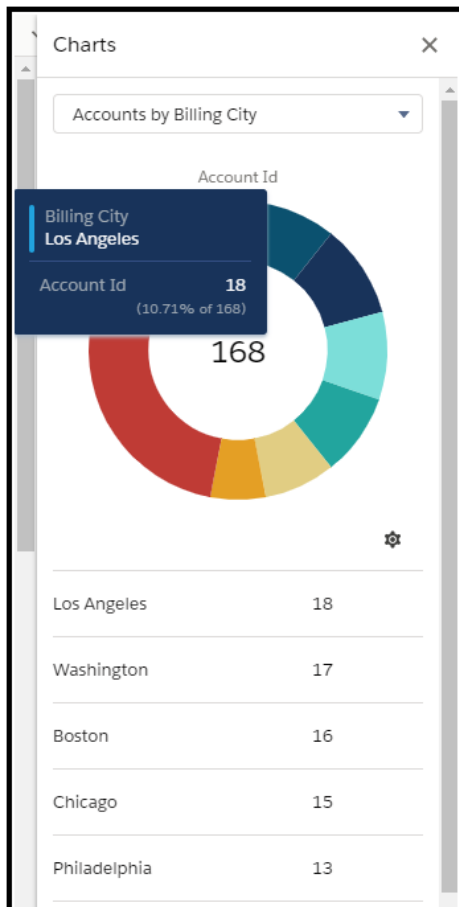
In this **exercise**, users will examine an existing chart and create a new chart.

1. Click on the **Chart** button from **View Settings**.

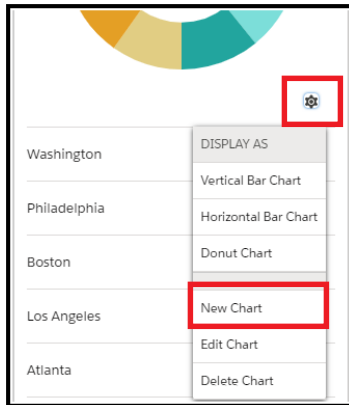


2. The **Accounts by City** chart displays.

- IF no chart displays, users will be prompted with the text, “**This list doesn’t have any charts yet**”. A **New Chart** button will enable creation.
- Users can float over a section of the chart to display summary information.



3. Click on the **gear icon** below chart on lower right.
4. From the **Display As** menu, select **New Chart**.
 - Users can create a new Chart - **even if they do not own** the List View.
 - The created List View is **saved/available** for future access.



5. In the **Chart Name** field, enter **Accounts by State**.
6. From the **Chart Type** dropdown, select **Horizontal Bar Chart**.
7. From the **Aggregate Type** dropdown, select **Count**.
8. From the **Aggregate Field** dropdown, select **Account Name**.
9. From the **Grouping Field** dropdown, select **Billing State/Province**.

A screenshot of the 'New Chart' configuration form. The form has a title 'New Chart' at the top. It contains several fields:

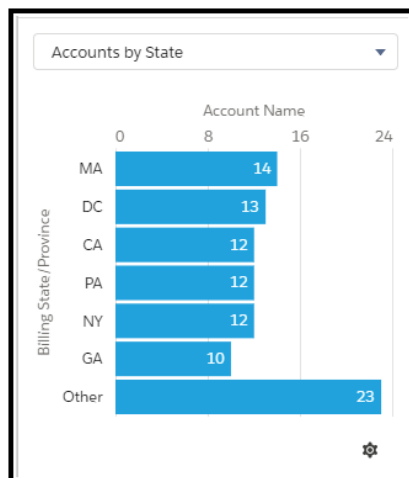
- Chart Name:** A text input field containing 'Accounts by State'.
- Chart Type:** A dropdown menu with 'Horizontal Bar Chart' selected.
- Aggregate Type:** A dropdown menu with 'Count' selected.
- Aggregate Field:** A dropdown menu with 'Account Name' selected.
- Grouping Field:** A dropdown menu with 'Billing State/Province' selected.

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

10. Click **Save**.

11. Observe the results.

- List View Charts provides easily viewable summaries.
- If users require expanded Chart functionality, they should consider creating a **Report** with a **Report based Chart** instead. Reports and Report Charts are covered in Chapter 3.



Editing List Views

One of the most useful features of List Views is the ability to edit quickly a single, or group of, existing record's data. This **Edit List** feature is available on every item in Nimble AMS.

Editing List Views is especially useful when updating groups of Item records that require **updating immediately post-Order**. Item Records such as Exhibitors or Advertising require additional information such as Booth size and configuration for an Exhibitor, or Color and Position for Advertising. Users can review post order editing by going to the Appendices in this manual for the Advertising and Exhibitor items.

IMPORTANT NOTE: Using **Edit List** enables updates to ordered items AND is only possible via a List View; clicking on the record in a List View for those items will simply open the Order.

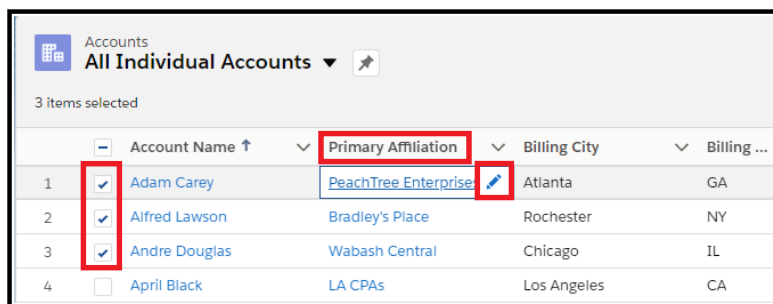
EDIT LIST – BULK UPDATE


In this exercise, users will use the **Edit List** function for the **All Individual Accounts** list view under the **Accounts** item.

1. Select the **All Individual Accounts** List View.
2. From the **View Settings**, click the **Edit List** button.



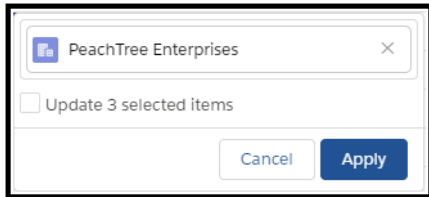
3. On the far left of list view, **check the first three records'** checkboxes.
4. Under **Primary Affiliation** column, select the **pencil icon** to the right of first record.



	Account Name ↑	Primary Affiliation	Billing City	Billing ...
1	<input checked="" type="checkbox"/> Adam Carey	PeachTree Enterprise 	Atlanta	GA
2	<input checked="" type="checkbox"/> Alfred Lawson	Bradley's Place	Rochester	NY
3	<input checked="" type="checkbox"/> Andre Douglas	Wabash Central	Chicago	IL
4	<input type="checkbox"/> April Black	LA CPAs	Los Angeles	CA

5. Users have the following options:
 - Click **Delete (x)** and search for a replacement value.
 - Click **Update 3 selected items** to change all checked records to same value.

- 6. Check the **Update 3 selected Items** - records will be changed to **PeachTree Enterprises** since that is the value defaulting in the value field of the **Primary Affiliation**.

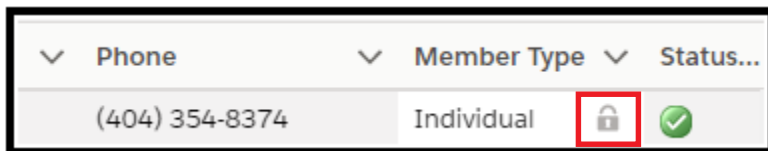


- 7. Click the **Apply** button.
- 8. Observe the results.

	Account Name ↑	Primary Affiliation ↓
1	<input checked="" type="checkbox"/> Adam Carey	PeachTree Enterprises
2	<input checked="" type="checkbox"/> Alfred Lawson	PeachTree Enterprises
3	<input checked="" type="checkbox"/> Andre Douglas	PeachTree Enterprises

- 9. Move the cursor over the first value of the **Member Type** column.
- 10. Observe the **lock icon** to the value's right.

- Not all Field values are available for editing; the **Member Type** value is **transactional** and is therefore **unavailable**.



- 11. Click on the **Select List View** dropdown.

IMPORTANT NOTE: Users **cannot edit** List View record fields:

From a **Recently Viewed** List View

In an **Accounts** List View that does not filter by at least one Record Type.

That are **Transactional Fields** (e.g. Order ID or Status)

New List Views

Most users find that utilizing existing views will be sufficient for their function. They will not have the technical capabilities, desire, and/or bandwidth to create new List Views. Selected others will have the need to create and/or regularly edit new List Views. In either scenario, understanding **how** to create List Views is useful:

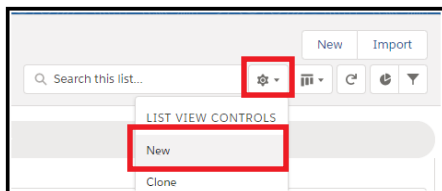
- Users **utilizing existing views** will understand options/configurations they can **request** for administrators building additional views.
- Users **creating views** will understand options/configurations options they can use to **build**.

IMPORTANT NOTE: Users should ALWAYS, **Clone an Existing List View** (if available) in the process of creating a New List View. Cloning enables users to copy, and ensure the accuracy of, Filters, Fields, and other options without having to recreate them.

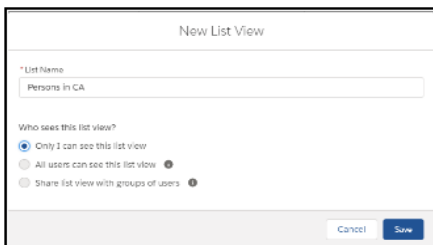
CREATING A NEW LIST VIEW

In this **exercise**, users will create a basic list view.

1. Click on **Accounts**.
2. From **View Settings**, click on the **List View Controls** icon.
3. Select **New**.



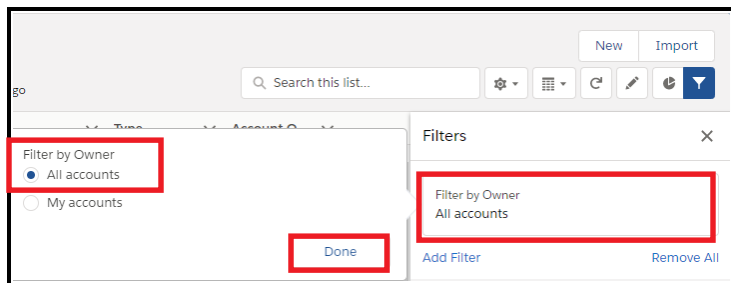
4. In the **New List View** box, enter **Persons in CA** in the **List Name** field.
5. Keep the **Only I can see this list view** radio button selected.
 - The additional radio buttons are greyed out and only available to Administrators.
 - Users can request Administrators to share the List View if desired.



6. Click **Save**.
7. By default, the results area produces a **No items to display** message.
8. Navigate to the **Filters** section (displays as a right hand column).
9. Click on the default **Filter by Owner (My accounts)** filter.
10. Click on the **All accounts** radio button.
 - By default, results auto-filter by **My accounts** (Accounts created by the logged in user).
 - If users **Clone** an existing list view, they could avoid having to adjust the default filter.

IMPORTANT NOTE: Users will need to adjust the defaulting My _____ to an All _____ filter on **EVERY** list view under **EVERY** item when creating a **NEW** List View.

11. Click **Done**.



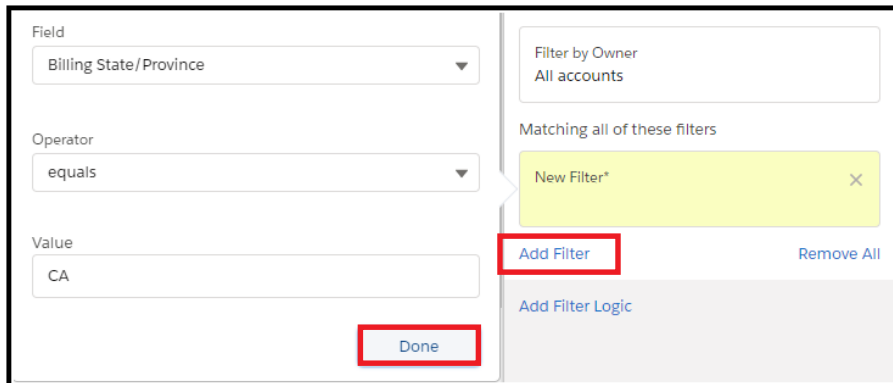
12. Click **Save**.
 - By default, the system pulls all accounts into the displayed List View. The user then needs to build and apply various filters/select fields.
 - Views will **ONLY** display 2000 results or less. If the user desires more than 2000 results, they should utilize Reports where results over 2000 are aggregated through reports.

	Account Name ↑	Billing Stat...	Phone	Type	Account O...
1	Adam Carey	GA	(404) 354-8374	tOrg	▼
2	Alfred Lawson	NY		tOrg	▼
3	Andre Douglas	IL		tOrg	▼
4	April Black	CA		tOrg	▼
5	Aquatics Incorporated	MA	(617) 555-7730	tOrg	▼
6	Aquila Consulting	DC	(202) 555-7530	tOrg	▼
7	Atlanta's Finest	GA	(404) 654-5555	tOrg	▼
8	Ben Peterson	IA		tOrg	▼
9	Best of NY	NY	(917) 555-4242	tOrg	▼
10	Billy Henderson	NY	(212) 555-2424	tOrg	▼

ADDING FILTERS

In this **exercise**, users will add Filters to their new List View.

1. From the **Filters** section on right, click on the **Add Filter** link.



2. In the **Field** dropdown, enter **Bi** quickly.
3. Select **Billing State/Province** from the list.
 - State/Province field values can be **multi-selected** when configured.
4. Keep **equals** in the **Operator** dropdown.
5. In the **Value** dropdown, enter **CA**.
6. Click the **Done** button.
7. From the **Filters** section, click on the **Add Filter** link.
8. From the **Account Balance** default field, click on the dropdown and select **Account Record Type**.
 - Account Record Type enables users to select from among available record form templates that distinguish one type from another (Organization vs Individual).
 - In this example, only **Individual** and/or **Organization** are available. In a client specific, configured org, there could be many more: Chapter, Student, Branch, Union etc.
9. Keep **equals** in the **Operator** dropdown.
10. Click in the **Value field** – observe the **0 options** selected; this Value field accommodates multi-selection of values.

11. Select **Individual**.

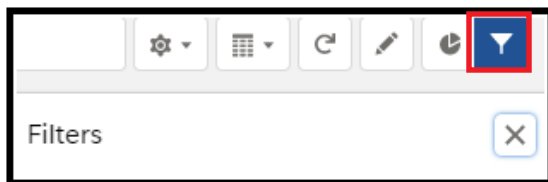
12. Click **Save**.

13. **Observe** the results.

A screenshot of a software interface showing a list of accounts. The title is "Accounts Persons in CA" with a dropdown arrow and a refresh icon. Below the title, it says "12 items • Sorted by Account Name • Filtered by all accounts - Account Record Type, Billing State/Province • Updated a few seconds ago". There is a search bar on the right that says "Search this list...". The table has columns: "Account Name" (with an upward arrow), "Billing Stat...", "Phone", "Type", and "Account O...". There are 12 rows of data, each with a checkbox, a name, a state (CA), a phone number, and a type (tOrg).

	<input type="checkbox"/> Account Name ↑	▼ Billing Stat... ▼	Phone	▼ Type	▼ Account O... ▼
1	<input type="checkbox"/> April Black	CA			tOrg ▼
2	<input type="checkbox"/> Brandon Rhodes	CA			tOrg ▼
3	<input type="checkbox"/> Calvin Wade	CA			tOrg ▼
4	<input type="checkbox"/> Eric Boyd	CA			tOrg ▼
5	<input type="checkbox"/> Glenda Thomas	CA			tOrg ▼
6	<input type="checkbox"/> Isaiah Mitchell	CA			tOrg ▼
7	<input type="checkbox"/> Jenny Nichols	CA			tOrg ▼
8	<input type="checkbox"/> Laurie Lynch	CA			tOrg ▼
9	<input type="checkbox"/> Marsha Montgomery	CA			tOrg ▼
10	<input type="checkbox"/> Nicholas Welch	CA	(424) 345-8282		tOrg ▼
11	<input type="checkbox"/> Victor Lee	CA			tOrg ▼
12	<input type="checkbox"/> Warren Hart	CA	(424) 556-7657		tOrg ▼

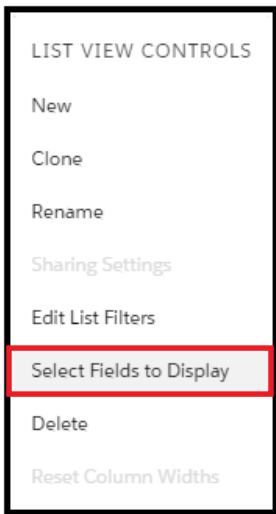
14. Click in the **Filters** icon in the upper right to **minimize** the section for better results visibility.



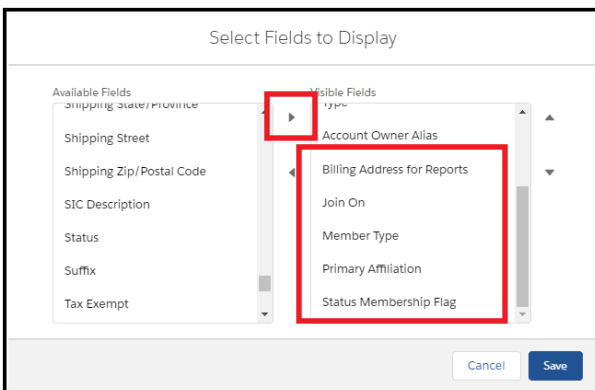
ADDING FIELDS

In this **exercise**, users will add Filters to their new List View.

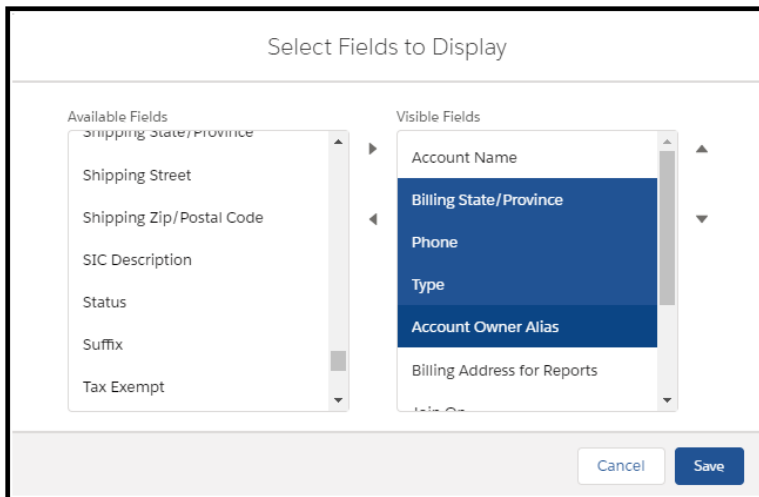
1. From the **View Setting** section, click on the **List View Controls** icon.
2. Select the **Select Fields to Display** option.



3. Select the following from the **Available Fields** column by using the **Ctrl** key on the keyboard and clicking on each one.
 - Billing Address for Reports
 - Join On
 - Member Type
 - Primary Affiliation
 - Status Membership Flag
4. Add the selected fields to **Visible Fields** column, by clicking the **Right** facing, middle arrow.



5. Select the following from the **Visible Fields** column by using the **Ctrl key** on the keyboard and clicking on each one.
- Billing State/Province
 - Phone
 - Type
 - Account Owner Alias



6. Remove selected fields from **Available Fields** column, by clicking **Left** facing middle arrow.
7. Users can also click on the arrows at the top right of the Visible Fields dropdown to move individual fields into a different order. Moving fields in the Visible Fields area changes their order as Columns in the Results.

RESULTS & EDITING LIST VIEW SETTINGS

In this **exercise**, users will add additional Filters to their new List View.

1. Click on the **Save** button - the **View results** display.

The screenshot shows a web interface for a list view titled 'Accounts' with a sub-header 'Persons in CA'. It displays 12 items, sorted by Account Name. The table has columns for Account Name, Billing Address for Re..., Join On, Membe..., Primary Affiliation, and St... (Status). Each row represents an individual account with details like name, address, join date, membership type, and affiliation.

	Account Name	Bi...	Phone	Ty...	Ac...	Billing Address for Re...	Join On	Membe...	Primary Affiliation	St...
1	April Black	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	LA CPAs	✓
2	Brandon Rhodes	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	LA CPAs	✓
3	Calvin Wade	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	So Cal Policy Board	✓
4	Eric Boyd	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	So Cal Policy Board	✓
5	Glenda Thomas	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	So Cal Policy Board	✓
6	Isaiah Mitchell	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013		Fossils	
7	Jenny Nichols	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013		LA CPAs	
8	Laurie Lynch	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013			
9	Marsha Montgomery	CA			tOrg	330 North Rodeo Drive Beverly Hills, CA 9021...	2/1/2013	Individual	Feeling Blue	✓
10	Nicholas Welch	CA	(424) 345-8282		tOrg	100 Main Street Santa Monica, CA 904...				
11	Victor Lee	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	LA CPAs	✓
12	Warren Hart	CA	(424) 556-7657		tOrg	1000 Vin Scully Avenue Los Angeles, CA 9002...	2/1/2013	Student	Feeling Blue	✓

2. **Observe** the results with the addition/reordering of the desired fields.
3. From the **View Setting** section, select the **List View Controls**.
4. Select the **Edit List Filters** option.
 - Users can add additional filters/change display fields on any view they own.
5. From the **Field** dropdown, select **Member**.
6. From the **Operator** dropdown, select **equals**.
7. From the **Value** dropdown, select **Yes**.
8. Click the **Done** button.

9. Click on the **Save** button.

10. The updated **results** display.

- Only 8 results display instead of 12 based on the **Member** filter.

	Account Name ↑	Bi...	Phone	Ty...	Ac...	Billing Address for Re...	Join On	Membe...	Primary Affiliation	St...
1	<input type="checkbox"/> April Black	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	LA CPAs	✓
2	<input type="checkbox"/> Brandon Rhodes	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	LA CPAs	✓
3	<input type="checkbox"/> Calvin Wade	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	So Cal Policy Board	✓
4	<input type="checkbox"/> Eric Boyd	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	So Cal Policy Board	✓
5	<input type="checkbox"/> Glenda Thomas	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	So Cal Policy Board	✓
6	<input type="checkbox"/> Marsha Montgomery	CA			tOrg	330 North Rodeo Drive Beverly Hills, CA 9021...	2/1/2013	Individual	Feeling Blue	✓
7	<input type="checkbox"/> Victor Lee	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	LA CPAs	✓
8	<input type="checkbox"/> Warren Hart	CA	(424) 556-7657		tOrg	1000 Vin Scully Avenue Los Angeles, CA 9002...	2/1/2013	Student	Feeling Blue	✓

IMPORTANT NOTE: It is VERY important that the user immediately **Rename** the view.

- The results now show **Person Members in CA**, not Persons in CA.
- If the name is **NOT** changed – it would be a misleading title.

11. From the **List View Controls**, select **Rename**.

12. Enter **Members in CA**.

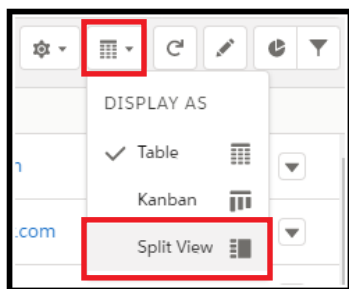
13. Click the **Save** button.

SPLIT VIEW

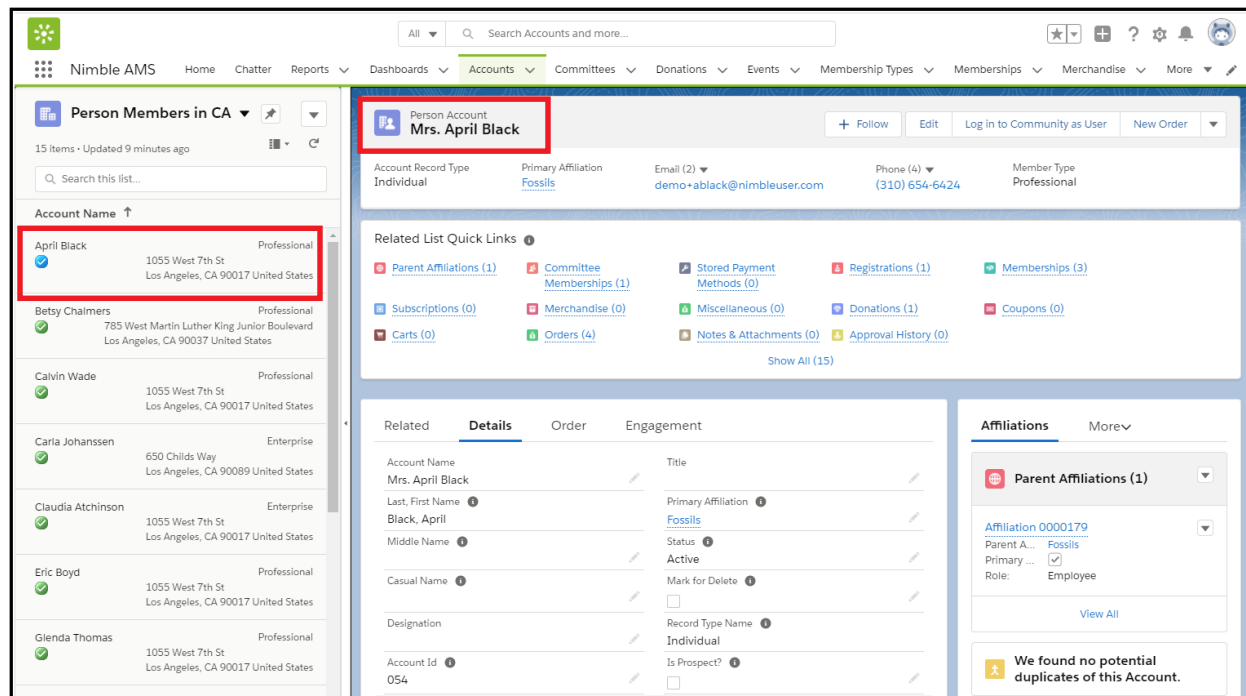
Split View is a very effective method for displaying full info about a selected record from a list view while retaining the ability to switch from one record to another quickly.

In this **exercise**, users will edit their existing **Person Members in CA** view to display the data in split view mode.

1. Click on the **Person Members in CA** list view under **Accounts**.
2. From the **View Settings** (upper right), click on the **Display As** dropdown.
3. Click on **Split View**.



4. Click on the **first record** displayed under the **left-hand column**.
5. Observe the display of the **full record** in the **right-hand display area**.
 - Users can quickly switch from one record to the next in the left-hand column.
 - Users have full edit capabilities to all fields in the right-hand display area.



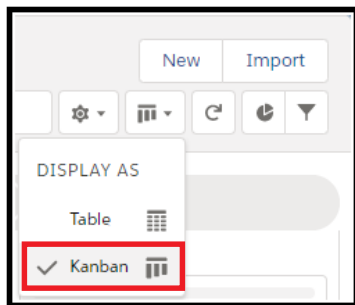
KANBAN CHARTS

Kanban Charts are valuable for Summarizing and Grouping by values. They can provide quick views of data from a unique perspective.

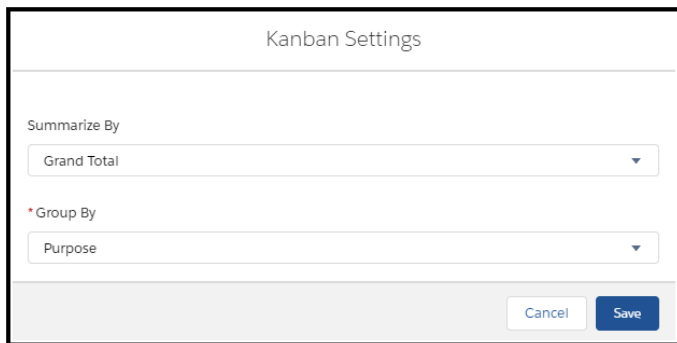
For more complex data displays, users should use **Reports** or **Dashboards**. Kanban Charts cannot provide multiple levels of data display for complex analysis.

In this **exercise**, users will create a Kanban chart to display the data of their created list view.

6. Click on the **Orders** Item.
7. From the **Select List View** dropdown, click on the **All Orders** List View.
8. From the **List View Controls**, select **Clone**.
9. In the **Name** the List View field, enter **All Orders (TEST)**.
10. From the **View Settings**, click on the **Display As** dropdown.



11. Click on **Kanban**.
12. **Kanban Settings** display.
13. From the **Summarize By** dropdown, select **Grand Total**.
14. From the **Group By** dropdown, select **Purpose**.



15. Click on **Save**.

16. Results display Order **Grand Total** amounts grouped by **Purpose** (Product Record Type).

Donation (6)	Membership (129)	Merchandise (8)	Miscellaneous (0)	Registration (22)	Subscription (6)
\$710	\$91,035	\$239		\$7,552	\$145
Order 0000004 Curtis Banks 9/17/2018	Order 0000005 Ted Williams 10/4/2018 10/4/2018	Order 0000001 James Meaden 9/11/2018 9/11/2018		Order 0000000 James Meaden 9/11/2018 9/11/2018	Order 0000136 Stan Smith 11/5/2018 11/5/2018
Order 0000039 James Meaden 10/6/2018 10/6/2018	Order 0000006 Boston Red Sox 10/5/2018 10/5/2018	Order 0000002 Ted Williams 9/11/2018 9/11/2018		Order 0000119 Adam Carey 10/10/2018 10/10/2018	Order 0000137 Eric Boyd 11/5/2018 11/5/2018
Order 0000146 Curtis Banks 11/21/2018	Order 0000007 Aquatics Incorporated 10/5/2018 10/5/2018	Order 0000003 Curtis Banks 9/14/2018 9/14/2018		Order 0000120 Virgil Watts 10/10/2018 10/10/2018	Order 0000138 Glenda Thomas 11/5/2018 11/5/2018
Order 0000150 Online Guest Checkout 11/30/2018	Order 0000008 Gardner Limited 10/5/2018 10/5/2018	Order 0000140 Glenda Thomas 11/12/2018 11/12/2018		Order 0000121 Marian Wade 10/10/2018 10/10/2018	Order 0000139 James Lane 11/5/2018 11/5/2018
Order 0000153 Jenny Silva 12/21/2018 12/21/2018	Order 0000009 LA CPAs 10/5/2018 10/5/2018	Order 0000141 Isaiah Mitchell 11/12/2018 11/12/2018		Order 0000122 Helen Bell 10/10/2018 8/30/2019	Order 0000144 Curtis Banks 11/21/2018 11/21/2018
Order 0000154					

17. From the **View Settings**, click on the **Display As** dropdown.

18. Select **Table**.

- Users can return to the Kanban display and will not have to re-set the Kanban settings.
- If users desire to edit the Kanban settings, they can click on the **List View Controls** dropdown and navigate to the Kanban settings **while in Kanban display mode**.

List Views Best Practices

Below are some best practices to consider when creating List Views:

- Before creating a **New** List View, check **Existing** List Views per Item to discover if a list view already exists/is similar to list view desired
- If the list view already exists/is similar, run the list view and **Clone** from the gear icon (upper right). Saves time & ensures data integrity by copying a proven list view with tested filters.
- When **initially** (pre Go-Live or new module use) **creating List Views** always:
 - 1) Have ADMINISTRATORS build the initial List Views for EACH Item. Because:
 - a. ONLY Administrators can share List Views - End Users CANNOT
 - b. Administrators CANNOT transfer ownership of List Views OR Share other owners list views
 - 2) **Compare** a small sample of **results** against a known outcome (former db results).
 - 3) Have employee/**department review the report** created by the Administrator – preferably in a room gathered around a projector.
- When initially creating List Views (or cloning and/or editing existing stock ones) for a department, it is advisable the Administrator create **Core List Views** that:
 - Find _____ (Use Find to indicate prompted filters are included – for instance, Find Registrations would include a prompt for Event, Find Orders would include a prompt for Account.
 - NOTE: End Users will HAVE to CLONE a prompted list view in order to use that list view; filters are automatically locked when created by an Administrator.
 - Any Date Based for _____ (for instance, All Orders This Week, All Past Due Orders Last 30 Days, All Registrations This Quarter, etc.
- Since List Views only display the initial 50 records – users must scroll down to see more – users should always add a **Chart** to the List View that displays totals. This ensures users can see the total amount of records in the List View without having to scroll each time.
- Use **Appendix G: Relative Date Values**, of this manual for examples of pre-defined date values that can be applied.

CHAPTER

4 Reports

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Reports Item	4.3
Existing Reports.....	4.5
New Reports	4.12
Reports Best Practices.....	4.21

Objective

In this chapter, users will learn how to:

- Understand Reports and how they function
- Find and interact with Existing Reports
- Create a New Report
- Create Advanced Reports
- Understand the impact of Report Types

Purpose

Users should use this chapter as a step-by-step guide on how to understand, create, and fully utilize reports. Users can reference specific examples and apply as needed.

Understanding Reports

Reports are the chief tool to help users view, manipulate, and analyze data from all Items of Nimble AMS. Reports provide the following:

- Display vast amounts of data: up to 2000 row results, unlimited aggregation
- Pull data simultaneously from multiple Items (i.e. Accounts AND Orders)
- Enable creation of interactive Charts
- Enable Grouping and Aggregation of the data
- Scheduled to communicate data to internal users of Nimble AMS
- Form foundation for all Dashboards
- Can be exported in multiple formats - xls., pdf, comma-delimited, etc.

Reports tie to the Items of Nimble AMS through Report Types and often gather data from multiple Items. Typical reports combine data from one or more of the following modules:

- Accounts
- Membership
- Orders/Payments
- Events
- Registrations
- Donations
- Merchandise
- Subscriptions

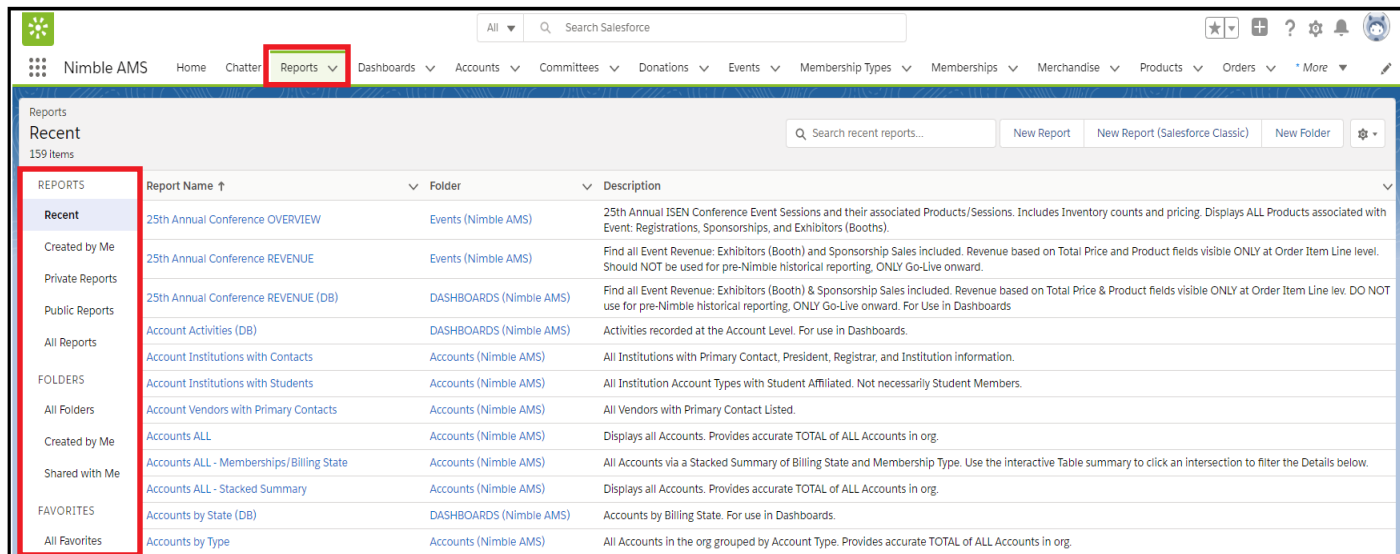
Existing Reports – Users have access to a large number of pre-existing reports that are a part of the stock Nimble AMS product. These Reports are located in Folders in the Reports Item (see next section) and organized topically.

When first implementing Nimble AMS, users should explore, utilize, and eventually revise the Reports Item folder structure to fit their own organization. In doing so, users will create Folders and Reports that are specific to their organization, are trusted, and utilized by all users.

Users should always clone an Existing Report when desiring to create a New Report. By doing so, users inherit tested Filters, default Fields (Columns), Grouping, and other features, without having to create them.

Reports Item

The Reports item provides structure for finding, organizing, and interfacing with Reports.



From the right hand, actions and settings section, users have the option to:

- Create a **New Report**
- Create a **New Report (Salesforce Classic)**
- Create a **New Folder**
- Edit the display of the current displayed list view.

Users can also access each of the four sections listed on the left-hand column:

- **Recent** - All recently accessed reports by the current logged in user.
- **Created by Me** - All reports ever created by the current logged in user.
- **Private Reports** - Reports whose visibility is limited to current logged in user.
- **Public Reports** - Reports made available to all users.
- **All Reports** - All reports visible to the user system wide.

Users have the option of searching through the following Folders of reports:

- **All Folders** – All Folders that are visible to the user; both created by the user and shared system wide to all users. Useful structure for finding existing reports.
- **Created by Me** – All personal Folders created by the logged in user.
- **Shared with Me** – All folders shared with the logged in user.

Users can also utilize the **All Favorites** section. The All Favorites section automatically displays any Reports the user has added to Favorites (Star).

It has the advantage over using the General Favorites located in the upper left of the window in that it **ONLY** shows Reports, not any other Favorited items.

Existing Reports

Users have access to a large number of pre-existing reports in the stock Nimble AMS product. These Reports are located in Folders in the Reports Item. In this section, users will explore some of these existing reports.

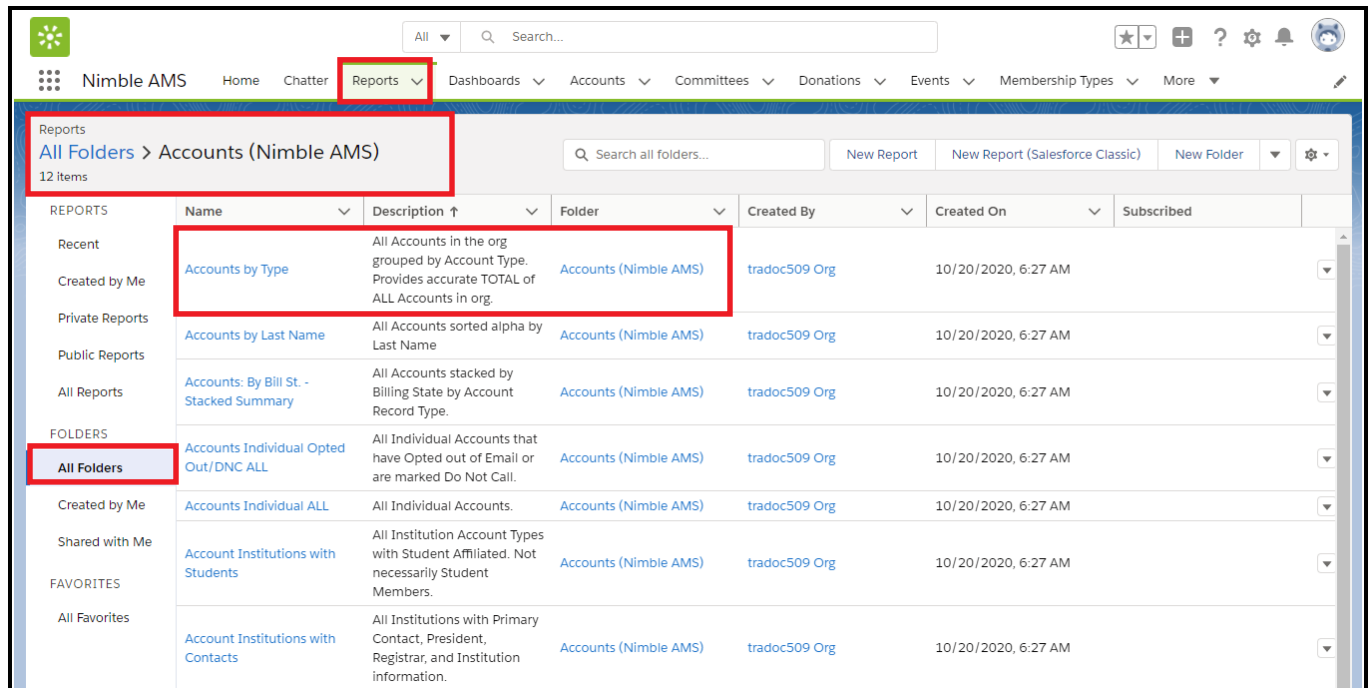
None of the changes a user applies to an unowned, existing report are permanent and will disappear once the report is exited/closed.

For most staff, this can be an effective usage model, since one knowledgeable Administrator level user from their department can build the report - apply complicated filters, add required fields (columns), and control other report settings - and the rest of the department can access/use the report from a shared folder.

OPENING AN EXISTING REPORT

In this **exercise**, users will open an existing report and explore available options.

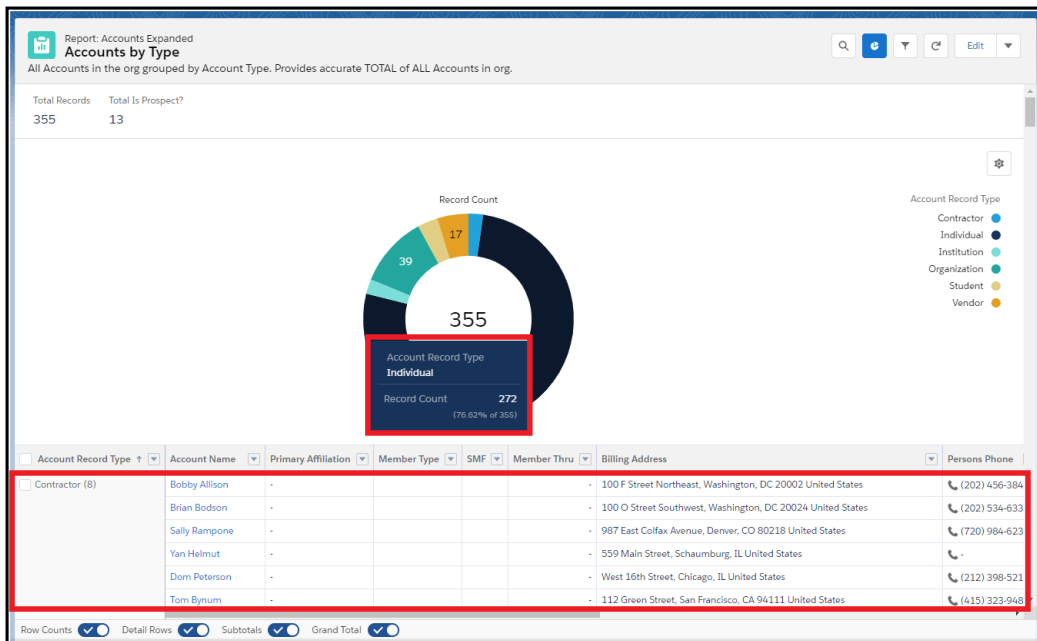
1. From the **Navigation** bar, click the **Reports** tab.
2. Click on the **All Folders** option from the far left column.
3. Click on the **Accounts (Nimble AMS)** folder.
4. Click on the **Accounts by Type** report.



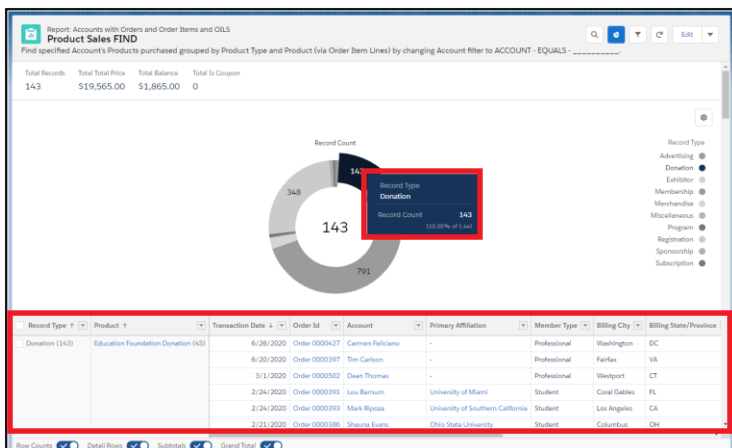
5. Float over and then click on the **Individual** segment of the **Donut** chart.

Existing Reports

6. Observe the **Summary**.
7. Look at the **List** of the **Individual** accounts below the chart.



8. Click on **Favorites**.
9. Select **Product Sales FIND**.
10. Click on the **Donation** (navy blue) segment of the **Bar** chart.
11. Observe the **Summary**.
12. Observe the **Totals** in top left of report.
 - Because report was Grouped/Aggregated in Properties, users can view Totals/Summary
13. Observe the **List** of the associated **Donation** records below the chart.



CHARTS

When a user opens an existing report, they may see a displayed Chart IF created by owner. Users can temporarily change the Chart type/display options. Opening the Chart settings (gear) icon in the upper right of the Chart area enables them to do the following:

- Change **Chart type** to Bar, Column, Line, Donut, Funnel, or Scatter Plot
- Change the **Chart Attributes**: Values, X & Y Axis, Sliced selection, Display options, Legend, etc. depending on type of Chart chosen
- **Toggle** the Chart display icon to show/hide the chart
- Change the chart **checkboxes**: show Values, Show Percentages, Combine Small Groups into “others”, and Show Total.

Report: Accounts with Orders and Order Items and OILS
Product Sales FIND
 Find specified Account's Products purchased grouped by Product Type and Product (via Order Item Lines) by changing Account filter to ACCOUNT - EQUALS - -----

Total Records	Total Total Price	Total Balance	Total Is Coupon
1,381	\$326,764.01	\$43,085.41	3

Record Count

1.4K

Record Type	Product	Transaction Date	Order Id	Account	Primary Affiliation
Advertising (12)	Classified (2)	2/7/2020	Order 0000333	Jenny Nichols	-
		2/7/2020	Order 0000334	James Lane	Empire State Corporation
	Subtotal				
	Full Page Banner (4)	1/12/2019	Order 0000157	Curtis Banks	Flos Consulting
		1/12/2019	Order 0000158	Jose Matthew	Elor Chicago

Row Counts Detail Rows Subtotals Grand Total

Display As

Bar Column Stacked Bar Stacked Column

Line Donut Funnel Scatter Plot

Chart Attributes

Chart Title

Value

Record Count

Sliced By

Record Type

Show Values

Show Percentages

Combine Small Groups into "Others"

Show Total

Charts will be more fully explored when the user goes through the section on Creating a New Report later in this Chapter.

NOTE: For Chart functions to be available, a Report must have one Field (Column) that has been **Grouped**, otherwise the chart icon will be greyed out.

INTERACTIVE FILTERS

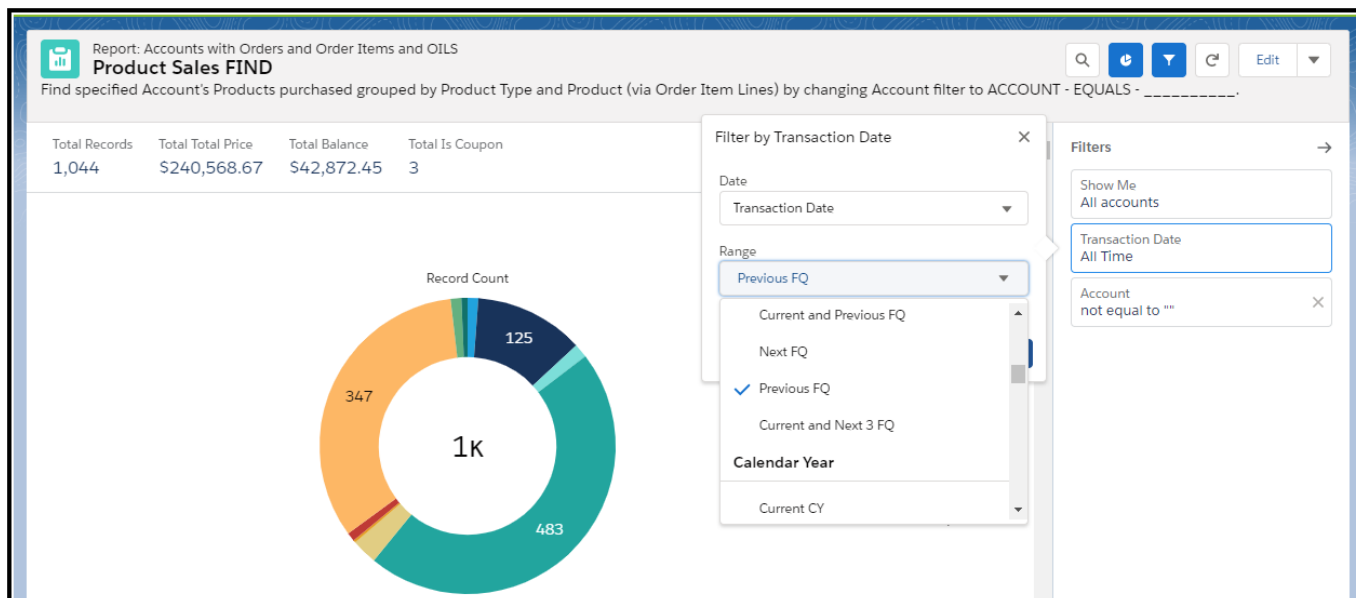
Any time a user opens an existing report, they can adjust the interactive filters to fit their desired criteria, without permanently changing them. Interactive filters enable multiple persons to use the same report across different areas of business; each user can run the report using adjusted filters to fit their needs – the report will always revert to default settings when exited.

The following advantages result in using existing reports with Interactive filters:

- **Data Integrity** – Since a single owner builds the Report’s filters and fields, they cannot be PERMANENTLY changed except by that Owner. Owners can even LOCK certain Filters from temporary change by a User.
- **Ease of Use** - Multiple Users can use reports without having to build their own reports. This also ensures both consistency and data accuracy.

In this **exercise**, users will use interactive filters to change the report results.

1. If closed, re-open the **Product Sales FIND** report.
2. Click on the **Filters** icon.
3. Click on the **Transaction Date** filter.
4. Scroll down under **Range** dropdown and select **Previous FQ** (under **Fiscal Quarter**).



5. Click **Apply** – observe results.

6. Click on the **Account Name** filter.
 - This filter is **NOT** a default filter – Report’s creator manually added it.
 - Users will learn how to create a manually created prompted filter in the next section.
7. Change the **Operator** dropdown value to **contains**.
8. Enter **Curtis Banks** in the **Value** field.
9. Click **Apply** – observe results.
10. Change the **Transaction Date** range back to **All Time**.
11. Observe the change in **Results**.
12. Change the **Account Name** back to **not equal** to **BLANK**.

COLUMN SETTINGS

When using an existing report, users can also change the settings/display of the columns displayed in the report. Users have the following self-explanatory options per column (field) by clicking on the dropdown to the right of the column header name for any column:

- Sort Ascending
- Sort Descending
- Group Rows by This Field
- Group Columns by This Field
- Remove Column

OPTIONS

Users have additional report options. This includes the **Save As** action that enables users to save a copy of the report. Users can then edit their copy permanently.

Click on dropdown arrow to the right of the **Edit** button (upper right corner) to see options:

- **Edit** - Users can click Edit, and add Filters and Columns (Fields) to a report, BUT, unless they own the report, those settings will be lost once they exit the report. Using the Save As (below) would enable them to save a personal copy.
- **Edit (Salesforce Classic)** – returns user to Classic Salesforce for editing; not advisable.
- **Save As** – If a shared report (from a folder) opened - can use Save As to create copy.
- **Subscribe** - Enables automatic report delivery to designated internal users on a **Daily**, **Weekly**, or **Monthly** schedule. Options for adding Conditions and Summary vs. Full Report.

The screenshot shows the 'Edit Subscription' dialog box. It has a title bar 'Edit Subscription'. Below it is the 'Schedule' section with 'Frequency' buttons for 'Daily', 'Weekly' (selected), and 'Monthly'. Under 'Days', buttons for 'Sun', 'Mon', 'Tue', 'Wed', 'Thu' (selected), 'Fri', and 'Sat' are shown. The 'Time' is set to '7:00 AM'. The 'Conditions' section has a checked checkbox 'Add conditions to this report' and a note: 'In addition to subscribing, you can set up conditions on this report. You will be notified when conditions are met. This is optional.' Below this, it says 'You will get notified when all of the conditions are met (AND)'. There are three fields: '*Aggregate' with a dropdown set to 'Record Count', '*Operator' with a dropdown set to 'Equals', and '*Value' with an empty text box. A '+ Add Condition' button is below. The 'Email options' section has two radio buttons: 'Summary + report' (selected) and 'Summary only'. At the bottom right are 'Cancel' and 'Save' buttons.

- **Export** – Enables users to export to Excel – additional Report types can be configured: Comma Delimited, PDF, Word, etc.
- **Add to Dashboard** – Enables user to add to existing or new dashboard.

AGGREGATION OPTIONS

Users also have additional aggregation options that enable the unique segmenting of results.

Observe the bottom of the **Product Sales FIND** report - Four checkbox options are available:

- **Row Counts** – Toggles display of embedded record counts within the Grouping column.
- **Detail Rows** – Toggles Details vs. Summary of Grouped column(s). See Screenshot.
- **Subtotals** – Toggles display of embedded Subtotals within the each numeric column.
- **Grand Total** – Toggles display of Grand Total from bottom of Report.

Report: Accounts with Orders and Order Items and OILS
Product Sales FIND
 Find specified Account's Products purchased grouped by Product Type and Product (via Order Item Lines) by changing Account filter to ACCOUNT - EQUALS - _____.

Record Type	Product	Sum of Total Price	Sum of Balance	Sum of Is Coupon	Record Count
Advertising					
	Classified	\$200.00	\$0.00	0	2
	Full Page Banner	\$4,000.00	\$0.00	0	4
	Half Page Ad	\$500.00	\$0.00	0	2
	Quarter Page Ad	\$450.00	\$0.00	0	3
	Web	\$150.00	\$150.00	0	1
	Subtotal	\$5,300.00	\$150.00	0	12
Donation					
	Education Foundation Donation	\$6,445.00	\$15.00	0	41
	PAC Donation	\$4,125.00	\$700.00	0	37
	Research Donation	\$7,285.00	\$1,250.00	0	47
	Subtotal	\$17,855.00	\$1,965.00	0	125
Exhibitor					
	10 X 10 Booth (ISENC)	\$6,000.00	\$2,000.00	0	6
	10 X 10 Booth (WLW)	\$3,000.00	\$0.00	0	4
	10 X 20 Booth (ISENC)	\$8,750.00	\$3,500.00	0	5
	10 X 20 Booth (WLW)	\$1,500.00	\$1,500.00	0	1
	Subtotal	\$19,250.00	\$7,000.00	0	16
Membership					
	Base Fee	\$11,050.00	\$1,330.00	0	13
	Chapter Dues	\$1,420.00	\$13,380.00	0	147
	Enterprise Dues	\$27,000.00	\$8,000.00	0	55

Row Counts Detail Rows Subtotals Grand Total

Toggling **Detail Rows** off is extremely helpful for user to see **Summary data** and for Reports leveraged in Dashboards.

New Reports

When initially considering the creation of a New Report, users should always check if an existing report meets their needs, and then use that existing report as a template to build a new report.

To do so, users should:

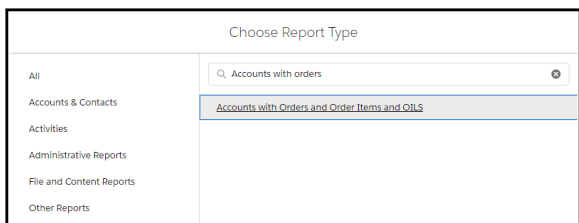
- Navigate to the **Reports** item and open the **All Reports** section on left.
- **Find** and **Open** the desired item/topic **Folder**.
- **Find** and **Run** a **Report** from folder most closely related to their desired result.
- Use the **Save As** button under **Edit** to create a copy of the report.

However, sometimes the desired Report is unique, requires special features, or a new Report Type needs utilization. In these cases, it may be necessary to create a new Report.

CREATING A NEW REPORT

In this **exercise**, users will understand how to start the process of creating a report.

1. From the **Navigation** bar, click the **Reports** item.
2. Click on the **New Report** button.
3. From the **Search Report Types** box, enter **Accounts with Orders and Order Items and OILS**.
 - Report Types determine which Items and Fields users can filter and display.
 - ONLY Administrators can create new, unique Report Types.
4. Click the **Accounts with Orders and Order Items and OILS** that displays (it will underline when selected).



5. Click the **Continue** button.
6. The **Report Configuration** area displays with two columns: **Order Id** and **Order Item ID**.
 - Users always land in the configuration area of the report first. Users must **RUN** the report to see all fully filtered data.

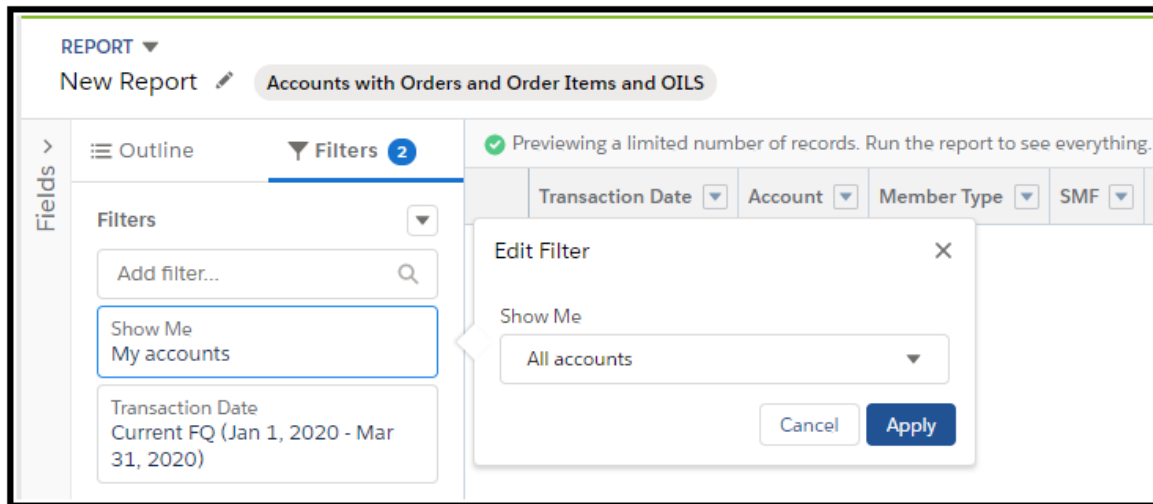
FILTERS

IMPORTANT: Users must immediately **Adjust the Default Filters** in any new report to see accurate and complete org data.

Salesforce automatically defaults new reports to filter for Accounts/Records only created by the logged in user. But in most cases, the user needs to see **ALL data across the org**. In order to view all org data, the user must change the first two, default filters in a newly created report.

In this **exercise**, users will understand how to build filters on their new report.

1. Go to the far, upper right of screen – click the **Update Preview Automatically** button.
 - This enables users to see the Report edits as they make them.
2. Click on the **Filters** button in the upper left of screen.
3. Click on the **Show Me My Accounts** filter.
4. Click on the **dropdown** and select **All accounts**.



5. Click **Apply**.
6. Click on the **Transaction Date** Current FQ (Jan 1,2020-Mar 31, 2020) filter.
 - Users should always **check** the default Date field and ensure it is a **logical** choice for the report created. When a report first created, the default Date filter always displays the **FIRST** date field under the **FIRST** item of the selected Report Type.
7. Change the **Range** as **All Time**, but click the dropdown to observe additional options.
 - A variety of Date Range options available: Years, Months, Days, Relative Dates, etc.
8. Click on **Apply**.

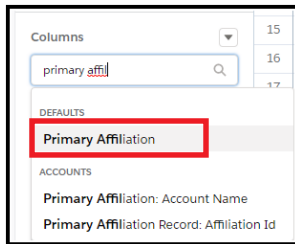
FIELDS

Column/Field selection enables users to determine the data they desire displayed in the Report.

If configured properly by an Administrator, users will see a number of “default” fields display when a Report Type is first selected and initially run. Users may then want to select additional or edit existing fields (columns) to meet their requirements.

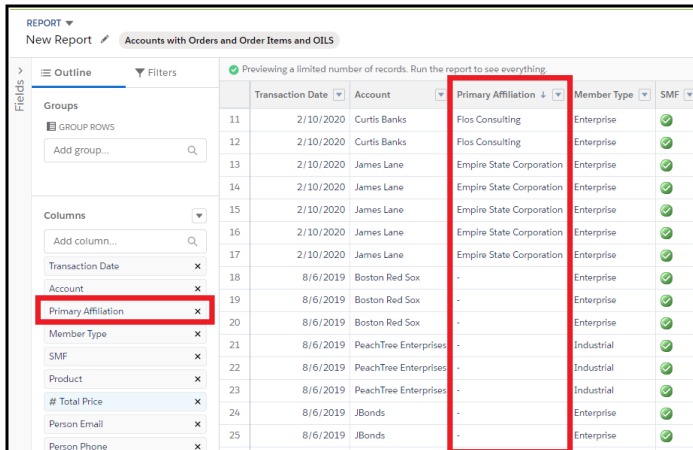
In this **exercise**, users will understand how to add columns (fields) to their new report.

1. Click on the **Outline** button in the upper left of screen.
2. Observe the two options that display:
 - **Group Rows** - enable users to Group displayed Columns by a designated Field.
 - **Columns** - enable users to display desired Fields in the report.
3. In the **Columns** section, enter **Primary Affiliation** in the **Add column** field.
 - **Columns EQUAL** an Item’s **Fields**.
4. Select the **Primary Affiliation** field when it displays.



5. Drag the **Primary Affiliation** Column Header in front the **Member Type** field.

- Users can do this two ways: dragging under the **column list** or by dragging the **column header** in the preview pane.








6. Add the following additional fields via the **Add Column** lookup:
 - **Billing Address**
 - **Record Type**
7. Move the **Billing Address** in front of the **Member Type** column.
8. Drag the **Record Type** and up to the **Group Rows** section (above Columns)
9. Drop the **Record Type** on the **Add group** field under **Group Rows**.
 - A blue outline will appear when successfully placed.
 - The Products Ordered are grouped according to their (Order) Record Type.
10. Delete the **Order Item: Order Item Id** field.
 - Users can delete any field by clicking the X to right of field under the Columns section.
11. Click on vertically written **Fields** in upper left of the screen. Users should use this area if:
 - Do not remember exact name of a Field.
 - Need to see ALL field options available under an Item.
12. Select **Balance**, and double-click on **Balance** to add to Report.
13. **Balance** added to the right of the **Total Price** field.

FIELD ICONS

To the left of each of the fields in the fields list are icons. Each icon represents a field type. It can be helpful to understand the function of a field prior to selection.

User can also Look up a field by using the Magnify Glass icon AND narrow their search according to a single field type by clicking on the dropdown to the right of the magnify glass and selecting a desired field type to search by.

-  - Numeric
-  - Text
-  - Calendar
-  - Checkbox
-  - Picklist

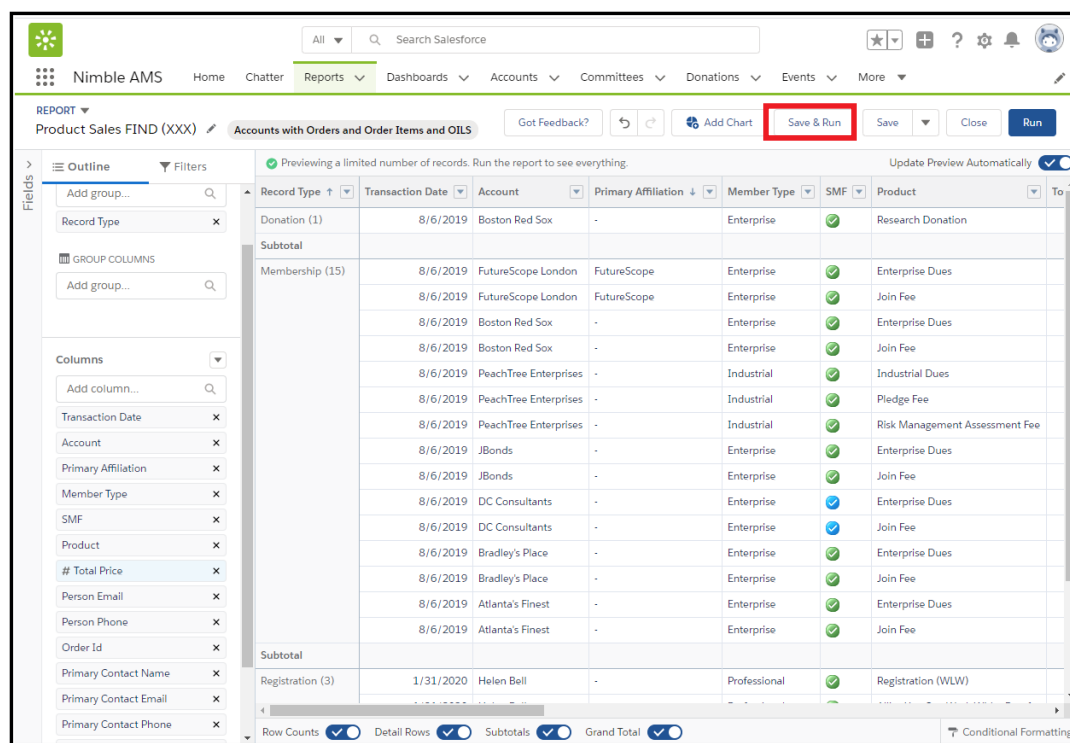
REPORT NAMING & RESULTS

In this **exercise**, users will name and view the results of their new report.

1. Observe the **Report Configuration** results.

IMPORTANT NOTE: This report does NOT display ALL available results since it is in Report Configuration/Preview mode. To see ALL results for this report, the user must RUN or SAVE & RUN the report. Reports in Configuration mode only display the first 20 rows of summarized data and 50 rows of tabular data.

2. Click the blue **Save & Run** button (upper right).



3. In the **Report Name** field, enter **Product Sales FIND (XXX)**.

- (XXX) = 's Users Initials.

4. In **Report Description** field, enter **For finding product sold across all accounts**.

IMPORTANT NOTE: Be diligent in both **Naming** and entering detailed **Report Descriptions** – the next user of the Report needs to understand exactly what the Report displays.

5. In the **Folder** field, keep the default: **Private Reports**.

- Users can use **Select Folder** to save a report to any folder to which they have access.
- **Administrators** should define **Shared** and **Private** folder structure.

New Reports

6. Click the **Save** button.
7. **Observe** the results of the saved report.

Report: Accounts with Orders and Order Items and OILS
Product Sales FIND (XXX)
 For finding product sold across all accounts.

Total Records: 1,044 Total Account Balance: \$37,059.10

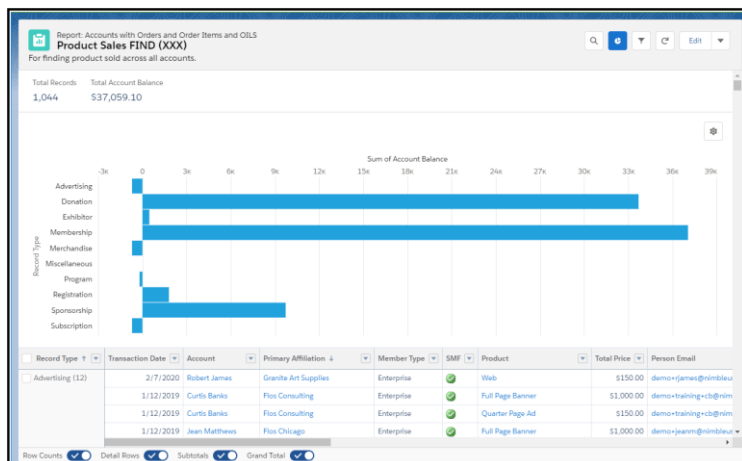
Record Type	Transaction Date	Account	Primary Affiliation	Member Type	SMF	Product	Total Price	Person Email
Advertising (12)	2/7/2020	Robert James	Granite Art Supplies	Enterprise	✓	Web	\$150.00	demo+rjames@nimbleu
	1/12/2019	Curtis Banks	Flos Consulting	Enterprise	✓	Full Page Banner	\$1,000.00	demo+training+cb@nim
	1/12/2019	Curtis Banks	Flos Consulting	Enterprise	✓	Quarter Page Ad	\$150.00	demo+training+cb@nim
	1/12/2019	Jean Matthews	Flos Chicago	Enterprise	✓	Full Page Banner	\$1,000.00	demo+jeanm@nimbleu
	2/7/2020	James Lane	Empire State Corporation	Enterprise	✓	Classified	\$100.00	demo+jamesl@nimbleu
	11/5/2018	Tara Richardson	Empire State Corporation	Enterprise	✓	Full Page Banner	\$1,000.00	demo+tarar@nimbleu
	12/21/2018	James Lane	Empire State Corporation	Enterprise	✓	Quarter Page Ad	\$150.00	demo+jamesl@nimbleu
	2/7/2020	Jenny Nichols	-	-	-	Classified	\$100.00	demo+jennyn@nimbleu
	1/12/2019	Stella Holt	-	Retired	✓	Half Page Ad	\$250.00	demo+stellah@nimbleu
	1/12/2019	John Watson	-	Professional	✓	Half Page Ad	\$250.00	demo+johnw@nimbleu
	1/12/2019	John Watson	-	Professional	✓	Quarter Page Ad	\$150.00	demo+johnw@nimbleu
	1/12/2019	Mark Donnellan	-	-	-	Full Page Banner	\$1,000.00	demo+markd@nimbleu
Subtotal								
Donation (125)	2/21/2020	Marsha Yardborough	Vanderbilt University	Student	✓	PAC Donation	\$100.00	demo+myardborough@r
	2/21/2020	Marsha Yardborough	Vanderbilt University	Student	✓	Education Foundation Donation	\$15.00	demo+myardborough@r
	2/21/2020	Julie Adams	University of Southern California	Student	✓	PAC Donation	\$50.00	demo+jadams@nimbleu
	2/24/2020	Mark Ripozza	University of Southern California	Student	✓	Education Foundation Donation	\$15.00	demo+mripoza@nimble

Row Counts Detail Rows Subtotals Grand Total

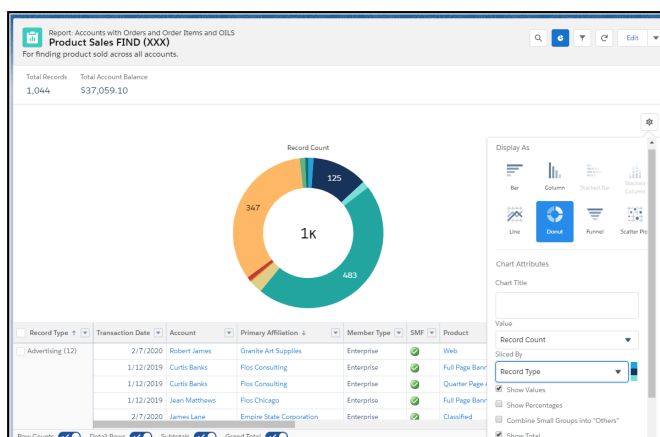
CHARTS

In this **exercise**, users will add a chart to their new report.

1. Click on the **Add Chart** icon (upper right-hand corner).



2. A **Horizontal Bar** chart displays by default.
3. Click on the **Gear** icon (above the key to right side).
4. Select the **Donut** chart.
5. From the **Value** dropdown, select **Record Count**.
6. Check the **Show Values** checkbox.
7. Uncheck the **Combine Small Groups into "Others"** checkbox.



8. Click off the **Chart** and observe results. Make sure to **SAVE** from Edit dropdown.

IMPORTANT NOTE For Chart functions to be available a Report must have one field Grouped, otherwise the chart icon will appear greyed out.

OPTIONS

As **Owners** (Creators) of a report, users have three additional options (underlined below) that differ from those available to simply a **User** of a shared report: **Edit**, **Save**, and **Delete**.

Click on dropdown arrow to the right of the **Edit** button (upper right corner) to see Options:

- **Edit** - Users who **OWN** the Report can always click **Edit**.
- **Edit (Salesforce Classic)** – returns user to Classic Salesforce for editing; not advisable.
- **Save As** – If user opens shared report (from a folder) - can use Save As to create copy.
- **Save** – Users need to Save from this location if they edit chart or Result settings.
- **Subscribe** - Enables automatic report delivery to the user, or others, on a **Daily**, **Weekly**, or **Monthly** schedule. Options for adding Conditions and Summary vs. Full Report.

Edit Subscription

Schedule

Frequency

Daily Weekly Monthly

Days

Sun Mon Tue Wed Thu Fri Sat

Time

7:00 AM

Conditions

In addition to subscribing, you can set up conditions on this report. You will be notified when conditions are met. This is optional.

Add conditions to this report

You will get notified when all of the conditions are met (AND)

*Aggregate Record Count *Operator Equals *Value

+ Add Condition

Email options

Summary + report

Summary only

Cancel Save

- **Export** – Enables users to export to Excel – additional Report types are configurable: Comma Delimited, PDF, Word, etc.
- **Delete** – Deletes Report.
- **Add to Dashboard** – Enables user to add to existing or new dashboard.

AGGREGATION OPTIONS

As owners, users also have the additional aggregation options of a simple user that enable the unique segmenting of results. The difference is as an owner, they can permanently save their changes.

Observe the bottom of the report - four checkbox options are available:

- **Row Counts** – Toggles display of embedded record counts within the Grouping column.
- **Detail Rows** – Toggles Details vs. Summary of Grouped column(s). See Screenshot.
- **Subtotals** – Toggles display of embedded Subtotals within the each numeric column.
- **Grand Total** – Toggles display of Grand Total from bottom of Report.

The screenshot displays a report titled "Product Sales FIND (XXX)" with a subtitle "For finding product sold across all accounts." The report shows a total of 1,044 records and a total account balance of \$37,059.10. A donut chart titled "Record Count" is shown, with segments for 347, 125, and 483 records, and a central "1k" label. Below the chart is a table with columns: Record Type, Transaction Date, Account, Primary Affiliation, Member Type, SMF, and Product. The table lists several records, including "Advertising (12)", "Robert James", "Curtis Banks", "Jean Matthews", and "James Lane". At the bottom of the report, four aggregation options are visible: "Row Counts" (checked), "Detail Rows" (checked), "Subtotals" (checked), and "Grand Total" (checked). A settings panel on the right shows "Display As" options (Bar, Column, Stacked Bar, Stacked Column, Line, Donut, Funnel, Scatter Plot) and "Chart Attributes" (Chart Title, Value, Sliced By, Show Values, Show Percentages, Combine Small Groups into "Others", Show Total).

Toggling **Detail Rows** off is extremely helpful for user to see **Summary** data and for Reports leveraged in Dashboards.

Reports Best Practices

Below are some best practices to consider when creating reports:

- Check existing Report Folders to discover if a report already exists/is similar to report desired
- If the report already exists/is similar, open the report and Save As. Saves time & ensures data integrity by copying a proven report with tested filters.
- When **initially** (pre Go-Live or new module use) **creating Reports** (or Views) always:
 - 1) **Compare** a small sample of **results** against a known outcome (former db results).
 - 2) Build with or have a fellow employee/**department review the report** – preferably in a room gathered around a projector.
- When initially creating Reports for a department, it is advisable to create **THREE Core Reports: All _____, Find _____, and _____ for Dashboards**. If created for each major Item, with careful attention paid to selecting the creation of **Filters** and adding the most commonly viewed **Fields (Columns)**, users will be able use **Edit, Save As**) (copy the report) on these Core reports to create new reports. Adopting this habit will provide users the following advantages:
 - Inherit a report structure that is **70-80%** developed.
 - Assured of a high level of **data integrity** by inheriting **Tested Filters** and the most frequently used **Fields** without having to develop/add them.
- Whenever a Report is FIRST created, the auto-generated **Show Me** and **Date** Filter values default to **My _____** and _____ **Date**. Users should **immediately** change the **My _____** to **ALL _____** and ensure the **default Date** represents a logical date for the report.

- Be careful when selecting **fields** (columns) to observe **WHICH Item it originates from**:
 - Example: choosing to display the Account Created Date under a report that includes both Account and Orders information could severely cripple the report outcome. The user should choose to filter by Order Date or Transaction Date, not by the Account Created Date, which would have no relevance to analyzing Orders or Revenue.
 - Example: choosing to display the Grand Total in a revenue focused report will display the total amount of ALL revenue on that order, NOT the individual Line Items. In order to show specific product generated revenue, users would have to select a report with the Order Item Lines item included and use the Total Price field to see revenue per product ordered.
- If two or more Report **fields** (columns) use the **same Name**, try the following strategies to determine which to use:
 - **Add all fields** (columns) to determine the data differences. If the same, select one with the shorter Column (Field) header to display.
 - **Open the originating record(s)** (for each field) in another window(s) and compare field values to those in the report.
 - **Change Display names** (Administrators only) of fields and make them unique, easier to understand, and even prevent them from displaying in the Report Type.
- When displaying a **chart**, to see ALL the key's values, open the Chart properties and un-check the **Combine Small Groups into "Others"** checkbox.

CHAPTER

5 Dashboards

Objectives.....	5.1
Dashboards Item.....	5.2
Understanding Dashboards	5.3
Existing Dashboards	5.4
New Dashboards	5.7
Dashboard Filter	5.21
Embedding Dashboards in Navigation Bar.....	5.24

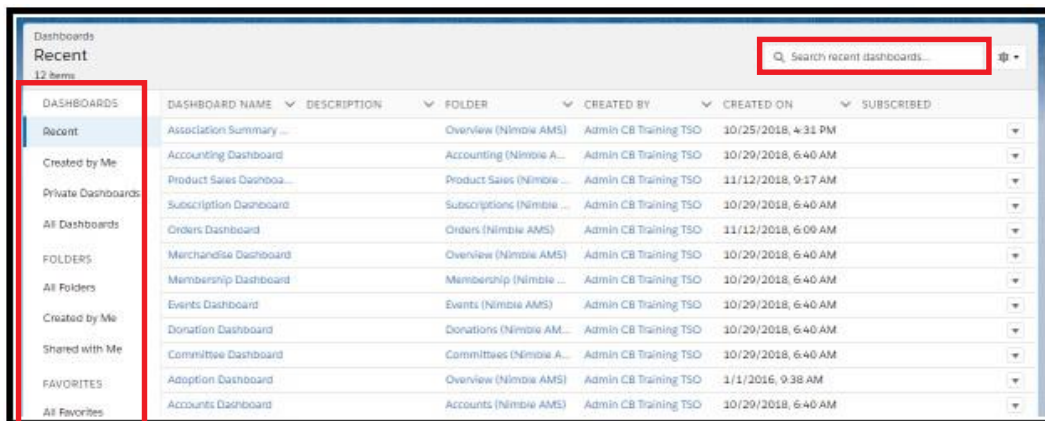
Objectives

In this chapter, users will learn how to:

- Understand Dashboards
- Use Existing Dashboards
- Create New Dashboards
- Edit Dashboards
- Use Components
- Filter a Dashboard

Dashboards Item

The Dashboards Item provides several different ways of finding, organizing, and interfacing with dashboards.



From the right hand, actions and settings section, users have the option to:

- **Search** recent dashboards

Users can also enter each of the four sections listed on the left-hand column:

- **Recent** - displays all recently accessed dashboards by the current logged in user
- **Created by Me** – Dashboards the user has personally created
- **Private Dashboards** – Dashboards that only I can see
- **All Dashboards** - All dashboards visible to the user system wide

Users have the option of searching through the following Folders of dashboards:

- All Folders
- Shared with Me
- Created by Me

Users can also utilize the **All Favorites** section. The All Favorites section automatically displays any Dashboard the user has added to Favorites (Star).

It has the advantage over using the General Favorites located in the upper left of the window in that it **ONLY** shows Dashboards, not any other Favorited items.

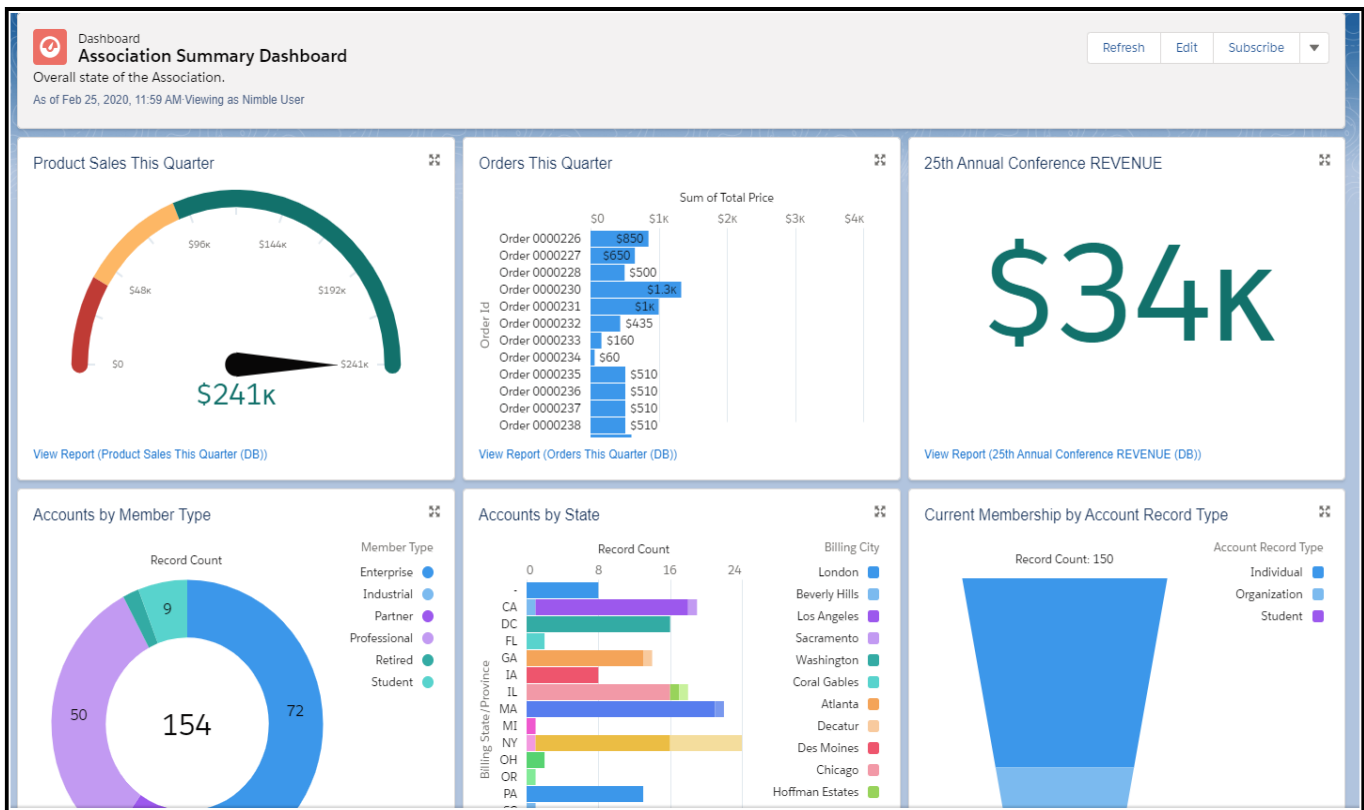
Understanding Dashboards

Dashboards are a flexible and engaging platform for displaying consolidated information in Nimble AMS. Dashboards are exclusively composed of Reports and can display multiple views of the same report, or leverage multiple reports.

Dashboards provide excellent displays of milestones, progress towards goals, revenue generated, total numbers, etc. over Items such as Membership, Registrations, Sales Revenue, Donation goals, etc. Often a user, or an entire department, can use a dashboard as a secondary landing page to display their specific goals and metrics.

The example below shows the **Association Summary Dashboard**. It displays six separate reports that display a useful overview of a typical Association’s company wide metrics.

Each of the six quadrants represents a different Report; filtered and configured in a particular fashion. In the following chapter, users will examine the parts of this dashboard to understand how these sections are created. Users will then create their own dashboard, add various components, and fully comprehend the flexibility of this tool.

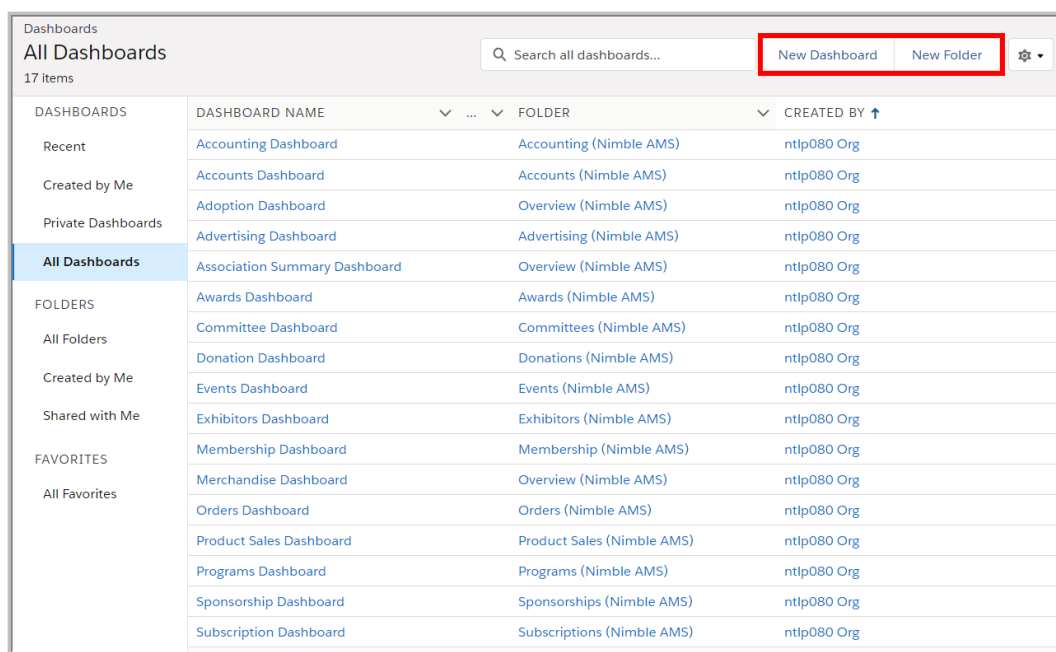


Existing Dashboards

In this **exercise**, users will explore and edit an existing Dashboard to understand its available features and components.

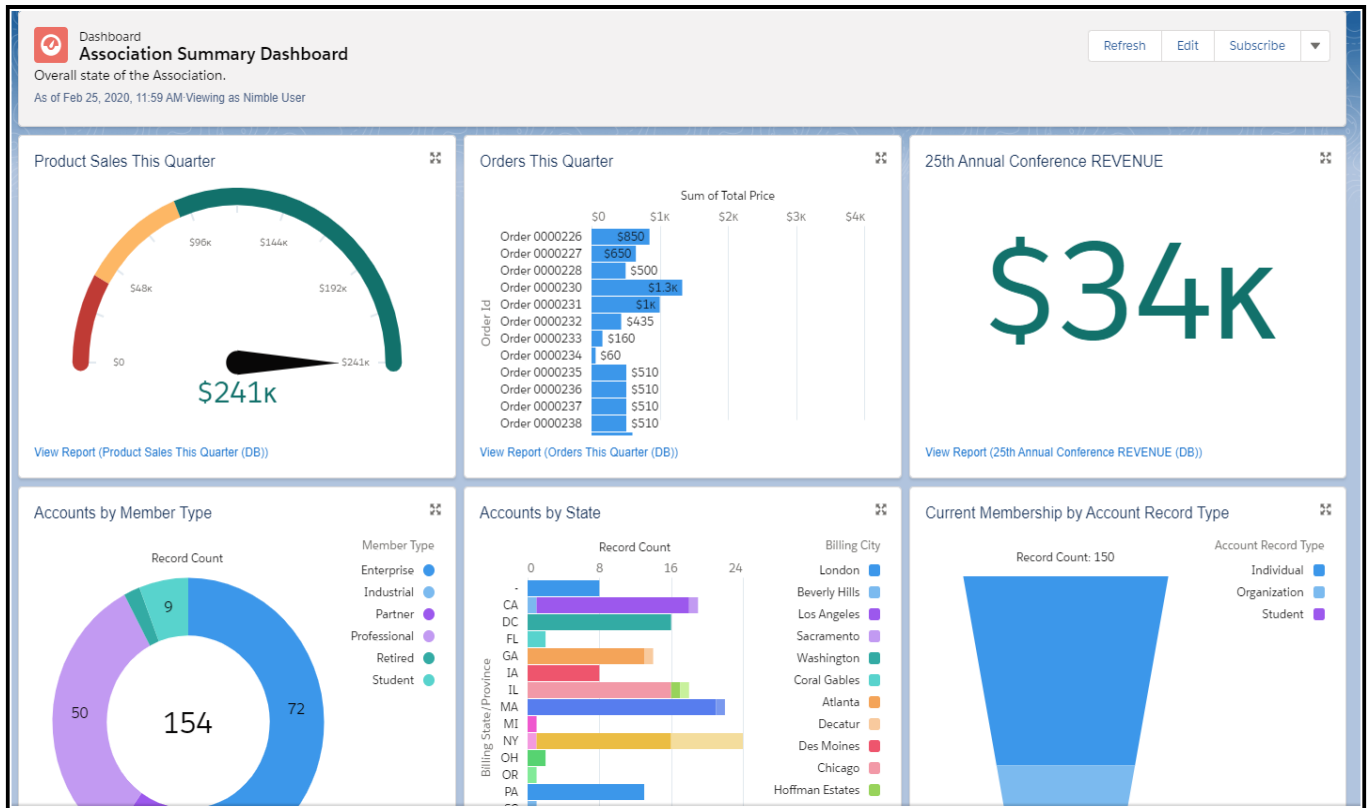
To View an Existing Dashboard:

1. From the **Navigation** bar, click the **Dashboards** Item.
2. Click on the **All Dashboards** list view from the left-hand column.



3. On the right side of the screen, observe the **Dashboard Options** area.
 - **New** - Enables creation of a new Dashboard record.
 - **New Folder** - Enables the creation of a New Dashboard Folder.

4. Click on the **Association Summary Dashboard** from the **All Dashboards** list view.



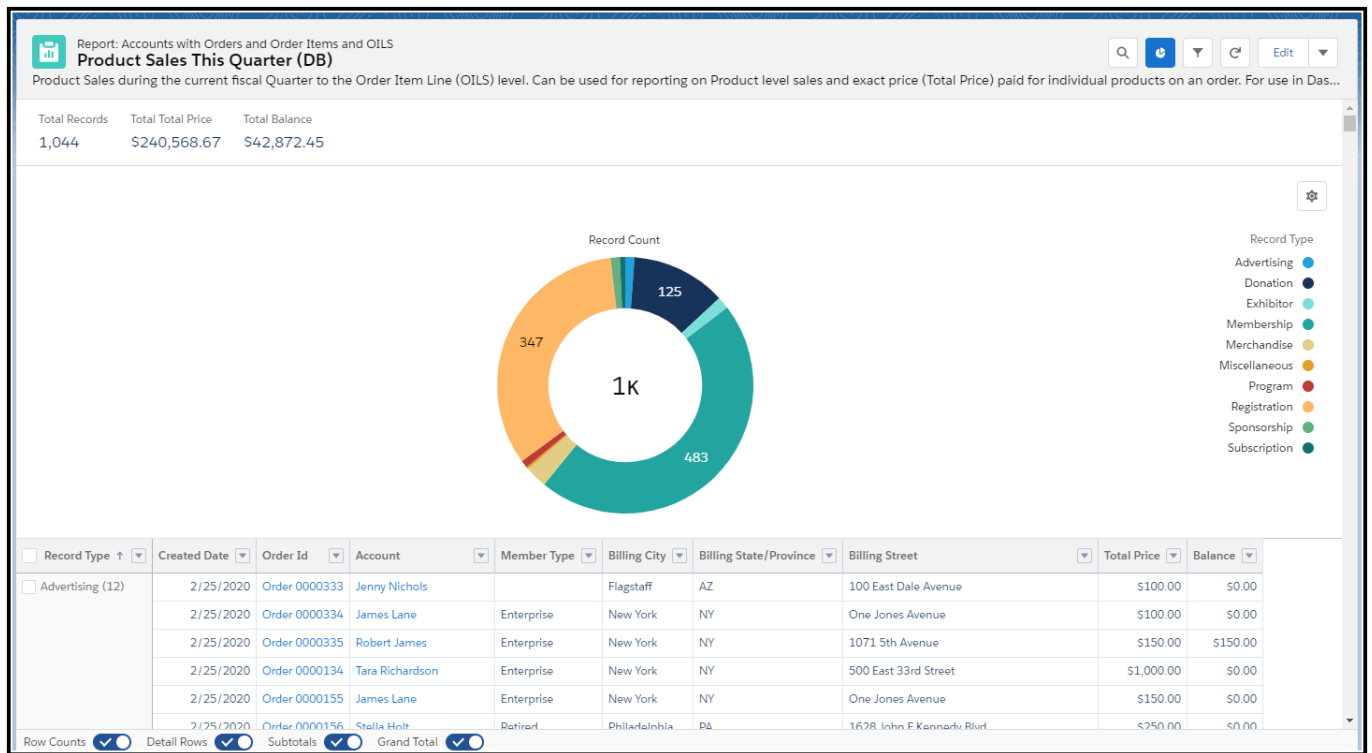
5. Observe the six displayed sections of the **Association Summary Dashboard**.

6. Float cursor over the middle section of chart in **Product Sales and Rev (YTD)** section.



7. The section displays a **Gauge Chart** for **Product Sales**.

8. Click on the **View Report (Product Sales This Quarter (DB))** link.



9. The **Product Sales This Quarter** report displays.

- Users can interact with and edit (if owned by user) the report.

10. Click on the **back Browser** button.

11. Users return to the dashboard.

New Dashboards

In this section, users will first learn how to create a basic dashboard with one component. Users will then learn how to edit their new dashboard by adding a second component. Finally, users will add additional components with distinct functions and create a fully functioning dashboard around product sales.

CREATING DASHBOARDS

In this **exercise**, users will learn how to create a dashboard, add an initial Component, and Save. Users will also learn the basics of a Donut Chart component type and how to interact with the Dashboard once saved.

1. From the **Navigation** bar, click the **Dashboards** Item.
2. Click on the **New Dashboard** button on the upper left of page.
3. In the **Name** field, enter **Product Sales YTD**.
4. In the **Description** field, enter, **“Displays Product Sales for Current Year”**.
5. In the **Folder** field, leave **Private Dashboards** as the default.

The screenshot shows a 'New Dashboard' form with the following fields and values:

- Name:** Product Sales YTD
- Description:** Displays Product Sales for Current Year
- Folder:** Private Dashboards (with a 'Select Folder' button next to it)

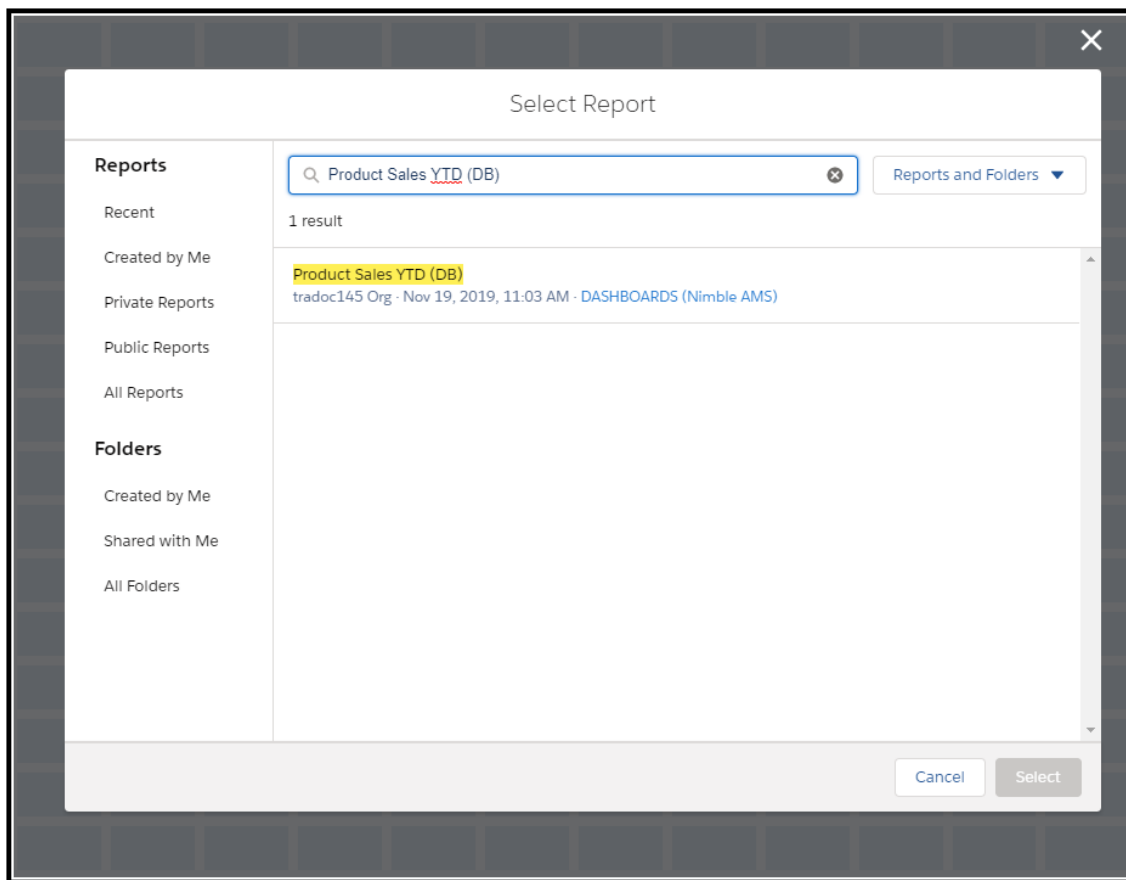
At the bottom right of the form are two buttons: 'Cancel' and 'Create'.

6. Click **Create**.
7. Dashboard **Edit** mode (Grid) displays.
8. Click on the **+Component** button.
9. The **Select Report box** displays.

10. Observe the **Default** settings.
 - **Recent** user accessed **Reports** display initially.
 - Users can **Search** through ANY available reports/folders.
11. In the **Search Reports** and **Folders** box, enter **Product Sales**.
12. A list of **recent reports** that match the criteria display.
13. Click on the **Product Sales this Week (DB)** report.

IMPORTANT NOTE: Prior to creating a Dashboard, users should create all REPORTS used IN the Dashboard. When creating these Reports, users should ALWAYS add the text (DB) to the end of the Name. This warns other users from editing the Report, which could ruin the integrity of the Report/Dashboard. Users should save ALL Dashboard Reports to a DASHBOARD folder under the Reports, All Folders area to segregate them from general use.

14. Click on the **Select** Button.



15. The **Add Component** box displays.

- Users can **Edit the Chart Configuration**.
- Users can **Preview the Current Chart**.

IMPORTANT NOTE: Users **MUST** have the originating Report **Grouped** by at least one Field in order to utilize all the Chart Type (Display As) Configuration options.

16. From the **Display As** section, select a **Donut Chart**.

17. Change the **Value** dropdown to **Record Count**.

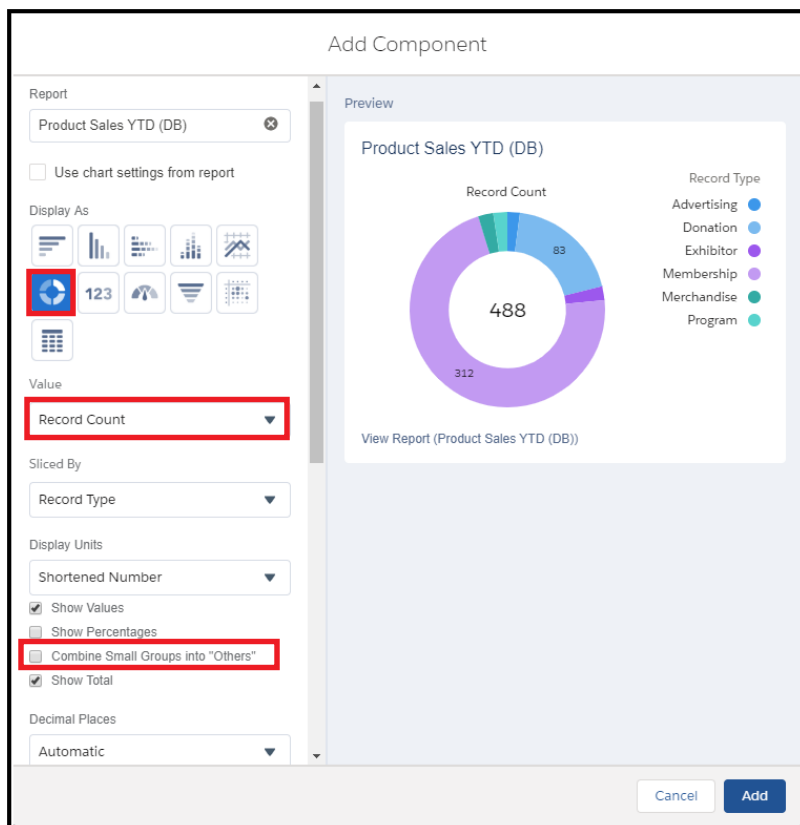
- Users can select a value based on any **Sub-totaled** column in the Report.

18. Uncheck the **Combine Small Groups into “Others”** checkbox.

- This limits up to six Record Types to display in the key when checked; best to uncheck.

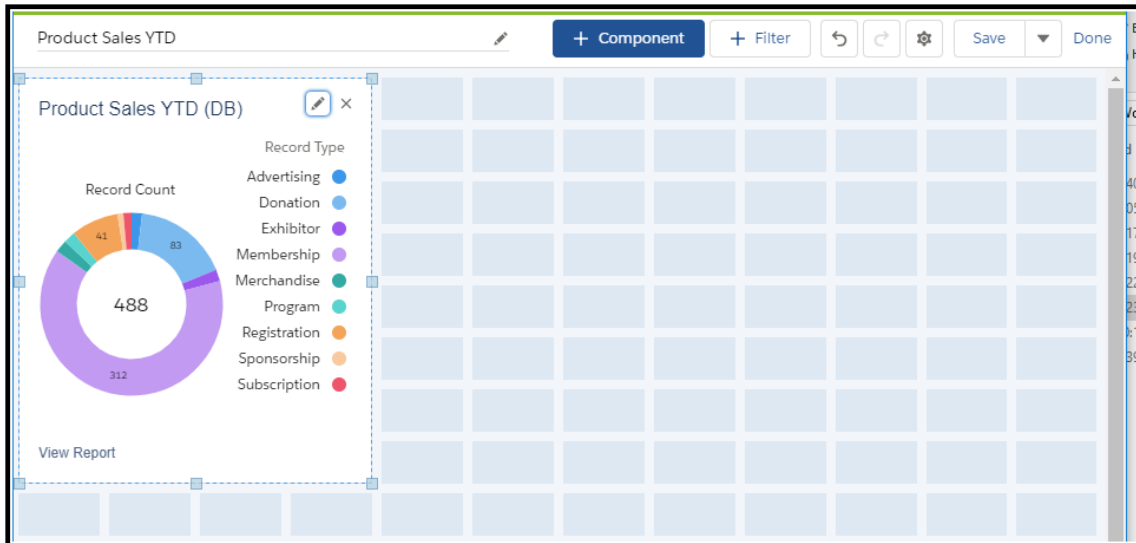
19. Scroll down to the **Max Values Displayed** field and change that value from **6** to **10**.

- This enables users to display (in the key) a number of values that **exceed six**. In this scenario, there are **nine** possible record types (products) to display.



20. Click on the **Add** button;

- Report added to the **Dashboard Edit Grid**.

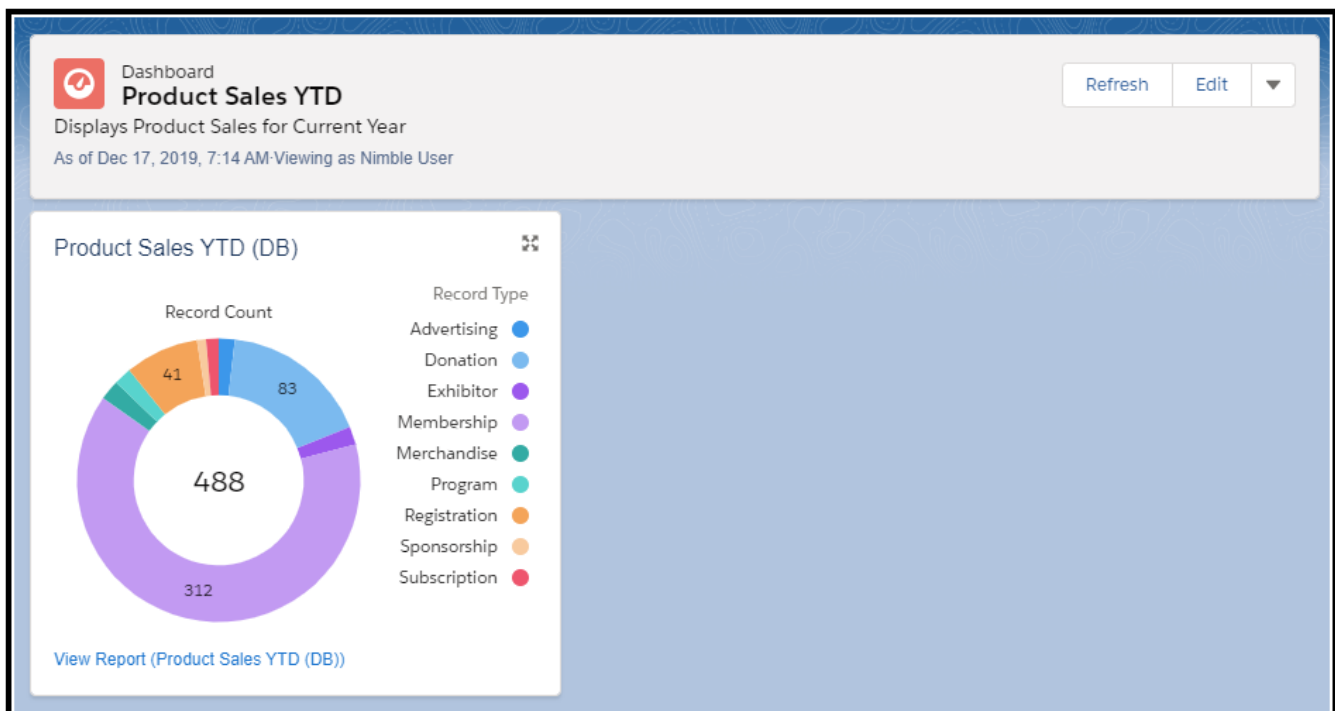


21. Click on the **re-size** boxes to adjust the size of the **Component** as desired.

22. Click on the **Save** button (top right).

23. Click on the **Done** button (top right).

24. Observe the **Saved/Configured** Dashboard.

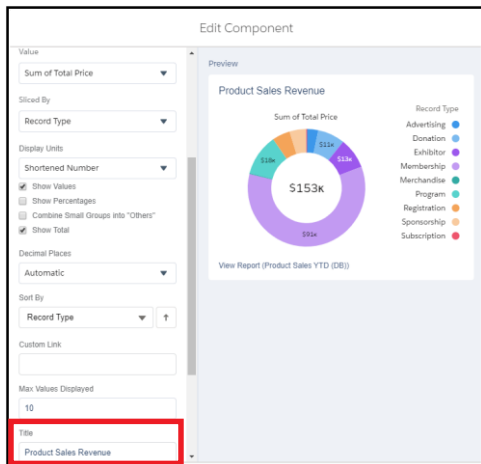


EDITING DASHBOARDS

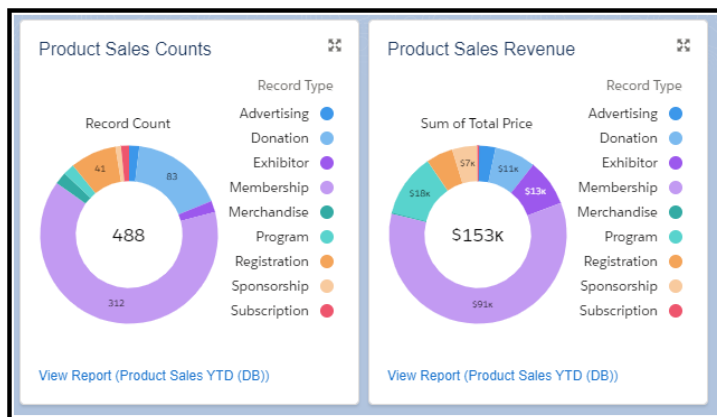
In this **exercise**, users will understand how to edit dashboards by adding an additional component to their previously created dashboard. Users will use the same Report to set up side-by-side comparisons. Users will also understand how to title and rename a Dashboard Component.

1. Click on the **Product Sales YTD** dashboard.
2. Click on the **Edit** button.
3. Click on the **+Component** button.
4. Add the **Product Sales this Week (DB)** report.
 - The **Product Sales this Week (DB)** report defaults in the most **Recent** Reports section, since it was selected previously.
5. Change the **Display As** to the **Donut Chart** option.
6. Keep the **Value** dropdown on **Sum of Total Price**.
 - In the original Report, **Record Count** and **Dashboard Component** was the Value selection – selecting the **Sum of Total Price** enables a comparison of Counts to Revenue.
7. Uncheck the **Combine Small Groups into “Others”** checkbox.
8. Scroll down to the **Max Values Displayed** field and change that value from **6** to **10**.
9. Change the **Title** field from **Product Sales YTD** to **Product Sales Revenue YTD**.
10. Click on **Add**.
11. Click on the **Edit** button (Pencil) above the **Product Sales YTD (DB)** Component.

12. Scroll down to the **Title** field.
13. Change the **Title** field from **Product Sales YTD** to **Product Sales Counts YTD**.



14. Click on **Update**.
15. Click on the **Save** button (top right).
16. Click on the **Done** button (top right).
17. Results display two different interpretations of the same Chart side by side: **Product Sales Counts** and **Product Sales Revenue**.

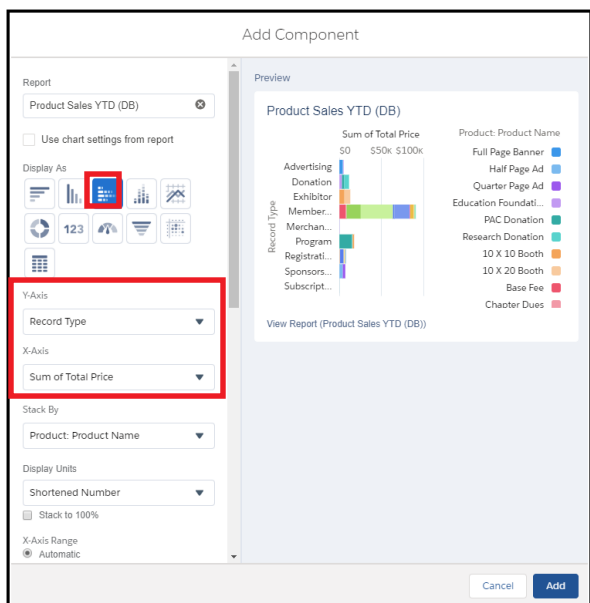


UNDERSTANDING COMPONENTS

In this **exercise**, users will add and understand FOUR major Dashboard Component Types using the same Product Sales YTD (DB) report. Users will explore the primary settings of a Stacked Horizontal Bar Chart, Metric Chart, Gauge Chart, and Lightning Table.

Stacked Horizontal Bar Chart

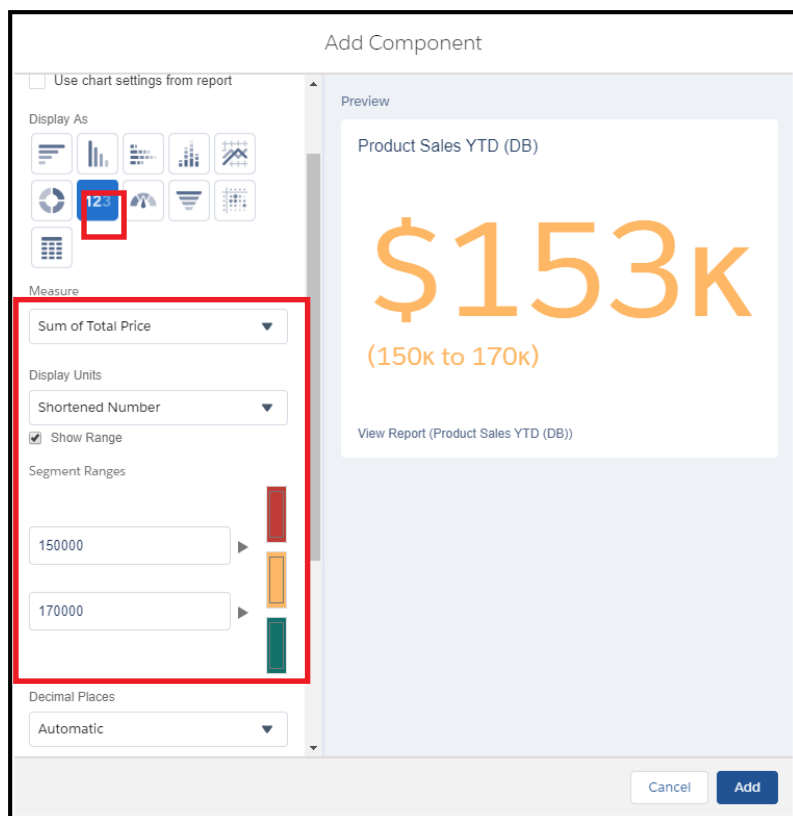
1. Click on the **Product Sales YTD** dashboard.
2. Click on the **Edit** button.
3. Click on the **+Component** button.
4. Add the **Product Sales this Week (DB)** report.
5. Change the **Display As** to the **Stacked Horizontal Bar Chart (SHBC)** option.
 - SHBCs display all report **Grouping**. E.G. **Record Type & Product Name** are grouped.
6. Click on the **Y-Axis** dropdown: But keep **Record Type** selected.
 - Observe the **Product: Product Name** option.
 - Selecting **Product: Product Name** exchanges the **Y-Axis** value with the **Key Value**.
7. Click on the **X-Axis** dropdown: But keep **Sum of Total Price** selected.
 - Observe the **Sum of Balance** and **Record Count** options.
 - Changing the **X-Axis** changes the numeric range of the **X-Axis** with dropdown value.



8. Scroll to the **Title** field and change the **Title** to **Product Sales by Product**.
9. Click on **Add**.
10. Left-click on the new **Component** in the **Dashboard Edit** screen.
11. **Drag and Drop** it to the free space to the right of the second Component.
12. **Drop** the new Component there.
13. Click on the **Save** button (top right).
14. Click on the **Done** button (top right).
15. Results display **Three** Different interpretations of the same Chart.

Metric Chart

1. Click on the **Edit** button.
2. Click on the **+Component** button.
3. Add the **Product Sales this Week (DB)** report.
4. Change the **Display As** to the **Metric Chart** option.
 - Metric Charts display a **Grouped Total** field value as a large number.
5. Click on the **Measure** dropdown: But keep **Sum of Total Price** selected.
 - Users could select **Sum of Balance** or **Record Count** as the large number displayed.
6. Click on the **Display Units** dropdown: Users could expand to a partial or full number format.
7. Check the **Show Range** checkbox.
8. In the first **Segment Range**, enter **150000**. In the second **Segment Range**, enter **170000**.
 - Observe the changes to the large number format. The total number displays Yellow Orange to indicate approaching Goal. The defined Range displays below the number.



9. Scroll to the **Title** field and change the **Title** to **Product Sales vs Goal**.

10. Click on **Add**.
11. **Re-size** the **Component** to be the same size as the other three.
12. Click on the **Save** button (top right).
13. Click on the **Done** button (top right).
14. Results display **Four** Different interpretations of the same Chart.

Gauge Chart

1. Click on the **Edit** button.
2. Click on the **+Component** button.
3. Add the **Product Sales this Week (DB)** report.
4. Change the **Display As** to the **Gauge Chart** option.
 - Gauge Charts display a **Grouped Total** field measured against a user defined **Range**.
5. Check **Show Percentages** and **Show Range** checkboxes. Keep **Show Values** checked.
6. Keep **0** in the **first Segment Range**.
 - In **second**: enter **65000**, in **third**: **130000**, in **fourth**: **200000**.

The screenshot shows the 'Add Component' configuration window. On the left, the 'Measure' is set to 'Sum of Total Price' and 'Display Units' is 'Shortened Number'. The 'Segment Ranges' section is highlighted with a red box and contains four input fields: 0, 65000, 130000, and 200000. To the right of these fields are three colored bars representing the segments: red, orange, and green. The 'Show Percentages', 'Show Values', and 'Show Range' checkboxes are all checked. The 'Decimal Places' are set to 'Automatic'. The 'Preview' area on the right shows a gauge chart titled 'Product Sales YTD (DB)'. The gauge has a needle pointing to \$153k (77%) and a range of 130k to 200k. The gauge is divided into three segments: red (0 to 65k), orange (65k to 130k), and green (130k to 200k). At the bottom right, there are 'Cancel' and 'Add' buttons.

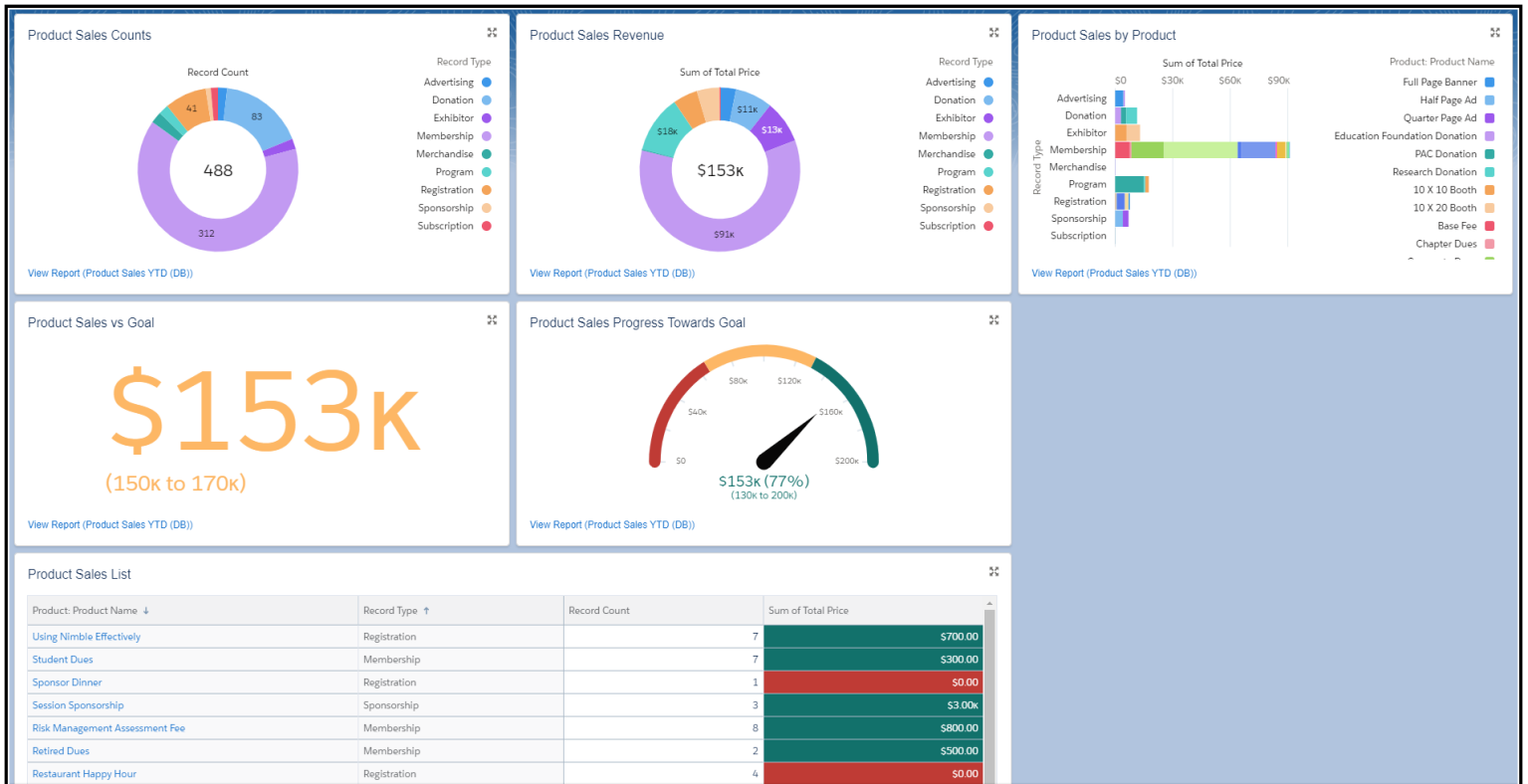
7. Scroll to the **Title** field and change the **Title** to **Product Sales Progress Towards Goal**.
8. Click on **Add**.
9. Left-click on the new **Component** in the **Dashboard Edit** screen.
10. **Drag and Drop** it to the free space to the right of the second Component on second tier.
11. **Drop** the new **Component** there.
12. Click on the **Save** button (top right).
13. Click on the **Done** button (top right).
14. Results display **Five** Different interpretations of the same Chart.

Lightning Table

1. Click on the **Edit** button.
2. Click on the **+Component** button.
3. Add the **Product Sales this Week (DB)** report.
4. Change the **Display As** to the **Lightning Table** option.
 - **Lightning Tables** display selected **Fields & Groupings** from targeted Report.
5. Under the **Groups**, **Add group...** lookup, Type & Add **Record Type** (Orders).
6. Under the **Measure Columns**, **Add measure column...** lookup, Type & Add **Total Price**.
7. Select **Sum of Total Price** under the **Highlight Column** dropdown.
 - Highlighting Columns is an excellent way of focusing users on targeted numeric bands such as revenue levels, registration counts, etc.
8. Leave defaults in the **Segment Ranges**.
9. Scroll to the **Title** field and change the **Title** to **Product Sales List**.

10. Click on **Add**.

11. Left-click on the new **Component** in the **Dashboard Edit** screen.
12. **Re-size** the **Component** to be the same size as the two others combined above.
13. Click on the **Save** button (top right).
14. Click on the **Done** button (top right).
15. Results display **Six** Different interpretations of the same Chart.



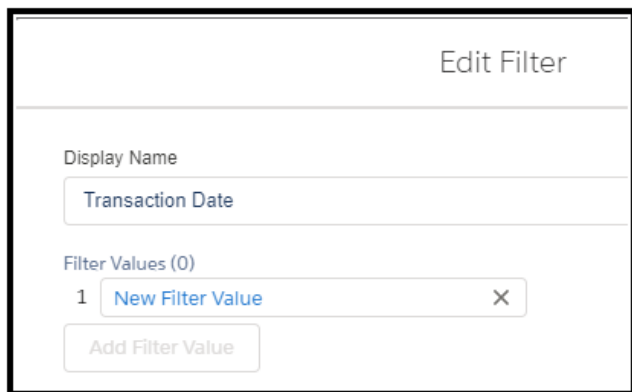
Dashboard Filter

The Dashboard Filter function enables users to define one or more filters via a dropdown and apply them one at a time to all Components in a dashboard simultaneously. Filters most often are used to change the Date ranges of displayed data.

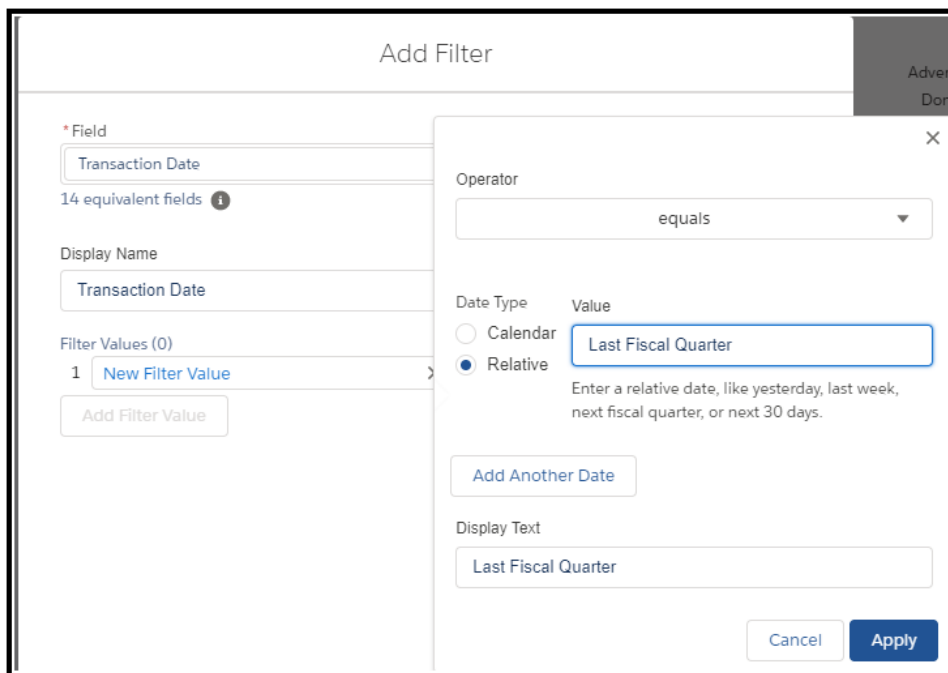
Dashboard filters are extremely useful for enabling users to interact with all displayed components (Reports) via a single filtering function. Users might use this in filtering for Product Sales, Donations Provided, Registrations Taken, etc.

In this **exercise**, users will apply **Transaction Date** filter to **Product Sales YTD** dashboard copy.

1. From the **Navigation** bar, click the **Dashboards** Item.
2. Click on the **Product Sales YTD** from **Recent**.
3. Click on the dropdown to the right of the **Edit** button (upper right hand corner).
4. Select **Save As**.
5. In the **Name** field, enter **Product Sales YTD (Date Filtered)**.
6. Click the **Create** button.
7. Click on the **Edit** button (upper right hand corner).
8. Select the **+Filter** button.
9. From the **Field** lookup, type and select **Transaction Date**.
 - Transaction Date displays under three different Items, but holds same value for each.



- 10. In the **Filter Values** field, click the **New Filter Value** linked text.
- 11. From the **Operator** dropdown, Keep **equals** selected.
- 12. Change the **Date Type** radio button to **Relative**.
- 13. In the **Value** box, enter **Last Fiscal Quarter**.
 - A complete list of **Relative Values** is available in **Appendix A** of this manual.



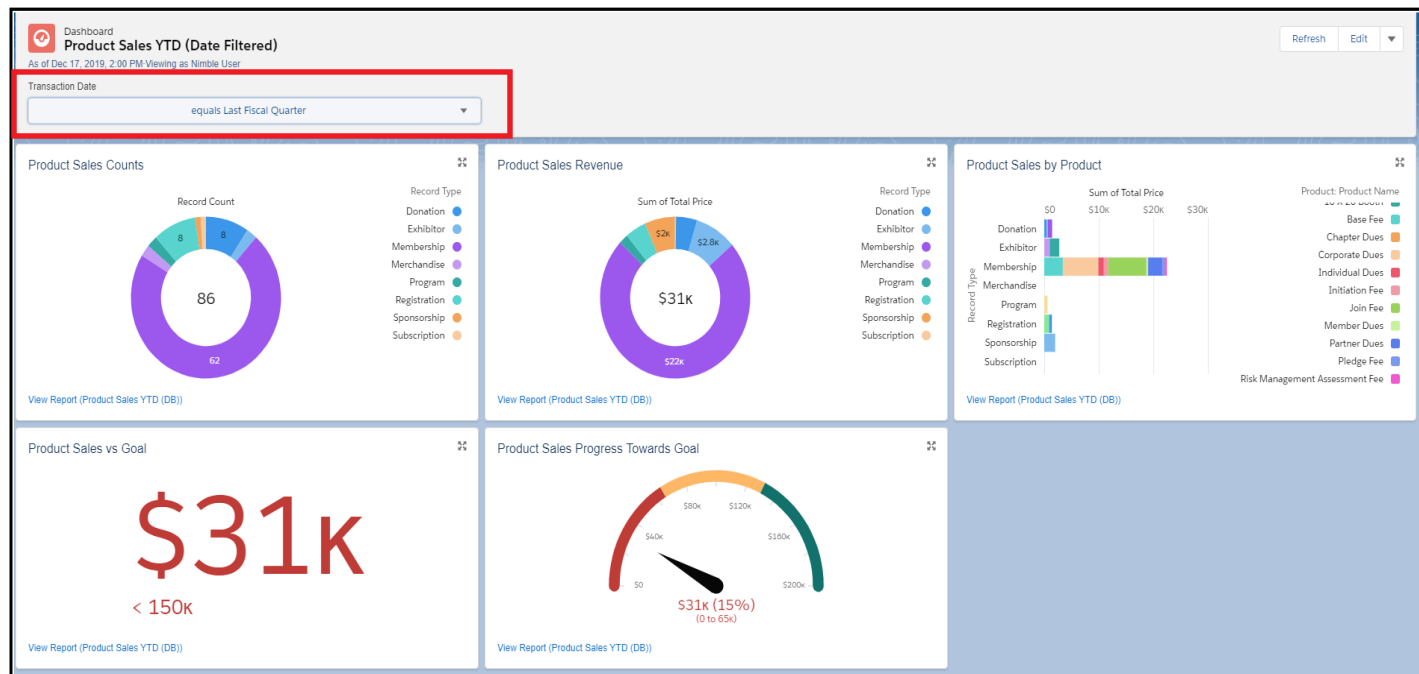
- 14. Click on the **Apply** button.
- 15. Click on the **Add** button.
 - **NO changes applied** until the Dashboard **Saved**, marked as **Done**, AND the new **Filter** actively **engaged**.
- 16. Click on the **Save** button (top right).
- 17. Click on the **Done** button (top right).

18. Click on **Transaction Date** filter dropdown (top left).

19. Select **equals Last Fiscal Quarter**.

20. Observe the results – the entire dashboard filtered for that value.

- **Additional filters are addable** to the dropdown for additional date ranges.



IMPORTANT NOTE: Users should ALWAYS review each of the dashboard Reports, Default Filters that underlay the Dashboard’s Components. This is because those Report, Filter settings will pre-filter the results of an overall, Dashboard Filter.

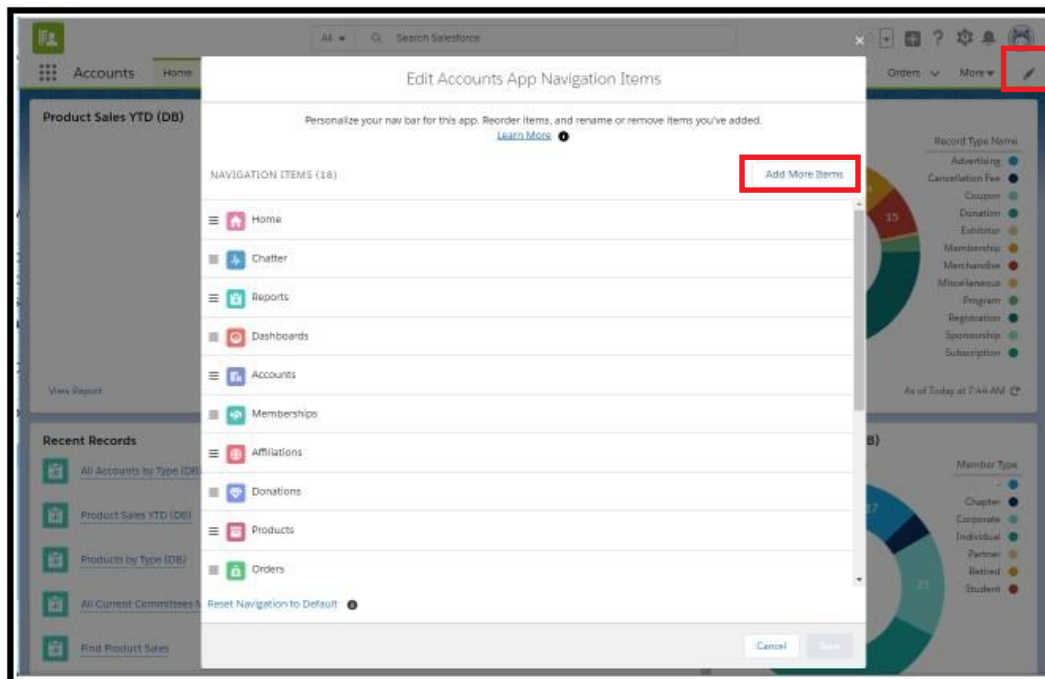
For instance, since ALL the Product Sales YTD Dashboard’s Components filter via the same Product Sales YTD (DB) report for the current year to date, any Report Filter that goes outside of that range would be ineffective. Best Practice would be to set Report Filters for all Reports used in Components within a Dashboard to be **Equal to All Time**. This enables the Dashboard to filter across ANY defined Date period.

Embedding Dashboards in Navigation Bar

In this **exercise**, users will learn how to embed a dashboard in an Application's Navigation (Nav) Bar. This function can be extremely useful as it can:

- Enable users to see a department based dashboard
- Enable users to see a personalized dashboard
- Ensure desired dashboards are easy to find/easily accessible

1. From the **Navigation** bar, click the **Personalize your nav bar** pencil icon on the far right.
2. Click on the **Add More Items** button.



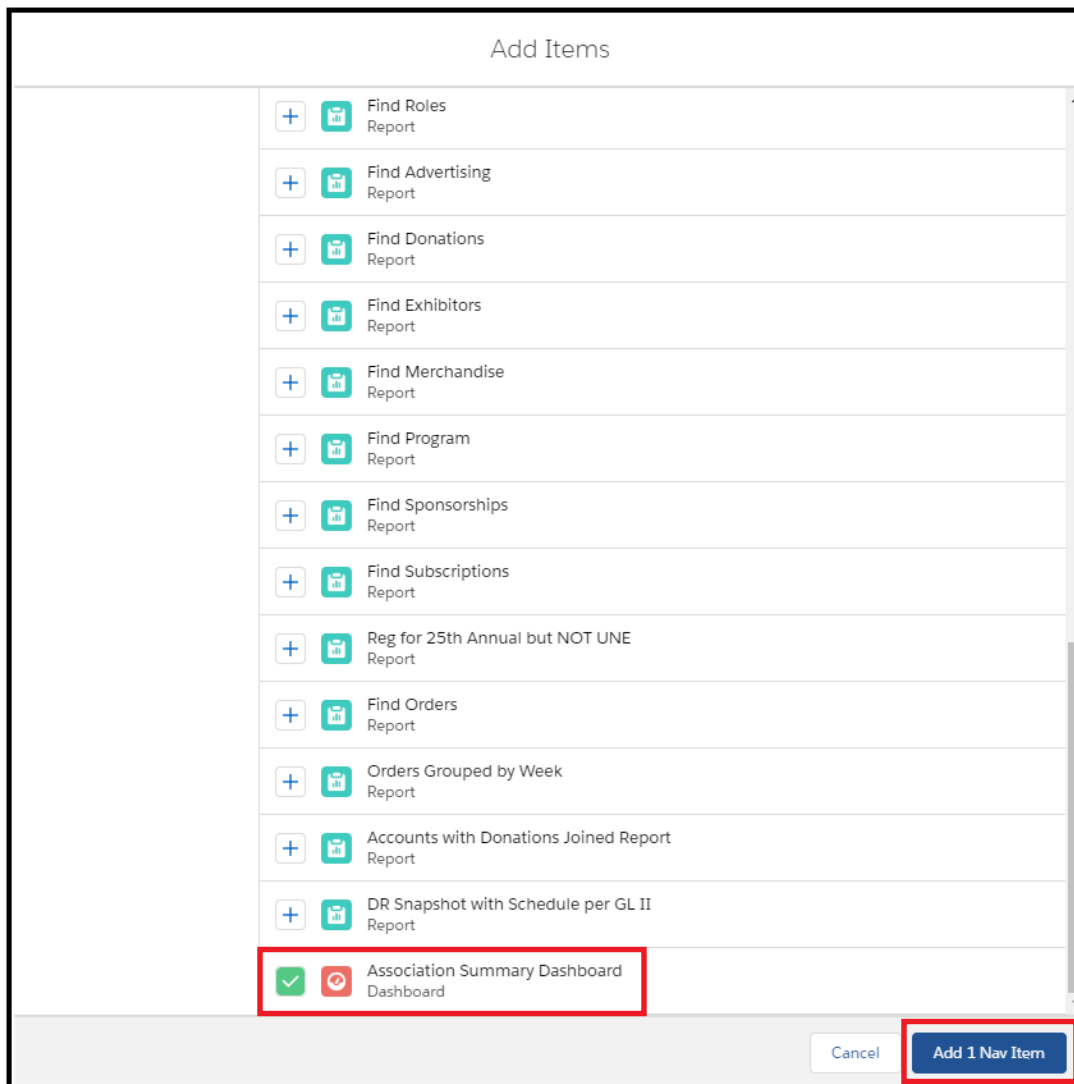
3. **Observe:**

- The system defaults the user to search through their **Favorites**.
- It is possible to search through **ALL** records and add ANY dashboard by switching the search setting to **All** under the **Available Items** bar in the upper left.
- Users can add **ANYTHING** in the system to the Nav Bar: Dashboards, Reports, List Views, Records, etc.

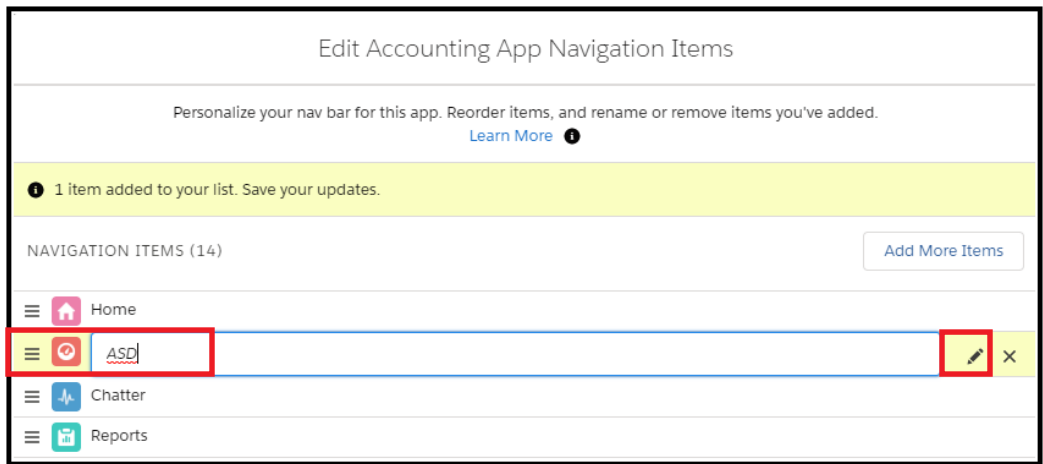
4. Click on the plus sign to the left of the **Association Summary Dashboard**.

- IF this dashboard was not Favorited first, users will have to Cancel this operation, do so, and return to this step.

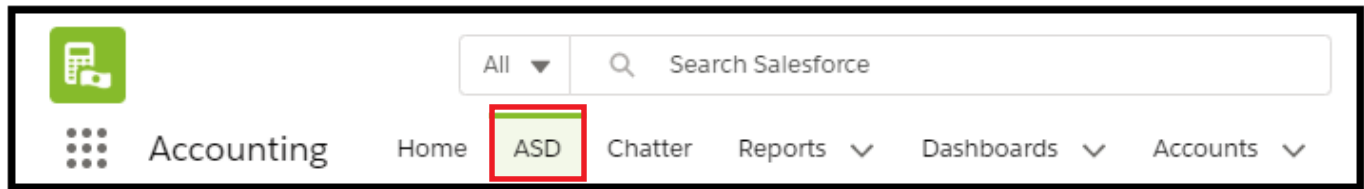
5. Click on the **Add 1 Nav Item** button in the lower left-hand corner.



- Using the **Move** icon (three vertical lines) to the left of the italicized **Association Summary Dashboard** - drag the record up and drop it just below the **Home** dashboard.



- Click on the **Pencil** icon to the far right of the **Association Summary Dashboard**.
- Enter **ASD** into the now editable **Item Name** field to the left.
 - Shortening the Item Names enables users to see more information across the Nav Bar.
- Click on the **Save** button.
- Observe** the results of the configuration to the **Nav Bar**.



IMPORTANT NOTE: the Association Summary Dashboard will remain on the Nav Bar unless removed by the End User, and will only be visible to this user. If however, the user changes to a different Application, the ASD Dashboard will NOT display in the new Application's Nav Bar and will have to be re-added.

CHAPTER

6 Chatter

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Understanding Chatter.....	6.2
Chatter Item.....	6.3
Adding Chatter.....	6.4
Using Chatter Posts.....	6.5
Using Chatter Questions.....	6.7
Using Chatter Polls.....	6.9

Objective

In this chapter, users will learn how to:

- Use Chatter Posts
- Use Chatter Questions
- Use Chatter Polls

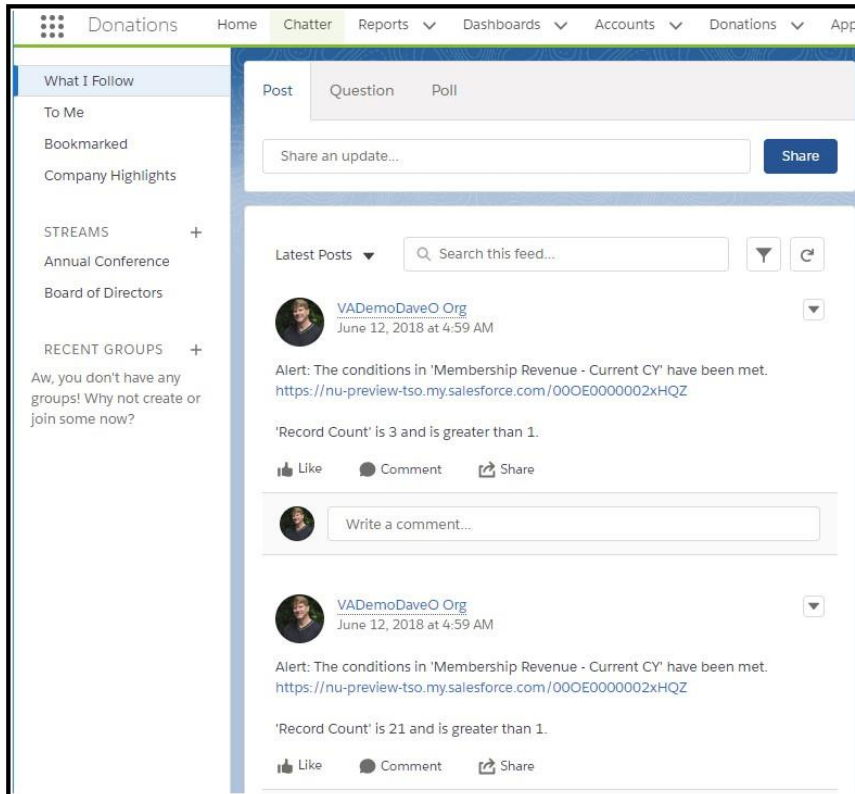
Understanding Chatter

The Chatter Item is the user's collaboration home base and gives them instant access to all the interactive social and tracking features of Nimble AMS. Chatter is based on Salesforce functionality that Nimble AMS leverages so users can collaborate on their AMS records. From the Chatter Item users can:

- View, filter, and sort your feed on the left side to view posts from people and records you follow and groups you're a member of, posts that mention you, posts you bookmarked, or all posts from your company.
- Search the feed to quickly find info in the feed posts/comments on Chatter tab. Make a post that's shared with people who follow you, or comment on someone else's post.
- Like posts or comments to show your support.
- Share a post to your profile or to a group, or send a link to the post to other Chatter users in an email or instant message.
- Bookmark a post to keep track of future comments on the post, or to remember to follow up on the post later.
- Users can bookmark critical chatter posts so they can return to it quickly.
- Add topics to a post to categorize the post and give it more visibility.
- Access your people, groups, files, and topics lists.
- View/update your profile, such as your profile photo or your contact information.
- Read or send private messages that are only visible to certain people.
- Access your favorites to see the latest posts and comments for your favorite topics, list views, and Chatter feed searches.
- View your recommendations for people, groups, files, and records that closely relate to your job and interests.
- View trending topics that people are discussing in Chatter right now.
- Invite people without Salesforce to join your Chatter network.
- Be alerted instantly via Salesforce mobile on any phone or device.
- Manage your Chatter settings via the user profile: change email signatures, enable/block following, etc.

Chatter Item

The Chatter Item is the “Home” of Nimble AMS collaborative area. It contains several distinct areas on the left hand side that enable users to manage what they interact with when interacting with Chatter.



In the top section of the Chatter management section are the following options:

- **What I follow** - when selected enables users to see any posts, questions, or polls they specifically follow.
- **To Me** - when selected enables users to see any posts, questions, or polls in which the user is specifically mentioned.
- **Bookmarked** - Enables users to return quickly to bookmarked feeds.
- **Company Highlights** - Enables user to quickly view feeds that are related to companies to which they are connected.

In the second section, users can follow specific **Streams** (i.e. Annual Conference or Board of Directors) that they are subscribed to and view any related posts that have been submitted.

The last section covers any **Recent Groups** the user has created in order to organize users or collections of posts.

Adding Chatter

The actions of the Chatter item are executed by using the publishing area of Chatter, which displays in the top center of the Chatter Tab screen.

- The publisher appears on the **Home, Chatter** object, user **profile** page, **group**, and **record** detail pages.
- Use the publisher to write a post, comment on a post, attach a file or link to a **post**, add a **poll**, or ask a **question**. Use the rich text editor to format the posts.
- Publisher actions include styling text and removing text styles, adding lists, adding inline images and emojis, @mentioning someone, and attaching a file.

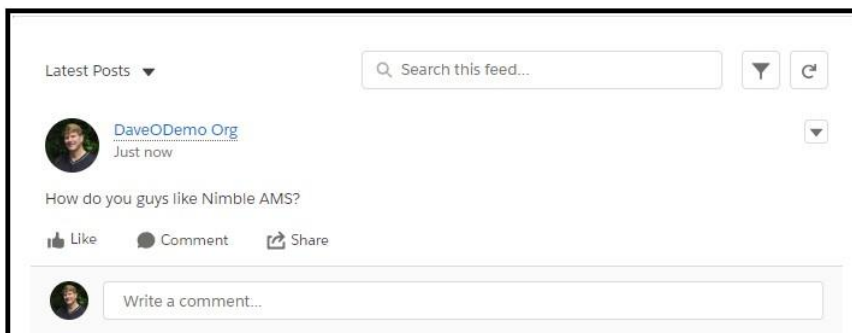
Using Chatter Posts

In this **exercise**, users will explore the features available through Chatter **Posts**.

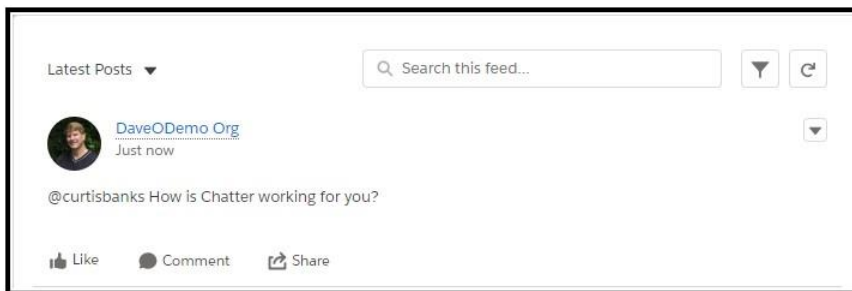
1. From the **Navigation** bar, click the **Chatter** Item.
2. The **Chatter Publisher** displays and defaults on the **Post** tab.



3. From the **Share an update** section, enter a **comment**.
4. Click on the **Share** button.
5. The post is listed in the **Chatter feed** and available for comment (replies) from followers.



6. From the **Share an update** section, enter another **comment**, but begin it with **@Admin CB Training TSO** - this represents ANY internal employee.
 - @Mention fellow employees and employee Groups in Posts and Comments
 - @Mention individual people or a group to keep them informed when you're discussing something relevant to them.
 - When you @mention people or groups in an update, anyone who has access to the update can see the post and all comments.
 - Use the forward slash - / - before adding a record: Account, Account, Product etc., and that link will be embedded in the post.
7. Click on the **Share** button.



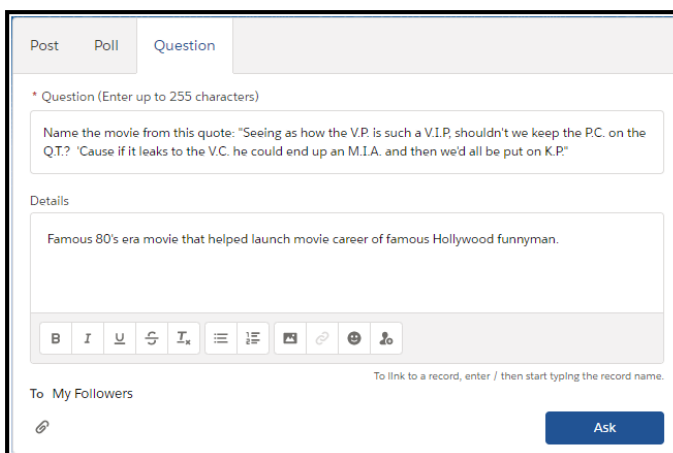
General Posting Notes:

- When new comments are made on a feed post that you're engaged in, you receive notifications. Notifications appear when you're actively typing comments or you've clicked in the comments box.
- Click Edit to modify your own posts and comments.
- If you're a group owner or manager, you can also edit other people's posts on the group feed. Click Delete to remove your post from the feed. However, you can't delete other people's posts or posts about feed tracked changes.

Using Chatter Questions

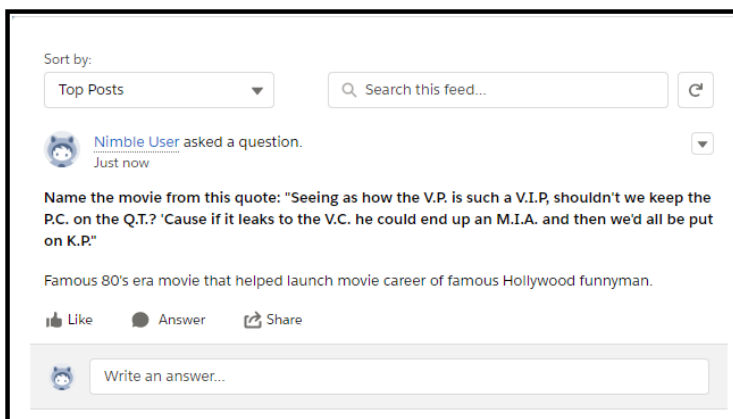
In this section, users will understand the features available through **Chatter Questions**.

1. From the **Navigation** bar, click the **Chatter** tab.
2. Click on the **Questions** tab in the **Chatter Publisher**.
3. In the **What would you like to know?** field, enter a question.
4. Enter some text about question in the **Details** field.



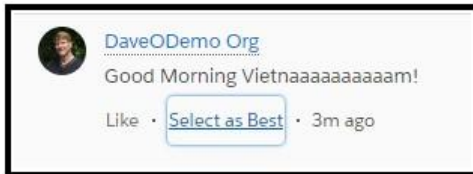
The screenshot shows the 'Question' tab in the Chatter Publisher. At the top, there are tabs for 'Post', 'Poll', and 'Question'. Below the tabs, there is a text input field for the question: "Name the movie from this quote: 'Seeing as how the V.P. is such a V.I.P, shouldn't we keep the P.C. on the Q.T.? 'Cause if it leaks to the V.C. he could end up an M.I.A. and then we'd all be put on K.P.'". Below this is a 'Details' field with the text: "Famous 80's era movie that helped launch movie career of famous Hollywood funnyman." At the bottom, there is a rich text editor with various icons (bold, italic, underline, link, unlink, list, image, video, emoji, user) and a 'To' field set to 'My Followers'. An 'Ask' button is located at the bottom right.

5. Click on the **Ask** button.
6. The **Question** displays in the **Chatter Feed**.

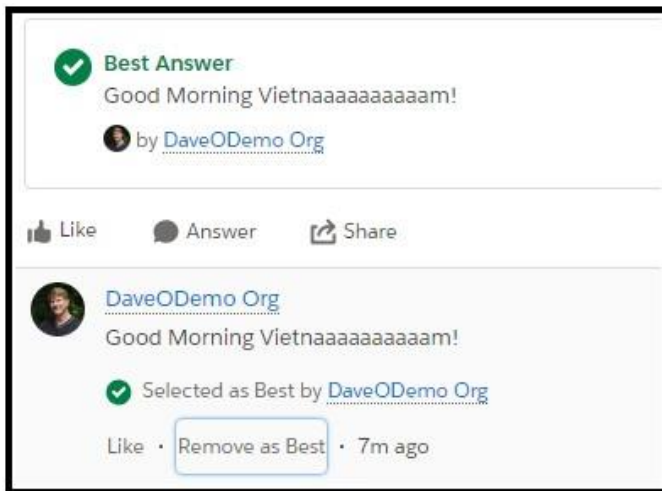


The screenshot shows the Chatter Feed. At the top, there is a 'Sort by:' dropdown menu set to 'Top Posts' and a search bar labeled 'Search this feed...'. Below this, a question is displayed: "Name the movie from this quote: 'Seeing as how the V.P. is such a V.I.P, shouldn't we keep the P.C. on the Q.T.? 'Cause if it leaks to the V.C. he could end up an M.I.A. and then we'd all be put on K.P.'". Below the question is the text: "Famous 80's era movie that helped launch movie career of famous Hollywood funnyman." At the bottom, there are icons for 'Like', 'Answer', and 'Share', and a text input field labeled 'Write an answer...'.

7. Post a reply to the question and click the **Select as Best** button.



8. That answer is then recognized as the **Best** answer in the **Chatter Feed**.



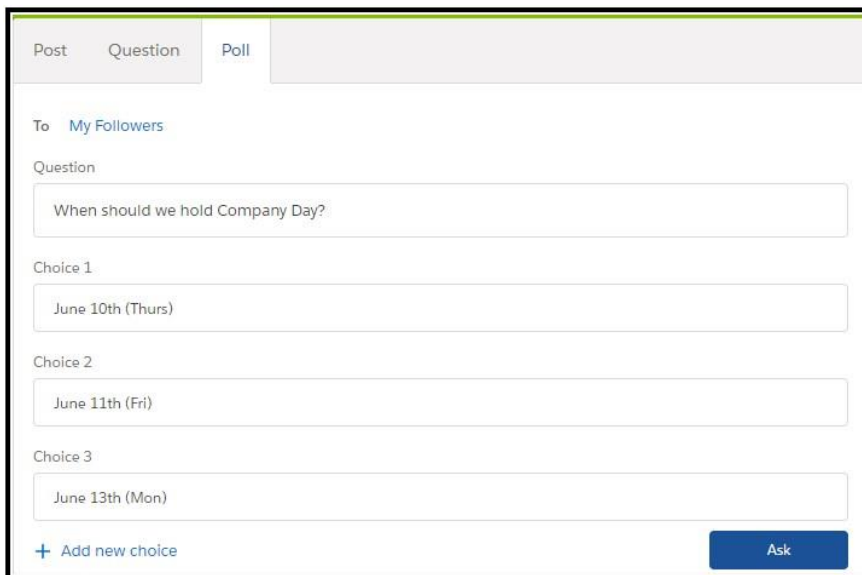
General Question Notes:

- Moderators and the question owner can:
 - Select the best answer for a question
 - Remove the best answer status from an answer
- Only one answer selected as the best answer. Moderators can be the Chatter moderator, the community moderator, or the Salesforce administrator. If a user doesn't have permission to select the best answer for a question, they don't see the **Select as Best** option.
- Users should NOT normally answer their own questions

Using Chatter Polls

In this section users will understand the features available through **Chatter Polls**.

1. From the **Navigation** bar, click the **Chatter** tab.
2. Click on the **Polls** tab in the **Chatter Publisher**.
3. In the **Question** field, enter the following: **When should we hold the Member Symposium Day?**
4. Enter **June 10th (Thu)** in the **Choice 1** field.
5. Enter **June 11th (Fri)** in the **Choice 2** field.
6. Click on the **Add new choice** button.
7. Enter **June 13th (Mon)** in the **Choice 3** field.

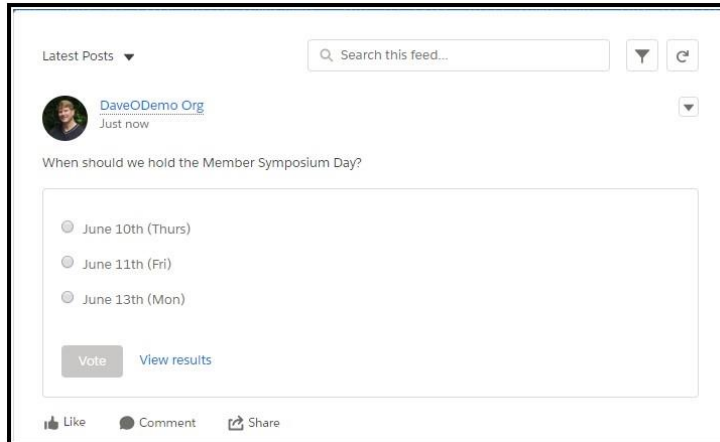


The screenshot shows the Chatter Poll creation interface. At the top, there are tabs for 'Post', 'Question', and 'Poll', with 'Poll' selected. Below the tabs, the 'To' field is set to 'My Followers'. The 'Question' field contains the text 'When should we hold Company Day?'. There are three 'Choice' fields: 'Choice 1' contains 'June 10th (Thurs)', 'Choice 2' contains 'June 11th (Fri)', and 'Choice 3' contains 'June 13th (Mon)'. At the bottom left, there is a '+ Add new choice' button, and at the bottom right, there is a blue 'Ask' button.

8. Click on the **Ask** button.

9. The **Poll** displays in the **Chatter Feed**.

- Users can click on the View results at any time to see the compiled votes.



General Polls Notes

Polls are a great way to get people's opinions. When you create a poll, anybody with access to the feed or the poll can vote on the poll. So when you post a poll, consider who you want to participate. For example, if you post a poll in a private group, only the members of that group can see the poll and vote. Keep the following in mind:

- When you create a poll, you can add up to ten choices.
- When voting on a poll, you can only select one choice.
- Polls are anonymous. You can see how many people voted, but can't see who voted.
- Click Refresh to see the latest poll result and the number of votes that were cast.
- You can't repost a poll.
- People can only cast one vote, but they can change their vote.
- You can mention someone and include hashtag topics in the poll question.
- You and others can add topics to your poll question after posting.
- The email notification options you enabled in your Chatter Email Settings apply to polls just as they do to posts. For example, if you get a notification whenever someone comments on a post you made, you also get an email notification when someone comments on a poll you posted.

CHAPTER

7 Committees

Objective.....	7.1
Understanding Committees.....	7.2
Committees Item.....	7.3
Committee Memberships.....	7.4
Committee Positions.....	7.6
Committee Reports and Dashboards.....	7.7

Objective

In this section, Users will learn to manage Committees in Nimble AMS.

This includes:

- Understanding Committees
- Viewing a Committee Roster
- Understanding Committee Members
- Adding a new Committee Member
- Understanding Committee Positions
- Running Committees Reports and Dashboard

Understanding Committees

Nimble AMS enables users to create Committees that organize and track constituent groups in the organization. Users can take advantage of the functionality in Committees to track formal groups - Board of Directors, Standing Committees, Task Forces, etc. or informal groups - Special Interest Groups, Listservs, etc.

Committees Application

The Committees application provide users a centralized area from which they have the flexibility to track committee participation and share information.

Users focused on Committees should use the App Launcher to change their primary application to the Committees application

Committees Items

The Committees Application contains several committee's items. Each of these items has a specific function in helping to maintain an accurate accounting of an organization's committees.

Committees

Main repository of the committee. Provides the Type, Status, Term (in Months), Committee Count (current active), and the Committee Main Contact. The Full Description field leveraged as the information posted to Community Hub for members.

Committee Memberships

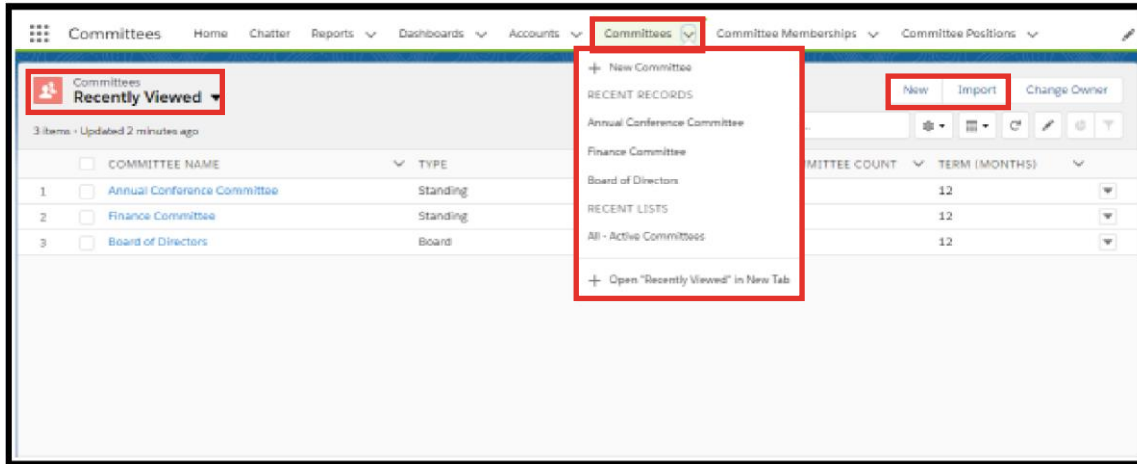
Tracks the individual Committee Member Names, Status, Position, Start, and End Dates. It is the Item where maintenance of committee participation occurs – adding /detracting members, status changes, changing start/end dates, and position changes.

Committee Positions

Simple repository of positions across ALL committees. Used to populate the lookups for the Position field found on a Committee Membership record.

Committees Item

The Committees item provides several different ways of finding, organizing, and interfacing with Committees.



From the TOP RIGHT HAND, **Actions** area, Users can:

- Create a **New** Committees
- **Import data to** Committees

From the TOP MIDDLE, **Committees** item drop down, Users can:

- Create a **New** Committees
- Use **Recent Records** to return to a previously accessed Committees
- Use **Recent Lists** to return to a previously accessed List View of Committees

From the TOP LEFT, **Committees Recently Viewed** drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

Committee Memberships

Committee Memberships function to view and track committee participation. Committee Memberships are the **connection** between individual accounts and Committees.

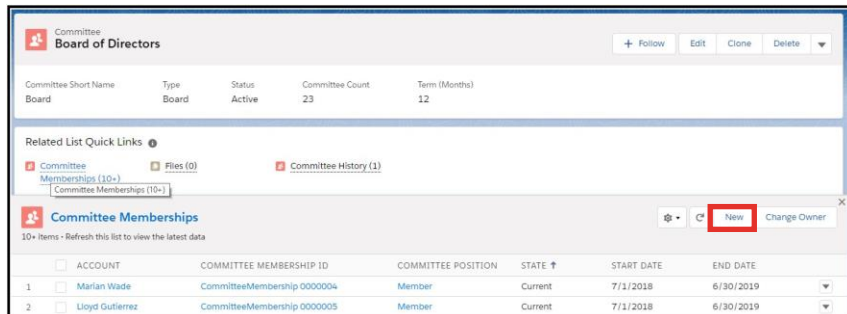
Adding a Committee Member

Users can add committee membership linking an individual account from:

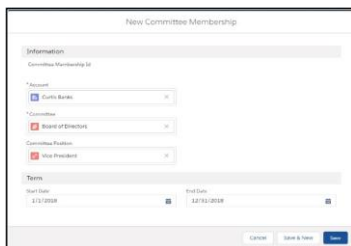
- **Committee** record - Committee Memberships item OR Related List Quick Link.
- **Person Account** record - Committee Membership Related List Quick Link.
- **Committee Membership** item – New button

In this **exercise**, users will create a new committee membership from the **Committees** item.

1. In the **Quick Search**, enter and select the **Board of Directors** committee record.
2. Float over the **Committee Memberships (10+)** Related List Quick Link.
3. Click on the **New** button (upper right).



4. Enter **Curtis Banks** in the **Account** field.
5. Enter **Vice President** in the **Committee Position** field.
6. Enter Term **Start Date** and **End Date** for current year.
7. Click **Save**.

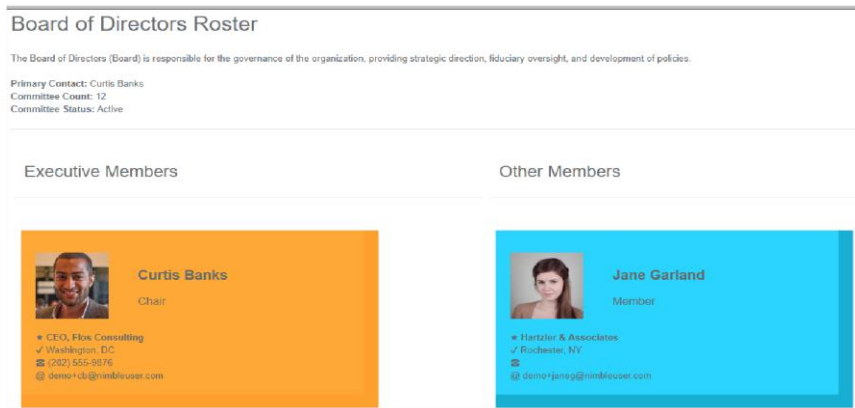
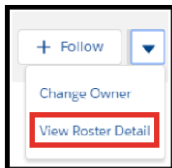


Viewing a Committee Roster

To view all the members of a committee sorted by their position:

1. From a committee record, click **View Roster Detail** from the drop down to the right of the **+ Follow** button.

Note: Only current memberships are displayed, not past or future memberships.



Note: A fully customizable committee roster can be created using Nimble Create.

Editing, Cloning and Deleting Committee Members

Users can edit, clone, or delete a committee member.

IMPORTANT NOTE: In general, deleting a committee membership record is NOT recommended, as it removes that record for audit tracking.

If a member of a committee ends their service early, the best practice should be editing the committee membership's **End Date** to match the last day of committee service. This option will preserve the history of the individual's service and removes them from any views or reports that show current committee members.

Committee Positions

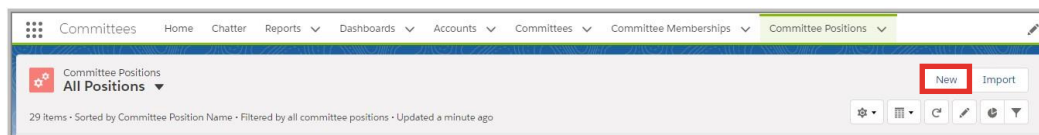
Nimble AMS allows Users to use Committee Positions to define committee roles like President, Vice President, Chair, etc. Users can define how positions will appear on roster using sort order.

Adding a Committee Position

To add an individual account to a committee position and sort order. The sort order is used in the committee roster.

In this **exercise**, users will add a new Committee Position:

1. Select the **Committees App** from the **App Launcher**.
2. Click **Committee Positions**.
3. Click **New**.



4. Enter **President** in **Committee Position**.

A screenshot of the 'New Committee Position' form. The form has a title 'New Committee Position' and a section titled 'Information'. There are two main input fields: 'Committee Position Name' and 'Sort Order'. The 'Committee Position Name' field is currently empty. The 'Sort Order' field is also empty. To the right of these fields, the 'Owner' is listed as 'Nimble User'. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

5. Enter **30** in **Sort Order**. The lower the number, the higher the name shown on the roster.
 - Consider spacing out numbers to accommodate for future changes in positions. In other words, instead of using: President: 1, Vice President: 2, Treasurer: 3 - You may want to use: President: 10, Vice President: 20, Treasurer: 30
6. Click **Save**.

IMPORTANT NOTE: To make a copy of an existing Committee Position record to expedite the creation of a new committee with similar information, use the Clone functionality.

Committee Reports and Dashboards

Committee Reports

1. Click the **Reports** item.
2. Click on the **All Folders** option.
3. Click the **Committees (Nimble AMS)** folder.
4. Select **Committee Members ALL OR Committee Members Products Purchased** report.

Report: Accounts with Committee Memberships and Committee
Committee Members ALL
 All committee members CURRENT and PAST grouped by committee.

Total Records
66

Committee ↑	Account	State ↓	Position	Start Date	End Date	PA	SMF	Member Type	Member Email
Board of Directors (25)	Jack Willis	Past	Secretary	7/1/2017	6/30/2019	Bradley's Place	✓	Professional	demo+jackw@nimbleuser.com
	Josephine Robertson	Past	Secretary	7/1/2017	6/30/2019	Des Moines CPAs	✓	Professional	demo+josephiner@nimbleuser.com
	Morris Ryan	Past	Member	7/1/2017	6/30/2019	Aquatics Incorporated	✓	Professional	demo+morrisr@nimbleuser.com
	Jane Garland	Past	Member	7/1/2017	6/30/2019	Aquatics Incorporated	✓	Professional	demo+janeg@nimbleuser.com
	Michael Hartzler	Past	Vice Chair	7/1/2017	6/30/2019	Cuomo & Associates	✓	Enterprise	demo+mh@nimbleuser.com
	Ben Peterson	Past	Member	7/1/2017	6/30/2019	Aquatics Incorporated	✓	Professional	demo+benp@nimbleuser.com
	Curtis Banks	Past	Immediate Past Chair	7/1/2017	6/30/2019	Fios Consulting	✓	Enterprise	demo+training+cb@nimbleuser.com
	Michael Hartzler	Past	Chair	7/1/2017	6/30/2019	Cuomo & Associates	✓	Enterprise	demo+mh@nimbleuser.com
	Michael Hartzler	Past	Chair Elect	7/1/2017	6/30/2019	Cuomo & Associates	✓	Enterprise	demo+mh@nimbleuser.com
	Brent Miller	Current	Treasurer	7/1/2019	6/30/2021	Fios Consulting	✓	Enterprise	demo+brentm@nimbleuser.com
	Jane Hill	Current	Member	7/1/2019	6/30/2021	-	✓	Professional	demo+janeh@nimbleuser.com
	Rachel Seratte	Current	Chair Elect	-	-	-			rachel.seratte@communitybrands.com
	Marian Wade	Current	Member	7/1/2019	6/30/2021	Bradley's Place			demo+marianw@nimbleuser.com

- Displays all **Past** and **Current** Members of every active Committee.
- Combines **Committee Membership** AND **Account** information.

Report: Accounts with Orders and Order Items and OILS
Committee Members Products Purchased

Find Product Sales purchased by an Account that holds specific Committee Membership by changing Account filter to ACCOUNT - EQUALS - _____, AND by entering EDIT m...

Total Records: 150 Total Total Price: \$36,665.29 Total Balance: \$5,825.65 Total Is Coupon: 2

Record Type	Transaction Date	Order Id	Account	Member Type	Billing City	Billing State/Province	Billing Street	Total Price
Advertising (2)	1/12/2019	Order 0000157	Curtis Banks	Enterprise	Fairfax	VA	4116 Roberts Road	\$1,000.00
	1/12/2019	Order 0000157	Curtis Banks	Enterprise	Fairfax	VA	4116 Roberts Road	\$150.00
Subtotal								\$1,150.00
Donation (11)	2/21/2020	Order 0000381	Jack Willis	Professional	Des Moines	IA	97 Indiana Ave	\$100.00
	2/6/2020	Order 0000332	Ben Peterson	Professional	Des Moines	IA	97 Indiana Ave	\$100.00
	1/19/2020	Order 0000258	April Black	Professional	Los Angeles	CA	1055 West 7th St	\$50.00
	1/18/2020	Order 0000233	Jack Willis	Professional	Des Moines	IA	97 Indiana Ave	\$100.00
	11/21/2018	Order 0000146	Curtis Banks	Enterprise	Fairfax	VA	4116 Roberts Road	\$100.00
	10/7/2018	Order 0000052	Virgil Watts	Retired	Detroit	MI	19507 Manor St	\$100.00
	10/7/2018	Order 0000106	Michael Hartzler	Enterprise	Washington	DC	625 Monroe St NE	\$100.00
	10/7/2018	Order 0000099	Katie Rivers	Enterprise	New York	NY	37 W 70th St	\$100.00
	10/7/2018	Order 0000078	Ben Peterson	Professional	Des Moines	IA	97 Indiana Ave	\$100.00

- Displays all **Products** purchased by members of a designated Committee.
- Users can change the Committee designated by entering the desired value in the **Committee Name cross filter**.

Committee Dashboard

To display the **Committee** dashboard:

1. Click the **Dashboards** item.
2. Click on the **All Folders** section.
3. Click the **Dashboards (Nimble AMS)** folder.
4. Click on the **Committees** Dashboard.

Dashboard
Committee Dashboard
Displays current committee memberships by committee.
As of Feb 26, 2020, 2:30 AM-Viewing as Nimble User

Committee Member Counts

Record Count

52

A breakdown of all active and current committee members.
[View Report \(Committees: Current Members \(DB\)\)](#)

BOD Products Purchased

Transaction Date ↑	Account	Product	Total Price
9/14/2018	Curtis Banks	Accounting Handbook - Digital Download	\$30.00
9/17/2018	Curtis Banks	PAC Donation	\$500.00
10/7/2018	Jane Garland	Professional Dues	\$500.00
10/7/2018	Jane Garland	Chapter Dues	\$10.00
10/7/2018	Virgil Watts	Retired Dues	\$250.00
10/7/2018	Virgil Watts	Chapter Dues	\$10.00

Committee: Current Members

Committee ↑	Account	Position	End Date
Board of Directors	Brent Miller	Treasurer	6/30/2021
Board of Directors	Jane Hill	Member	6/30/2021
Board of Directors	Rachel Seratte	Chair Elect	-
Board of Directors	Marian Wade	Member	6/30/2021
Board of Directors	Lloyd Gutierrez	Member	6/30/2021
Board of Directors	Ben Peterson	Member	6/30/2021
Board of Directors	Jane Garland	Member	6/30/2021
Board of Directors	Morris Ryan	Member	6/30/2021
Board of Directors	Michael Hartzler	Member	6/30/2021
Board of Directors	Virgil Watts	Member	6/30/2021
Board of Directors	Sherri Ortiz	Member	6/30/2021
Board of Directors	April Black	Vice Chair	6/30/2021
Board of Directors	Billy Henderson	Parliamentarian	6/30/2021
Board of Directors	Curtis Banks	Chair	6/30/2021
Board of Directors	Jack Willis	Secretary	6/30/2021
Board of Directors	Katie Rivers	Member	6/30/2021
Certification Committee	Curtis Banks	Chair	5/31/2021
Certification Committee	Bob Wiley	Vice Chair	5/31/2021

Nimble AMS End User Training Manual

7.9

CHAPTER

8 Products

Objective.....	8.1
Products Item.....	8.2
Understanding Products.....	8.3
Inventory.....	8.11
Shipping Methods.....	8.14
Cross Selling Products.....	8.16
Product Reports.....	8.18

Objective

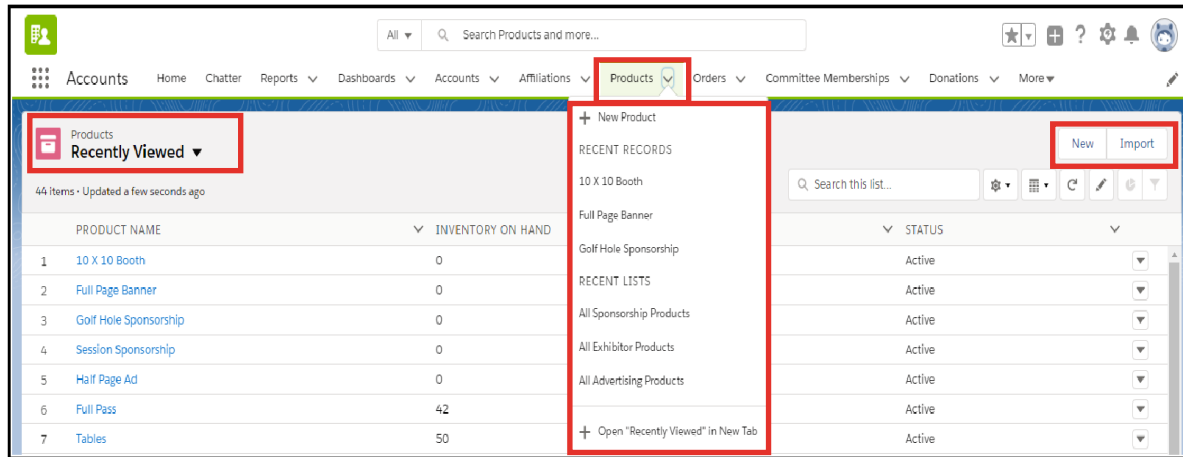
In this section, Users will understand Products in Nimble AMS.

This includes:

- Understanding Product Types
- Understanding Product Sections and Fields
- Understanding Pricing
- Using Inventory Tracking
- Using Shipping Methods

Products Item

The Products Item provides several different ways of finding, organizing, and interfacing with Products.



From the TOP RIGHT HAND, Actions area, Users can:

- Create a **New Product**
- **Import data to Products**

From the TOP MIDDLE, Products Item drop down, Users can:

- Create a **New Product**
- Use **Recent Records** to return to a previously accessed Products
- Use **Recent Lists** to return to a previously accessed List View of Products

From the TOP LEFT, Products Recently Viewed drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

Understanding Products

Users will often have to interface with products, even if they are not required to create or edit them. As such, it is important that users understand what Nimble AMS product is, how it performs in the system, and what the options are for creating/editing.

Product Setup and Maintenance

Most Users will not need to set up or edit products. However, they may have to:

- **Take Orders** for specific Products
- **Request New** Product creation
- **Require Edits** to a particular Product

The **Users most likely to Create/Edit** products are:

- **Nimble AMS Consultants** – during the Implementation/pre Go-Live cycle
- Members of the **Accounting/Finance** Team
- Members of the **Events/Meetings** Team – if large numbers of events held
- Members of teams that require **frequent edits to Products** – unusual, but can occur in certain situations.

Product Types

To optimize the data captured for different products, Nimble AMS supports several **Product Types**, such as Membership, Subscriptions, Merchandise, Donations, Sponsorships and more.

Each Product type can contain its own page layout, fields, pick-list values, and other unique information.

In the screen shots below, the central sections of three products: A **Subscription**, a **Registration**, and a **Donation** and the distinct sections that set them apart, display.

▼ Description

Short Description ⓘ
The Mercury Newsletter will help you be a more effective and influential presenter and communicator. ✓

Description ⓘ
This newsletter is packed full of useful presentation and communication skills needed for the modern-day professional. ✓

▼ Subscription

Subscription Renewal Type ⓘ Anniversary ✓	Subscription Annual Start Month ⓘ 01 ✓
Subscription Term (Months) ⓘ 12 ✓	Subscription Start Date Control ⓘ 20 ✓
	Subscription Grace Period (Months) ⓘ 0 ✓

▼ Event

Event ⓘ Nimble Consultant NetWORKS Series 1 ✓	Event Session Group ⓘ Additional Event Badge ⓘ <input type="checkbox"/> ✓
Registration Types ⓘ Conflict Codes ⓘ Event Session Start Date ⓘ ✓	Is Fee ⓘ <input type="checkbox"/> ✓ Event Session End Date ⓘ ✓

▼ Financial

List Price ⓘ \$25.00 ✓	Revenue GL Account ⓘ 01-42300 ✓
Entity ⓘ International Society for the Exceptionally Nimble ✓	Deferred Revenue Method ⓘ Annual Conference (Start Month) ✓

▼ Inventory

Track Inventory ⓘ <input type="checkbox"/> ✓	Inventory Used ⓘ Inventory On Hand ⓘ 0 ✓
Inventory ⓘ ✓	Inventory Last Updated ⓘ ✓

▼ Description

Short Description ⓘ

Description ⓘ
The Education Fund awards scholarships and educational grants to organizations committed to delivering innovative educational experiences to young students. ✓

▼ Donation

Suggested Donation Amounts ⓘ 100;250;500;1000 ✓	End Date ⓘ ✓
Start Date ⓘ ✓	

▼ Financial

List Price ⓘ \$100.00 ✓	Revenue GL Account ⓘ 02-10000 ✓
Entity ⓘ Nimble Foundation ✓	

Product Form Sections and Fields

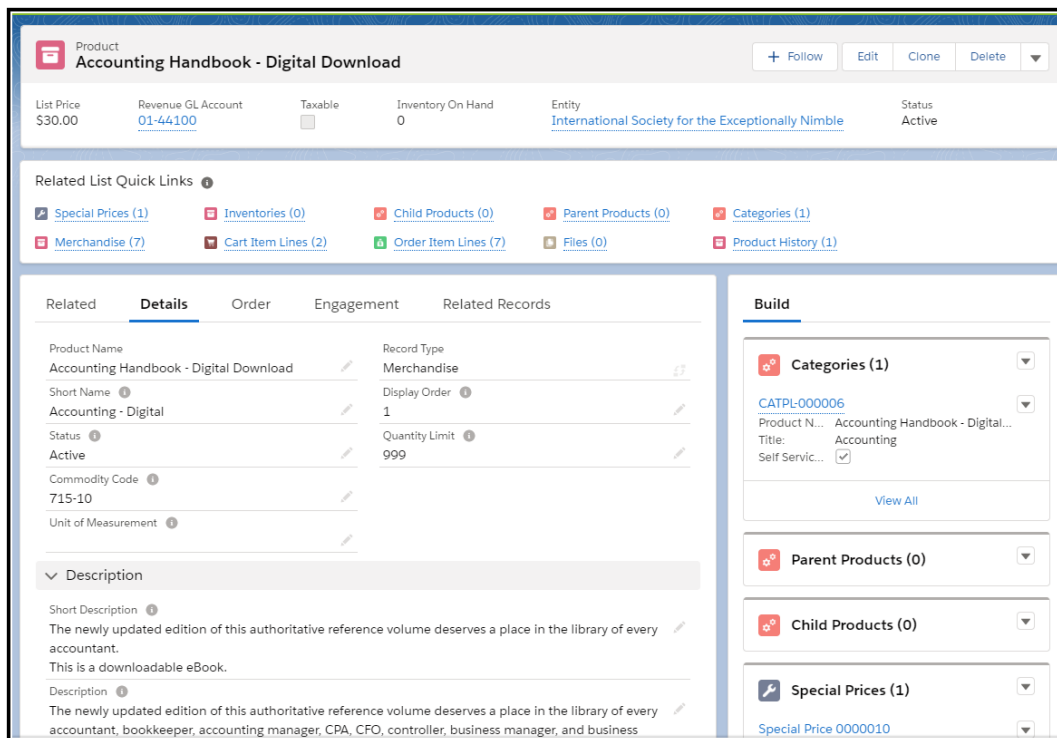
In this review of Product sections, users will open and explore a basic product (Merchandise) form to understand how it performs in the system. Other product types such as Membership, Registrations, Donations, Subscriptions, etc. are covered in this manual in subsequent chapters.

This chapter’s focus is on the review of basic product features that are consistent across all product types.

Opening a Product

In this **exercise**, users will open a merchandise product to review its basic features.

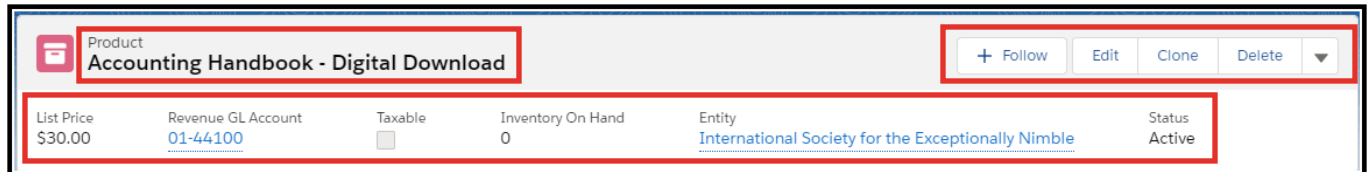
1. In the **Search** field, enter and select **Products by Type (DB)**.
2. Click on the **Merchandise** section of the **Donut Chart** OR click the text **Merchandise** under the **Record Type Name** list (to right).
3. Scroll down in the report and click on the **Accounting Handbook - Digital Download** product link under the **Product Name** column.



Name – Summary - Actions

Name and **Summary** areas provide the unique name of the product and up to six critical fields replicated from the main body of the product and displayed in the area at the top of the screen.

The **Actions** menu (top right) will vary depending on user permissions. For users that have full permissions to products, it will contain **Edit**, **Clone**, and **Delete**.



Details Top

The Details Top section contains general information about the Product.

Product Name: Full Name of Product.

Short Name: Leveraged in displays (Reports) where full name would be too lengthy.

Status: Active or Inactive – Inactive checked prevents sale of product.

Commodity Code: Five-digit code denoting the Category to which a Product belongs.

Unit of Measurement: Unit of measure by which product measured (3x5, gallons, etc.).

Record Type: Describes the Product Type (Form/Fields) being used by this product.

Display Order: Sort order of products in Community Hub and in Back Office.

Quantity Limit: Maximum purchasable products per order.

Related	Details	Order	Engagement	Related Records
Product Name	Accounting Handbook - Digital Download		Record Type	Merchandise
Short Name ⓘ	Accounting - Digital		Display Order ⓘ	1
Status ⓘ	Active		Quantity Limit ⓘ	999
Commodity Code ⓘ	715-10			
Unit of Measurement ⓘ				

Description

Displays both the Short Description and Description.

Short Description: Internal (Employee) facing description leveraged on Back Office.

Description: Description presented to members on Community Hub. Can include HTML.

Financial

Displays Financial and Accounting relevant fields.

List Price: The default price paid for this product by all purchasers unless Special Pricing enabled – see area below.

Taxable: Indicates if product is Taxable or not. Checked triggers cross referencing of back end tax tables that stamp tax on order based on origin and/or destination fees.

Entity: Displays which Entity the Product tied. Sale of product will be credited to the Entity listed.

Revenue GL Account: The Sales revenue General Ledger account to use for crediting in transactions.

Is Fee: If checked, this product acts as a fee and will NOT create Membership, Registration, Subscription, or Donation records.

The screenshot shows a 'Financial' section with the following fields:

List Price ⓘ \$30.00	Revenue GL Account ⓘ 01-44100
Taxable ⓘ <input type="checkbox"/>	Is Fee ⓘ <input type="checkbox"/>
Entity ⓘ International Society for the Exceptionally Nimble	

Special Pricing

Pricing defaults for the entire product by the **List Price** field. If unique pricing is required for a specific period, member type, or additional pre-requisites, users can apply **Special Prices**, per each scenario, to the product.

1. Open the **Accounting Handbook - Digital Download** product.
2. Under the **Build** section (on right of form), observe the **Special Prices (1)** section.
3. Open **Special Price 0000010** by clicking on the **blue link**.
4. Click on the **Edit** button.
5. Observe the **Price Classes** that can be applied;

IMPORTANT NOTE: Price Classes configured and added via code to Nimble AMS before use. Price Classes are created by a system Administrator most often during Implementation.

Form titled "Edit Special Price 0000010".

Special Price Id
Special Price 0000010

* Product
Accounting Handbook - Digital Download

* Price Class(es) ⓘ

Available	Chosen
Speaker	Member
Default	

Event Price

Early Price ⓘ

* Default Price
\$20.00

Buttons: Cancel, Save & New, Save

6. Click **Save** and then the **Back Browser** button to return to Product.

Shipping

Multiple Shipping methods supported via Nimble AMS. The specific options available for those methods outlined later in this chapter.

Shippable: If checked, when product ordered a shipping method will be required.

Weight: Weight of the product in US pounds and leveraged by shipping method.

Inventory

Tracking Inventory supported via Nimble AMS. The specific options available for setting up and configuring inventory discussed later in this chapter.

Track Inventory: If checked, Inventory tracked for this product AND there must be an Inventory amount listed in the Inventory field in order for the product to be sold.

Inventory: Displays the actual amount of product inventory available for sale. Will depreciate as inventory sold.

Inventory Used: Displays total amount of inventory sold.

Inventory: Displays total amount of remaining inventory for sale.

The screenshot shows a configuration interface with two main sections: Shipping and Inventory. Each section has a dropdown arrow and a title. The Shipping section contains two fields: 'Shippable' with a checkbox and an information icon, and 'Weight (Pounds)' with a text input field containing '0.00' and an information icon. The Inventory section contains three fields: 'Track Inventory' with a checkbox and an information icon, 'Inventory Used' with a text input field and an information icon, and 'Inventory' with a text input field and an information icon. The 'Inventory On Hand' field is also visible with a value of '0' and an information icon.

Shipping	
Shippable ⓘ	Weight (Pounds) ⓘ
<input type="checkbox"/>	0.00

Inventory	
Track Inventory ⓘ	Inventory Used ⓘ
<input type="checkbox"/>	
Inventory ⓘ	Inventory On Hand ⓘ
	0

Community Hub

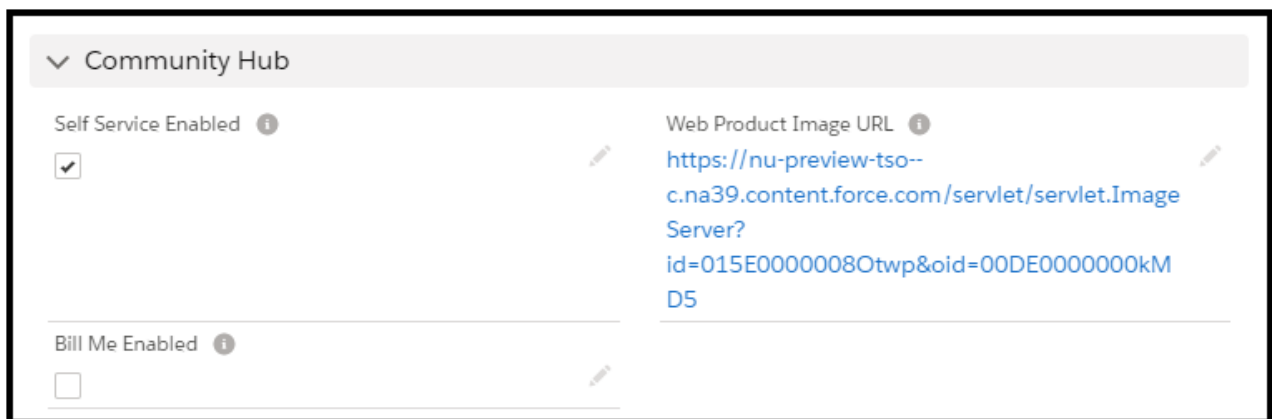
Fields listed control how Community Hub interacts with the product.

Self Service Enabled: If checked, product is purchasable via Community Hub (online).

Bill Me Enabled: If checked, this enables the Bill Me option on Community Hub (online); user does NOT have to pay at checkout, but they are invoiced.

- In order for Bill Me Enabled to work for an Account, that Account MUST be marked as Trusted. The Trusted checkbox is found at the bottom of an Account record.

Web Product Image URL: The absolute image of the primary image for this product.



The screenshot displays a configuration panel for the 'Community Hub' section. It contains three fields:

- Self Service Enabled:** A checkbox that is currently checked.
- Web Product Image URL:** A text field containing the URL: <https://nu-preview-tso--c.na39.content.force.com/servlet/servlet.ImageServer?id=015E0000008Otwp&oid=00DE0000000kMD5>
- Bill Me Enabled:** A checkbox that is currently unchecked.

Inventory

Users can set up products with quantity limits and inventory tracking to manage and track the flow of products.

Inventory Tracking

Users can set up products with current inventory information and enable inventory tracking to help track inventory levels for different types of products. For Merchandise Products, inventory tracking is used to track the remaining stock of a product. For Registration Products, like sessions, inventory tracking is used to track the number of seats in that session.

Inventory levels do not update immediately after submitting a cart, instead, **levels update within five minutes after submission**. When this update occurs, Inventory Used on the product increases and Inventory On Hand decreases. If inventory tracking is not enabled for a merchandise product, Inventory Used and Inventory On Hand are not impacted by purchase of that product.

Orders

As constituents and Users add products to their cart and submit it, Nimble AMS automatically checks and updates inventory levels.

Community Hub

To ensure constituents do not purchase products that have insufficient inventory, the Product Details and My Checkout page in Community Hub do a few checks and provide some direction.

On the **Product Details** page, constituents can view merchandise products, select a quantity to purchase, and add in-stock merchandise products to their cart. If there is no remaining quantity of a product, or constituents try to select a quantity greater than what is in stock, a message displays indicating that an insufficient quantity exists and are not allowed to add the product to their cart.

On the **My Checkout** page, constituents are notified if inventory for one of their selected products has decreased to the point that there is an insufficient quantity to be purchased. Constituents must reduce their selection or remove the product altogether to check out. When the cart is submitted, the quantity purchased reflects in Inventory On Hand on the product within five minutes of submission.

Users View

To ensure Users do not purchase products that have insufficient inventory, the Users View order process only allows the selection of in-stock products. On the Add Items step of the User View order process, products with no remaining inventory display in the list of products, but Users cannot add them to the cart. Additionally, Unit Price and Quantity for the product cannot be adjusted. If inventory for one of the selected products has decreased to the point that there is an insufficient quantity to be purchased, a message displays when they try to save, and Users must adjust their selection. On the Payment step of the User View order process, when Users try to submit the cart, if inventory for one of their selected products has decreased to the point that there is an insufficient quantity to be purchased, a message displays letting them know what product lacks inventory and Users must go back to the Add Items step and adjust their selection.

Inventory Log

To help keep track of inventory amounts, when a cart is submitted, an inventory record is created for any order item line containing a product with inventory tracking enabled. The inventory record contains the quantity purchased of the related products.

Concurrency

When inventory on a product is low and multiple individuals, Users or Constituents, attempt to purchase a product, Nimble AMS processes the carts in the sequence in which the carts are submitted. That said, once a cart has been submitted, it can take up to five minutes to update the **Inventory On Hand** for a product.

Example 1: Inventory On Hand for a coffee mug is at **1** and three constituents attempt to order the mug at the same time. All three orders will be successful. When **Inventory On Hand** is updated—within five minutes after the first order—it will read **-2** because all three orders went through. Also, once **Inventory On Hand** is updated, any other users with that product in their cart will receive a message indicating that inventory is insufficient when trying to submit the cart.

Example 2: Inventory On Hand for an event session with limited seats is at **1** and Users submit their cart first for the session and, within 5 minutes, **Inventory On Hand** is updated to **0**. A constituent trying to submit a cart with the same session receives a message indicating that inventory is insufficient. If the constituent submits their cart first and **Inventory On Hand** is updated, the opposite is true.

Again, whichever user submits their cart first can successfully purchase the product and will schedule the update of **Inventory On Hand** for that product, which will occur within 5 minutes thereafter.

Backorders

When backordering is enabled, negative inventory can be assigned to a merchandise product to indicate a backordered item. With backordering enabled, Individuals, Users and Constituents, can order merchandise products that have an inventory of **0** or less. This means inventory records are still created and **Inventory On Hand** on the merchandise product ends up populated with a negative inventory value to represent backordered items.

IMPORTANT NOTE: Backordering is only supported with **Merchandise Products**

Cancellations

When Users cancel an order containing a product(s) that is inventory tracked, within five minutes:

- **Quantity** on the related inventory record changes from the quantity ordered to **0**
- **Inventory Used** on the product decrements back to the quantity available prior to order submission
- **Inventory On Hand** is restored

Things to Keep in Mind

- Inventory levels do not update immediately. Instead, levels update within five minutes after submission or cancellation of an order.
- When setting **Quantity Limit** on a registration product, Community Hub does not currently enforce this value as the maximum number constituents can choose. Instead, if Users set **Quantity Limit** to **1**, constituents can choose to register for the session. If Users set **Quantity Limit** to **2** or more, constituents can choose to register for the session and bring as many guests to the session as they want.
- If **Inventory On Hand** on a registration product is **1** or more, in Community Hub, constituents can choose to register for the session and bring as many guests to the session as they want, regardless of the remaining seats.
- Though the Inventory Item contains the **Adjustment field**, this field is not updated when the related order is edited or cancelled.

Shipping Methods

Community Hub supports four Ship Method record types driven by Nimble AMS Users view functionality:

- **Cost:** Ship methods that are based on the cost of the merchandise being shipped.
- **Flat Rate:** Ship methods with a defined or set shipping charge.
- **Percentage of Cost:** Ship methods that are based on a percentage of the cost of the merchandise being shipped.
- **Weight:** Ship methods that are based on the weight of the merchandise being shipped.

Community Hub users can select a shipping method during the checkout process if shippable merchandise items are included in their order. The user can select the desired shipping method from the list of available methods and the appropriate fees will be added to the cart total. Shipping address fields will only be shown to the user if they have selected shippable products.

IMPORTANT NOTE: Ship methods must be marked Community Enabled in order to be visible in Community Hub.

Community Hub users do not see every ship method available. Only methods that are available and relevant to their region and the product(s) they have selected are shown to users.

Community Hub users will see a summary of the shipping type via the Shipping Method Name. If users update their shipping address, they must click the **Calculate Shipping** button in order to see updated shipping options for that address.

IMPORTANT NOTE: If a shipping option is restricted by State/Province and the user enters the full name of the state (e.g. New York instead of NY), the shipping method will not appear. They must use the state/province code (NY).

Cost-Based Ship Methods

For Cost and Percentage of Cost ship methods, Community Hub users see a shipping cost determined by the price of the products in their cart. These ship methods can be created by price range and displayed in Community Hub for specific products. The **Threshold** field can be used to determine the upper limit of the product value allowed for that ship method.

Flat Rate Ship Methods

Flat rate ship methods are displayed to the user based on set shipping charges for specific regions or products. Additional handling charges can be added to the ship method record by specifying a Handling Type (Flat Rate or Percentage of Shipping) or a Minimum Handling Charge in User view. These rates will be assigned to the product and visible to the user when their order meets the selected criteria.

Weight-Based Ship Methods

Weight-based ship methods are used when there are certain weight ranges for orders. Users can set up various weight classes to be used within different geographical regions. Total shipping cost is calculated by adding the weight of all merchandise cart items and determining the shipping address. The options available for that weight/region combination will be the only options presented to the user to select from. The **Threshold** field can be used to determine the upper weight limit for that shipping method. For example, Users can create different records with thresholds of 5,10, 15 lbs. and so on for various regions. If the total weight of the shippable products in the cart is 15 lbs., users can select that option from the ship methods lookup.

Cross Selling Products

What is Cross-Selling?

Cross-selling is a sales technique used to get a constituent to contribute more by purchasing a related product that is related to what has been purchased already. For an example, if a constituent is purchasing the 'Accounting Handbook for Beginners' then there is a good chance that the person might be interested in 'Annual Conference for Accounting Professionals' or 'Journal for Accountants'. This can help increase the visibility of products and services and help in increasing revenue and engagement for the Organization or it could be the Membership Directory when a Membership for an Organization is purchased.

Cross-Selling vs. Upselling

Its easy to confuse cross-selling with upselling. Cross-selling involves offering the constituent a related product(s) or service(s), while upselling typically involves trading up to a better version or more benefits of what's being purchased.

Default Cross-sell Carousel logic is based on:

- **Community Hub Store**- based on Account tags
- **Product Details** –based on Product tags
- **Donate Now** –Membership Products tags
- **Upcoming Events** –based on Account tags
- **Checkout** –based on Products in the cart
- **Order Summary** –based on Purchased products

In Community Hub, the below example is a “You also might Like” - “Carousel” that is displayed at the bottom of Community Hub Store page as an example based on the above logic. **An administrator is required to activate Cross-selling for an Organization.**

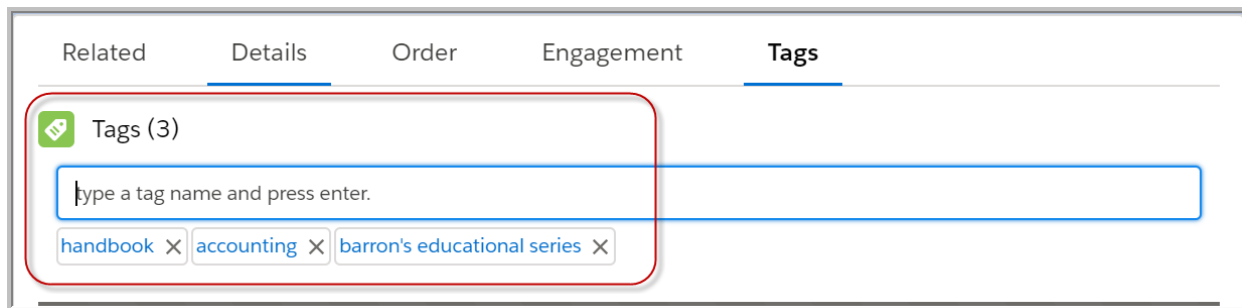


Cross-Selling on the Product Item

After an Administrator has activated Cross Selling the **Related Records** tab is added on the Product records, and if required can configure this **Related Records** tab on Account, Events or Membership type records. The **Related Records** tab displays the related products and accounts according to the entered tags. The products and accounts are sorted in order from highest number of shared tags to the lowest.

On the Product Details page, users can see details on a merchandise product such as its name, a large image, a full product description (including HTML content), retail price, and—if users are logged in as members—the member price.

If an Org is enabled with Cross-Sell feature, a carousel is displayed at the bottom of the page that shows Community Hub enabled merchandise products with “tags” in common to the product being viewed. For example, “handbook”, “accounting” and “Barron’s educational series” would have a few products in common.



The carousel then displays related products in a group of four at one instance and if there are more than four related products, the carousel auto-scrolls to show the additional products or the user can manually scroll to view them. Constituents can see the image and title of the related products based on the “Tags” and if they are interested in buying the product, they can click the product to view the product details and add it to the cart.

An administrator can edit the page to show the required number of related products and turn on/off the auto-scroll feature. Also, the administrator can filter the products to be displayed on the carousel, based on the product type.

Ordering a Cross Sold Product

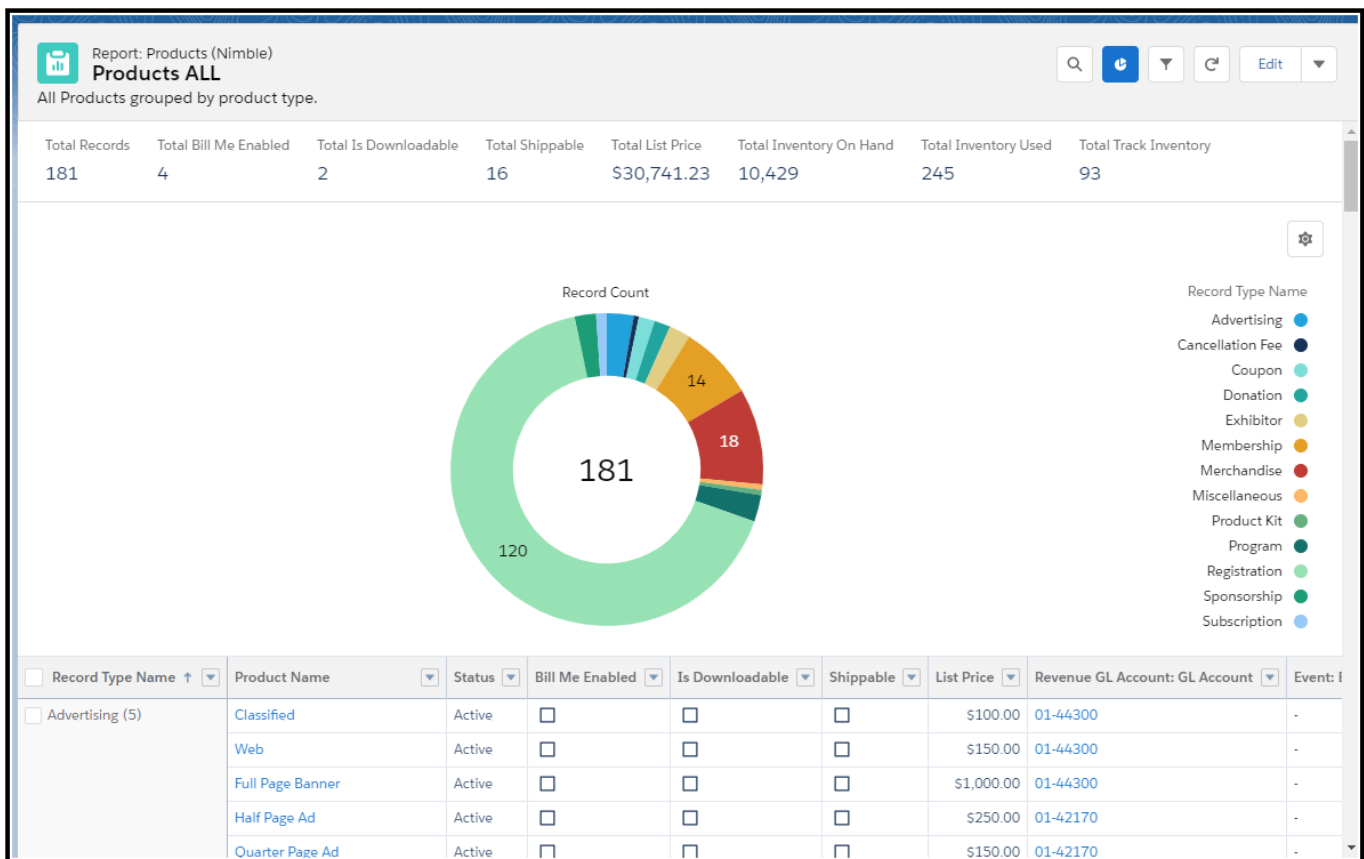
For additional information about cross-selling in Nimble AMS – reference Chapter 14.10– Cross Selling Carousel in Community Hub.

Product Reports

To run a Product report:

1. Click the **Product** Item.
2. Select the **All Folders** section under **Folders**.
3. Click the **Products (Nimble AMS)** folder.
4. Click on the **Products ALL** report.

Products ALL



IMPORTANT NOTE: Products tracking in dashboards usually handled by Orders and Sales Dashboards.

CHAPTER

9 Orders and Payments

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Objective

In this section, Users will learn to manage Orders and Payments in Nimble AMS.

This includes:

- Understanding Orders and Order Items
- The Order Process
- Carts and Cart Items
- Tax and Shipping
- Payments and Payment Lines
- Order and Payment Adjustments
- Order Batches
- Order Analytics and Reports

Understanding Orders and Payments

User's Constituents may want to purchase a Membership, Event Registration, Subscription, Merchandise, Miscellaneous product or a Donation from the Association. Nimble AMS makes it simple to combine the purchase of any number of products into a single order that can be paid immediately or through an invoice. Optionally, orders can be grouped into batches and processed together, simplifying handling and reconciliation.

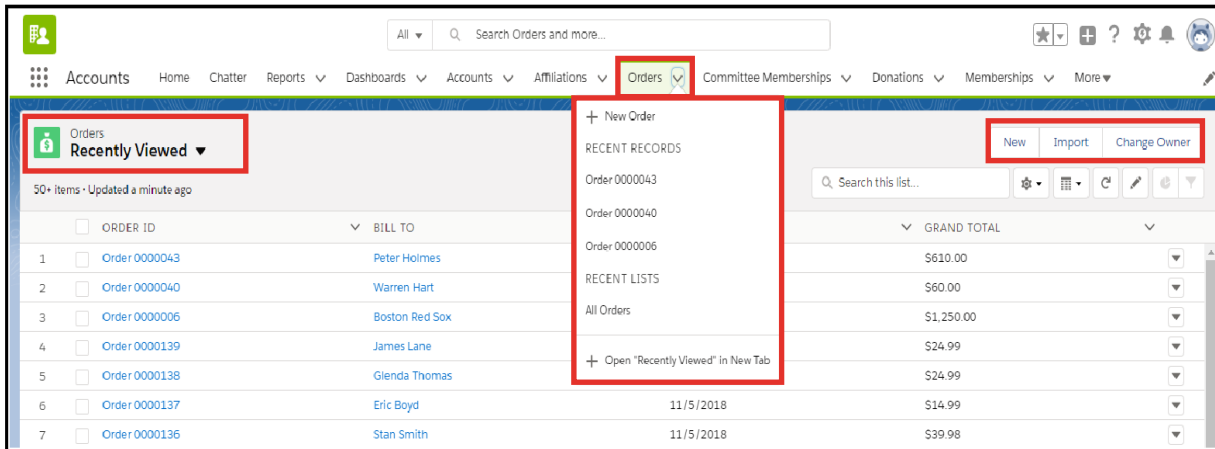
Nimble AMS provides a similar order experience for self-service Constituents and Users. Both Users and Constituents can place orders, make payments, and obtain confirmation of an order, all in one place.

With Orders and Payments Users can manage:

- New Orders
- Existing Orders
- Bulk Operations
- Payments
- Refunds
- Order and Payment Adjustments
- Order Analytics

Orders Item

The Orders Item provides several different ways of finding, organizing, and interfacing with orders.



From the TOP RIGHT HAND, **Actions** area, Users can:

- Create a **New Order**
- **Import data to** Orders

From the TOP MIDDLE, **Orders** Item drop down, Users can:

- Create a **New Order**
- Use **Recent Records** to return to a previously accessed Orders
- Use **Recent Lists** to return to a previously accessed List View of Orders

From the TOP LEFT, **Orders Recently Viewed** drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

The Order Process

Within the order process, Users can progress through a multiple step process where they select one or more product(s) which are added to a cart. Throughout the process, Users can select related options for the type of product, like shipping and tax options for merchandise, and apply payment. When the process is complete, the cart is submitted and turned into an order which can later be edited or cancelled.

Order Info

The Order Info step is the first step in the order process where the user sets the Bill To account for the cart, the entity in which the cart is being created, and the batch of which this cart is part.

Add Items

The Add Items step of the order process is where the user selects the products the user wants to include in the cart. Users display this step each time they choose to add a item to the cart.

Users will see a different page in this step depending on what type of cart item they are adding to the cart.

Verify Cart

The Verify Cart step of the order process is where users review the cart item(s) in the cart. To update products that need to be updated, users can click to edit or delete them. Users will be brought to this step after adding each cart item to the cart.

Tax and Shipping

The Tax and Shipping step is the part of the order process seen only when users have a cart item(s) containing taxable or shippable merchandise products. Each cart item with taxable or shippable merchandise products displays the combined weight, shipping cost, tax rate with cost and the user can choose and update the sales tax and ship method options for each.

Payment

The Payment step of the order process is where users enter purchase order and invoice information, select the products in the cart to pay for, choose a payment method, modify any payments, and submit the cart.

Placing an Order

The order process flows through **four** stages:

- I. Define order information
- II. Add item(s) to the cart
- III. Add a payment or create an invoice for later payment
- IV. Submit and finalize the order

During the first three stages of the process, items are kept in a cart component that has no accounting impact. At the fourth stage (Submit), the order is finalized and the full order details are generated.

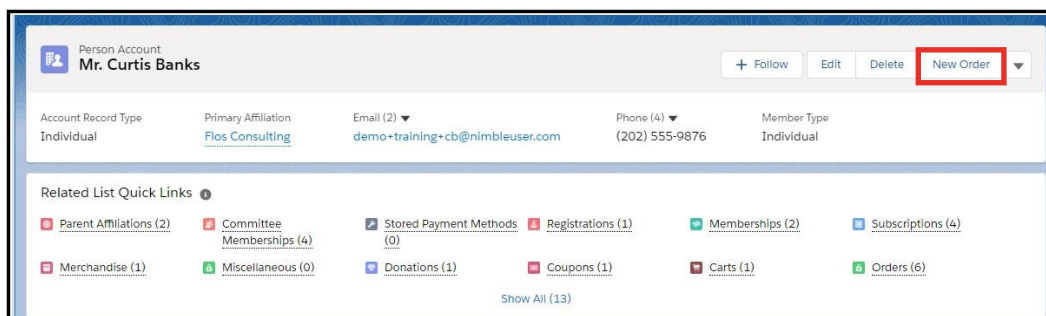
Creating a New Order

In this section users will learn how to create a new order.

The Order Info step is the first step in the order process where users set the Bill To account for the cart, the entity in which the cart is being created, and the batch of which this cart is part.

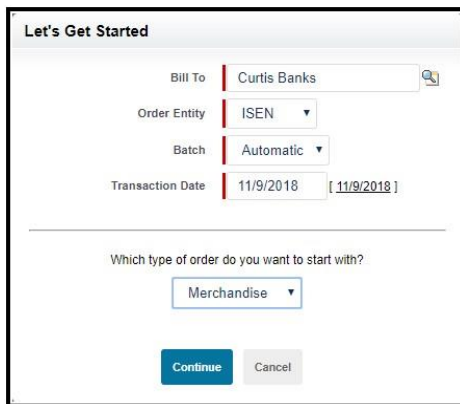
New Order Info

1. Using **Search**, find and select the **Account** for **Curtis Banks**.



2. Click the **New Order** button.
3. Use the **Let's Get Started** dialog box to set the key fields to get a cart started.

4. The drop down values of the order usually remain as displayed unless exceptions apply:
 - **Bill To:** Can be changed or entered if selected off of a blank order.
 - **Order Entity:** Could be changed if desired to Foundation, Charity, or some additional Entity that is being tracked.
 - **Batch:** If a manual batch has been set up (possibly for Checks) it would appear in the drop down and could be selected.
 - **Transaction Date:** If there is a necessity to back/forward date the order.
5. From the **Which type of order do you want to start with?** dropdown, select **Merchandise**.



The screenshot shows a form titled "Let's Get Started" with the following fields and values:

- Bill To:** Curtis Banks
- Order Entity:** ISEN
- Batch:** Automatic
- Transaction Date:** 11/9/2018 [11/9/2018]

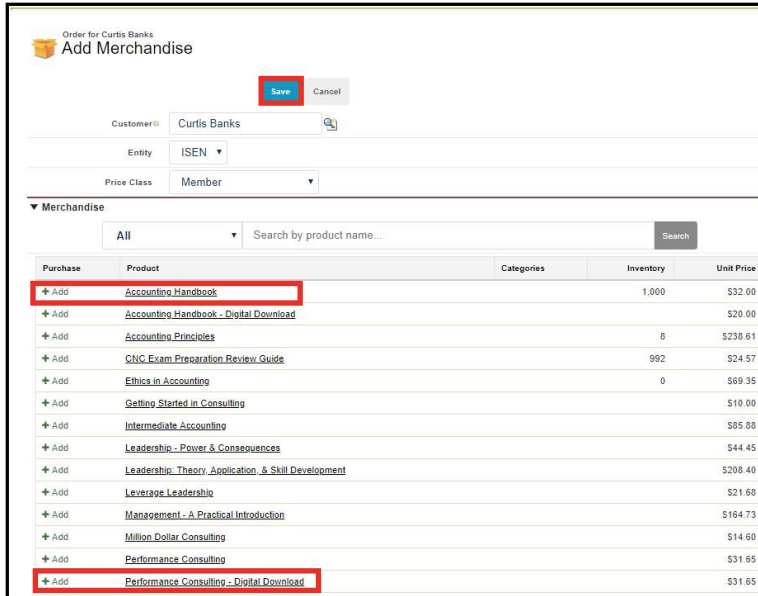
Below these fields, there is a question: "Which type of order do you want to start with?" with a dropdown menu set to "Merchandise". At the bottom of the form are two buttons: "Continue" (highlighted in blue) and "Cancel".

6. Click **Continue**.

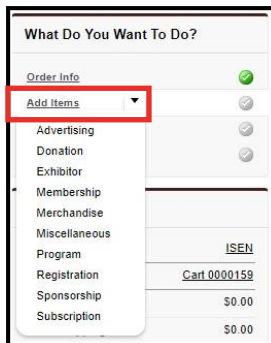
Add Merchandise

The **Add Merchandise** step of the order process is where products are added to the cart.

1. Click **+Add** next to the **Performance Consulting - Digital Download** Product.
2. Click **+Add** next to the **Accounting Handbook** Product.



IMPORTANT NOTE: The Add Items drop down menu (upper right) available to add additional products to an order.



3. Click the **Save** button from either the top, or bottom of the page.

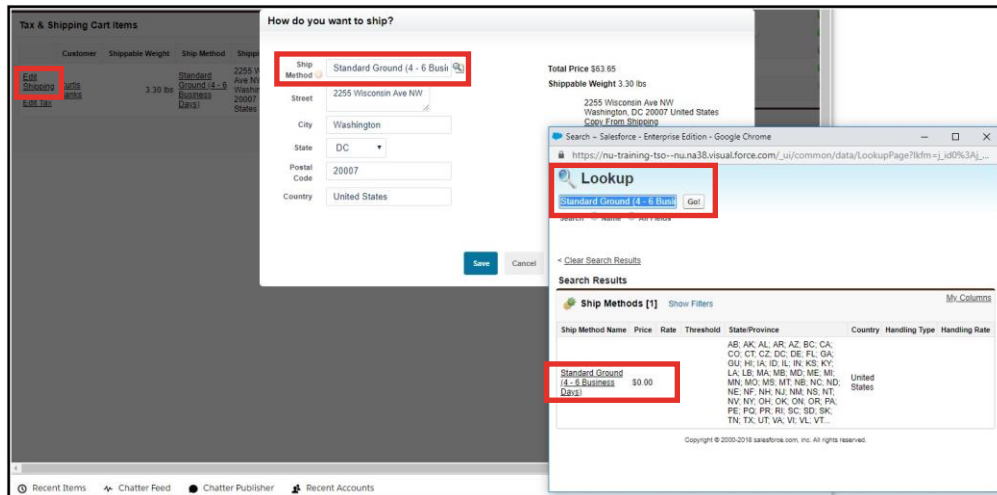
Tax and Shipping Step

The Tax and Shipping step is the part of the order process seen **only** when users have a cart item(s) containing taxable or shippable merchandise products. Each cart item with taxable or shippable merchandise products displays the combined weight, shipping cost, tax rate with cost and users can choose and update the sales tax and ship method options for each.

If a user has multiple cart items containing taxable or shippable merchandise products, like in the case where a user is ordering merchandise sold by the association and foundation, users can click to edit the sales tax and ship method options for each cart item individually.

1. From the **What Do You Want To Do?** Section, click **Go To Tax & Shipping**.
 - **Accounting Handbook** is a physical product that will require shipping assigned to it.
2. Click on the **Edit Shipping** link.
3. Users can select from the following **Ship Methods**:
 - 2 Day Express
 - Express Ground
 - Next Day
 - Standard Ground
4. Type **Stan** in the **Ship Method** field and hit the lookup icon to the right.

5. Select the **Standard Ground (4-6 Business Days)** link from the results display.



6. There is no applicable Tax, so the **Edit Tax** link does not need to be completed.

7. Click **Save**.

8. Click **Go to Payment**.

Payment Step

The Payment step of the order process is where Users enter purchase order and invoice information, select the products in the cart to pay for, choose a payment method, modify any payments, and submit the cart.

Selecting Cart Items for Payment

Users can review the list of all cart items and choose to which they would like to apply payment. By default, all order items in the cart are preselected for payment application. Users can deselect a cart item(s) to avoid applying payment for it when the order is submitted.

IMPORTANT NOTE: Users can apply payment for the deselected cart item(s) later by editing the order after submission.

1. Click **Pay Now** to apply payment to the cart items.

Order for Curtis Banks
Add Payment

Cart Items

Customer	Order Type	Total
<input checked="" type="checkbox"/> Curtis Banks	Merchandise	\$63.65

Payments
No Payments

Pay Now

2. From the **Payment Details** dialog box, select **Check**.
3. Enter **12345** in Check Number.

Payment Details

Payment Method: Check

Payment Amount: 63.65

Check Number: 12345

Note

Save Cancel

4. Click **Save**.

Paying Order Balances

As payments are received for outstanding invoices and AR balances, these payments need to be entered in Nimble AMS and applied to the correct order and order items. These payments can be entered at any time via order edits and adjustments.

In this **exercise**, users will learn how to add a **Payment** to an existing **Order**.

1. Locate and Open the desired **Order**.
 - From **Search** - type in **Order #** (i.e. Order 0000015)
 - From an **Account** record – click the **Orders** RLQL – locate desired Order
 - From **Orders** Item – click on **Orders with Balances Due** or **Invoiced Orders** List View
2. Click **Edit**.
3. On the **Let's Get Started** popup – adjust, IF NECESSARY:
 - Adjustment Entity
 - Batch
 - Transaction Date
4. Click **Continue**.
5. Click **Go To Payment** (lower right).
6. Click on **Pay Now**.
7. From **Payment Method** dropdown, select: **Cash**, **Check**, **Credit Card**, or **Stored Payment**.
 - **Bad Debt** or **Credit Refund** are available for those circumstances.
8. Fill in the Payment details:
 - **Payment Amount** can be adjusted to reflect a partial payment.
 - **Notes** can be added to any Payment
 - **Credit Card** requires a full **CC #**, valid **Expiration Date**, and **CSC #**
 - **Check** required a **Check #**
9. Click **Submit**.
10. Observe the resulting adjusted **Order** with the **Balance** equal to **\$0**.

Scheduling Payments

There are three basic types of scheduled Payment.

- **One-time Scheduled Payment** – to postpone to a future date a payment anticipated for a one-time payment.
- **Installments** – Payment divided evenly between Payment frequencies.
- **Recurring Payments** – Payment in full delivered on a scheduled date.

To Set up a One Time Scheduled Payment:

1. Using **Search**, find and select the **Account** for **James Meaden**.
2. Click **New Order**.
3. Select **Membership** from the list of entity order items for the selected entity.
4. From the **Membership Type** dropdown, select **Individual**.

Order for James Meaden
Add Membership

Customer: James Meaden

Membership Type: Please select a membership type

5. On the **Add Membership** review screen, ensure that **Individual Membership** selected.

Membership Products					
Purchase	Product	Stage	Start Date	End Date	Price
<input checked="" type="checkbox"/>	Individual Dues	Join	2/1/2020	1/31/2021	500.00

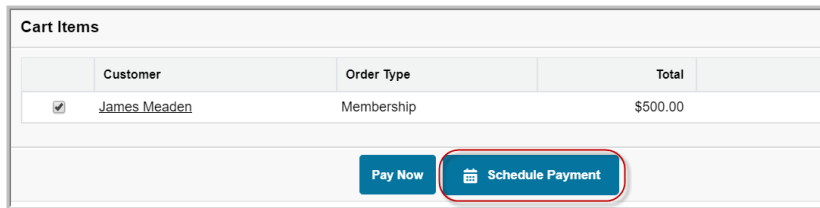
Other Products					
Purchase	Product	Stage			Price
<input checked="" type="checkbox"/>	Charter Dues	Join			10.00
<input type="checkbox"/>	New Member Roundtable	Join			10.00

Donation Products					
Purchase	Product	Appeal	Stage		Price
<input type="checkbox"/>	Research Donation	No Appeals Configured	Join		100.00
<input type="checkbox"/>	Education Foundation Donation		Join		100.00
<input type="checkbox"/>	PAC Donation	No Appeals Configured	Join		100.00

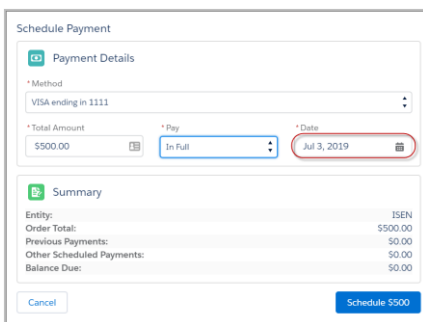
Save Cancel

6. Click the **Save** Button.

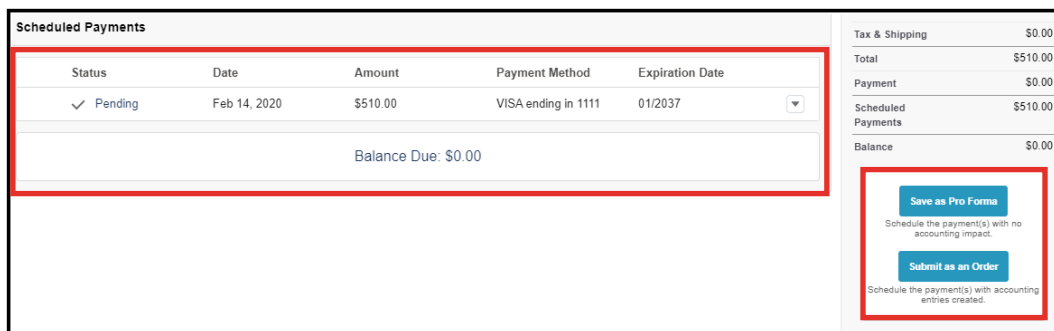
7. Click **Go to Payment** button.
8. Click the **Schedule Payment** button.
 - Users will schedule a **One Time Scheduled Payment** for this exercise.



10. Change the **Date** field to **one month in the future**.



11. Click the blue **Schedule \$500** button.
12. Observe the following changes to the **Order**:
 - An additional **Scheduled Payments** section has been added.
 - Users can **Save/Submit Payments** as:
 - **Pro Forma**: No Accounting Impact.
 - **An Order**: Accounting Entries Created.



13. Click the **Submit as an Order** button to complete the transaction.

To Schedule Installment Payments:

1. Create an **Order** for **James Meaden** for a **Research Donation** of **\$10000.00**.
2. **Save** and **Go to Payment – Schedule Payment**.
3. Change **Pay** dropdown to **Installments**.

The screenshot shows the 'Schedule Payment' form with the following details:

- Payment Details:**
 - Method: VISA ending in 1111
 - Total Amount: \$500.00
 - Start Date: Jul 3, 2019
 - Repeats: Monthly Installment - 12
 - Occurs: A Number of Times
 - Number of Times: 1
- 1 Payments:**

Jul 3, 2019	\$500.00
-------------	----------
- Summary:**
 - Entity: ISEN
 - Order Total: \$500.00
 - Previous Payments: \$0.00
 - Other Scheduled: \$0.00
 - Payments: \$0.00
 - Balance Due: \$0.00

The 'Pay' dropdown menu is highlighted with a red box and shows 'In Installments' selected.

4. Keep the Monthly Installments in the **Repeats** dropdown.
5. From the Occurs dropdown, select **A Number of Times**.
6. In the **Number of Times** field, enter **10**.
7. Observe the **Scheduled Amounts** (10 Payments) and **Summary** are previewed.

The screenshot shows the 'Schedule Payment' form with the following details:

- Payment Details:**
 - Method: VISA ending in 1111
 - Total Amount: \$10,000.00
 - Start Date: Jan 16, 2020
 - Repeats: Monthly Installment - 1
 - Occurs: A Number of Times
 - Number of Times: 10
- 10 Payments:**

Jan 16, 2020	\$1,000.00
Jan 16, 2021	\$1,000.00
Jan 16, 2022	\$1,000.00
Jan 16, 2023	\$1,000.00
Jan 16, 2024	\$1,000.00
Jan 16, 2025	\$1,000.00
- Summary:**
 - Entity: ISEN
 - Order Total: \$10,000.00
 - Previous Payments: \$0.00
 - Other Scheduled: \$0.00
 - Payments: \$0.00
 - Balance Due: \$0.00

The 'Schedule \$10000' button is highlighted with a red box.

8. Click the blue **Schedule \$10000** button to complete the transaction.
9. Click the **Submit as an Order** button to complete the transaction

Cancelling & Refunding Orders

Initiating the Refund Process

In this section, users will understand how to **cancel an order** and **issue a refund** using a Credit Card, Check, or Cash. Because of its additional complexity, the processing of Credit Card refunds and the three distinct levels of elapsed time that affect that process, will be covered first. Users will then process separate refunds for the three credit card time frames and a check refund.

Credit Card Refund Overview

Users can process cancellations and refunds for credit cards using the order process, but depending on the timing of those actions, different steps are required.

Voids

A void deletes the charge from a constituent's account in the payment gateway before the credit card processor has settled the charge. Credit card payments can take up to **24 hours** to settle in the payment gateway. Each night Nimble AMS runs a scheduled job that contacts the gateway to determine which payments have settled. When an order is cancelled and then a credit card is successfully voided, a manual refund is NOT necessary.

Cancellations and Automatic Refunds

After a payment settles, but **before 120 days have passed**, cancellations and subsequent refunds in the full amount or partial amount occur can be issued. This is because the payment gateway provides a token that enables the payment to remain active during that time-period. Users must go through the order cancellation process first, and then will be given the opportunity to refund the payment to the original credit card. Users can also manually choose a different card for refund if desired.

Cancellations and Manual Refunds

After 120 days the token provided by the payment gateway expires and an automated refund is no longer possible. To refund **after 120 days**, users will still have to cancel the order, but then will have to manually refund by selecting a check or keying in a different credit card. It is advised that a check/different credit card be used to refund after 120 days to avoid fraud flagging.

IMPORTANT NOTE: Voids and Refunds to **eCheck payments** process manually in the payment gateway.

Cancelling and Refunding an Order

Orders can be cancelled at any time once an order is submitted in Nimble AMS. This can range from 1 second after the order is submitted to several years later if necessary. Partial cancellations as well as cancellations of all products on an order are also accommodated. Once an Order is successfully cancelled, additional Transaction records are added to the order that reflect GL adjustment to both order and payment transactions.

In the following **exercises**, users will learn how to cancel and refund (if necessary) for:

- Cancelling/Refunding Orders paid by **Credit Card** within **first 24 Hours** of Submission
- Cancelling/Refunding Orders paid by **Credit Card** within **first 120 Days** of Submission
- Cancelling/Refunding Orders paid by **Credit Card** **after 120 Days** of Submission
- Cancelling/Refunding Orders paid by **Check/Cash** at **any time**.

Cancelling/Refunding Orders paid by Credit Card within first 24 Hours

Note: in the Training org, the instructor will have to demonstrate this exercise, as credit card payments cannot be taken due to payment gateway restrictions on training/test environments.

1. Create an **Order** from an **Account** for the **Accounting Handbook – Digital Download**.
2. Pay with **Credit Card – Visa (4111111111111111)**, Exp Date - **12/2022**, CSC - **234**
3. **Complete** the **Order** by **Submitting**.
4. The completed **Order** form displays BUT, the client has just decided:
 - They do **NOT** want the product
 - They need a **refund** to their credit card
5. On completed **Order** form, click the **Edit** button (upper right).
6. Click on the **Continue** button.
7. Click **Payment** link under the, **What Do You Want To Do**, section (upper right).
8. Under the **Payments** section, float over the **Payment ID** link, and click on the **Edit** button.
9. Under the **Payment** section, select the **Payment is Void** checkbox.
10. Click **Submit Order** button.

IMPORTANT NOTE: After 24 hours, the **Payment is Void** will not work, in which case users will have to follow the automatic or manual refund steps in the following exercises.

Cancelling/Refunding Orders paid by Credit Card within 120 Days

1. In Search, type Payment Transactions by CC last 150 Days.
 - Users can also access this **Report** by going to **Reports, All Folders, Accounting Folder, Payments Sub-Folder**.
 - If User does NOT have access to this Report or Training Org, they can find an Order under the **Order Item** for the Date range paid by **Credit Card**.
2. Open an Order that has a Balance **WITHIN the last 120 Days** under **Transaction Date**.
3. When Order displays, click **Edit**.
4. Click on the **Continue** button.
5. Click on the **Cancel** button in the upper left of screen, to left of Order Item listed.
 - If a more than one Order Item displays AND a user wishes to cancel all the items on an order, they can click on the **Cancel All Items** link that displays under Submit Order button in lower right of screen.
 - Users can cancel items individually by the **Cancel** button to the left of Order items.
6. Click **OK** on the **Order Cancel Confirmation** popup that displays.
7. Under the **What Do You Want To Do?** Section in the upper right of screen, click on the **Payment** link.
8. Click on the **Refund** button.
9. Under the **Payment Details** popup, **Please select a Payment Method** dropdown, select **Credit Card**.
10. **Observe** the following:
 - The previously selected CC used for initial payment defaults in the Credit Card field.
 - The Refund Amount is listed as a negative.
11. Click on **Save**.
12. **Submit** the Order.
 - **Note:** in the Training org, the instructor will have to demonstrate this exercise from this point on as credit card payments cannot be taken due to payment gateway restrictions on training/test environments.
13. On the Completed Order, note the additional Transaction records adjusting the GLS for the cancellation.

Cancelling/Refunding Orders paid by Credit Card after 120 Days

1. In Search, type **Payment Transactions by CC last 150 Days**.
 - Users can also access this **Report** by going to **Reports, All Folders, Accounting Folder, Payments Sub-Folder**.
 - If User does NOT have access to this Report or Training Org, they can find an Order under the **Order Item** for the Date range paid by **Credit Card**.
2. Open an Order that has a Balance **OVER the last 120 Days** under **Transaction Date**.
3. When Order displays, click **Edit**.
4. Click on the **Continue** button.
5. Click on the **Cancel** button in the upper left of screen, to left of Order Item listed.
 - If a more than one Order Item displays AND a user wishes to cancel all the items on an order, they can click on the **Cancel All Items** link that displays under Submit Order button in lower right of screen.
 - Users can cancel items individually by the **Cancel** button to the left of Order items.
6. Click **OK** on the **Order Cancel Confirmation** popup that displays.
7. Under the **What Do You Want To Do?** Section in the upper right of screen, click on the **Payment** link.
8. Click on the **Refund** button.
9. Under **Payment Details** popup, **Please select a Payment Method**, select **Check**.
 - To avoid a Fraud flag, users should NOT refund to the previous credit card, but should issue via a check if refund is for an order initially taken by a cc that is over 120 days old.
10. Enter a **Check Number** – this would be the AP check used by accounting.
11. Click on **Save**.
12. **Submit** the Order.
13. On the **Completed Order**, note the additional **Transaction** records adjusting the GLS for the cancellation.

Cancelling/Refunding Orders paid by Check

1. **Search** and **Run** the **Payments Find** report.
2. Click on an **Order Id** that corresponds to a transaction taken with a **Check** as Payment under the **Pay Method** column.
3. When Order displays, click **Edit**.
4. Click on the **Continue** button.
5. Click on the **Cancel** button in the upper left of screen, to left of Order Item listed.
 - If a more than one Order Item displays AND a user wishes to cancel all the items on an order, they can click on the **Cancel All Items** link that displays under Submit Order button in lower right of screen.
 - Users can cancel items individually by the **Cancel** button to the left of Order items.
6. Click **OK** on the **Order Cancel Confirmation** popup that displays.
7. Under the **What Do You Want To Do?** Section in the upper right of screen, click on the **Payment** link.
8. Click on the **Refund** button.
9. Under **Payment Details** popup, **Please select a Payment Method**, select **Check**.
10. Enter a Check Number – this would be the AP check used by accounting.
11. Click on Save.
12. Submit the Order.
13. On the Completed Order, note the additional Transaction records adjusting the GLS for the cancellation.

Payments and Refund Reports

The following reports used during Training should be built in the Client production version of Nimble AMS:

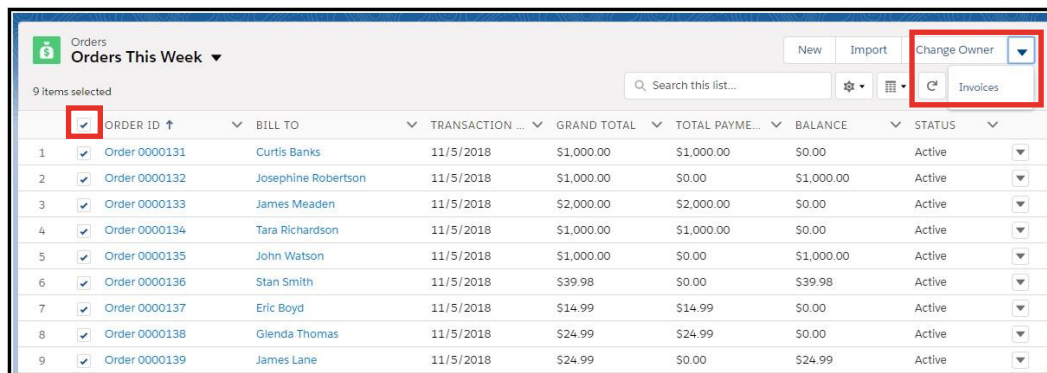
Find Payments - enables users to see breakdown of payments by payment method: Credit Card, Check, or Cash. Contains Order number field for easy access to apply Cancellation or other action.

Refunds ALL– Enables users to view all Refunds taken. Users can narrow by date range if desired. Contains transactions to catch any Credit Card refunds made directly through the Payment Gateway but do NOT generate a separate, payment record.

Bulk Invoicing or Order Confirmation

Using the Orders List View, users can invoice multiple orders at once.

1. From the **Nimble AMS** app, select the **Orders** tab.
2. Click on the **Recently Viewed** drop down on the left.
3. Select the **Orders This Week** list view.
4. Click the **check box** on the upper left next to **Order Id** to select All orders in the view.
5. To the right of **Change Owner** (upper right), click on the **drop down**.
6. Click on **Invoices**.



7. Nimble AMS generates Invoices or Order Confirmations for the selected orders, and presents a preview page, with three actions: **Generate**, **Print/PDF** or **Email** and **Close**.

- **Generate:** creates a report of the invoices.
- **Print/PDF:** To retain a reference copy of the invoice(s), select PDF and then save the output as a file or Print the invoices as hardcopies.

Note: Make sure the printing of Headers and Footers is disabled.

Email: To save trees, invoices can be generated and sent to the Bill To contact from the order. Up to 1000 emails can be sent in one day. Note that this is a shared limit, and other emails sent by other processes count toward the limit. The email is sent using Rich HTML, which is displayed in line by modern browsers.

Running Order Confirmations and Invoices

Nimble AMS provides a variety of standard order reports. These reports assist users in the day-to-day order processing. Order reports can be accessed in a variety of locations.

- Order confirmation and invoice reports from the Order record
- A variety of other reports from the Reports tabs

Order Confirmation

While viewing the Order record, users can view a printer-ready order confirmation report that can be printed or emailed via a single button click.

To run an Order Confirmation:

1. Complete a **new order** OR navigate to an **existing order**.
 2. Click **Order Confirmation**.
 3. Click either **Email** or **Print/PDF**.
-

Tip: Orders for individual accounts, the email will be sent to the email on the account and/or entered in the additional recipient field. Orders for organization accounts, the email will be sent to the affiliated primary contact accounts email and/or entered in the additional recipient field.

Order Invoice

While viewing the Order record, users can view a printer-ready order invoice report that can be printed or emailed via a single button click.

To run an Order Invoice:

1. Complete a **new order** OR navigate to an **existing order**.
2. Click **Invoice**.
3. Click either **Email** or **Print/PDF**.

Managing Carts

If an order is started but NOT submitted, the items remain in a cart.

Orders are left in Carts for **three main reasons**:

- I. The Cart is left unprocessed **internally** by an employee.
- II. The Cart is left unprocessed **externally** on Community Hub by a user.
- III. The Cart is part of the **membership renewal** cycle.

IMPORTANT NOTE: Community Hub AND Membership Renewal Carts are automatically excluded from the Batching process. However, unprocessed INTERNAL Carts (created manually by employees) must be either excluded, deleted, or submitted for Batches to process successfully. Employees that generate those carts, or users in charge of Batching, should track these Carts and take the appropriate actions.

Editing a Cart

Any order in cart status can be completed by editing the cart and submitting the order.

To change a cart to an order:

1. Locate the **Cart** record in one of these five ways.
 - **Tasks** - Carts appear on the **Home** tab under **My Tasks**.
 - **Batch** - Carts appear on the **Batch** record associated with the order.
 - **Account** - Carts appear on the Order's **Account** record, **Cart** Related List.
 - **Cart Org** - Carts appear as Cart records on a **Cart org list view**.
 - **Reports** – Run an Outstanding Carts report. This report could be tied to the logged in employee and embedded in a dashboard for easy access/reminders.
2. Select the **Cart** record.
3. Click **Edit**.
4. Complete the entry of the order item(s) as needed.
5. Complete the entry of the payment(s) and/or no payment for AR/invoice as needed.
6. Click **Submit**.

Deleting a Cart

When orders are incomplete and in the Nimble AMS cart, they may need to be removed because they are no longer needed or they were created in error. Instead of editing the Cart and submitting, the cart can simply be deleted and removed.

To delete a cart:

10. **Locate** the **Cart** record in one of five ways listed in previous exercise.
11. Open the **Cart** record.
12. Click **Edit** (upper right).
13. On the **Order Information** pop-up, click **OK**.
14. Click **Delete Cart** (lower right).
15. On Confirmation pop-up, click **OK**.

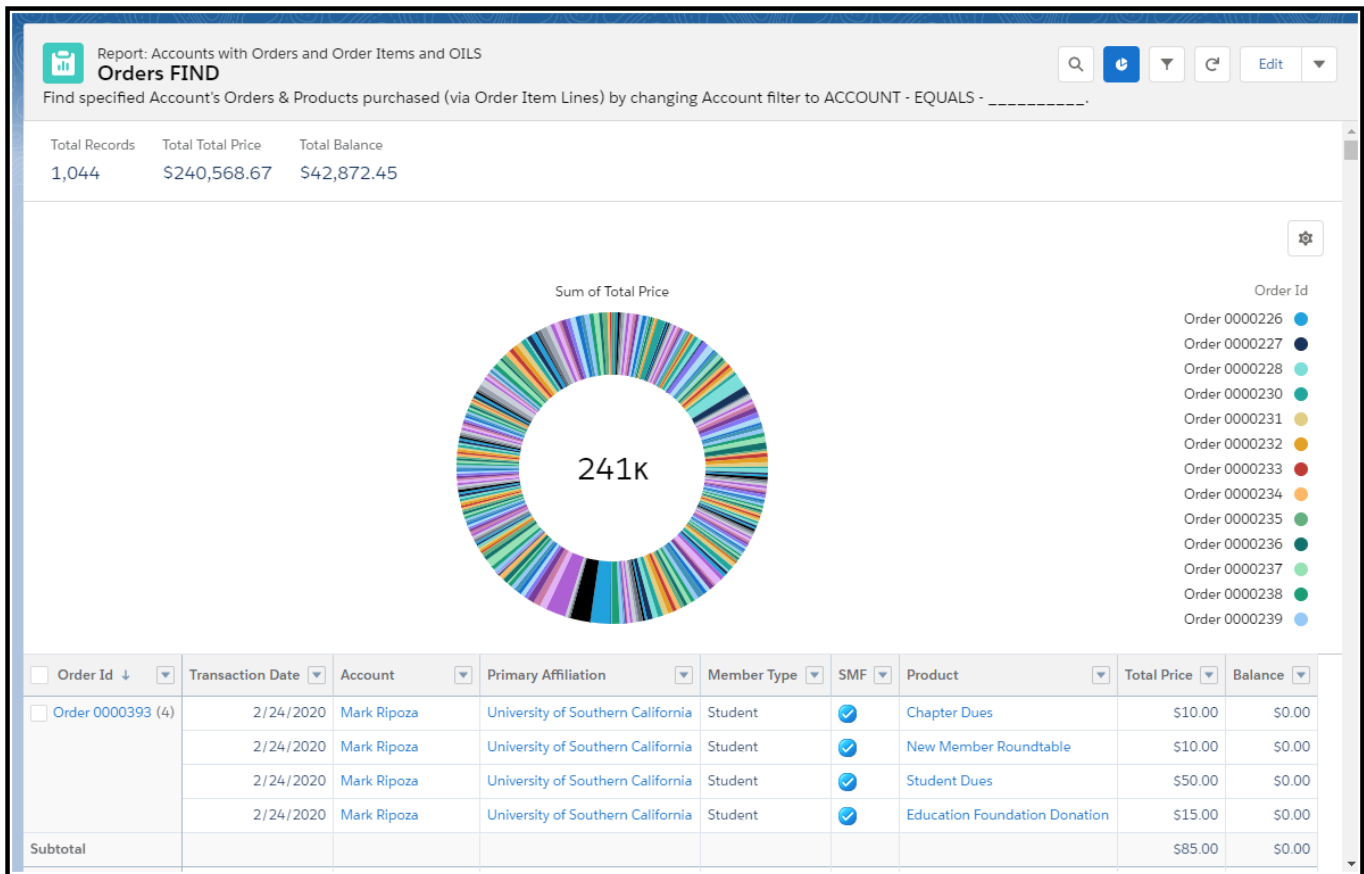
IMPORTANT NOTE: Carts with Payments CANNOT be deleted. The Cart would have to be processed as an Order OR the Payment would have to be voided before the Cart can be removed.

Order Reports and Dashboards

To run an Orders report:

1. Click the **Orders** Item.
2. Select the **All Folders** section under **Folders**.
3. Click the **Orders (Nimble AMS)** folder.
4. Click on the **Orders FIND** report.

Orders FIND

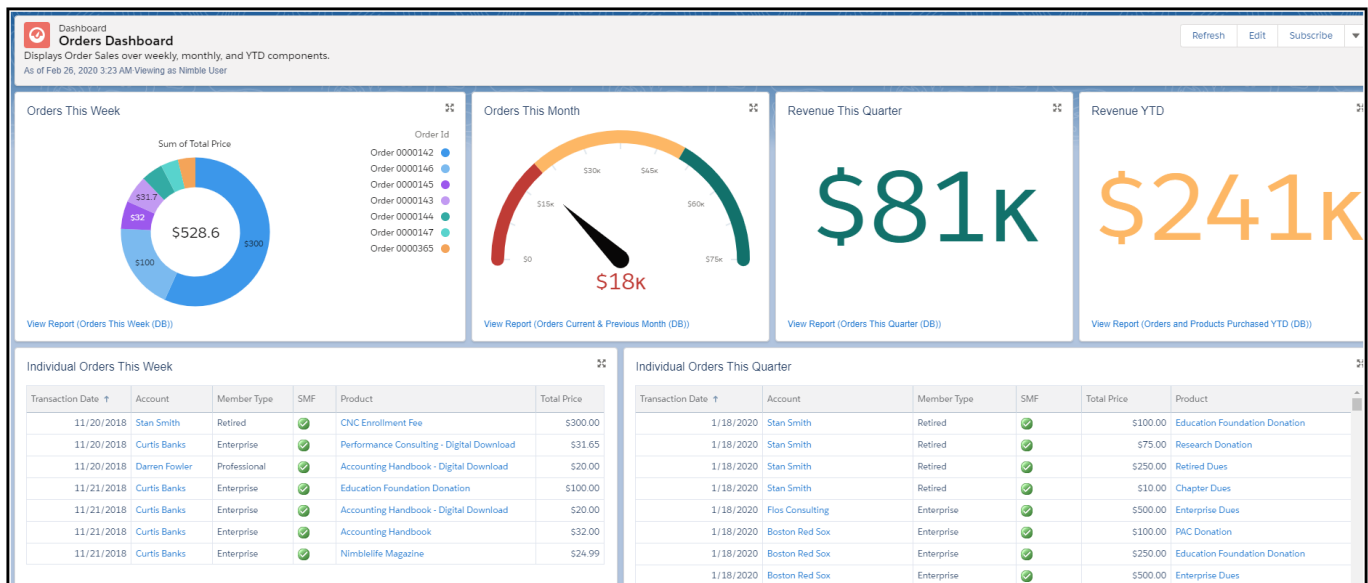


- Displays **Account, Order, Order Item, and Order Item Line** info.
- Enables users to see **ALL Products** that were contained on the Order and the individual **Prices** paid for each item.

Orders Dashboard

To display the Orders dashboard:

1. Click the **Dashboards** tab.
2. Click on the **All Folders** section.
3. Click the **Orders (Nimble AMS)** folder.
4. Click on the **Orders Dashboard**.



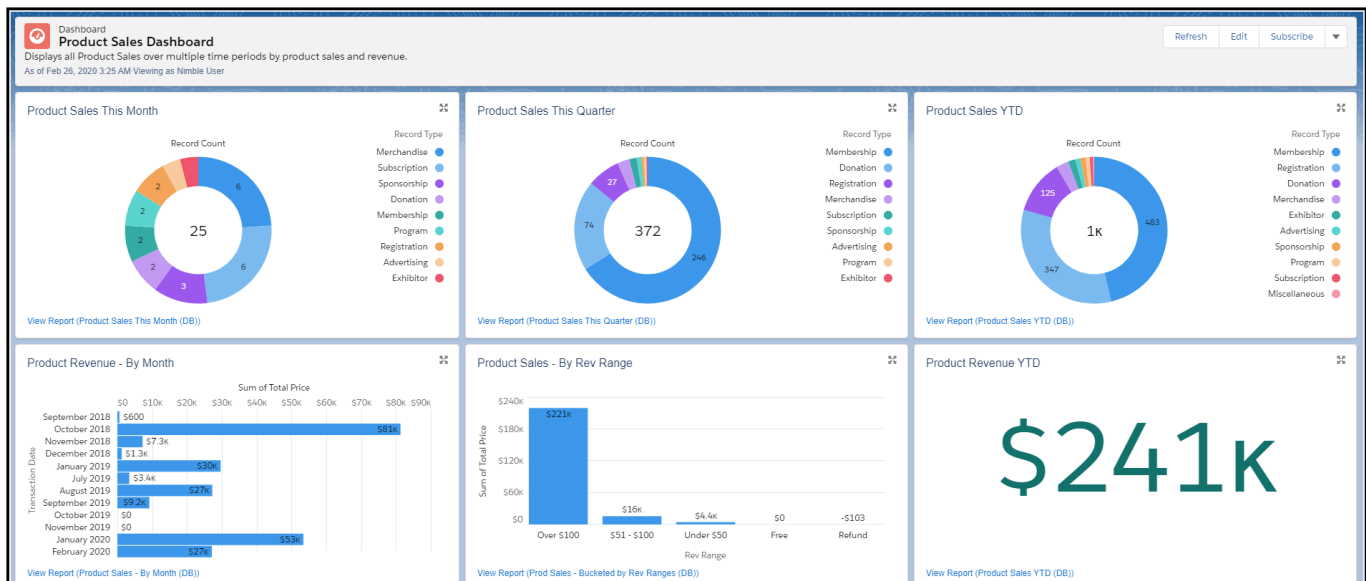
Notes:

- The Orders Dashboard displays the Orders that have occurred within each of the designated time periods with the total revenue. Users can click on the accompanying View Report link to see the individual Orders.
- Sum of Total Price equals the amount the purchaser paid for the items on the order individually including discounts.
- Cannot sum the total number of Orders as the Record Count for this view can only total ALL Order Lines, and not just Orders (which could have multiple order lines).
- ALWAYS check the Date Range that is being used to filter reports - in this case the Date Range should be set to Order Created Date.

Product Sales Dashboard

To display the **Product Sales** dashboard:

1. Click the **Dashboards** tab.
2. Click on the **All Folders** section.
3. Click the **Product Sales (Nimble AMS)** folder.
4. Click on the **Product Sales** Dashboard.



Notes:

- The **Product Sales** dashboard displays all product sales occurring within each of the designated time periods with the total count of each Product Type. Users can click on the accompanying View Report link to see the individual Products ordered and the revenue generated.
- Sum of Total Price equals the amount the purchaser paid for each product individually including discounts.
- ALWAYS check the Date Range that is being used to filter reports - in this case the Date Range should be set to Order Created Date.

CHAPTER

10 Membership

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Objective

In this section, Users will learn to manage Memberships in Nimble AMS.

This includes:

- Understanding Membership
- Processing New Memberships
- Membership Types, Products and Product Links
- View Membership related information
- Enter Orders for Membership Products
- Membership, Payments and Renewal Management
- Running Reports and Dashboards

Understanding Membership

The Nimble AMS Membership module provides the tools to manage current, future and past memberships. Membership configuration in Nimble AMS is adjustable to track, for instance, professional associations where memberships are primarily individuals (persons), to trade associations, where memberships track at an organization (company) level with complex flow down rules, or, to a combination of both individual and organizational memberships.

With Membership Users can manage:

- Viewing Membership information on an Account
- Membership Types
- Membership Products
- Membership Pricing
- Process New Memberships
- Manage Renewals
- Manage Payments
- Running Reports and Dashboards

Training Org Membership Data

The exercises in this manual are designed for the Training org to replicate membership scenarios that are covered in Nimble AMS Training classes. They are based on the setup of two specific categories of Membership: Individual and Organizational. Under each of categories – tied to Person Account and Account Types - are three Membership Types each:

Organization: Enterprise, Industry, and Partner

Individual: Professional, Student, and Retired

Training Member Types function only as models of the wide range of possible Client memberships. They therefore exist to demonstrate as much of Nimble AMS's membership options as possible – each client will have their own, unique membership structure.

Given these circumstances, the Training Membership Types have certain characteristics that users should keep in mind in going through the exercises or just exploring the Training org:

1. Organizational Membership (Enterprise, Industry, & Partner) – can only be purchased by Organizational level Accounts.
2. Individual Memberships (Professional, Student, & Retired), can only be purchased by Person level Accounts.
3. If an Organization purchases membership, the Children/Affiliates (Individual records) of that Organization inherit membership from the Parent (Primary Affiliation).
 - a. EXCEPT in point 4 below.
4. IF an Individual purchases Individual membership, and that Individual is already receiving Organizational membership benefits, the Individual membership will trump any current Organizational membership AND be stamped on the Individuals, Account record.

Organizational Memberships renew on an **ANNUAL** basis (January 1 starts new)

Individual Memberships renew on an **ANNIVERSARY** basis (Day 1 of Month purchased) dependent on the start control date.

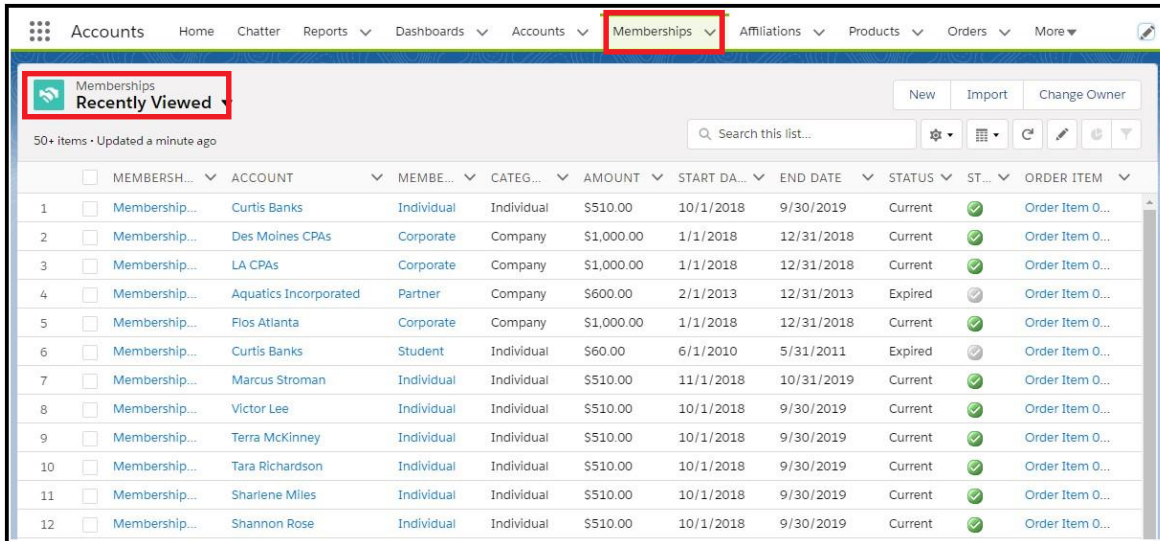
For INDIVIDUAL Membership analysis, users should use reports that focus on **Professional** membership. For ORGANIZATIONAL Membership analysis, users should use reports that focus on **Enterprise** membership. Both these memberships contain the most Account records

Keep in mind, this org and its membership structure exist only as a **wide ranging model** to demonstrate functionality. ANY desired membership model is configurable in Nimble AMS:

- Only Organizational membership with no Individual memberships.
- Only Individual memberships with no Organizational memberships.
- Organizational memberships where Child Affiliates inherit membership.
- Organizational memberships where Child Affiliates do NOT inherit membership.
- Organizational memberships that are tracked independently of Individual memberships.

Memberships Item

The Memberships Item provides several different ways of finding, organizing, and interfacing with Membership information.



From the **TOP RIGHT HAND**, **Actions** area, Users can:

- Create a **New** Membership
- **Import data to** Memberships

From the **TOP MIDDLE**, **Memberships** Item drop down, Users can:

- Create a **New** Membership
- Use **Recent Records** to return to a previously accessed Membership
- Use **Recent Lists** to return to a previously accessed List View of Membership

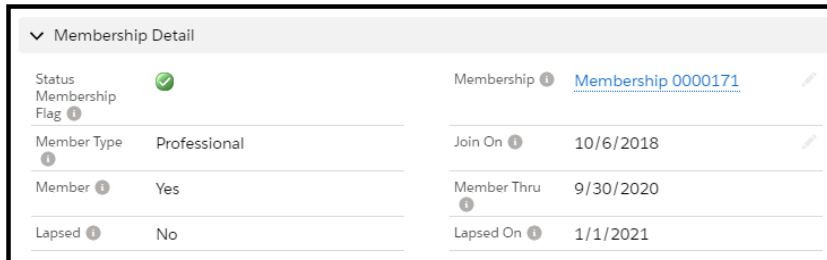
From the **TOP LEFT**, **Memberships Recently Viewed** drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

Viewing Membership Information

Viewing Account Membership (Individual OR Organization)

1. Enter and select **Adam Carey** in the **Search** box.
2. Scroll down to the **Membership Detail** section.



Membership Detail	
Status Membership Flag	Membership Membership 0000171
Member Type	Professional
Member	Yes
Lapsed	No
Join On	10/6/2018
Member Thru	9/30/2020
Lapsed On	1/1/2021

3. The following base fields are included in the **Membership Detail** section:
 - **Member Status Flag**
Blue = Future, Green = Current, Yellow = Pending, Gray = Expired
 - **Member Type**
Designation of Person's Account Member Type - Professional, Student, or Retired
 - **Member**
Yes or **No** designation for whether the Person currently holds membership
 - **Lapsed**
A calculation based on the most recent membership End Date + system's Grace Period.
Is **Yes** or **No**.
 - **Membership**
Link to the most recent Membership detail record
 - **Join On**
Initial date of the Person FIRST acquiring Membership
 - **Member Thru**
Date through which the individual will hold their current Membership
 - **Lapsed On**
A calculation based on the most recent membership End Date + system's Grace Period.
Is **Yes** or **No**.

Viewing Individual Account Membership History

1. Scroll back to the top of **Adam Cary's** record.
2. Float over the **Memberships (2)** link under the **Related List Quick Links** section.
 - A record for every membership purchased is displayed.

Person Account
Mr. Adam Carey

Account Record Type: Individual | Primary Affiliation: [PeachTree Enterprises](#) | Email (2): acarey@nimbleuser.com | Phone (4): (404) 354-8374 | Member Type: Professional

Related List Quick Links

- [Parent Affiliations \(2\)](#)
- [Committee Memberships \(0\)](#)
- [Stored Payment Methods \(0\)](#)
- [Registrations \(2\)](#)
- [Memberships \(2\)](#)**
- [Subscriptions \(0\)](#)

Memberships

2 items · Sorted by End Date · Updated a few seconds ago

Membership Id	Customer Email	Membership T...	Stage	Start Date	End Date ↓	Amount	Status	Statu...	
1	Membership 0000171	acarey@nimbleuser.com	Professional	Renew	10/1/2019	9/30/2020	\$510.00	Current	
2	Membership 0000030	acarey@nimbleuser.com	Professional	Join	10/1/2018	9/30/2019	\$520.00	Expired	

[View All](#)

3. Click on the most current **Membership Id** link.

Membership
Membership 0000171

Account: [Adam Carey](#) | Membership Type: [Professional](#) | Start Date: 10/1/2019 | End Date: 9/30/2020 | Amount: \$510.00 | Status: Current

Related List Quick Links

- [Order Item Lines \(2\)](#)
- [Donations \(0\)](#)
- [Files \(0\)](#)
- [Notes & Attachments \(0\)](#)
- [Membership History \(2\)](#)

Related: **Details** | Engagement

Membership Id	Membership 0000171	Category	Individual
Account	Adam Carey	Stage	Renew
Membership Type	Professional	Pending	<input type="checkbox"/>
Primary Membership Product	Professional Dues	Primary Contact Name	
		Primary Contact Email	

Term

Status Flag		Status	Current
Start Date	10/1/2019	End Date	9/30/2020

Financial

Order Item	Order Item 0000350	Entity Name	International Society for the Exceptionally Nimble
Amount	\$510.00		
Total Payment	\$510.00		
Balance	\$0.00		

Order | Activity | Chatter

Order Item Lines (2)

- [Order Item Line 0000543](#)
Product: [Professional Dues](#)
Total Price: \$500.00
Transaction... 9/27/2019
- [Order Item Line 0000542](#)
Product: [Chapter Dues](#)
Total Price: \$10.00
Transaction... 9/27/2019

[View All](#)

4. Users can observe additional details regarding the individual's current membership, including the **Payment**, **Order**, and **Order Line** information.

Membership Types

Membership Types are the primary building blocks to set up a Nimble AMS orgs membership. They are critical for tracking membership history on a term-by-term basis for all past, present and future members. Each designated client membership requires a separate membership type record. This Membership Type record controls all membership business rules and provides different dues options for Users to sell, and constituents to purchase. Nimble AMS Administrators can create and modify membership types as needed to support client specific needs.

In setting up membership types, Administrators can customize client membership experience with:

- Cash and accrual accounting methods
- Income recognition assigned to different GL accounts based on the stage of membership (join income vs. renewal income), which also supports deferred income recognition
- Various term length & pricing options based on stage (join or renew)
- Grace period configuration
- Community Hub join and renewal options
- Proration of annual term membership types
- Auto renew functionality that automatically renews and charges a stored credit card at the end of a member's term

IMPORTANT NOTE: Membership types also support complimentary/non-income memberships.

Membership Type Setup Variations

Each Membership Type ties to a primary membership product that can act as either:

- The only available option for selection
- One of many primary options, acting more as subtypes for a given membership type

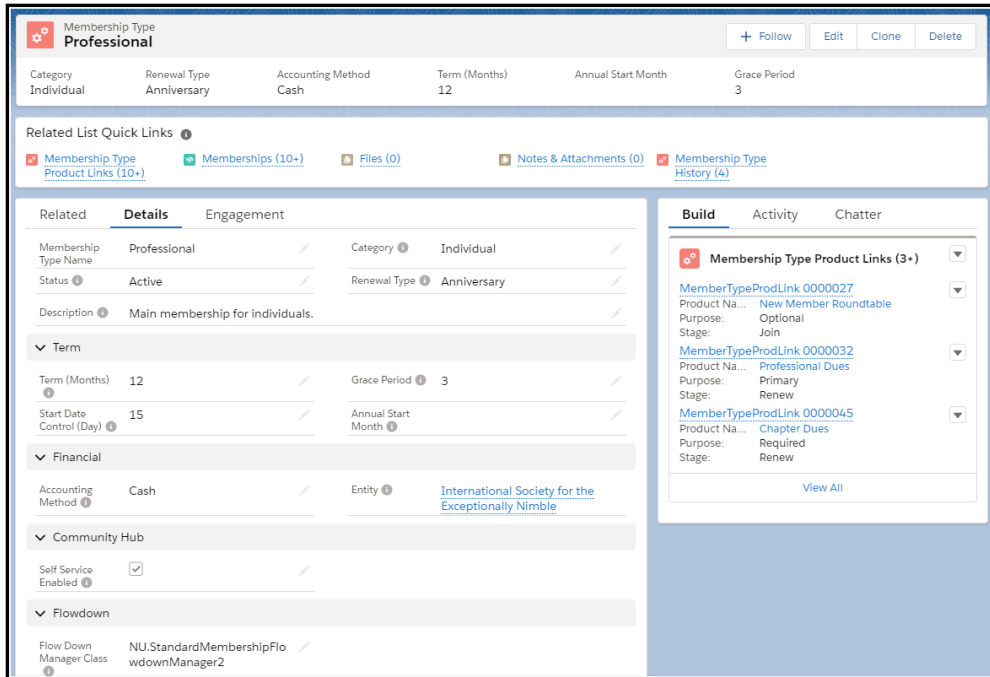
Membership types are setup either way, depending on an association's needs.

IMPORTANT NOTE: Creating and maintaining Membership types will normally be the responsibility of Nimble AMS Administrators. However, the End User needs to understand the information in a Membership Type record.

Opening a Membership Type

To open a Membership Type record:

1. Enter and select **Professional** (Membership Type) in the **Search** box.



2. The following base fields are especially critical on the **Membership Type** record:

- **Member Type Name**
Is the membership purchase Individual or Organization level membership
- **Category**
If **Company** is chosen - flow down rules apply
If **Individual** is chosen - flow down rules are ignored
If **Both** is chosen (Organization Member Type) - flow down rules apply
- **Renewal Type**
Anniversary or Annual
- **Start Date Control (Day)**
>= To this date, Membership starts 1st of next month
< This date, Membership starts 1st current month
- **Grace Period (Months)**
Period in which membership benefits continue unpaid/un-renewed

Membership Type Product Links

Membership Type Product Links enable users to link the following types of membership products directly to the purchase of a Membership:

- **Primary** - The **Dues Products** that govern how much the individual pays for the Membership. Each Membership Type must contain at least one Primary Dues Product. Most associations prefer to have both **Renew** and **Join** Membership Type Product Links for tracking purposes.
- **Required** – Required Products additional to Dues: Chapter Dues, Processing Fees, etc.
- **Optional** - Recommended products: Directories, Round Tables, Membership Guides, etc.
- **Donation** - Donation products displayed to encourage member contribution at the time of membership join or renewal.

Once a **Product** is linked to a **Member Type** via a **Membership Type Product Link**, it will display in the **Order** process based on its settings and the stage of the Account’s membership.

Viewing the Membership Type Product Links

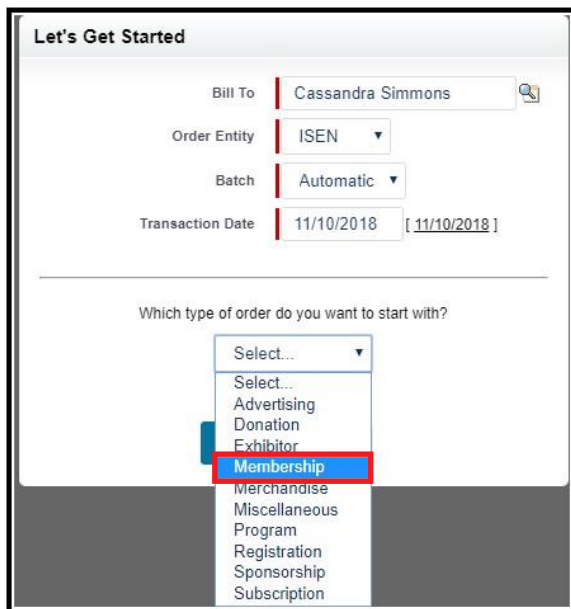
1. Open the **Professional Member Type** record.
2. From the **Related List Quick Links**, float over **Membership Type Product Links (10+)**.
3. Observe the **Purpose** column of the displayed List View.
 - Users can also select/display these by clicking the **View All** link under the **Build** tab on the right of the **Professional** member type record.

	Membership Type Product Link: Membe...	Product Name	Purpose ↑	Stage	Term Ov...	Self Service...	Price Ov...
1	MemberTypeProdLink 0000032	Professional Dues	Primary	Renew		<input checked="" type="checkbox"/>	▼
2	MemberTypeProdLink 0000057	Professional Dues	Primary	Join		<input checked="" type="checkbox"/>	▼
3	MemberTypeProdLink 0000045	Chapter Dues	Required	Renew		<input checked="" type="checkbox"/>	▼
4	MemberTypeProdLink 0000054	Chapter Dues	Required	Join		<input checked="" type="checkbox"/>	▼
5	MemberTypeProdLink 0000027	New Member Roundtable	Optional	Join		<input checked="" type="checkbox"/>	▼
6	MemberTypeProdLink 0000051	Education Foundation Donation	Donation	Join		<input checked="" type="checkbox"/>	▼
7	MemberTypeProdLink 0000053	Education Foundation Donation	Donation	Renew		<input checked="" type="checkbox"/>	▼
8	MemberTypeProdLink 0000062	PAC Donation	Donation	Join		<input checked="" type="checkbox"/>	▼
9	MemberTypeProdLink 0000063	Research Donation	Donation	Renew		<input checked="" type="checkbox"/>	▼
10	MemberTypeProdLink 0000065	PAC Donation	Donation	Renew		<input checked="" type="checkbox"/>	▼

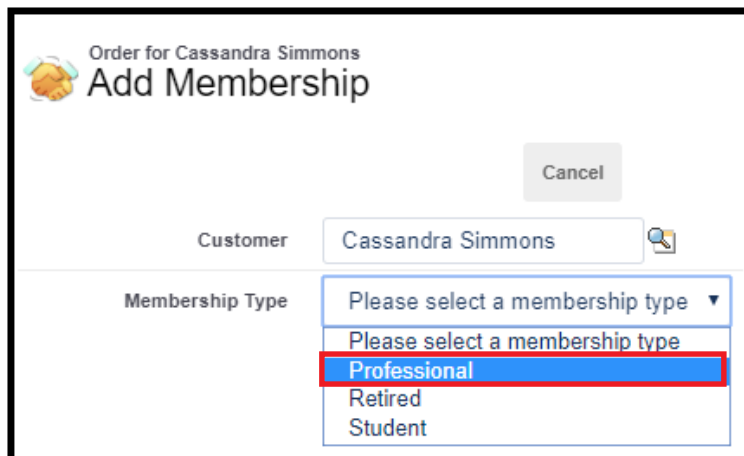
Ordering a New Membership

In this **exercise**, users will learn how to process a new membership.

1. Enter and select **Cassandra Simmons** in the **Search** box.
2. Click on the **New Order** button from the upper right hand corner.
3. Select **Membership** for the type of Order.



4. Click **Continue**.
5. Click the **Membership Type** drop-down and select **Professional**.



6. Observe the following results from the setup of the **Member Type** and its related **Membership Type Product Links**:

- **Professional Dues** are automatically selected
- **Chapter Dues** is automatically selected
- Three **Donation** Products are available for selection

7. Click **Save**.

Order for Cassandra Simmons
Add Membership

Customer: Cassandra Simmons

Membership Type: Professional

Stage: Join

Price Class: Default

Join On: 6/1/2010 [Copy from Start Date]

Automatically Renew?

▼ Membership Products

Purchase	Product	Stage	Start Date	End Date	Price
<input checked="" type="checkbox"/>	Professional Dues	Join	2/1/2020	1/31/2021	500.00

▼ Other Products

Purchase	Product	Stage	Price
<input checked="" type="checkbox"/>	Chapter Dues	Join	10.00
<input type="checkbox"/>	New Member Roundtable	Join	10.00

▼ Donation Products

Purchase	Product	Appeal	Stage	Price
<input type="checkbox"/>	Research Donation	No Appeals Configured	Join	100.00
<input type="checkbox"/>	Education Foundation Donation		Join	100.00
<input type="checkbox"/>	PAC Donation	No Appeals Configured	Join	100.00

8. Click **Go to Payment**. (lower right)

9. Click **Pay Now**.

10. From the **Payment Method** drop down, select **Check**.

11. In the **Check Number** field, enter **12345**.

12. Click **Save**.

13. Click **Submit Order** (lower right).

Results of Purchasing Membership

1. An **Order** record is **generated** with these overall order details:
 - A **Membership Order Item** record.
 - **Membership Order Item Line** record(s) corresponding with the specifics of the order.
2. Both **Payment & Payment Line** records **created** with payment details (IF Payment made).
3. **Transactions** that correspond to the associated order item lines **generated**.
4. A **Membership** record **created** for historical engagement tracking.
5. Membership information on the Account record is updated with latest membership info:
 - The **Cassandra Simmons** will show as a **Member**.
 - The **Member Type** will be updated to **Individual**.
 - The **Member Thru** date will be advanced by the new membership term. Example:
Advanced by one year for a new one year membership.
 - The **Lapsed** and **Lapsed On** fields will be **updated** as appropriate.
6. **Log in to Cassandra Simmons Account record and Verify.**

Understanding Membership Renewals

Membership Renewals in Nimble can be handled for both Organizational and Individual Memberships AND/OR Anniversary based or Annually calculated memberships.

In the Training org, users have the choice of “practice” processing renewals for the following:

- I. **Annually** calculated, **Organizational** (Account) **Enterprise** level memberships.
- II. **Anniversary** calculated, **Individual** (Person Account) **Professional** level memberships.

IMPORTANT NOTE: Extensive membership data exists monthly for Professional level and annually for Enterprise level membership in the Training org. Other Memberships – Student and Retired for Individual – Industry and Partner for Organizational – do NOT have consistent data to model the renewal process and should be avoided for these exercises.

Nimble handles the renewal process for both Annual or Anniversary based memberships in the same fashion. Below is a quick stock overview:

1. 90 days out from the Membership due date, user creates a new **Billing History** record.
 - a. EACH Membership Type requires its own, separate Billing History record.
 - b. Time frames differ per organization. Some will use 90 days out, some 60, etc.
2. Once executed, the Billing History auto-generates two critical components:
 - a. **Carts** generate for every qualified membership.
 - b. **Renew Buttons** auto-display on qualified membership Account records on Community Hub. They display on the individual users Profile page upon login.
3. Simultaneously, most organizations send out a separate **Renewal Email** to users with an embedded **Renewal link** found on the Billing History generated Cart.
4. Members have multiple options with which to renew:
 - a. Opening **Community Hub** and renewing via the **Renew Button**.
 - b. Clicking on the **Renewal Link** sent via email.
 - c. Contacting the Organization and having a **Representative** process the membership via the generated Cart.
5. Users can track the success of the renewal process by running reports displaying remaining outstanding renewal Carts and memberships that have Joined or Renewed.

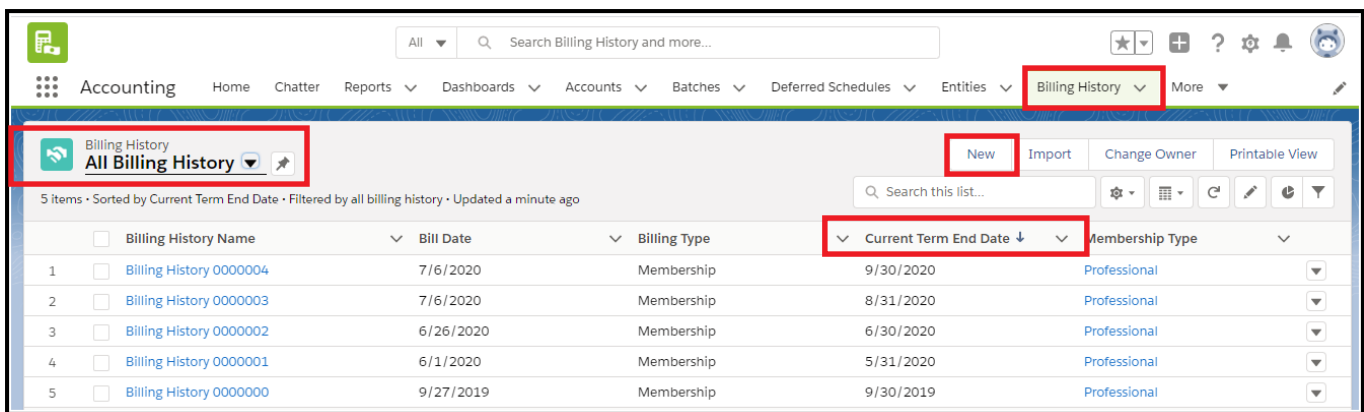
Creating Membership Renewals

In this **exercise**, users will process Renewals for Professional (Anniversary based) memberships in the Training org. In this scenario, users will:

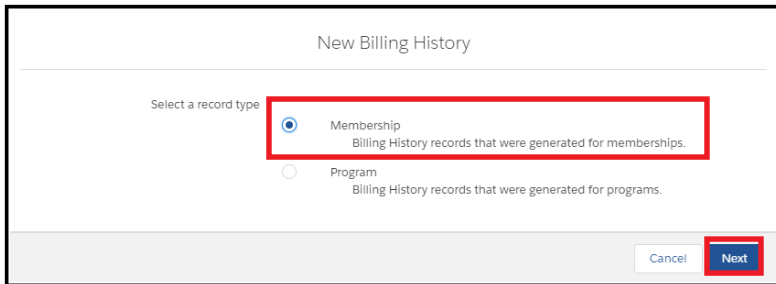
- Create renewal Carts via a new Billing History.
- Observe the generated renewal carts.
- Select a Cart from Billing History and renew from Staff Side.
- Select a second Cart and renew via Community Hub.
- Run a report to display the status of that month’s memberships.

CREATING RENEWAL CARTS

1. Click on the **App Launcher**.
2. In the **Search apps and items** box, enter **Billing History**.
3. Click on the newly added **Billing History** Item dropdown.
4. Click on the **+ Add Billing History to Nav Bar** option to permanently add the Item.
5. Click on the **Recently Viewed** dropdown (upper left) and select **All Billing History**.
6. Click on the **Current Term End Date** column header to sort descending.
7. Observe the most current term end date listed – users will enter the NEXT months end date for this exercise. Note that End Date here _____.
8. Click on the **New** button (upper right).



9. Confirm that the **Membership** radio button selected.



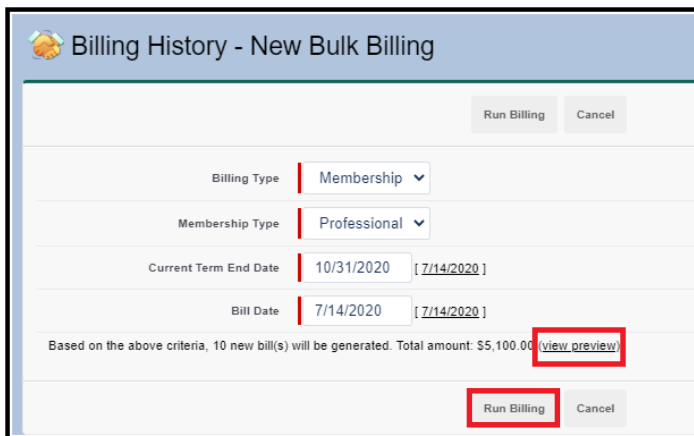
10. Click **Next**.

11. From the **Billing Type** dropdown, select **Membership**.

12. From the **Membership Type** dropdown that displays, select **Professional**.

13. In the **Current Term End Date**, enter the date noted in **step 7** above.

14. Observe (once screen refreshes) the message that displays at bottom: **Based on the above criteria, 10 new bill(s) will be generated. Total amount: \$5100.00 (view preview).**

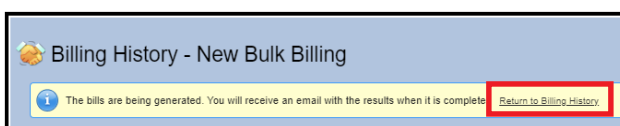


15. Click on the **View Preview** button; the individuals scheduled for renewal and amounts display in a separate Salesforce tab.

16. **Close** the tab.

17. Click on the **Run Billing** button on the original tab.

18. Observe the **processing message**.



19. Click on the **Return to Billing History** link.

PROCESSING A STAFF SIDE RENEWAL

1. Click on the **Recently Viewed** dropdown (upper left) and select **All Billing History**.
2. Click on the **Billing History 00000XX ID** link for the record just generated.
3. From the **Related List Quick Links** section, click on the **Cart Items (10)**.
4. Observe the renewal **Carts** generated for each Account.

Billing History > Billing History 0000005
Cart Items
 10 Items • Updated 9 minutes ago

Cart Item Id	Cart	Customer	Total	Total Payment	Balance	Created By
1 Cart Item 0000830	Cart 0000712	Jose Quinterra	\$510.00	\$0.00	\$510.00	tradoc400 Org
2 Cart Item 0000831	Cart 0000713	Donald Isner	\$510.00	\$0.00	\$510.00	tradoc400 Org
3 Cart Item 0000832	Cart 0000714	James Ulrich	\$510.00	\$0.00	\$510.00	tradoc400 Org
4 Cart Item 0000833	Cart 0000715	Walt Longmire	\$510.00	\$0.00	\$510.00	tradoc400 Org
5 Cart Item 0000834	Cart 0000716	Bobby La Beux	\$510.00	\$0.00	\$510.00	tradoc400 Org
6 Cart Item 0000835	Cart 0000717	Sheila Xavier	\$510.00	\$0.00	\$510.00	tradoc400 Org
7 Cart Item 0000836	Cart 0000718	John Watson	\$510.00	\$0.00	\$510.00	tradoc400 Org
8 Cart Item 0000837	Cart 0000719	Marcus Stroman	\$510.00	\$0.00	\$510.00	tradoc400 Org
9 Cart Item 0000838	Cart 0000720	April Black	\$510.00	\$0.00	\$510.00	tradoc400 Org
10 Cart Item 0000839	Cart 0000721	Leroy Taylor	\$510.00	\$0.00	\$510.00	tradoc400 Org

5. Click on the first Cart Link, **Cart 000XXXX** in the second column.
6. From the **Cart** record, observe the **Payment URL** link. This link is distributable to members via email for **Express Payment**.

Cart
Cart 0000713

Bill To: Donald Isner | Transaction Date: 7/14/2020 | Total: \$510.00 | Total Payment: \$0.00 | Balance: \$510.00 | Batch:

Related List Quick Links: [Cart Items \(1\)](#) | [Cart Payments \(0\)](#) | [Files \(0\)](#) | [Cart History \(1\)](#)

Details

Cart Id: Cart 0000713

Bill To: Donald Isner | Entity: International Society for the Exceptionally Nimble

Transaction Date: 7/14/2020 | Order:

Confirmation Email: | Additional Emails:

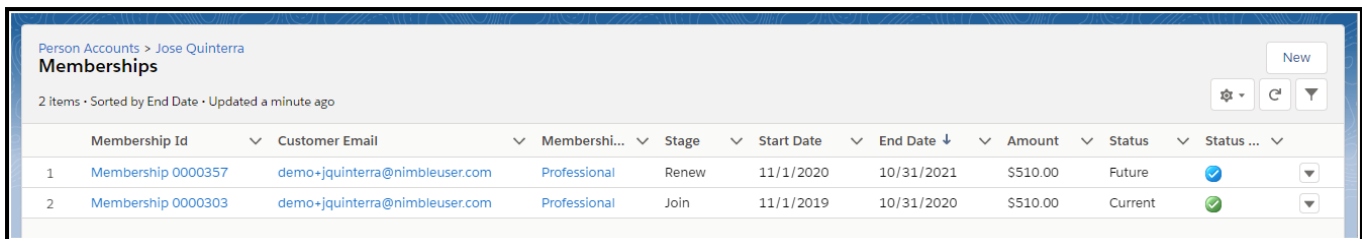
Payment URL:
<https://cb-training-tso.force.com/communityhub/expresspaymentcart?id=a0K3h0000023sDf-5979f6d57fbc1eb07216648609aceef8>

Order Information: **Cart Items (1)**
 Cart Item 0000831
 Record Type: Membership
 Customer: Donald Isner
 Total: \$510.00

Edit

7. Click the **Edit** button (upper right).
8. Observe the displayed **Order Information**, click on the **OK** button.
9. Click on the **Go To Payment** button.

10. Click **Pay Now**.
11. From the **Payment Details**, Please Select a **Payment Method** dropdown, select **Check**.
12. In the **Check Number** field enter **1234**.
13. Click **Save**.
14. Click **Submit Order**.
15. Once the processed order displays, click on the **Bill To**, linked **Account** name.
16. From the **Account** record, **Related List Quick Links**, click the **Memberships (2)** section.
17. Observe the newly processed membership in **Renew** Stage for the Account.



The screenshot shows a web interface for 'Person Accounts > Jose Quinterra' with a 'Memberships' section. It displays a table with 2 items, sorted by End Date. The table has columns for Membership Id, Customer Email, Membership Name, Stage, Start Date, End Date, Amount, Status, and Status actions. Two rows are visible: one for a 'Renew' stage membership (ID 0000357) and one for a 'Join' stage membership (ID 0000303).

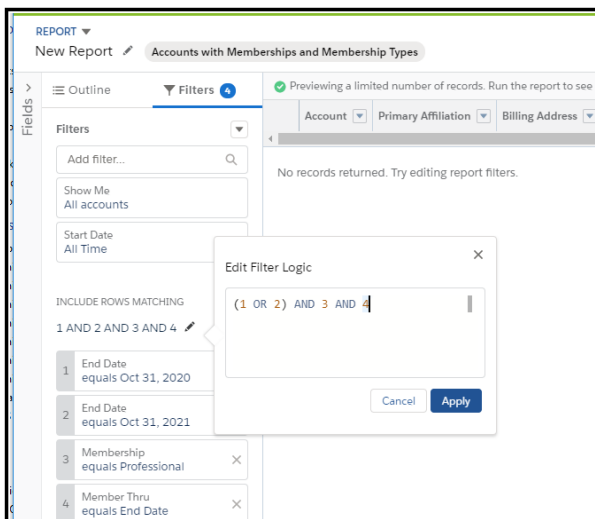
Membership Id	Customer Email	Membershi...	Stage	Start Date	End Date ↓	Amount	Status	Status ...
1	demo+jquinterra@nimbleuser.com	Professional	Renew	11/1/2020	10/31/2021	\$510.00	Future	🔄
2	demo+jquinterra@nimbleuser.com	Professional	Join	11/1/2019	10/31/2020	\$510.00	Current	✅

OBSERVING THE COMMUNITY HUB (MEMBER FACING SITE) RENEWAL

1. In Search, enter the name of the **Account** just renewed and select.
2. From the **Account** record, click on the **Log in to Community as User** button (upper right).
 - All Users may NOT have permissions to log into Community Hub as a specific member.
 - Exercise's purpose is to demonstrate a members experience in renewing membership.
3. Observe the **Renew** button displayed under the **Membership** section.
 - The **Renew button** auto-generated as a result of the **Billing History** creation.
4. Since the **Account** has already renewed, there is no need to click on the Renew button.
 - Renew buttons can be set for deactivation once a renewal is performed from either Staff or Community Hub side for the current membership time period.

CREATING/RUNNING MEMBERSHIP ANALYSIS REPORT

1. Click on the **Reports** Item.
2. Click on **New Report**.
3. Enter and Select Accounts with Memberships and Membership Types.
4. Click on **Filters**.
5. Change **Account** filter to **Show Me - All Accounts**.
6. Change **Date** filter to **Start Date – All Time**.
7. Add the following **Filters**:
 - **End Date – Equals – End of Month/Year** used in Billing History Report.
 - **End Date – Equals – End of Month/Year PLUS ONE YEAR** used in Billing History.
 - **Membership – Equals – Professional**.
8. Add this special filter:
 - For **Field**, select **Member Thru**.
 - For **Operator**, select **equals**.
 - For **Type**, select **Field** from dropdown.
 - For **Value**, enter **End Date**.
9. Click on the **Filter Logic**.
10. Edit the logic to read: **(1 OR 2) AND 3 AND 4**.



11. Click on **Outline**.

12. Enter the following three **Groups** under **Group Rows** in this Order:

- Member Thru
- Stage
- Status

13. From **Columns**, **Delete** the following **Fields** (Columns):

- Primary Affiliation
- Membership
- Primary Contact
- Primary Contact Email
- Primary Contact Phone

Member Thru	Stage	Status	Account	Billing Address	Status Flag	Start Date	End Date
10/31/2020 (9)	Join (7)	Current (7)	John Watson	175 Humboldt St, Rochester, NY 14610 United States	✓	11/1/2019	10/31/2020
			Leroy Taylor	300 Peachtree Street, Atlanta, GA 30308 United States	✓	11/1/2019	10/31/2020
			Donald Isner	East Coyote Wash Drive, Cave Creek, AZ 85331 United States	✓	11/1/2019	10/31/2020
			James Ulrich	Cypress Lane, Birmingham, AL 35244 United States	✓	11/1/2019	10/31/2020
			Walt Longmire	State Street, Meeteetse, WY 82433 United States	✓	11/1/2019	10/31/2020
			Bobby La Beux	921 South Pine Street, Little Rock, AR 72204 United States	✓	11/1/2019	10/31/2020
			Sheila Xavier	675 West Main Street, Madison, WI 53703 United States	✓	11/1/2019	10/31/2020
			Subtotal				
			Subtotal				
	Renew (2)	Current (2)	April Black	1055 West 7th St, Los Angeles, CA 90017 United States	✓	11/1/2019	10/31/2020
			Marcus Stroman	1602 L St NW, Washington, DC 20036 United States	✓	11/1/2019	10/31/2020
			Subtotal				
			Subtotal				
			Subtotal				
10/31/2021 (1)	Renew (1)	Future (1)	Jose Quinterra	94 Rattlesnake Road, Santa Fe, NM 87508 United States	✓	11/1/2020	10/31/2021
			Subtotal				
			Subtotal				
			Subtotal				
			Total (10)				

14. Click **Save and Run**.

15. Enter **Membership: Pro Monthly Status XX/XX** (Month/Year).

16. Enter **Memberships (Nimble AMS)** in the **Folder** field.

17. Click **Save**.

18. Observe the results, Users have a report that accurately reports their renewed/joined, grace, expired memberships for the desired month:

- Displays All Current Memberships in Join/Renew Stage
- All Future Memberships – Carts that have been renewed.
- Once Memberships exist beyond their End Date, they will turn into Status of Grace.
- Once Memberships exist beyond their Grace Date, they will turn into Status of Expired.

Report: Accounts with Memberships and Membership Types
New Report

Total Records: 10

Member Thru	Stage	Status	Account	Billing Address	Status Flag	Start Date	End Date	Amount	Person Email
10/31/2020 (9)	Join (7)	Current (7)	John Watson	175 Humboldt St, Rochester, NY 14610 United States	✓	11/1/2019	10/31/2020	\$510.00	demo+johnw@nimbleuser.com
			Leroy Taylor	300 Peachtree Street, Atlanta, GA 30308 United States	✓	11/1/2019	10/31/2020	\$510.00	demo+leroyt@nimbleuser.com
			Donald Isner	East Coyote Wash Drive, Cave Creek, AZ 85331 United States	✓	11/1/2019	10/31/2020	\$510.00	demo+disner@nimbleuser.com
			James Ulrich	Cypress Lane, Birmingham, AL 35244 United States	✓	11/1/2019	10/31/2020	\$510.00	demo+julrich@nimbleuser.com
			Walt Longmire	State Street, Meeteetse, WY 82433 United States	✓	11/1/2019	10/31/2020	\$510.00	demo+wlongmire@nimbleuser.com
			Bobby La Beux	921 South Pine Street, Little Rock, AR 72204 United States	✓	11/1/2019	10/31/2020	\$510.00	demo+blabeux@nimbleuser.com
			Sheila Xavier	675 West Main Street, Madison, WI 53703 United States	✓	11/1/2019	10/31/2020	\$510.00	demo+sxavier@nimbleuser.com
	Subtotal								
	Subtotal								
10/31/2020 (9)	Renew (2)	Current (2)	April Black	1055 West 7th St, Los Angeles, CA 90017 United States	✓	11/1/2019	10/31/2020	\$510.00	demo+ablack@nimbleuser.com
			Marcus Stroman	1602 L St NW, Washington, DC 20036 United States	✓	11/1/2019	10/31/2020	\$510.00	cparra+marcus@nimbleuser.com
	Subtotal								
	Subtotal								
	Subtotal								
10/31/2021 (1)	Renew (1)	Future (1)	Jose Quinterra	94 Rattlesnake Road, Santa Fe, NM 87508 United States	✓	11/1/2020	10/31/2021	\$510.00	demo+jquinterra@nimbleuser.com
	Subtotal								
	Subtotal								
	Subtotal								
	Total (10)								

Membership Term Override

Users can select a date on which to end a membership, without the need to cancel or issue a refund. This selected date can also be used to extend a membership, if the date is in the future. The **End Date Override** feature has no financial or accounting implications. It only affects the **End Date** and **Status** of the membership record on which it is set. Constituents can still renew their membership, it will just have a Start Date beginning on the date following their last membership.

Override Logic

- If the **End Date Override** is specified for the last day of a month, the **End Date** is updated to that day.
- If the **End Date Override** is specified within the first month of a membership, the **End Date** is updated to last day of the month—since a membership term must be a minimum of one month—which is when the membership will end.
- If the **End Date Override** is a date between the **Start Date** and the end of the grace period, the **End Date** will update to the last day of the month prior to the date selected and the membership may be terminated immediately.
- If the **End Date Override** is today or within the current month, but not the last day of the month, the **End Date** will update to the last day of the month prior and the membership will be terminated immediately.
- If the **End Date Override** is in the future, the **End Date** will update to the last day of the month prior to the date selected.

Things to Keep in Mind

- Populating the **End Date Override** does not cancel the order tied to the membership and will not make any accounting entries.
- Populating the **End Date Override** does not cancel the membership itself.
- Dates changed as a result of using the **End Date Override** can only be undone manually.
- Populating the **End Date Override** does not affect any custom membership fields.

Ending a Membership Term

Users can select a date on which to end a membership, without the need to cancel or issue a refund.

IMPORTANT NOTE: Users should only follow these instructions if they want to end a membership without canceling the membership or issuing a refund. If a user wants to cancel or refund see the **Order Process** in the **Orders** chapter.

In this **exercise**, users will manually end a membership term.

1. Select the **Membership App** from the **App Launcher**.
2. Click on the **Accounts** tab.
3. Select a list view that contains the record to edit.
4. Click **Edit**.
5. In the **Membership** related list, click **Edit** next to the Membership that needs to end.
6. Click **Save**.

Installment Payments

Installment payments let members distribute the cost of membership across the term in intervals of weekly, bi-weekly, monthly, bi-monthly, quarterly, semi-annually or annually.

Nimble AMS allows members to more easily pay for memberships through installment payments. Installment payments are a great way to help members spread the cost of membership over the course of the year rather than requiring full payment up front. Members can opt into paying for their membership through installments over the course of their term during the join or renewal process. Installment payments can be setup in varying schedules - from once every week to once a year.

IMPORTANT NOTE: If the user wishes to pay for a membership in full after enrolling in Installment Memberships, there is a Pay in Full payment schedule option that can be selected in the User view order process. There is also the option to pay in full on the enroll page of the Membership detail record.

Remember: Installment payments only work with auto-renewable enabled memberships.

Tip: When opting to pay a membership in installments in User view or self-service, if the membership term has already begun, the user will be required to pay a “catchup” amount so that the schedule will be in alignment with the other existing payment schedules for that membership type.

Example 1: If a member joins in March for a January-December membership and would like to pay their \$120 membership in monthly installments, they owe the first 3 months (\$30) at the time of sign-up. They will then pay \$10 in monthly installments rather than pay \$12 over 10 payments (March-December).

Example 2: If a member joins in December for a January-December membership and would like to pay monthly—but have not yet paid anything toward their \$120 membership—they owe \$120 at the time of sign up (since the membership term ends on the current month). They will then pay \$10 in monthly installments for the next year's membership.

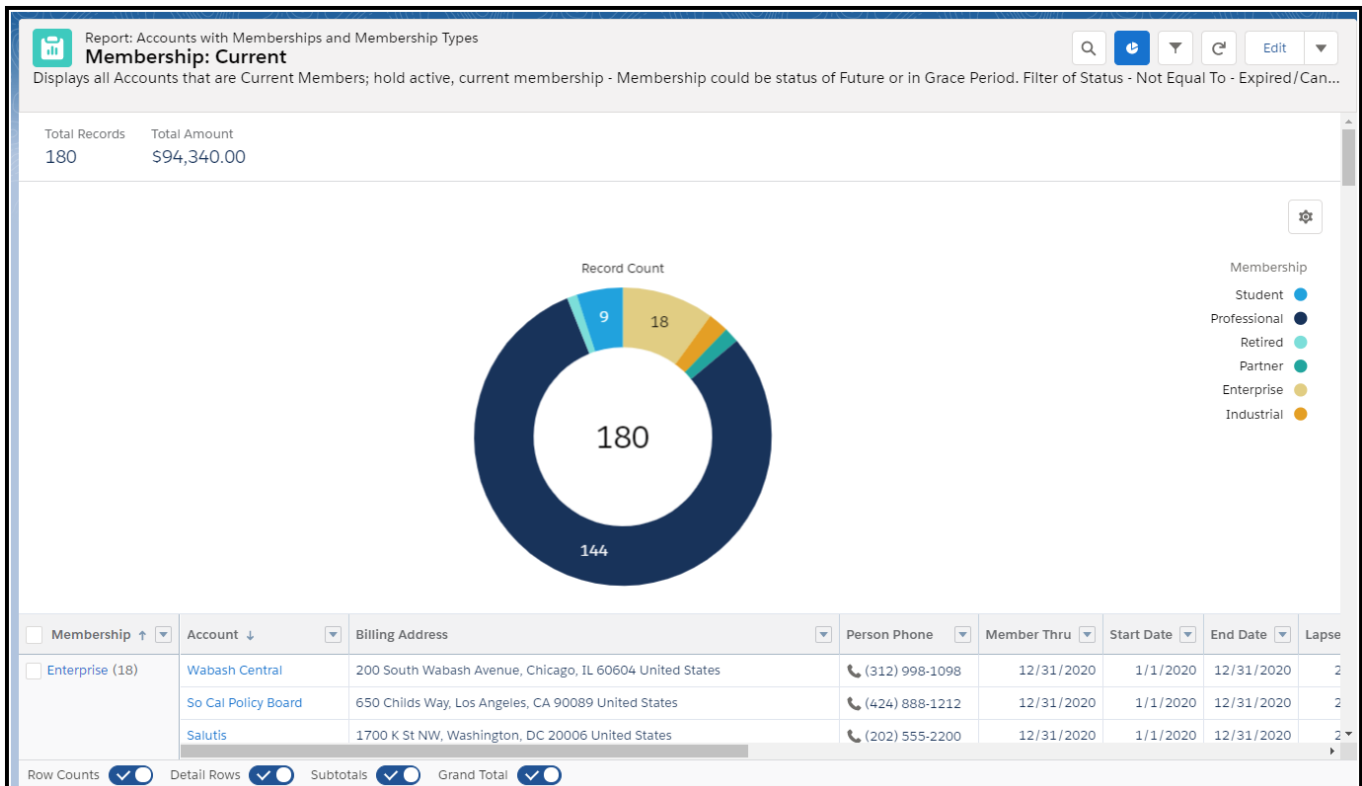
Membership Reports and Dashboard

Membership Reports

To run a Membership report:

1. Click the **Reports** Item.
2. Select the **All Folders** section under **Folders**.
3. Click on the **Memberships: Current** report.
4. Observe the 6 different **Member Types** that are displayed. Keep in mind, these are stock training examples of membership:
 - Three **Organization**: Enterprise, Partner, and Industrial
 - Three **Individual**: Professional, Student, and Retired
5. Scroll down to observe the **Accounts** that are in each of the six **Member Type** designations.

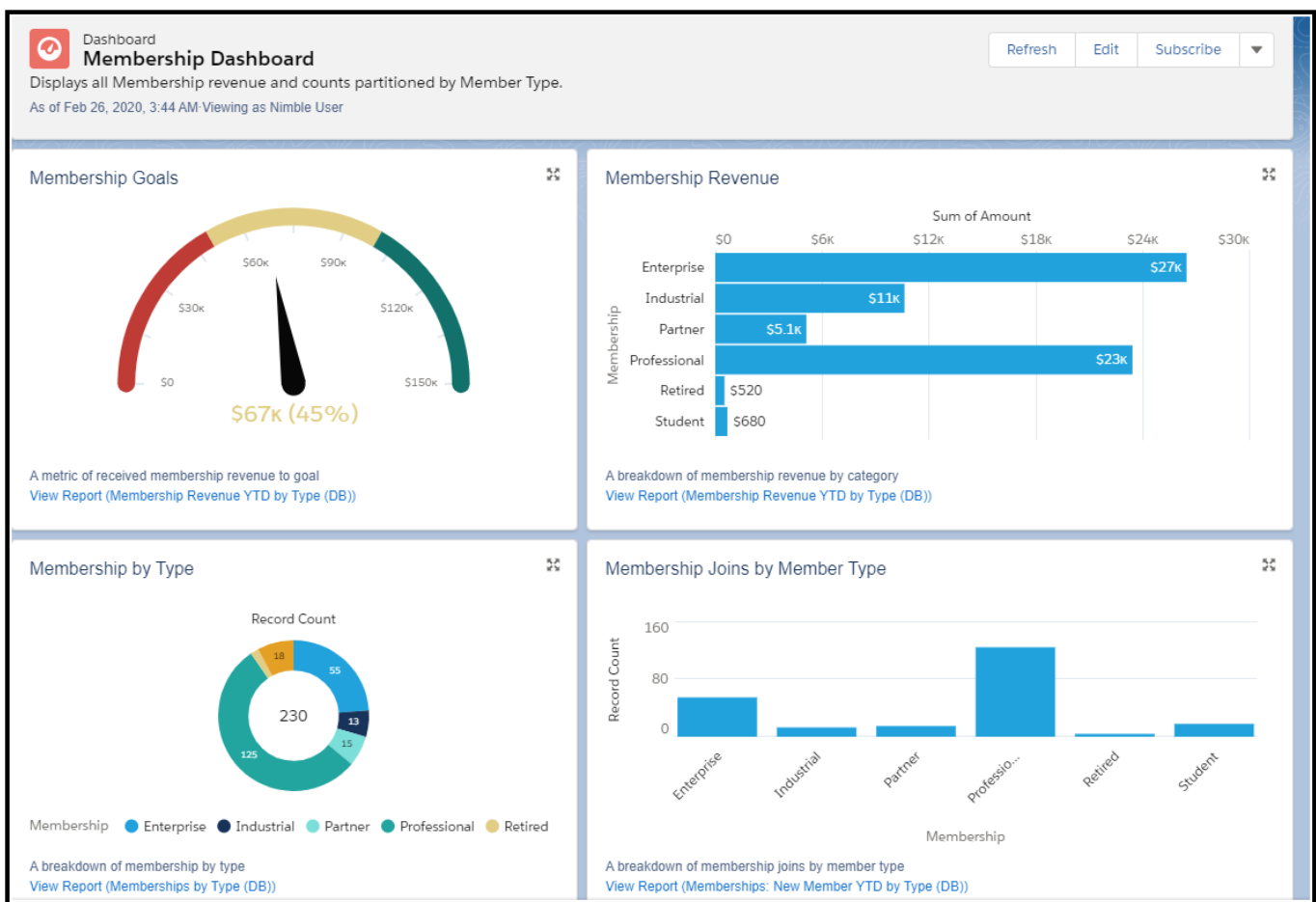
This report displays both **Active** and **Inactive** Memberships as indicated by the **Status Membership Flag** column.



Membership Dashboard

To display a Membership dashboard:

1. Click the **Dashboards** tab.
2. Click on the **All Folders** section.
3. Click the **Membership (Nimble AMS)** folder.
4. Click on the **Membership Dashboard**.



CHAPTER

11 Donations

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Donations Product	11.3
Processing Donations	11.4
Updating Donation Records	11.6
Appeals.....	11.7
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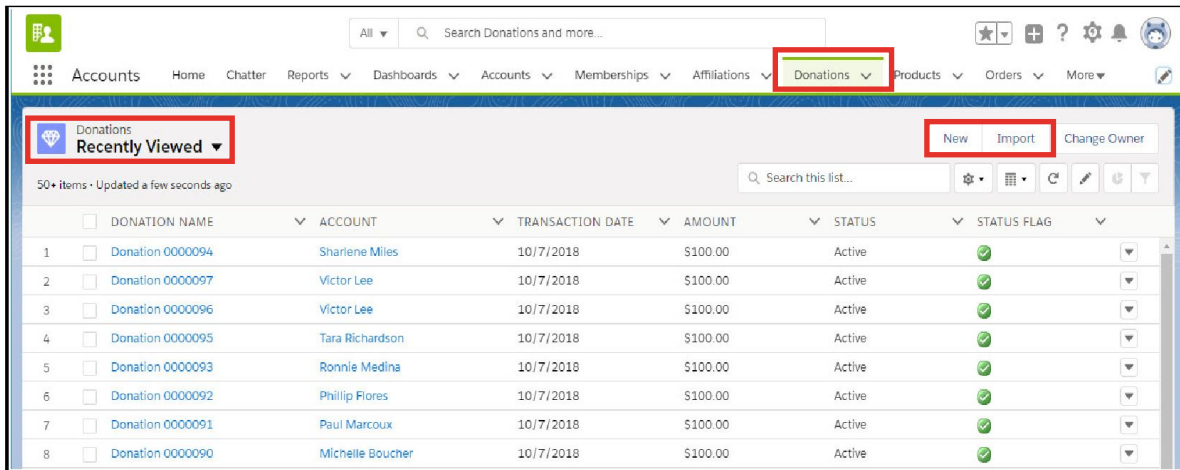
Objective

In this chapter, users will:

- Process Donations
- View and Edit Existing Donations
- Delete Donations

Donations Item

The Donations Item provides several different ways of finding, organizing, and interfacing with Donations.



From the **TOP RIGHT HAND**, **Actions** area, Users can:

- Create a **New** Donation
- **Import data to** Donations

From the **TOP MIDDLE**, **Donations Item** drop down, Users can:

- Create a **New** Donation
- Use **Recent Records** to return to a previously accessed Donations
- Use **Recent Lists** to return to a previously accessed List View of Donations

From the **TOP LEFT**, **Donations Recently Viewed** drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

Overview

Nimble AMS provides functionality that enables client constituents to make, and users to easily track, donations. Donations display in Nimble AMS as “products”, like any other item that is sold, but are provided with unique attributes that distinguish them, such as fields added for, “in memory of”, “in honor of”, or “on behalf of”.

Donations also do not generally have designated “price”, but instead have suggested donation amounts that are of one value, or a series of values.

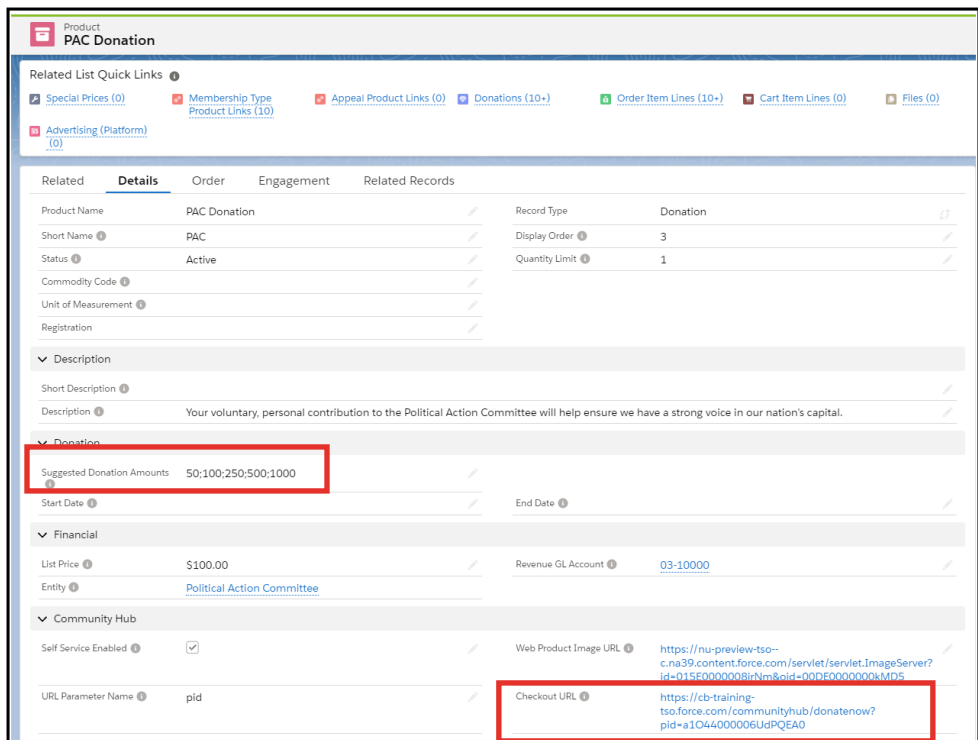
Donations are also distinct from other products by having their own, separate section of Community Hub, where constituents can be directed via email, donate anonymously, and proceed through a more rapid checkout.

Donations Product

The Donations Product has two distinct fields that are important for users to be aware of:

Suggested Donation Amounts: These are dollar amounts are separated by semi-colons and when designated, display on Community Hub as easy to click buttons that auto add that amount to Donation.

Checkout URL: Contains the Community Hub, Donation checkout URL specific to that product. This URL can be leveraged in Appeal marketing or Donation promotion via email.



Processing Donations

Client Users of Nimble AMS can process standalone donations via the phone (or email, fax, etc.) on behalf of constituents using the normal order process. There, Users can select a donation product receiving the gift, use a suggested gift amount or enter another amount, and can even select an appeal to which the gift applies if applicable.

In Community Hub, logged in (or directed by email) constituent donors can click a "Donate Now" button in the global menu to browse a list of causes or use direct links shared with them by Users to browse to a Community Hub checkout page for donation product. On the donation checkout page, they can choose their gift amount, provide some donation information, and checkout as a guest or by logging into their account to be credited with their gift. This section will focus on the User process for entering donations.

“Ordering” a Donation

When placing a one-time donation for a constituent, the Add Donation page is where users are able to select the donation options to include in a donation cart item.

In this exercise, users will process a donation for Stan Smith.

1. Using **Search**, find and select **Stan Smith’s Account** record.
2. Click on **New Order** (upper right).
3. The **Let’s Get Started** screen appears.
 - Leave the **Bill To**, **Entity**, **Batch** and **Transaction Date** at their default values.
4. Select **Donation** from the drop down at the bottom of the window.
5. Click **Continue**.

The screenshot shows a web form titled "Let's Get Started". It has four rows of input fields: "Bill To" with the value "Stan Smith", "Order Entity" with a dropdown menu showing "ISEN", "Batch" with a dropdown menu showing "Automatic", and "Transaction Date" with the value "11/11/2018" and a small "[11/11/2018]" link. Below these fields is a question "Which type of order do you want to start with?" followed by a dropdown menu showing "Donation". At the bottom of the form are two buttons: "Continue" (highlighted in blue) and "Cancel".

6. The **Order** screen displays.

- The customer name and entity will default from the previous screen.
- The price class does not apply to donations, so Users may leave it at Default.

7. **Check** the box to the left of the **Research Donation**.

Note: If the user toggles the **Entity** above, the following Donations will appear:

- **NF (Foundation)** - Education Foundation Donation
- **ISEPAC (PAC)** - PAC Donation
 - The Entity can also be changed on the previous, Let's Get Started screen with the same result.

8. The **Appeal** drop-down is blank.

- If the user toggles to the **NF** Entity, the **Education Foundation Appeal** will display in the **Appeal** drop down.

9. Click **Save**.

Purchase	Product	Appeal	Unit Price	Quantity	Price
<input checked="" type="checkbox"/>	Research Donation	No Appeals Configured	100.00	1	\$100.00

10. The order cart will display. From here, Users will process the payment the same as with any other type of order.

- For more information, please refer to the **Orders and Payments** chapter.

Updating Donation Records

Once an Order for a Donation is processed, a separate Donation record (via an Order Line Item) is created. These Donation records are stored under the Donations Item.

Donation records also contain unique and updateable fields that display information pertinent to that specific Donation. This information is NOT updateable during the normal Order Process, but IS, once the Order is taken, on the new Donation record.

In this **exercise**, users will open the Donation record created as a result of the order taken in the previous exercise and update its unique information.

1. Click the **Donations** Item.
2. From the default **Recently Viewed** list view, float over the **In Memoriam** column value for the **Donation** you created in the previous exercise's order.
3. Click on the **Pencil** icon that displays to the right of the **In Memoriam** field.
4. In the **In Memoriam field**, enter **Bob Smith**.
5. Click on the **Save** button (displays at bottom of screen).
6. Observe the updated results.
 - Users can leverage the updated information in Reports to do in depth analysis of Donations.
 - The **Appeals** field can also be updated post-order, even though it is an optional part of the Order process.

Appeals

Appeals enable users to track granularly the success of a marketing campaign on behalf of a selected donation.

Appeals can be created by system Administrators and once created, can be selected as part of the Appeal during the Order process. They are enabled for tracking to a particular donation by adding an Appeal Product Link to a Donation product.

In this **exercise**, users will review the how the Education Foundation Appeal is linked to the Education Foundation Donation.

1. Open the **Education Foundation Donation**.
2. Click on the **Appeal Product Links** (1) located under the **Related List Quick Links** section at the top of the form.
3. Click on the **Education Foundation Appeal** link under the second view column.
4. Observe the following fields:
 - **Type** - can define the Appeal for reporting purposes
 - **Start Date & End Date** - used to indicate when the Appeal is active

The screenshot displays the 'Edit Education Foundation Appeal' form. Key elements include:

- Appeal Name:** Education Foundation Appeal
- Type:** A dropdown menu with 'Other' selected, highlighted by a red box.
- Status:** Active
- Status Flag:** A green checkmark icon.
- Description:** Appeal to raise funds for Education Foundation
- Planning:** A section highlighted by a red box containing:
 - Start Date:** 1/1/2019
 - End Date:** 12/31/2019
- System Information:**
 - Created By: Admin CB Training TSO, 10/29/2018 8:37 AM
 - Last Modified By: Admin CB Training TSO, 11/12/2018 8:38 AM
 - Owner: Admin CB Training TSO
- Buttons:** Cancel, Save & New, Save

Membership Links

The option to donate can also be included as a part of a Membership purchase. This is done by creating a Membership Type Product Link that joins a Donation product to a Membership Product via a Membership Type record.

As a result of this linkage, when a membership is ordered (renewed or joined), the donation product linked to that Membership Type displays on the order. Constituents, whether over the phone via a user, or directly on Community Hub, are then provided the option to donate.

Membership Product links are covered in the previous chapter on Membership.

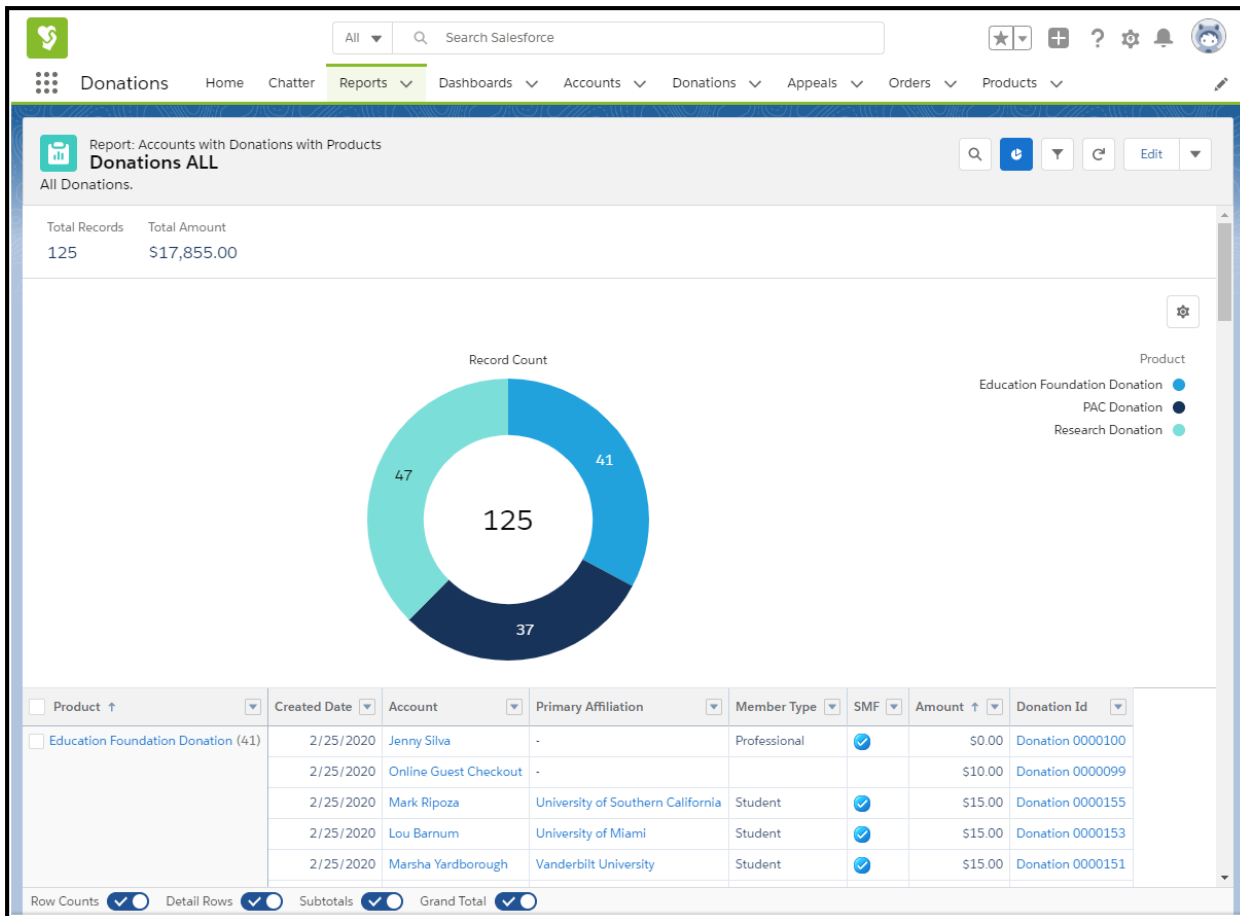
Donation Reports and Dashboards

Donation Reports

To run a Donation Report:

1. Click the **Reports** Item.
2. Click on the **All Folders** option.
3. Click the **Donations (Nimble AMS)** folder.
4. Select the **Donations ALL** report.

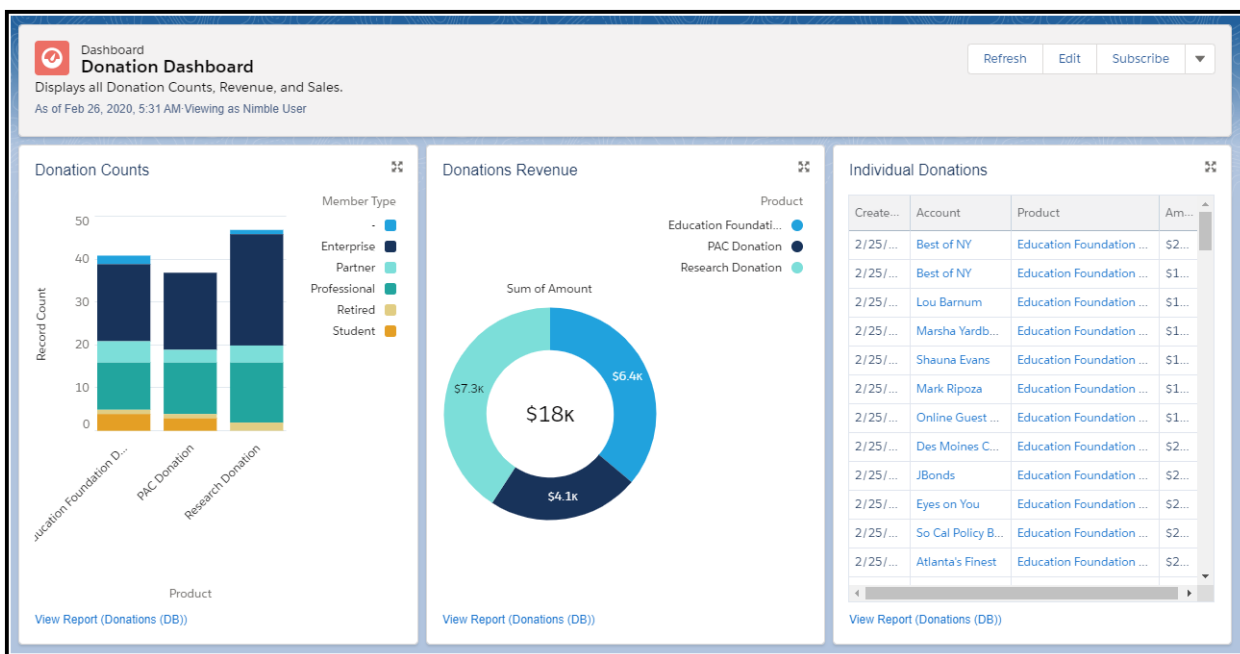
Donations ALL



Donations Dashboard

To display the **Donations** dashboard:

1. Click the **Dashboards** Item.
2. Click on the **All Folders** section.
3. Click the **Donations (Nimble AMS)** folder.
4. Click on the **Donations** Dashboard.



CHAPTER

12 Events

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Objective

The Events function enables users to track Events, Event sessions and Event registrants. After completing this lab, Users will be able to:

- Set up new events, event sessions, and event products.
- Create special pricing for registrations.
- Create survey questions for event registrations.
- Clone existing events.
- Add registrations.
- Edit existing registrations.
- Cancel existing registrations.

Understanding Events

The Nimble AMS event management tools scale to handle your organization's most complicated or simplest event.

Most users of Nimble concerned with Events (Conferences, Meetings, etc.) will need to know how to both **set up** and **create** new events. This is due to the varying nature of events - they can be complex or simple, can be held multiple times in different locations, can vary in length and audience, etc.

Listed below are the required and optional Event Items/records that users have at their disposal. In this section, users will explore both a complex and simple event to understand how events work.

Event Items/Records

Event - Main repository for identifying the event's core information and functionality. Holds the Description, Date Ranges, Location, Wait list enablement, etc. Is NOT a Product - products are linked to an event.

Registrations – Where Registration records are stored post order. These provide the history, tracking, and update ability for users.

Products - ANY Product that is associated to the Event. Products must be linked to an event on the specific product in order to be tracked against that event. An Event MUST have at least one Registration product linked to it. Likely products types linked to an event include:

- **Registrations** - Full Pass, Day Pass, Guest Pass, Session Registrations, Dinners, Outings, etc.
- **Exhibitor** - Booths: 10x10's, 10x20's, optional chairs/tables
- **Sponsorship** - Session, Golf Outing, Main Halle, etc.
- **Advertising** - Session
- **Cancellation Fee** - Registration or Booth

Event Session Groups - Groups created to organize product types together; usually used to organize Day activities - sometimes into Morning and Afternoon sessions. Can be used as dividers between Tracks of activities as well.

Event Questions - Questions can be added to auto-display when an event is selected for purchase. Users can make questions required or optional.

Event Badges - Event Badges are embedded in the order process and are generated as a result of a Registration purchase. Generation of Badges can be optional.

Logistics - Used to track equipment/ services linked to the main Event or Product (Session). Users can monitor location/use of Projectors, Podiums, Breakfast services, etc.

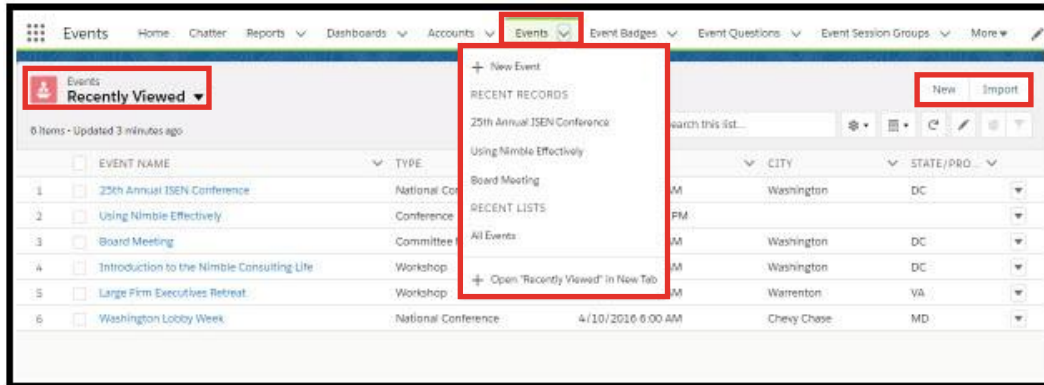
Rooms - Basic record tracking Room capacity information and contact details.

Wait lists - Can only be enabled at the Event level. If enabled, all linked Registration Products will compile and be compared against the number entered in the Event's **Max Number of Registrations** field. When that number is exceeded, the Registrant should have a separate Waitlist record created for them - this is a **MANUAL** process.

In both major event (conference/multiple registration products,) and small seminar scenarios (one reg product), it is advisable to track the capacity of the event using **Inventory, Inventory on Hand, Inventory Used, and Inventory Last Updated** fields on the individual Registration products.

Events Item

The Events Item provides several different ways of finding, organizing, and interfacing with Events.



From the TOP RIGHT HAND, **Actions** area, Users can:

- Create a **New Event**
- **Import data to Events**

From the TOP MIDDLE, **Events** Item drop down, Users can:

- Create a **New Event**
- Use **Recent Records** to return to a previously accessed Events
- Use **Recent Lists** to return to a previously accessed List View of Events

From the TOP LEFT, **Events Recently Viewed** drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

Viewing an Existing Event

The Nimble Training Database has two main examples of Events and many of their possible component parts (listed on previous page) that users can interact with:

- **25th Annual ISEN Conference** - is an example of a major conference with most of the component parts typically associated with a large event; multiple Registration products, multiple Event Session Groups, Event Questions, Event Badges, and Inventory Tracking.
- **Using Nimble Effectively** - is an example of a small seminar that has a direct Event to Registration Product relationship. This enables the user to check the Waitlist option on the Event product and use the Wait lists Item to create/track wait list records for all that exceeding capacity.

IMPORTANT NOTE: Use the Events with Products and Event Waitlists reports (In Favorites) to track the Inventory and see the Waitlists for this event/reg. product.

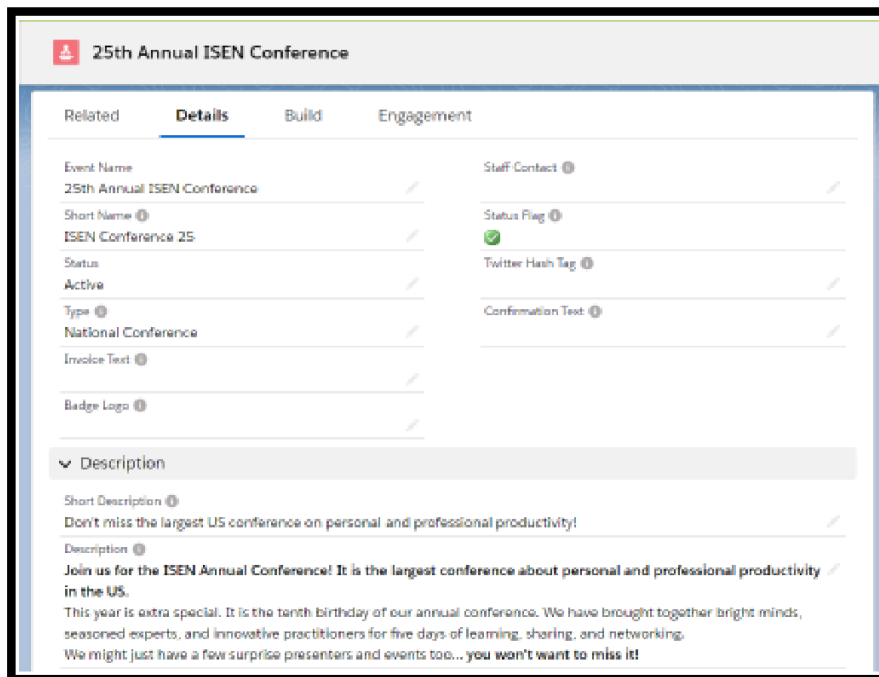
Event

In this **exercise**, users will investigate the fields/setup of the 25th Annual ISEN Conference.

1. Select **Events** from the **App Launcher**.
 - Displays the **Event** Item possibilities
2. Enter and select the **25th Annual ISEN Conference** in the **Search** box.
3. Scroll down through each of the bolded sections to examine each of the major fields in the following pages:

Details (TOP)

- The **Details Top** area unique fields are the **Type** of event, the wording of **Invoice Text**, a Badge **Logo** and **Confirmation of Registration Text**.
- The **Description Top** area unique fields are **Short Description** used for cross reference in the DB and **Description** which is leveraged in Community Hub.



Date & Time

- **Early Registration Cut Off Date** - applies if users had date based Special Prices applied.
- **Regular Registration Cut Off Date**- the date after which users will be charged a Special Price for late registration.

Attendee

- **Waitlist Active in Self Service** - Indicates if users are currently being waitlisted on the Web.
- **Waitlist Enabled** - Determines if users can be waitlisted.
- **Total Registrants** – Any linked Registration record created for this event will be recorded under Total Registrants. This field provides an accurate count of individual registrations regardless of how many sessions tied to that registration/event are purchased.
- **Total Cancellations** – Accurately records the total amount of cancellations that have occurred for registrations tied to this Event.

The screenshot displays a configuration interface for an event, divided into two main sections: 'Date & Time' and 'Attendee'.

Date & Time Section:

- Start Date:** 9/16/2019 6:00 AM
- End Date:** 9/20/2019 12:00 PM
- Check In Time:** 9/15/2019 5:00 AM
- Early Registration Cut Off Date:** 1/1/2018 6:00 AM
- Regular Registration Cut Off Date:** 8/16/2019 6:00 AM

Attendee Section:

- Waitlist Active In Self Service:**
- Waitlist Enabled:**
- Total Registrants:** 9
- Total Cancellations:** 0
- Max Number Of Registrations:** 8,000
- Registration Count Last Updated:** 10/11/2018 6:02 AM

Venue

- **Directions** - Web based link to directions to the event or room.

Community Hub

- **Self Service Enabled** – If checked, enables users to see the Event on Community Hub.
- **Hidden** and **Community Hub URL** – The Hidden field determines if event will be hidden from web access. IF checked, users will have to create a separate, smaller event with only one product tied to it, such as a registration product for a Board of Directors, Black Tie Dinner. Once that Event is created, the Community Hub Event URL would be distributed to select invitees via email. Those recipients would then be able to click on that URL link to register for the event.
- **Web Registration Start and End Dates** - dates governing when a web user can start/end signing up for the event via Community Hub. If the Event is sold on Community Hub, these fields **MUST** be completed, even if Self-Service Enabled is already checked.
- **Logo** - URL for the banner representing the event.

The screenshot shows a configuration form with two main sections: Venue and Community Hub. The Venue section includes fields for Location (Walter E. Washington Convention Center), Address Line 1 (801 Mt Vernon Pl NW), Address Line 2, City (Washington), State/Province (DC), Postal Code (20001), and Country (United States). It also includes Directions (http://dcconvention.com/Venues/ConventionCenter/DirectionsAndParking.aspx), Room Name/Number, Hall D, and Central Phone Number ((202) 249-3000). The Community Hub section includes Self Service Enabled (checked), Hidden (unchecked), Co-Worker Registration Enabled (checked), Web Registration Start Date (1/1/2018 6:00 AM), Web Registration End Date (9/5/2019 6:00 AM), and Logo (https://nu-preview-tso-c.na39.content.force.com/servlet/servlet.ImageServlet?_af=015E0000007m2EE&oid=60DE0000000kMD5).

Financial

- **Expected Revenue** - Projected revenue number entered for reporting purposes.
- **Actual Revenue** - Actual revenue that is compiled from DB product sales.
- **Budgeted Costs** - Projected expenses number entered for reporting purposes.
- **Actual Costs** - Actual expenses compiled from expense records.

The screenshot shows a configuration form for the Financial section. It includes fields for Expected Revenue (\$10,000,000.00), Actual Revenue (\$13,359.00), Budgeted Costs (\$8,500,000.00), and Actual Cost. The Entity is listed as International Society for the Exceptionally Nimble.

Registration Product

In this **exercise**, users will investigate how a **Registration** product is linked to the 25th Annual ISEN Conference.

1. From the **25th Annual ISEN Conference Record**, look under **Build** tab on right side.
2. Under the **Products (3+)** area, click on the **Full Pass** link.
 - Any Product linked to the Event, whether Registration or other types will display when clicking the **View All** link at the bottom of the Products section or by clicking the **Products (10+)** section under the **Related List Quick Links** area.
3. Scroll down and observe the **Details Top**, **Description**, and **Event** areas:

Description (TOP)

- **Display Order** - Display order number in both Community Hub and Internal. Users should space products by 10 in case other products are added later.
- **Quantity Limit** - The Maximum number of this product a user can purchase on the web in a single order. Also used to limit the number of guest registrations for an event in self-service.
- **Short Description** - used for cross reference in the DB.
- **Description** - leveraged in Community Hub.

Event

- **Registration Types** - Can define types, such as if a registrant is an attendee, a speaker, or an exhibitor. If defined, registrations can be limited to the defined user type. If undefined, all can purchase on web.
- **Conflict Code** – Used to prevent users from purchasing any other product defined with a specific code as long as that code is entered on the product. Used most often to prevent users from registering for multiple sessions that occur at the Event during the same time period.
- **Event Session Start/End Dates** - Start/End Date & Time the session begins.
- **Event Session Group** - Session Group this registration product belongs to; can be critical for organizing sessions under a day/topic.
- **Additional Event Badge** - If checked, users can purchase additional badges.

The screenshot displays the 'Full Pass' product details page. The interface includes a header with the product name 'Full Pass' and a navigation menu with tabs for 'Related', 'Details', 'Order', and 'Engagement'. The 'Details' tab is active, showing a grid of fields for product configuration. Fields include Product Name (Full Pass), Record Type (Registration), Short Name, Display Order (0), Status (Active), Quantity Limit (1), Commodity Code, and Unit of Measurement. A 'Description' section contains a Short Description and a full Description, both stating 'Full access pass including sessions and social events for every day of the conference.' An 'Event' section lists the Event (25th Annual ISEN Conference), Event Session Group (Registration), Registration Types (Attendee:Speaker), Additional Event Badge (unchecked), Conflict Codes (REG), Is Fee (unchecked), Event Session Start Date, and Event Session End Date. Each field has an edit icon.

Financial

- **List Price** - Regular price for the product; any unique pricing should be taken care of by adding a Special Price record.
- **Deferred Revenue Method** - should be one present for a registration type product.

Inventory

For Event Products, these fields are much more likely to be utilized for Sessions to track seats available/remaining.

- **Track Inventory**- If checked, Inventory will be tracked.
- **Inventory** - Initial Inventory amount for this product can be overwritten with room size increases to accommodate additional registrations.
- **Inventory Used** - Total amount sold and depreciated from Inventory.
- **Inventory on Hand** - Remaining Inventory on hand.
- **Inventory Last Updated** - User, Date, Time last updated.

Community Hub

- **Self Service Enabled** - Needs to be checked to appear on Community Hub; may NOT be checked if it is a closed event.
- **Bill Me Enabled**- could be effectively used for a zero \$ cost amount product.

The screenshot displays a configuration interface for an event product, organized into three main sections: Financial, Inventory, and Community Hub. Each section contains several fields with values and edit icons.

Financial	
List Price	\$700.00
Entity	International Society for the Exceptionally Nimble
Revenue GL Account	01-42110
Deferred Revenue Method	Annual Conference (Start Month)

Inventory	
Track Inventory	<input checked="" type="checkbox"/>
Inventory	50
Inventory Used	8
Inventory On Hand	42
Inventory Last Updated	10/10/2018 12:18 PM

Community Hub	
Self Service Enabled	<input checked="" type="checkbox"/>
Bill Me Enabled	<input type="checkbox"/>

Session Groups

1. Return to the **25th Annual ISEN Conference Record**.
2. From the **Related List Quick Links**, click on the **Event Session Groups**.
3. The **Event Session Groups** display for the **25th Annual ISEN Conference**.
 - Each Group represents multiple products grouped together for logical or time-based reasons.

EVENT SESSION GROUP NAME	DISPLAY ORDER
1. Registration	1
2. Optional Activities	101
3. Day 5 Morning Sessions	51
4. Day 4 Morning Sessions	41
5. Day 4 Afternoon Sessions	42
6. Day 3 Morning Sessions	31
7. Day 3 Afternoon Sessions	32
8. Day 2 Morning Sessions	21
9. Day 2 Afternoon Sessions	22
10. Day 1 Pre-Conference Tours & Workshops	11
11. Booth Options	5

4. Click on the **Registration** group.
5. Observe the **Products Linked** under Build area to the left - notice the **Full Pass** product.
 - Products are linked to sessions via the **Event Session Group** field on a **Registration Product** form.

Registration [Edit] [Clone] [Delete]

Event: 25th Annual ISEN Conference | Display Order: 1 | Require Session Selection:

Related List Quick Links: Products (10+), Files (0), Event Session Group History (1)

Details

Event Session Group Name: Registration | Require Session Selection:

Display Order: 1 | Event: 25th Annual ISEN Conference

Description

Description: What days will you be joining us? Bringing anyone?

System Information

Created By: mtdoc070 Org: 11/26/2018 8:35 AM | Last Modified By: mtdoc070 Org: 11/26/2018 8:35 AM

Build

Products (3+)

- Full Pass - Sponsor
Revenue GL: 01-42110
List Price: \$0.00
Status: Active
- Full Pass
Revenue GL: 01-42110
List Price: \$700.00
Status: Active
- Day 2 Pass
Revenue GL: 01-42110
List Price: \$200.00
Status: Active

View All

Viewing Sessions and Registrations

- Click on the **25th Annual ISEN Conference Overview** report from Favorites.
 - Observe the grouping of products by **Event Session Groups**.
 - Observe the top Event Session Group is undefined - this is because these products are NOT Registration products but are still linked to the Meeting.
 - Observe the Inventory columns displaying total and remaining inventory.

EVENT SESSION GROUP	PRODUCT: PRODUCT NAME	PRODUCT: RECORD TYPE	LIST PRICE Sum	INVENTORY Sum	INVENTORY ON HAND Sum	INVENTORY USED Sum	INVENTORY LAST UPDATED
(5 records)	Half Page Ad	Advertising	\$250.00	-	0	-	-
	Cancellation Fee	Cancellation Fee	\$40.00	-	0	-	-
	10 X 10 Booth	Exhibitor	\$1,000.00	-	0	-	-
	Golf Hole Sponsorship	Sponsorship	\$2,000.00	-	0	-	-
	Session Sponsorship	Sponsorship	\$1,000.00	-	0	-	-
Subtotal			\$4,290.00	0	0	0	
Booth Options (2 records)	Chairs	Registration	\$30.00	50	50	-	-
	Tables	Registration	\$80.00	50	50	-	-
Subtotal			\$110.00	100	100	0	
Day 1 Pre-Conference Tours & Workshops (5 records)	Flawless Consulting: Getting Your Expertise Used	Registration	\$79.00	1	1	-	-
	Executive Coaching and Feedback	Registration	\$79.00	1	1	-	-
	Managing Conflict with Power and Presence	Registration	\$79.00	1	1	-	-
	Find Your Purpose, Passion and Principles	Registration	\$79.00	1	1	-	-
	Nimble Leadership Best Practices	Registration	\$79.00	1	1	-	-
Subtotal			\$395.00	5	5	0	
Day 2 Afternoon Sessions (7 records)	PUT THE SOUL IN SOLE PRACTICE - Use Resilience Training to Make Decisions	Registration	\$0.00	50	50	-	-
	EMERGING INDUSTRY TRENDS - Technology Trends - The Rise of Smart Offices	Registration	\$0.00	50	50	-	-
	MARKETING - Content Marketing Intensified	Registration	\$0.00	50	50	-	-

- Click on the **25th Annual ISEN Conference Overview** report from Favorites.
 - Observe the grouping of Registrations by Product.
 - Observe the Total Price column; this is the actual amount that registrant paid for the product, discounts included.

PRODUCT: PRODUCT NAME	ACCOUNT NAME	MEMBER TYPE	STATUS MEMBERSHIP FLAG	TOTAL PRICE Sum	REGISTRATION ID
Annual Golf Classic (5 records)	Adam Carey	Individual	✓	\$39.00	Registration 0000001
	Virgil Watts	Retired	✓	\$39.00	Registration 0000002
	Leroy Taylor	Individual	✓	\$39.00	Registration 0000005
	Ben Peterson	Individual	✓	\$39.00	Registration 0000007
	Billy Henderson	Individual	✓	\$39.00	Registration 0000008
Subtotal				\$195.00	
Day 1 Pass (1 record)	Marian Wade			\$300.00	Registration 0000003
Subtotal				\$300.00	
Day 2 Pass (1 record)	Marian Wade			\$300.00	Registration 0000003
Subtotal				\$300.00	
Full Pass (7 records)	James Meaden	Individual	✓	\$800.00	Registration 0000009
	Adam Carey	Individual	✓	\$450.00	Registration 0000001
	Virgil Watts	Retired	✓	\$450.00	Registration 0000002
	Leroy Taylor	Individual	✓	\$450.00	Registration 0000005
	Ben Peterson	Individual	✓	\$550.00	Registration 0000007

Creating a New Event

The first step in setting up an event is creating the event record. The record anchors all other event related Items. Various fields in the event Item help define how the event will display on the self-service site.

In this exercise, users will create a **simple** Event to Registration Product example to experience the basics of setting up an Event. Every field will not be filled out – instead, skip to the next Area after filling out the fields to the current Area.

1. Select **Events** from the **App Launcher**.
2. Click the **Events** Item drop down and select **New Event**.
3. The **New Event** window displays.

Details (TOP)

4. Enter **XYZ Event** in the **Event Name** and **Short Name** fields.
5. Set the **Status** as **Active**.
6. For the **Type**, select **Regular**.
 - Fields with an asterisk (*) are required.
7. Enter **Learning more about XYZ** in the **Description** and **Short Description** fields.

Date & Time

8. Scroll down to the **Date and Time** section - start and end date of the event are required.
9. Enter **Next Wednesday's date 1:00** for the **Start Date**.
10. Enter **Next Wednesday's date 3:00** for the **End Date**.
 - If using special pricing for early registrations, enter **last date** price will be available in the **Early Registration Cutoff Date** field. After this date, regular price will apply.
 - If using special pricing for late registrations, enter **last date** regular price will be available in the **Regular Registration Cutoff Date** field. After this date, late price will apply.

Attendee

11. Check the **Waitlist Enabled** box.
12. Enter **25** in the **Max Number of Registrations**.
13. Skip the **Venue** area.

Community Hub

14. Community Hub settings and dates are all optional but are recommended to control how web users can interact with the event.
15. Check the **Self Service Enabled** box - allows web users to register for this event on-line.
16. Check the **Co-Worker Registration Enabled** - allows web users to register co-workers on-line.

Financial

17. Enter **\$2500** in the **Expected Revenue** field.
18. Click **Save**.

Creating a New Registration Product

1. On the event record, select the **Build** tab.
2. Under **Build** section on the right, click the **drop-down** to the right of **Products**.
3. Click the **New** button.
4. Scroll down, select the **Registrations** option, select and click **Next**.

Information

5. **Product Name** - Enter **XYZ Registration**.
6. **Short name** - Enter **Standard**.
7. **Status** - Select **Active**.
8. **Display Order** - Enter **10**.
 - It is recommended that you rank your products 10, 20, 30, and so forth. Rather than 1, 2, 3. Then if you need to insert another product into the existing order, you can easily insert 25, without needing to edit the display order on all products that follow.
9. **Quantity Limit** - enter **1**.

Event

10. **Event** - Enter **XYZ Event**.
11. **Registration Types** - The registration types that may purchase the session on-line. If none are selected, all registration types will be available to purchase.
12. Add **Attendee**.

Financial

13. Enter **100** in the **List Price**.
14. Enter **01-42500** in the **Revenue GL Account**.
15. Enter **Deferred Registration** in the **Deferred Revenue Method**.
16. Enter **International Society for the Exceptionally Nimble** in the **Entity** field.

Community Hub

17. Community Hub settings and dates are all optional but are recommended to control how web users can interact with the event.
18. **Check the Self Service Enabled box** - allows web users to register on-line.
19. Click **Save**.

Creating a Registration

Once an event has been set up, registrations can be ordered. Event registrations are entered into Nimble AMS as orders with a Product Type of Registration.

Add a Registration

1. From the Events home page, click the **Registrations** tab.
2. Click **New Registration**.
3. The **Let's Get Started** window displays.
 - Enter "**Stan Smith**" in the **Bill To** field.
 - **Order Entity** should default to **ISEN**.
 - **Batch** will default to **Automatic**.
 - **Transaction Date** will be today's date.
 - Click **Continue**.
4. The **Add Registration** window displays.
 - The Bill To name defaults in the Account field. Users can lookup other attendees if needed.
 - Select the **XYZ Event** from the **Event** drop-down.
 - Leave the **Price Class** field at **Default**.
 - Select the **Standard Registration** product.
 - Click **Save**.
 - Process the order as usual and submit. For more information, see the training guide for order processing.

Edit Existing Registrations

1. Navigate to the order with the registration. Refer to the Orders training for information on how to find an order.
2. On the order details screen, click **Edit**.
3. On the Let's Get Started screen, Users can change the entity, transaction date, and batch.
 - No changes are needed for the exercise, so click **Continue**.
4. When the cart displays, click **Edit** to make changes to the registration.
 - Users can update the Price Class, Registration Product, Badge information, and Question answers.
5. Make changes to the registration screen as needed and click **Save**.

Cancel Existing Registrations

1. Navigate to the order with the registration. Refer to the Orders training for information on how to find an order.
2. Click **Cancel** to cancel the registration.
3. Select with Fees or Without Fees to continue.
 - When cancellation is complete, the cart will display with the registration displaying as canceled.

Transferring Event Registrations

1. Navigate to the existing registration order and click the **Edit** Button.
2. From the **Let's Get Started** pop-up, click the **Continue** button.
 - Users can change the adjustment batch and date, if needed.
3. From the **Verify Cart** page: select **Cancel** to left of the registration order item.
4. Under **What Do You Want To Do** (upper right), select the down arrow next to **Add Items**.
5. Select **Registration**.
6. The **Accounts** box at the top of the registration will default to the original constituent who placed the order.
7. Select the small **magnifying glass** to open the global search - find and choose the new registrant.
8. Use the **Event** drop down to choose the desired event to transfer the registration.
 - Most likely, a user will transfer the Registration to the same event as the previous registrant was attending, but users can choose a different event if desired.
 - Any change to the Event (from the originating registrant's event), OR if another price class is applied to the new registrant, will require the user to make an Adjustment to the Payments section - either an additional payment or refund - before Order submittal.
9. Select the desired **Registration** product, and, if desired/available: add any additional sessions, adjust the badge record, and answer any event questions.
10. Save the new registration.
11. From the **Verify Cart** page, observe BOTH the cancelled registration & transfer registration.
12. Under **What Do You Want To Do** (upper right), click the **Payment** link (upper right) to automatically transfer the existing payment from the cancelled order item line to the new order item line.
 - If there is a price difference between the two orders, you will need to add an additional payment, send an invoice, or refund the difference in cost as needed.
13. Click Submit the **Order**.
14. Observe the adjusted **Transactions**, **Order Item Lines**, and **Registration** records linked to Order.

Event Questions

An organization may want to collect additional details during registration. If a user decides to collect extra information from registrants, then create event questions and event question options as needed.

In this **exercise**, users will add a question to their previously created question.

1. Navigate to the **XYZ Event** record created earlier.
2. Under the **Build** section, click **New** on the event questions line.
3. In the **Question Text** field, enter **Is this your first time attending the Annual Conference?**
4. In the **Status** dropdown, select **Active**.
5. In the **Type** dropdown, select **Picklist**.
 - When Multi-picklist or Picklist selected as the type, Users must define the possible answers. **This process will be covered in the next section.**
6. Check this **Required** box.
 - Required - Forces all registrants to answer the question.
7. In the **Display Order** field, enter **10**.
 - Determines the sort order in which the questions display.
8. The previously created event should default in the **Event** field.
9. Observe the **Session** field.
 - If applicable, Users could have chosen a session to which the question should be added.
10. Check the **Community Hub** box to enable online registrants to answer the question.
11. Click **Save**.
 - The question will appear in the **Build** section, under **Event Questions**.

Event Question Options

As mentioned earlier, if a Multi-picklist or Picklist question has been added, Users must add the list of possible answers.

1. Ensure you are still on the **Event** record just created.
2. Click on the **Event Questions** in the **Related List Quick Links**.
3. Click on the **Question ID** to the left of the question you created in the previous exercise.
4. Click the drop down on the right of the **Events Question Options** section (on far right).
5. Click **New**.
6. The **Event Question** value defaults; the **Event Question Option Id** will fill in once saved.
7. In the **Display Order** field, enter **10**.
8. In the **Option Text** field, enter **Yes**.
9. Click **Save**.
10. Repeat steps 4-9 with the **Option Text** being **No**.

Cloning Existing Events

Many associations hold the same event every year or the same event is held in different locations in the region the association serves. Rather than needing to set up each of these repeated events from scratch, Nimble AMS provides the ability to clone an event, saving Users time.

Cloning an event will copy the following elements of the original event: Event, session products, session groups, event questions, event question options.

1. Navigate to the **Event**.
2. Click the **Clone** button in the upper right corner.
3. In the **Event Name** field, enter **XYZ Event II**.
4. Click **Clone**.
5. The new event record will display.
6. Edit the items to be changed, following the guidelines discussed in this training.
 - The most critical edit will be to change the event's dates. This includes dates for the event, registration cutoffs, community hub access, etc.
 - If special prices have been created on the original event, be sure to review all prices

Microsites

Nimble AMS now includes two Event microsite templates, which are public communities built on Salesforce Community Cloud.

A microsite is a branded content site that lives outside of the brand URL.

Event microsites are perfect for showcasing large events like Annual conferences and Events but can also be customized for Donation campaigns or another specific function. Using Community Workspaces and Community Builder, users can rapidly point-and-click configure these template sites to match the association's theme, style, and event content, and then publish them for public access.

These microsites are dedicated communities that exist alongside Community Hub in any Nimble AMS org, so community management is handled for each one separately, allowing for granular theming and design on a site-by-site basis.

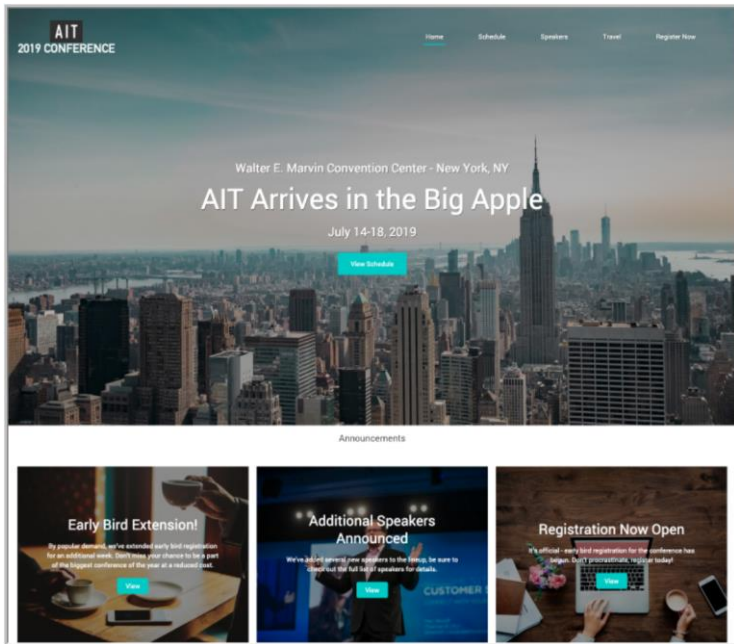
Enabling the Microsites

To have the microsites added to, please contact Nimble AMS Support.

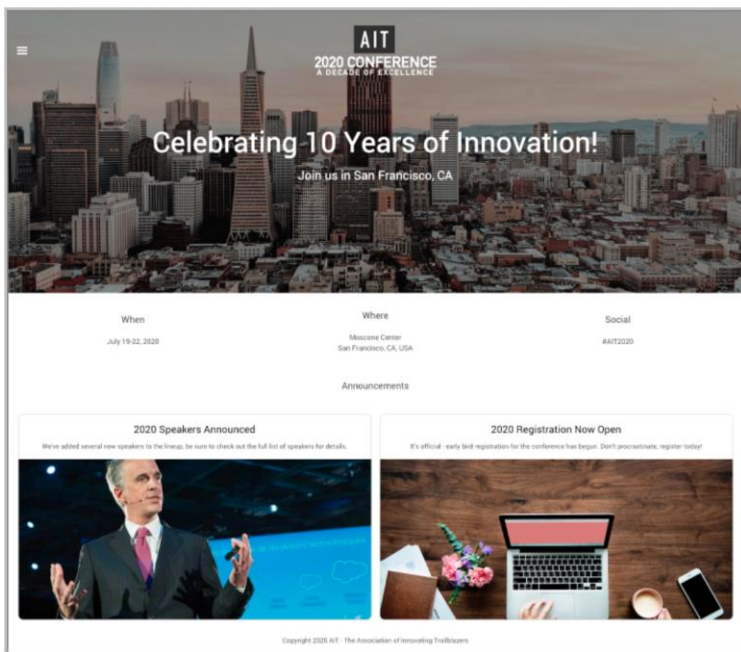
Once the microsites are added, an administrator or user can access them. The event microsites are Salesforce communities and, by default, are called 2019 Conference and 2020 Conference.

The next page displays 2 template examples that are available.

2019 Template.



2020 Template



Nimble AMS gives users a big head start by laying out the theme, navigation, and some default pages to easily modify it to match an event's content. Management of the community is all done via Community Workspaces.

Viewing an Existing Microsite

To see the example of the Microsite in the Training Org, follow these steps:

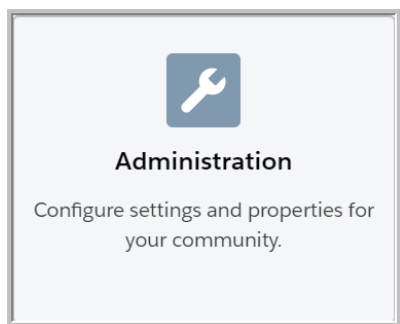
1. Click **Setup**.
2. Click **Feature Settings**.
3. Click **Communities**.
4. Click **All Communities**.
5. Click **Workspaces** next to Donation Example.

Action	Community Name	Description	URL	Status
Workspaces	Community Hub		https://cb-training-tso.force.com/communityhub	Active
Workspaces Builder	Donation Example		https://cb-training-tso.force.com	Preview

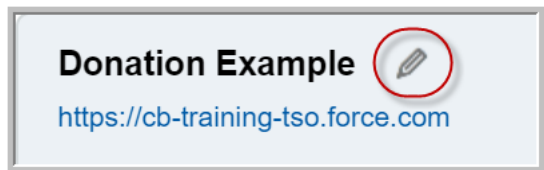
Getting Started with Microsite Editing

From Community Workspaces, a user can access anything needed to manage the site. One of the first things a user should do is rename the site and change the URL:

1. From Community Workspaces, click the **Administration** tile



2. In the Settings area, click the pencil icon next to the name:



3. Change the Name and **URL** to match an Event or Donation Campaign name. For this example, change the value of “Donation Example” to “Event Example”.

4. Click **Save**.

From here, a user can click the top left, where it says **Administration**, and move into customizing the pages and theme.

5. Click **Administration** in the top-left and select **Builder**.

6. Use the Community Builder to change the theme and layout of pages. Users can further learn how to “**Customize Communities with Community Builder**” with Salesforce platform Trailheads and articles.

Next Steps for Microsites

After renaming the site and URL, and customizing pages with the Builder, users will likely want to update some of the content or even expose content from the CMS. There are a lot of options in Community Workspaces, so Community Brands recommends reviewing, “**Manage Your Community with Community Workspaces**” with Salesforce platform Trailheads and articles to further understand all the possible configurations for a microsite.

Events Reports and Dashboard

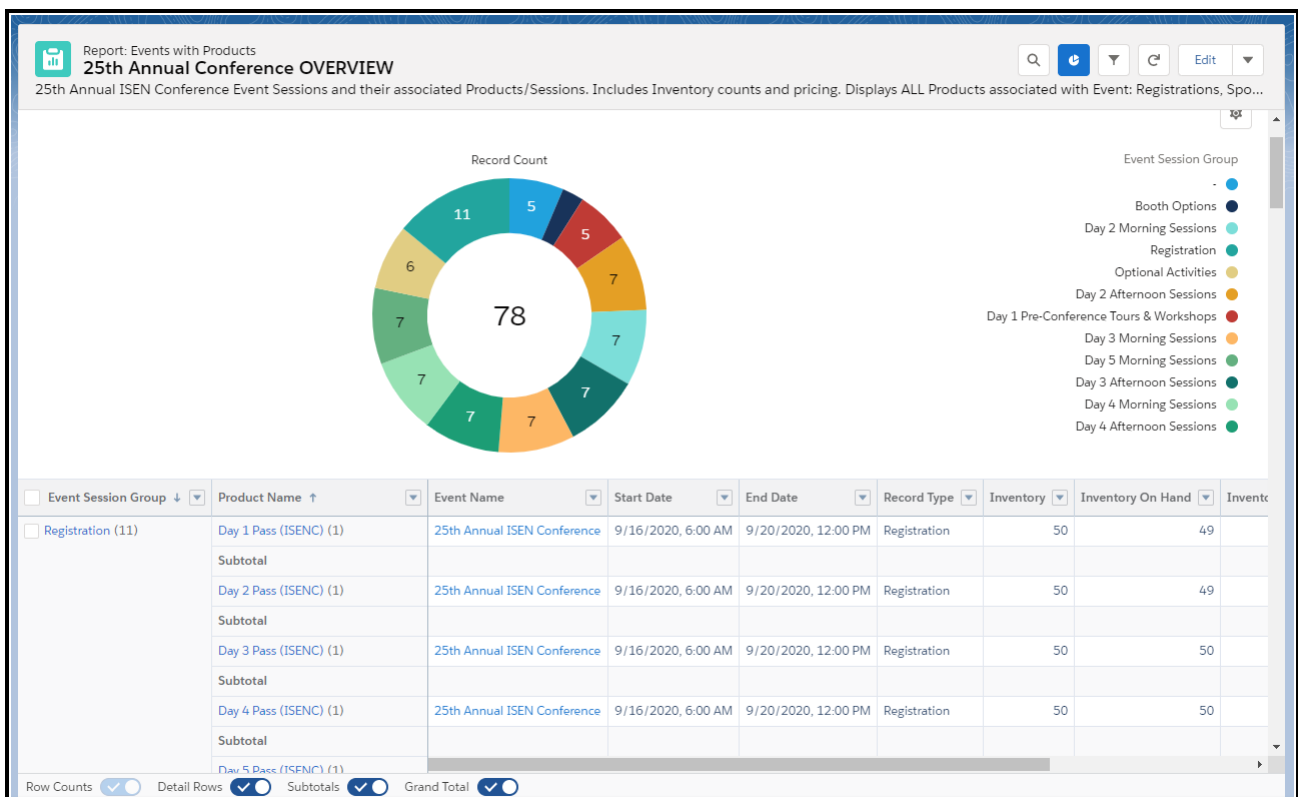
Events Reports

To run a **Planning** focused Events report:

1. Click the **Reports** Item.
2. Select the **All Folders** section under **Folders**.
3. Click the **Events (Nimble AMS)** folder.
4. Click on the **25th Annual Conference Overview** report.

Tip: If the report returns more than 2,000 records, only the first 2,000 are displayed. To see a complete view of the report, click Export Details.

25th Annual Conference Overview

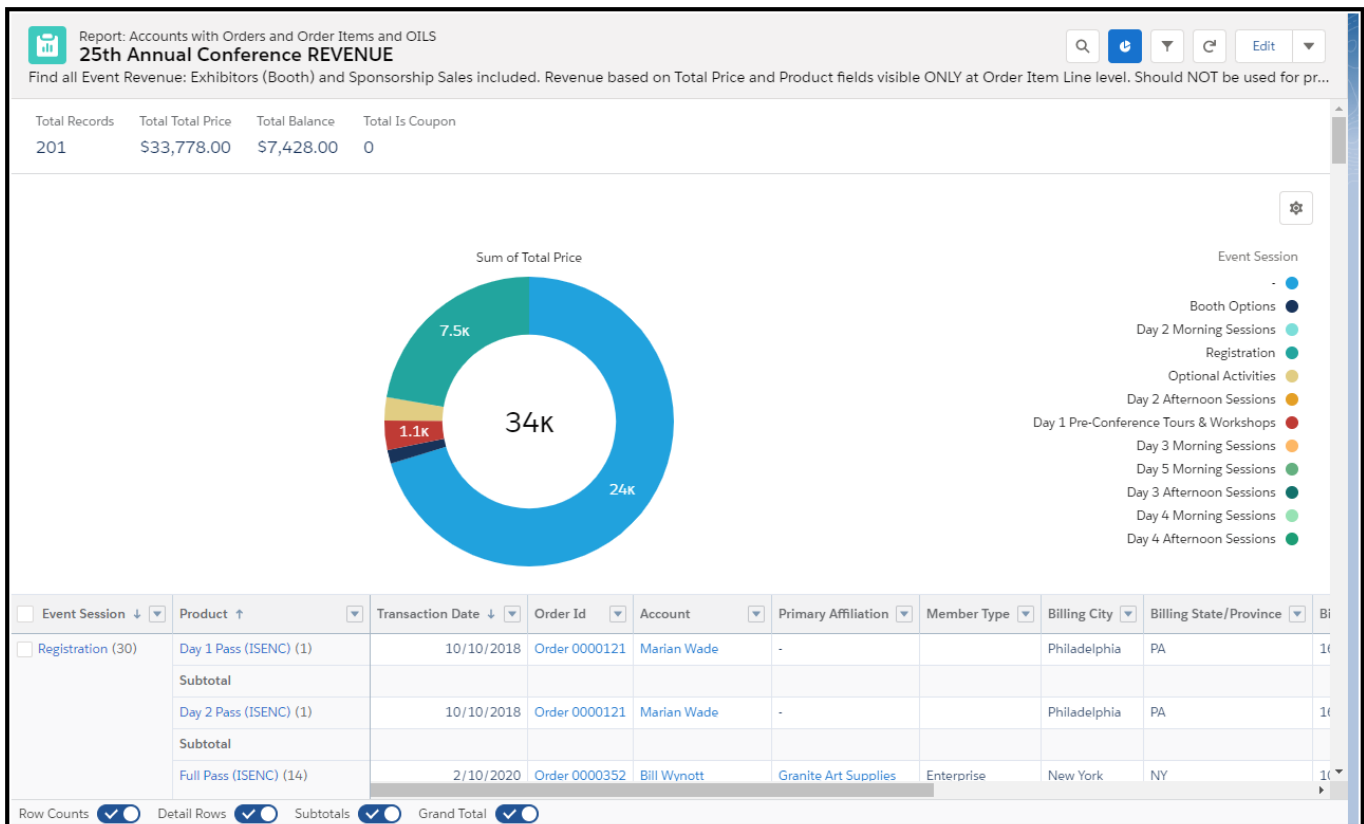


To run a more **Revenue** focused Events report:

5. Click the **Reports** Item.
6. Select the **All Folders** section under **Folders**.
7. Click the **Events (Nimble AMS)** folder.
8. Click on the **25th Annual Conference Overview** report.

Note: Be careful not to edit this report - note that the text (DB) at the end of this report name indicates it is also embedded in a dashboard.

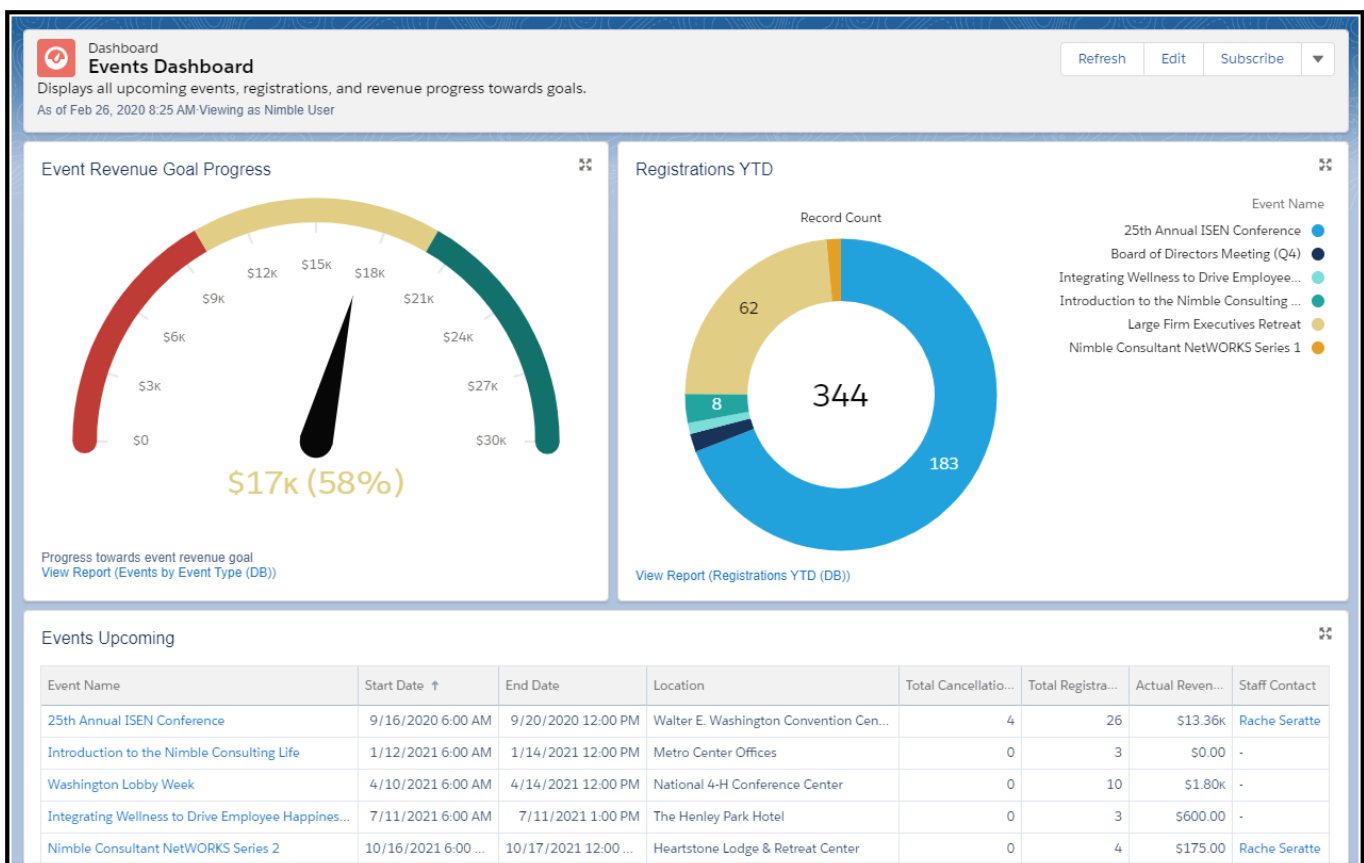
25th Annual Conference Revenue (DB)



Events Dashboard

To display an Events dashboard:

1. Click on the **All Folders** section.
2. Click the **Events (Nimble AMS)** folder.
3. Click on the **Events Dashboard**.
4. Click the **Dashboards** tab.

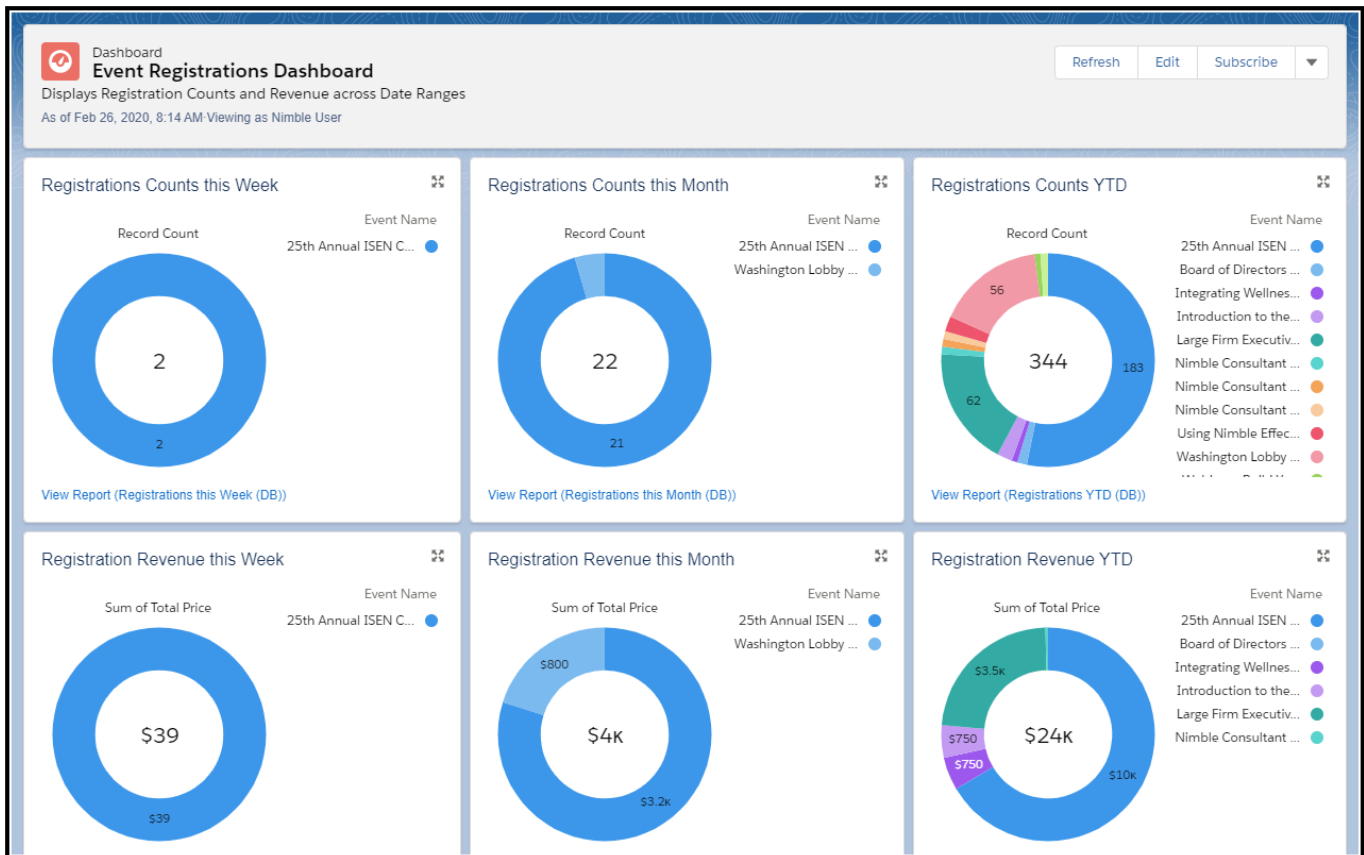


- **Displays** revenue for Events
- Overall **Registration Counts** for Events
- Lists ALL Upcoming **Events, Dates, Location, Reg, Cancellations, & Staff Contact**

Events Registrations Dashboard

To display an Events dashboard:

1. Click on the **All Folders** section.
2. Click the **Events (Nimble AMS)** folder.
3. Click on the **Events Registrations Dashboard**.
4. Click the **Dashboards** tab.

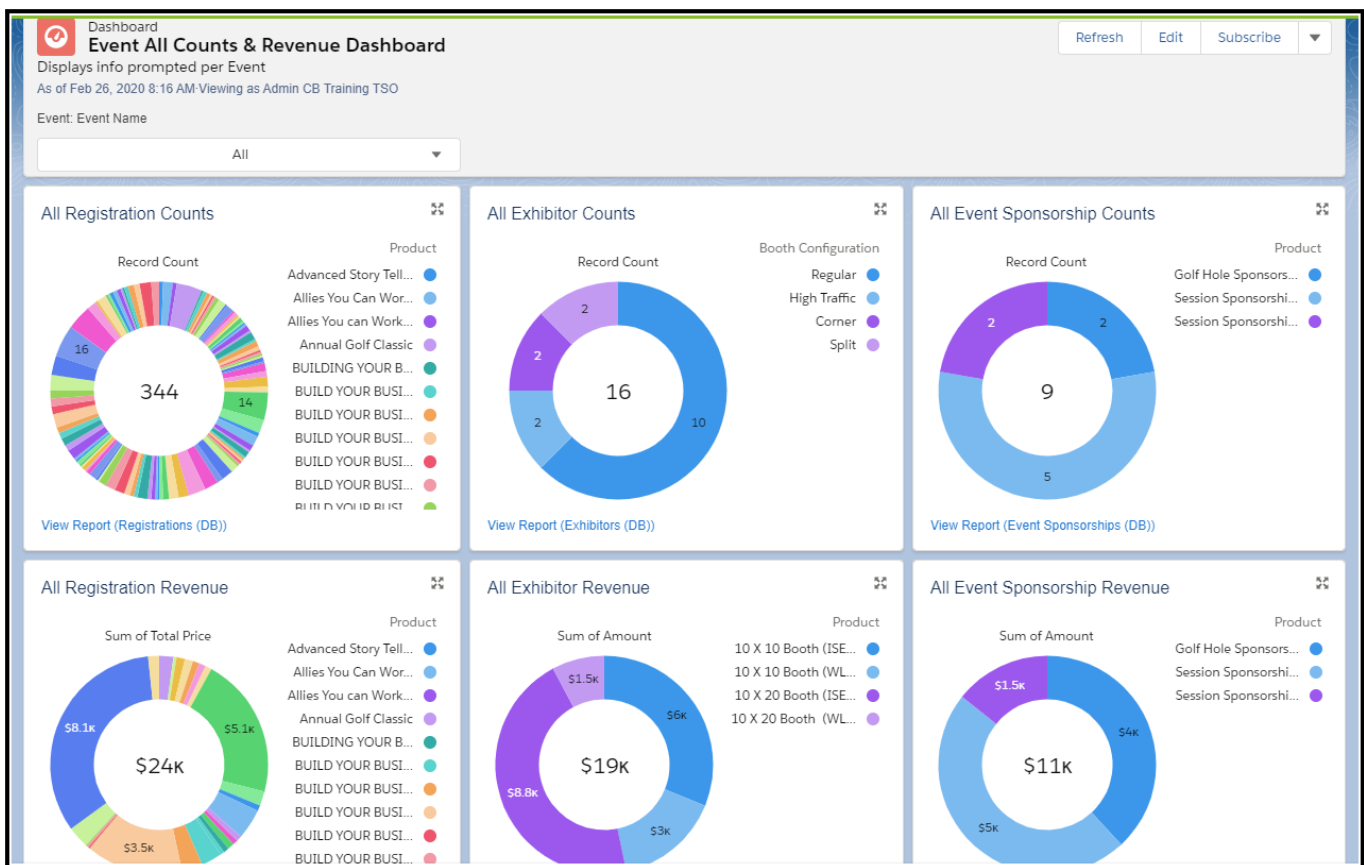


- **Displays** Registration Counts over selected Time Frames
- **Displays** Registration Revenue over selected Time Frames

Events Registrations Dashboard

To display an Events dashboard:

1. Click on the **All Folders** section.
2. Click the **Events (Nimble AMS)** folder.
3. Click on the **Events All Counts & Revenue Dashboard**.
4. Click the **Dashboards** tab.



For a filtered Event Name:

- **Displays Registration Counts and Revenue**
- **Displays Exhibitor Counts and Revenue**
- **Displays Sponsorship Counts and Revenue**

CHAPTER

13 Subscriptions

Objective.....	13.1
Understanding Subscriptions	13.2
Subscriptions Item	13.3
Purchasing a Subscription	13.4
Subscription Reports and Dashboard.....	13.6

Objective

In this section, Users will learn to manage Subscriptions in Nimble AMS.

This includes:

- Understanding Subscriptions
- Creating a new Subscriptions Product
- Editing a Subscriptions Product
- Viewing Subscriptions-related Information
- Purchasing Subscriptions
- Managing Renewals
- Running Subscription Reports
- Subscriptions Dashboard

Understanding Subscriptions

The Nimble AMS Subscriptions module provides the tools to easily manage subscriptions for your association. The subscription module can be used to manage your publication and periodicals as well as service-oriented subscription enrollments. With flexible terms, pricing, and renewals, it is easy to manage multiple subscriptions for your organization.

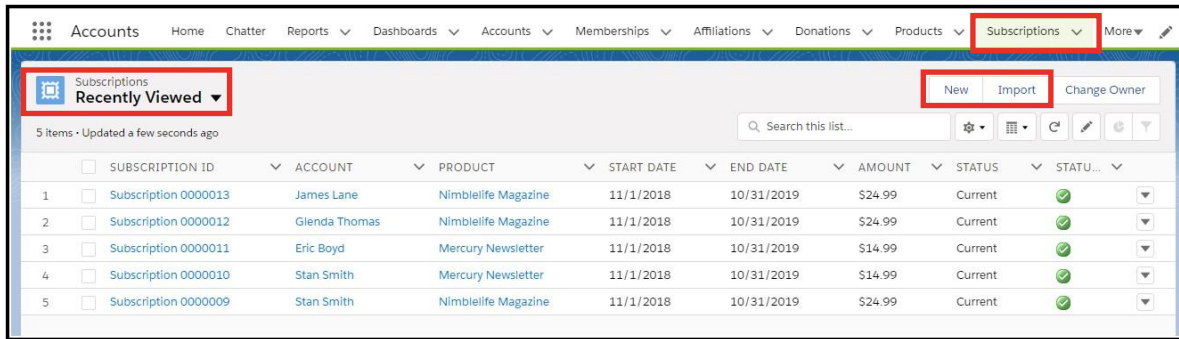
Nimble AMS makes it easy for constituents to get engaged with the association and subscribe to your organization's subscriptions products via the self-service portal. The self-service portal makes it easy for a constituent to enable automatic renewals via credit card or bank account, choose to enroll in single year or multi-year subscriptions, as well as have personalized pricing based on demographic data.

With Subscriptions Users can manage:

- Set up:
 - Subscription products
 - Special Prices
- Subscription-related information
- Entering orders for Subscription products
- Renewals

Subscriptions Item

The Subscriptions Item provides several different ways of finding, organizing, and interfacing with Subscriptions.



From the TOP RIGHT HAND, **Actions** area, Users can:

- Create a **New** Subscription
- **Import data to** Subscriptions

From the TOP MIDDLE, **Subscriptions** Item drop down, Users can:

- Create a **New** Subscription
- Use **Recent Records** to return to a previously accessed Subscriptions
- Use **Recent Lists** to return to a previously accessed List View of Subscriptions

From the TOP LEFT, **Subscriptions Recently Viewed** drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

Purchasing a Subscription

To purchase a Subscription:

1. Start an **Order** for the **Curtis Banks** Account purchasing the Subscription.
2. Select **Subscription** for the type of order.
3. Click **Continue**.

The screenshot shows a form titled "Let's Get Started" with the following fields:

- Bill To: Curtis Banks
- Order Entity: ISEN
- Batch: Automatic
- Transaction Date: 11/12/2018 [11/12/2018]

Below these fields is a question: "Which type of order do you want to start with?" with a dropdown menu set to "Subscription". At the bottom are "Continue" and "Cancel" buttons.

4. Click in the **Nimble Magazine** checkbox.
5. Click **Save**.

The screenshot shows the "Add Subscription" form for Curtis Banks. It includes a "Save" button and a "Customer" dropdown set to "Curtis Banks". Below is a "Price Class" dropdown set to "Member".

The "Subscription Products" table is as follows:

Purchase	Product	Start Date	End Date	Unit Price	Quantity	Price
<input checked="" type="checkbox"/>	Nimblelife Magazine	4/1/2016	3/31/2017	24.99	1	\$24.99
<input type="checkbox"/>	Mercury Newsletter	2/1/2014	1/31/2015	14.99	1	\$14.99

At the bottom of the table are "Save" and "Cancel" buttons.

6. Click **Go To Payment**.

7. Click **Pay Now**.
8. Click the **Payment Method** drop down.
9. Select the **Check** payment method.
10. Enter **123** in the **Check Number** field.
11. Click **Save**.
12. Click **Submit Order**.

Subscription Reports and Dashboard

A variety of subscription reports are available from the Report tab.

To run a Subscriptions Report:

1. Navigate to the **Reports** tab.
2. Click on the **All Folders** section.
3. Select the **Subscriptions (Nimble AMS)** folder.
4. Select the **Subscriptions ALL** report.

Subscriptions ALL

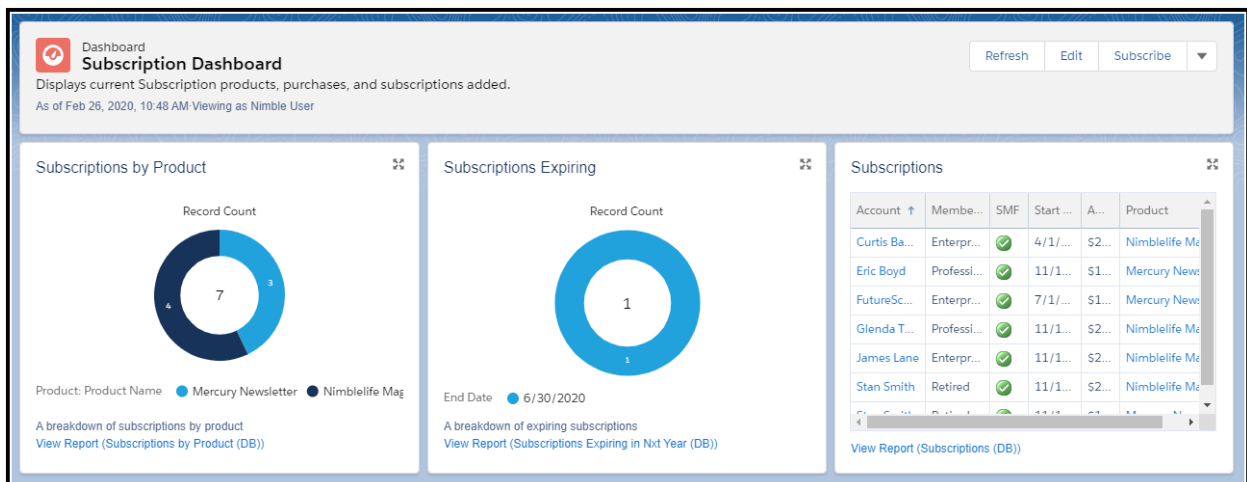
Report: Accounts with Subscriptions with Products
Subscriptions ALL
 All Subscriptions.

Total Records: 7 Total Amount: \$144.93

Product	Account	Primary Affiliation	Member Type	SMF	Start Date	End Date	Amount	Subscription Id
Mercury Newsletter (3)	FutureScope	-	Enterprise	✓	7/1/2019	6/30/2020	\$14.99	Subscription 0000015
	Stan Smith	-	Retired	✓	11/1/2018	10/31/2019	\$14.99	Subscription 0000010
	Eric Boyd	-	Professional	✓	11/1/2018	10/31/2019	\$14.99	Subscription 0000011
Subtotal							\$44.97	
Nimblelife Magazine (4)	Stan Smith	-	Retired	✓	11/1/2018	10/31/2019	\$24.99	Subscription 0000009
	Glenda Thomas	-	Professional	✓	11/1/2018	10/31/2019	\$24.99	Subscription 0000012
	James Lane	Empire State Corporation	Enterprise	✓	11/1/2018	10/31/2019	\$24.99	Subscription 0000013
	Curtis Banks	Flos Consulting	Enterprise	✓	4/1/2016	3/31/2017	\$24.99	Subscription 0000014
Subtotal							\$99.96	
Total (7)							\$144.93	

To display a **Subscription** dashboard:

1. Click the **Dashboards** tab.
2. Click on the **All Folders** section.
3. Click the **Subscriptions (Nimble AMS)** folder.
4. Click on the **Subscriptions** Dashboard.



CHAPTER

14 Mobile

Objective.....	14.1
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Navigation.....	14.4
High Impact Areas	14.5
Additional Functions.....	14.8

Objective

The Mobile functionality of Nimble AMS enables users to login to Nimble AMS by downloading the Salesforce App onto their mobile device. All functions of Web based mobile are supported via the Mobile app and provide the flexibility of mobile solutions. Users can interface with clients at conferences, reference data and conduct analysis on the fly, and track their department's progress and metrics via mobile dashboards.

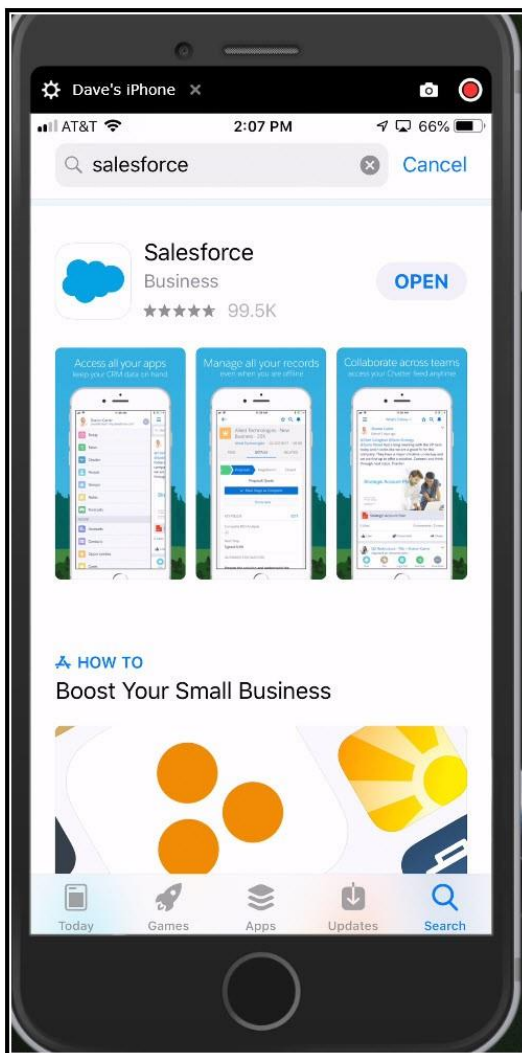
In this chapter, users will:

- Learn to Login
- Learn to Navigate
- Learn How to Use the High Impact Areas for the Mobile App
- Learn about additional Functions

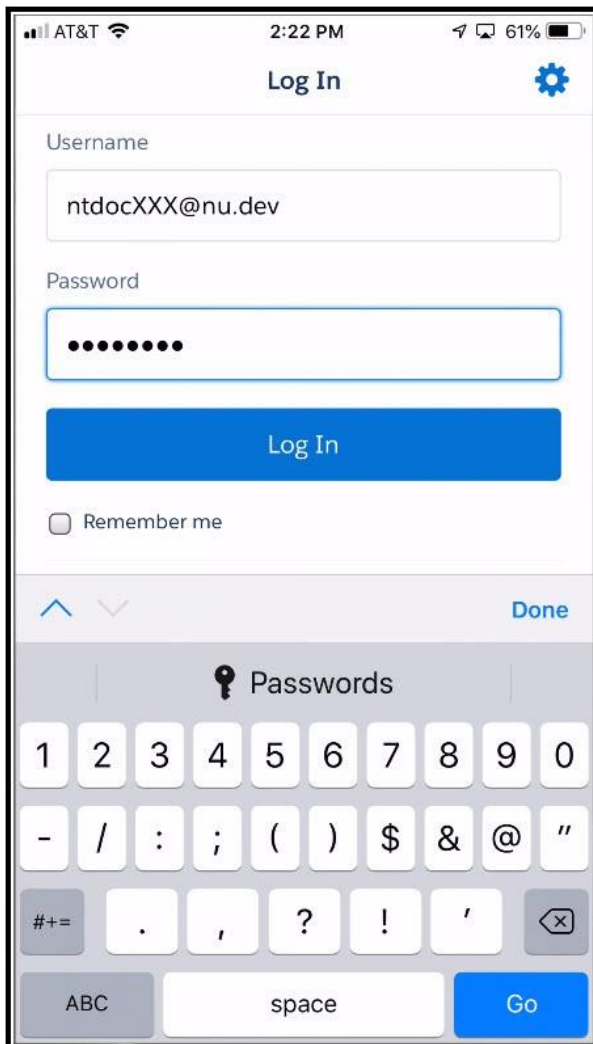
Logging In

Users will log in to the mobile version of the Training TSO they are currently using. They can substitute their staging or production instance if that information is available.

1. Navigate on the desired mobile device to the **App Store**.
2. Enter **Salesforce** in the **Search** box.
3. Select **Get** button next to the **Salesforce** App when it displays (Screenshot reads **Open**).



4. Enter the **Username** and **Password** for the Training Instance.
 - The same one used to log in initially; if the instructor logged the user in, directions will be provided.
 - Or for the **Staging** or **Production** TSO of the Organization.
5. Tap **Remember me** (if desired).
6. Tap the **Log In** button.



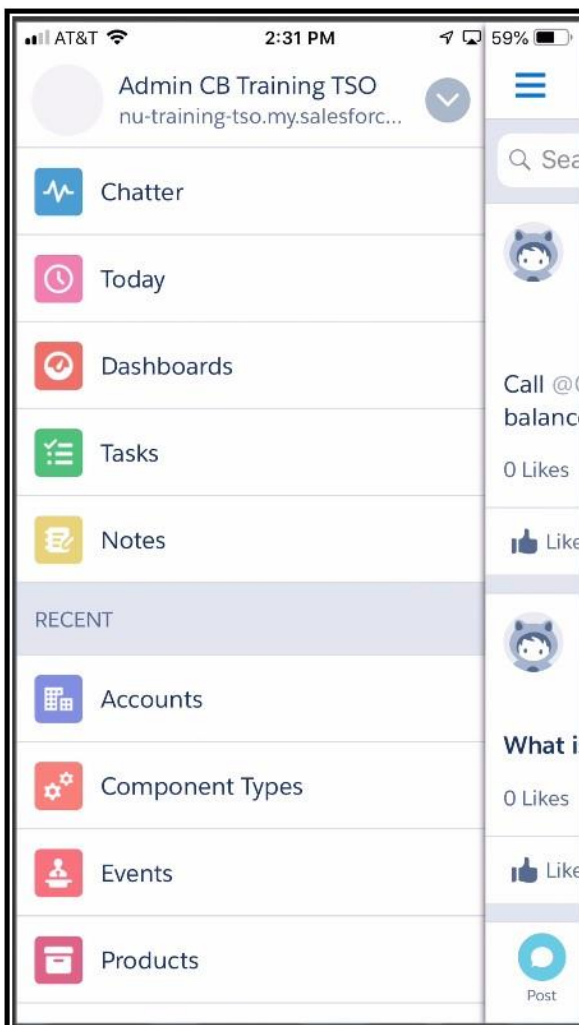
Navigation

Users will land on their Chatter feed but will be able to quickly navigate to other areas of the site by clicking on the blue (hamburger) icon in the upper left-hand corner.

By swiping on the desired section, users can navigate to any of the areas that they have access to in the full, web-based version of Nimble.

These sections are conveniently divided into two categories:

- **Commonly accessed areas:** Chatter, Today, Dashboards, Tasks, and Notes
- **Recent:** All other Apps/Items to which the user has access
- **Apps** (scroll down): Additional, more complex areas such as Reports or Events

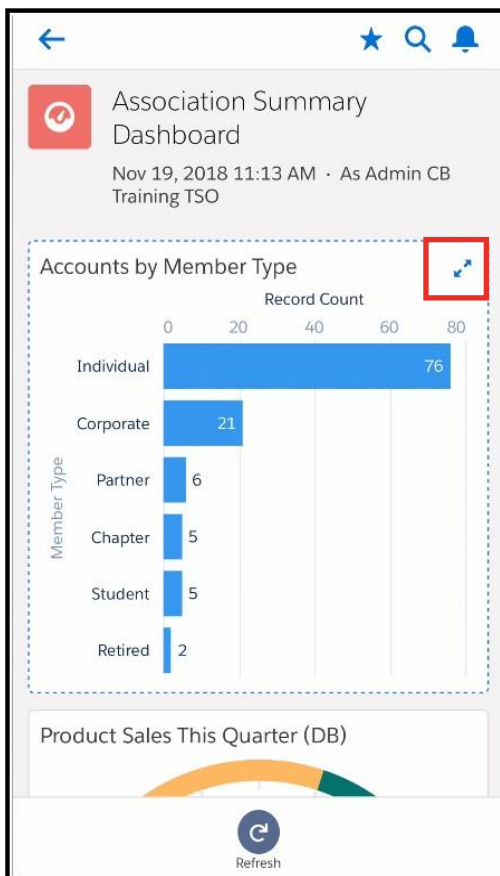


High Impact Areas

Most of Mobile is very intuitive, and is easily interfaced with and explored. Most of its functions exactly mirror that of computer based Nimble. By way of an abbreviated tour, users will be taken through three commonly accessed areas: Dashboards, Accounts, and Orders.

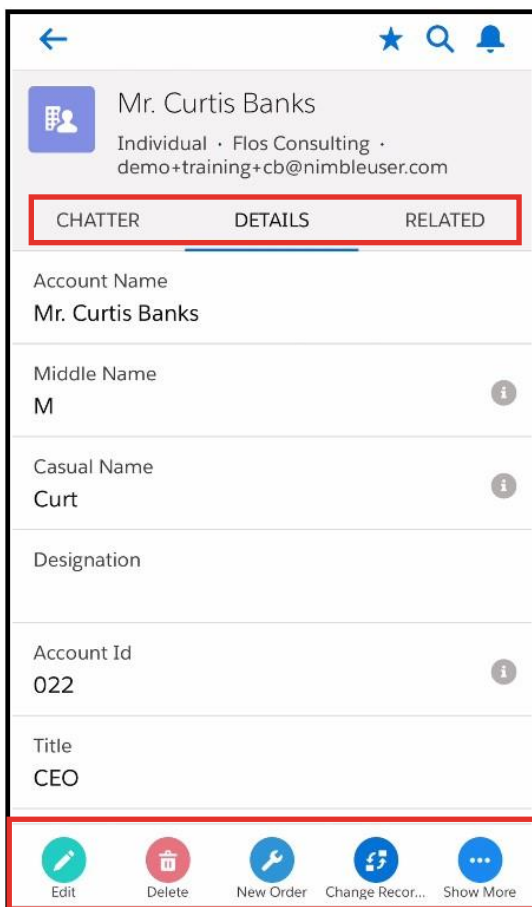
Dashboards

1. Tap on the **Dashboards** section under the initial **Navigation** display section.
2. **Recent Dashboards** display.
3. Find the **Association Summary Dashboard** and click on it.
 - Users can swipe downward to see other areas of the dashboard.
 - Users can tap **ON** the dashboard report and then click the expand arrows in the upper right hand corner to display the full report.



Accounts

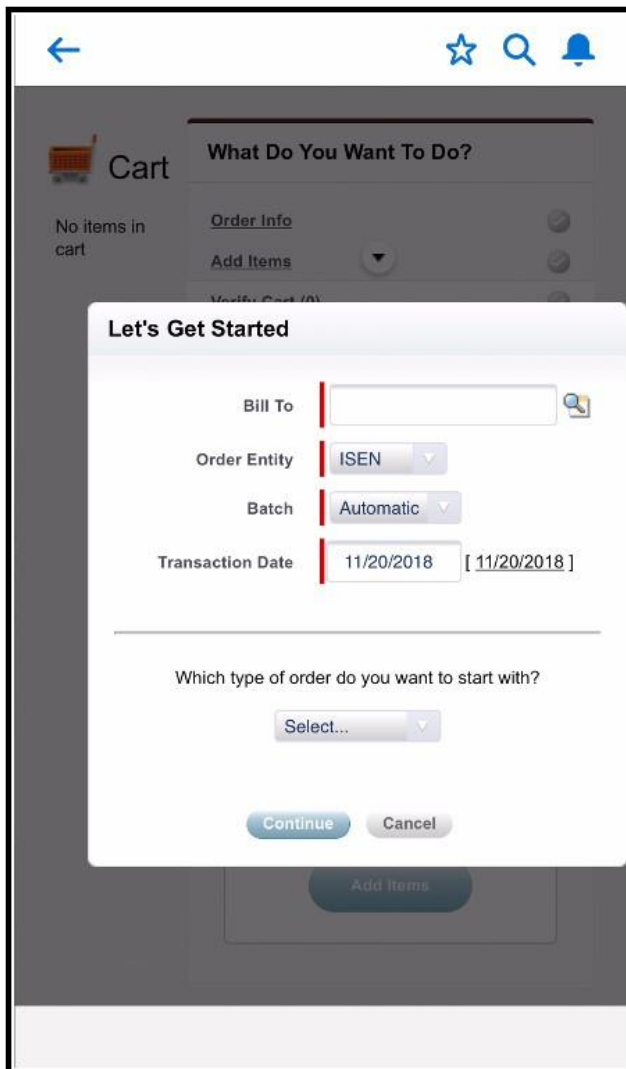
1. Tap on the **Accounts** section under the **Recent** display section.
2. The **Recent Accounts** list view displays.
3. Tap on **Curtis Banks**'s account record located below the **More List Views** section.
4. Curtis's **Account** record displays.
 - Users can swipe downward to navigate additional **Details**.
 - Users can click on the **Chatter** or **Related** tabs to navigate to those areas.
 - Users can **Edit**, **Delete**, create a **New Order**, **Change Records**, or **More** from the bottom of the record.



5. Tap on the blue **Back Arrow** until you reach the **Menu** icon.
6. Tap on the **Menu** icon.

Orders

1. Tap on the **Orders** section under the **Recent** display section.
 - You may have to scroll down
2. The **Orders This Week** list view displays.
3. Tap on the **New** button in the upper right-hand corner.
4. A **New Order** is started. The format is the same as the regular Nimble interface - users progress from the **Let's Get Started** step all the way through to **Submit Order**.

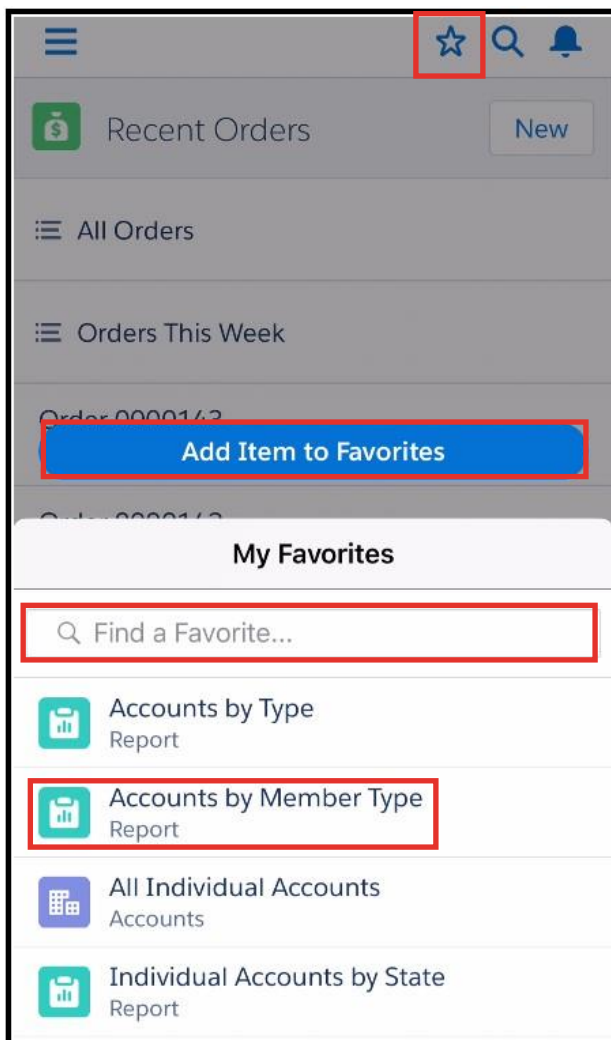


Additional Functions

Favorites

From any area users can also **Access, Add, or Manage** their **Favorites**.

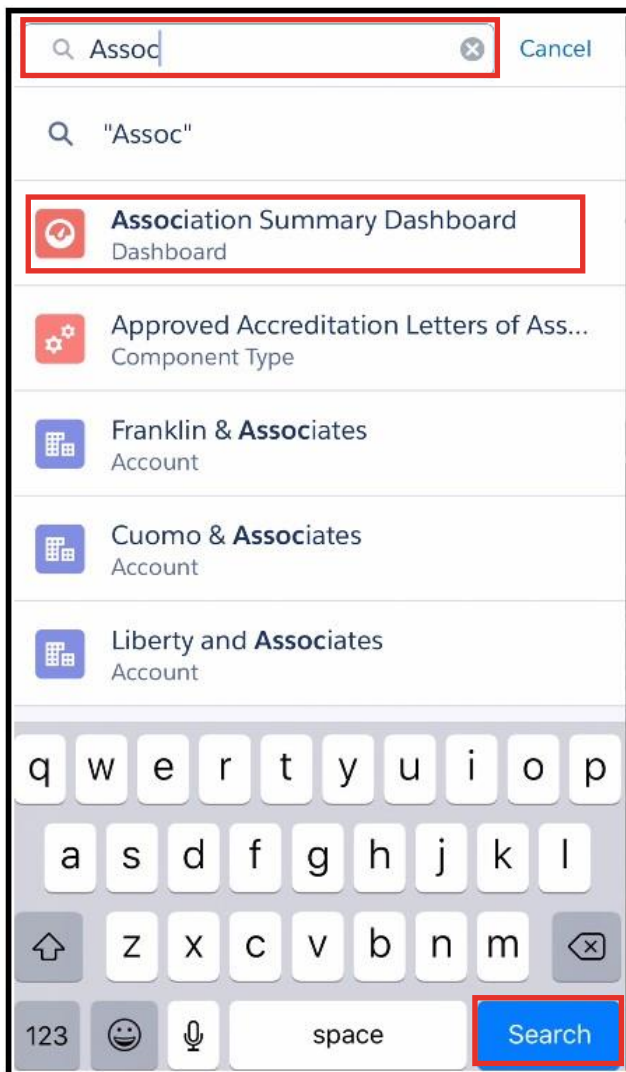
1. Tap on the **Favorites** icon (**Star**) in the upper right hand corner of the screen.
2. Observe the ability to:
3. **Add Item to Favorites** - current to what the user is located on.
4. **Find** a Favorite.



Search

From any area users can also use the Search function.

1. Tap on the **Search** icon (**Magnify Glass**) in the upper right hand corner of the screen.
2. Type **Assoc** in the **Search** box.
3. **Observe** the results. Users can:
4. Tap on one of the suggested, returned values.
5. Tap on the **Search** button to bring back focused results.



CHAPTER

15 Community Hub

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Personal Snapshot & Navigation.....	15.3
Registering for an Event.....	15.5
Online Store.....	15.8
Donations	15.10
Checkout	15.12
Cross Selling Carousel.....	15.14

Objective

Community Hub is the client’s customer facing portal for Nimble AMS. In Community Hub, the organization’s constituents can make purchases, view downloadable documents, and check status on registrations and program enrollments. In this chapter, the basic functions of Community Hub will be explored.

In this chapter, users will learn:

- How to Login
- How to Use the Personal Snapshot and Navigation
- How to Register for an Event
- How to User the Online Store
- How to Manage Donations
- How to Checkout

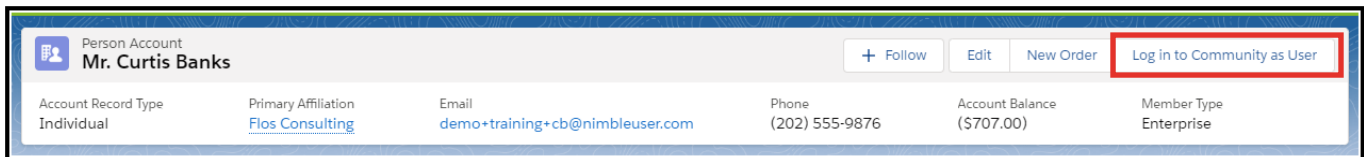
Logging In

Access Community Hub

Users with permissions can access a constituent's Community Hub page directly from **Nimble AMS**.

Users should use caution if enabled to use this function and should have received permission from the Account owner to do so.

1. **Search** for, and **Open, Curtis Banks**.
2. Select the **Log in to Community as User** button (upper right).
 - If this account was NOT enabled, users would see an **Enable Customer User** selection in place of the **Log in to Community as User**.
 - The Administrator could then use that button to enable an End User AND/ OR the customer to log into Community Hub.



IMPORTANT NOTE: In order to see Log in to Community as User **IN THE TRAINING ORG**, users will have to log out as Nimble User, and log back in as the Administrator.

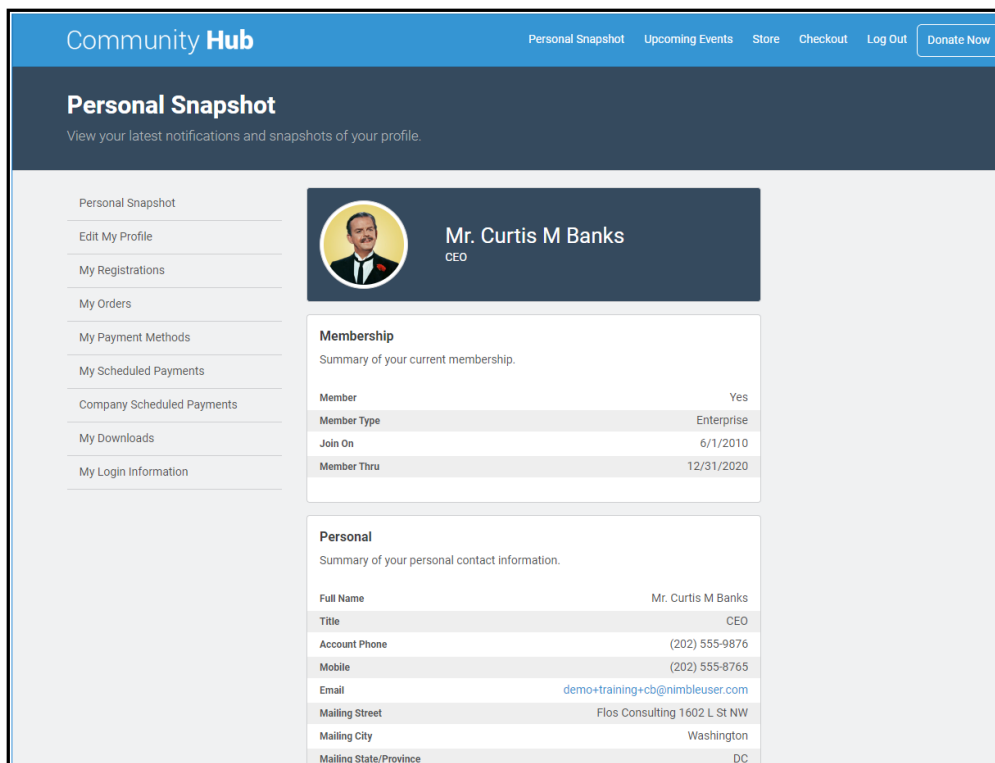
Personal Snapshot & Navigation

The **Personal Snapshot** screen is the initial landing page. This page displays the constituent's Name, Address, Phone, Email, and other contact information.

The snapshot is editable by the user by clicking on the **Edit My Profile** button on the left.

Users can also view/interact with, the following areas:

- **My Registrations** – Registrations for Upcoming Events.
- **My Orders** – All Orders that have an Outstanding balance; can be configured to show any orders ever taken if desired.
- **My Payment Methods** – Any saved payment methods stored for the account.
- **My Scheduled Payments** – Any Payments Scheduled which are available for Pay/Editing.
- **Company Scheduled Payments** - Any Company level Payments Scheduled which are available for Pay/Editing. Only displays if logged in user is Company Manager of account.
- **My Downloads** – All items available for download.
- **My Login Information** – Enables user to update/change login and/or password.

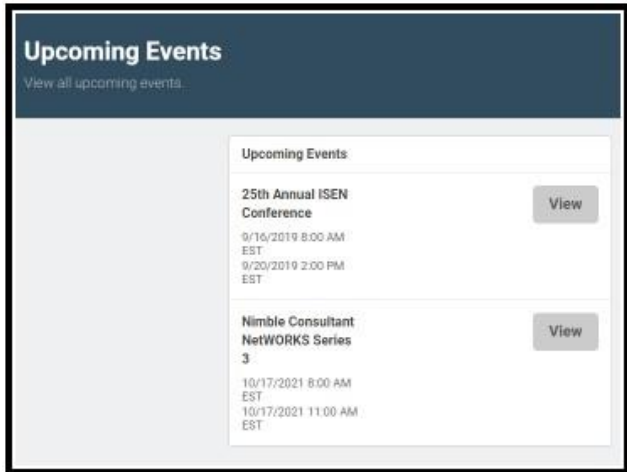


Along the top of the screen users also have the ability to navigate to the following areas:

- **Personal Snapshot** – Returns user to the previous page shown above.
- **Upcoming Events** – Displays all upcoming events with information re: the event AND the option to Register for the Event.
- **Store** – Takes users to the Merchandise store where users can purchase those items enabled for Community Hub purchase.
- **Checkout** – Takes users to the Payment screen for the current Cart items.
- **Logout**
- **Donate Now** – Takes users to the Donations page and enables them to select from among existing Donations and enter an amount and payment type.

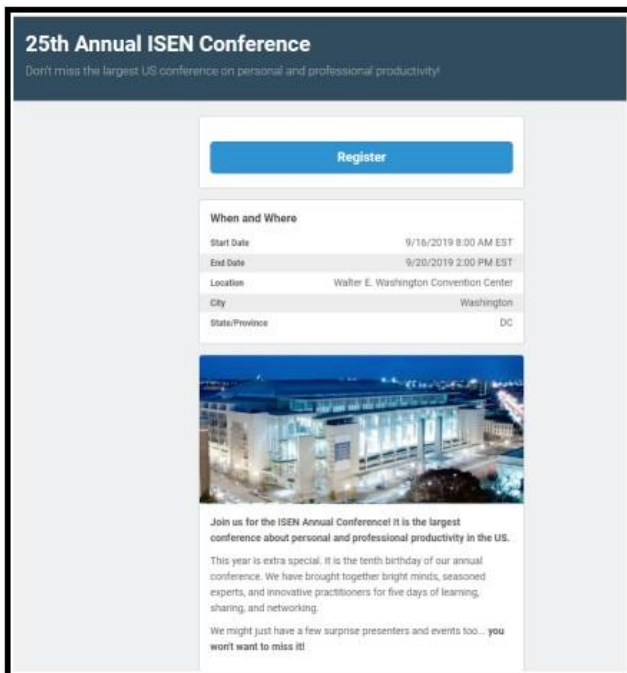
Registering for an Event

1. Click the **Upcoming Events** tab in the navigation bar to display all future events.
2. This screen displays upcoming events that were set to display on Community Hub.

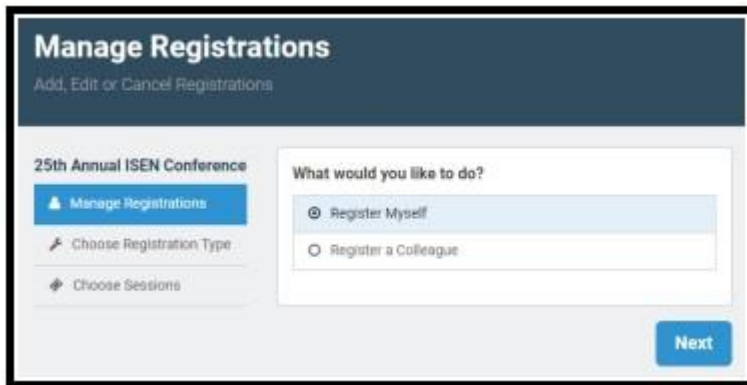


- Each Event has a **View** button that allows the customer to see more information for the event and registration options.

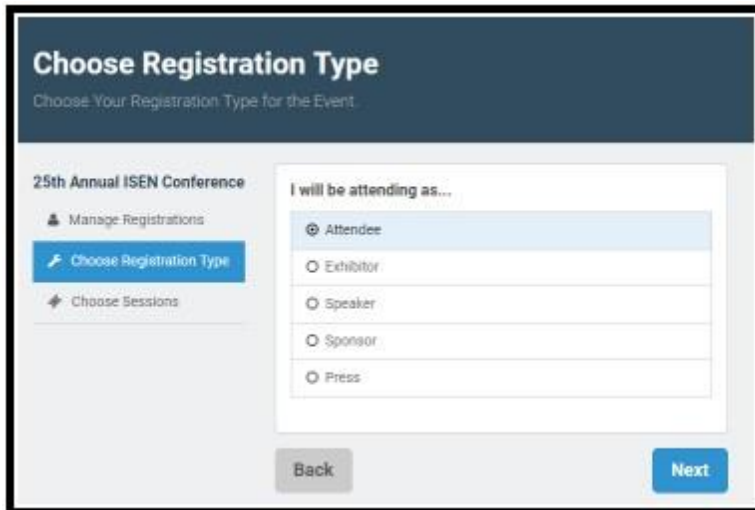
3. Click on the **View** button next to the **25th Annual ISEN Conference**.



4. Users can click on the **Register** button to register themselves or a **Colleague**.



5. Click on **Register Myself**.
6. Click **Next**.
7. Users can choose their **Registration Type**.
8. Select the **Attendee** button under the **I will be attending as...** section.
9. Click **Next**.



10. Users can **Choose the Sessions** they wish to attend by clicking the boxes to the left of each Session or package of Sessions.
11. Click on the **Full Pass**.

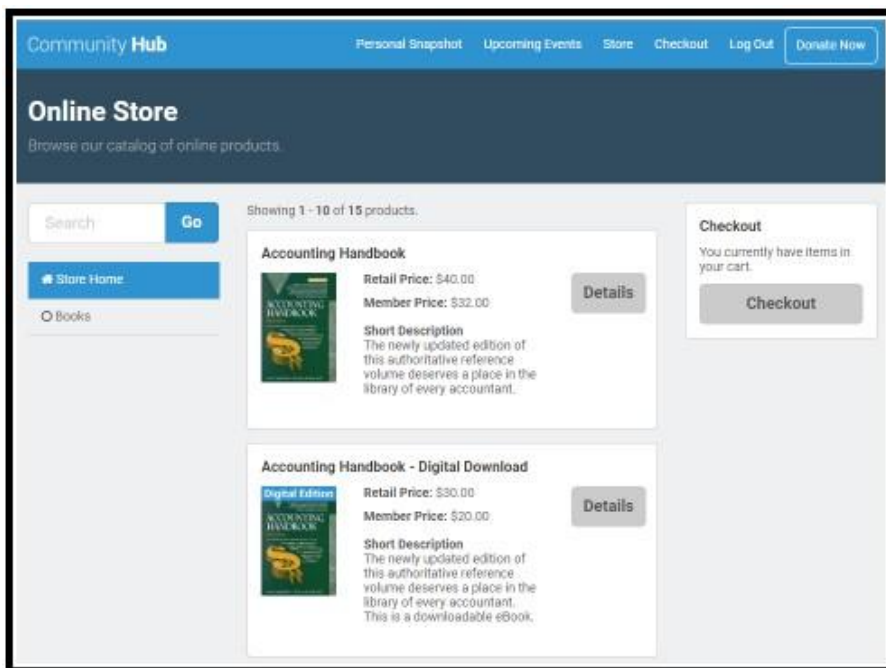
12. Scroll to the bottom of the page.

13. When users are ready to pay, they can click on the **Checkout** button.

The screenshot shows a registration interface for the 25th Annual ISEN Conference. On the left, a sidebar contains navigation options: 'Manage Registrations', 'Choose Registration Type', and 'Choose Sessions' (highlighted in blue). The main content area is titled 'Choose Sessions' and includes the instruction 'Choose the sessions that you would like to attend at this event.' It is divided into two sections: 'Registration' and 'Day 1 Pre-Conference Tours & Workshops'. The 'Registration' section asks 'What days will you be joining us? Bringing anyone?' and 'Please select a session from this group.' It lists several pass options with checkboxes and prices: Full Pass (\$550.00), Day 1 Pass (\$300.00), Day 2 Pass (\$300.00), Day 3 Pass (\$300.00), Day 4 Pass (\$300.00), Day 5 Pass (\$300.00), and Guest Pass (\$75.00). Each option has a 'More' link and a 'Quantity' input field set to 1. The 'Day 1 Pre-Conference Tours & Workshops' section asks 'Choose the tour or workshop you are most interested in to kick off the conference!' and lists two options: 'Executive Coaching and Feedback' (\$79.00) and 'Find Your Purpose, Passion and Principles' (\$79.00), each with a 'Quantity' input field set to 1.

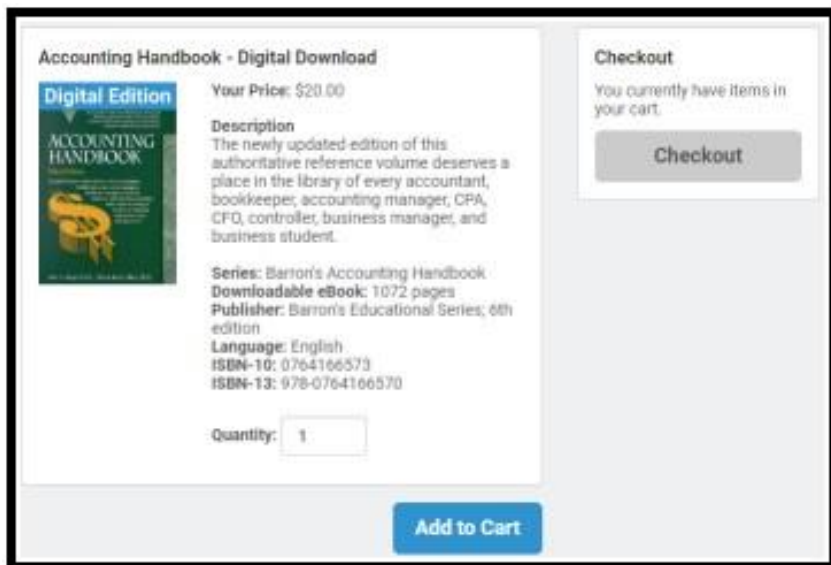
Online Store

1. Click the **Store** tab in the navigation bar to display the items available for purchase.
2. The **Store** screen displays, listing all products.
 - Customers can search for specific products in the **Search** field.
 - Customers can also filter the displayed products by choosing the product type in the pick list, to the left of the screen.
3. Click on the **Details** button next to the **Accounting Handbook - Digital Download**.



4. The Product Details screen displays.

5. Users can read **Description**, Change Quantity, **Add to Cart** (the item), and/or **Checkout**.

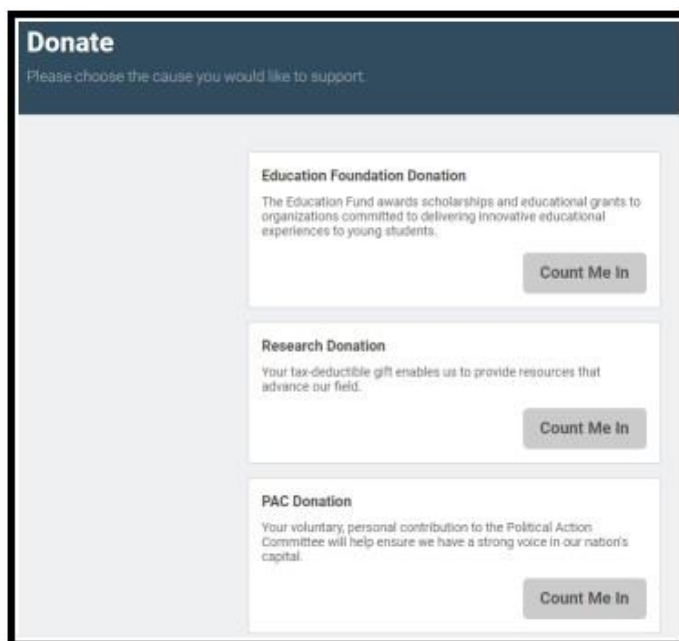


6. Click on **Add to Cart**.

Donations

Community Hub includes a **Donate Now** button in the navigation bar so that constituents may make one time donations easily from any screen.

1. Click the **Donate Now** button in the navigation bar.
2. The available donation products will be displayed.
 - For more information on configuring donation products, please see the Donations chapter of this guide.



3. Click on the **Count Me In** button to the right of the **Education Foundation Donation** product.
4. Constituents are then taken to the **Donations Checkout** screen.
 - The Donation checkout is separate from the store checkout, where customers will pay for registrations, programs, and merchandise.
5. Choose **100.00** as the donation amount.
6. Leave the **Anonymous** and **In Memory Of** fields **blank**.
7. The **Email** field will pull in the email address on the account.
8. **Additional Emails:** Leave **blank**.
9. **Payment Type:** Select **Pay Now - Saved Payment**.

Every Dollar Counts. Donations Checkout.

Please select a donation amount, complete the required fields, and enter your payment information.

Education Foundation Donation

\$100.00

\$250.00

\$500.00

\$1,000.00

Other Amount

About Your Donation

Anonymous

Order Details

Enter your email address in the Confirmation Email to receive a confirmation. To send the confirmation to additional email(s) enter the email address(es) separated by commas in the Additional Emails field.

Payment Type

Pay Now - Saved Payment

Pay Now - Credit Card

My Payment Methods

You have selected the Saved Payment option. [Add, edit, or remove your saved payments](#) if you would like to update your payment information.

Checkout

10. Click **Checkout**.
11. The **Order Summary** screen will display.
12. Users can **Print** the screen if desired.

Order Summary

You're all set.

Order

Order #0000146
Transaction Date 11/21/2018
Grand Total \$100.00

Bill To

Curtis Banks
Flis Consulting
2255 Wisconsin Ave NW
Washington, DC 20007
United States

Print

Donation Products

Product	Quantity	Total Price
Education Foundation Donation	1	\$100.00

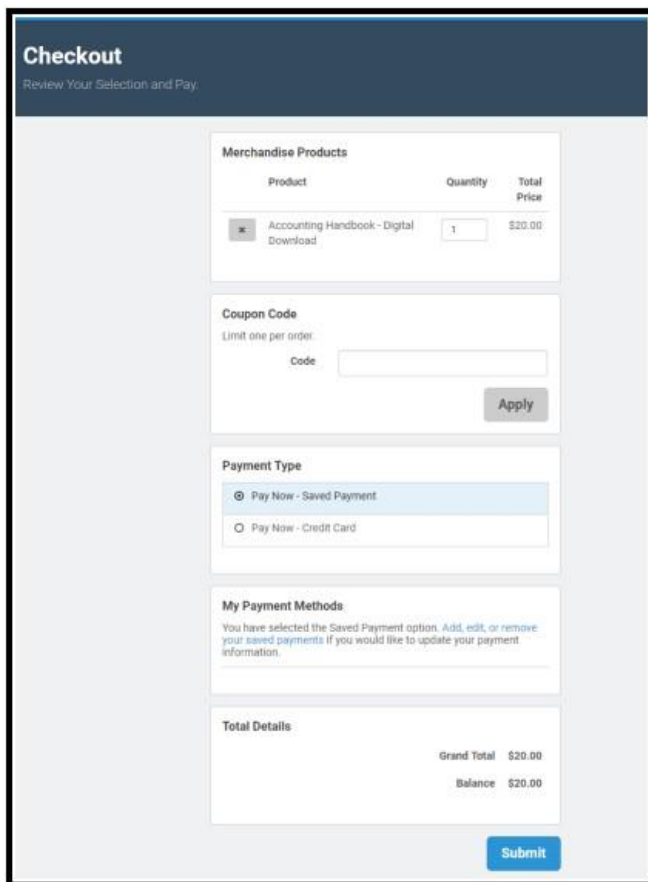
Total Details

	Grand Total	\$100.00
	Total Payment	\$100.00
	VISA ending in 1111	
	Balance	\$0.00

Checkout

Once customers have added all items they wish to purchase to their cart, they can continue to order checkout to enter payment details and complete the order.

1. Click the **Checkout** tab in the navigation bar.
2. Users can:
 - Review the products selected for purchase and change the quantities
 - Enter a Coupon Code
 - Select a Payment Method
 - Click on Checkout



3. Click on the **Submit** button.

4. The Order Summary page displays.

- Users can print if desired.

The screenshot shows the 'Order Summary' page with a dark blue header. Below the header, there are two columns of information: 'Order' and 'Bill To'. The 'Order' column lists the order number (#0000147), transaction date (11/21/2018), and grand total (\$20.00). The 'Bill To' column lists the name (Curtis Banks), company (Fios Consulting), address (2255 Wisconsin Ave NW, Washington, DC 20007), and country (United States). A 'Print' button is located in the top right corner. Below this is a 'Merchandise Products' table with columns for Product, Quantity, and Total Price. The table contains one row for 'Accounting Handbook - Digital Download' with a quantity of 1 and a total price of \$20.00. At the bottom is a 'Total Details' section with a table showing Grand Total (\$20.00), Total Payment (\$20.00), and Balance (\$0.00).

Order Summary

You're all set.

Order	Bill To
Order #0000147 Transaction Date 11/21/2018 Grand Total \$20.00	Curtis Banks Fios Consulting 2255 Wisconsin Ave NW Washington, DC 20007 United States

[Print](#)

Merchandise Products

Product	Quantity	Total Price
Accounting Handbook - Digital Download Download	1	\$20.00

Total Details

Grand Total	\$20.00
Total Payment	\$20.00
VISA ending in 1111	
Balance	\$0.00

Cross Selling Carousel

What is Cross-Selling?

Cross-selling is a sales technique used to get a constituent to contribute more by purchasing a related product that is related to what has been purchased already. For an example, if a constituent is purchasing the 'Accounting Handbook for Beginners' then there is a good chance that the person might be interested in 'Annual Conference for Accounting Professionals' or 'Journal for Accountants'. This can help increase the visibility of products and services and help in increasing revenue and engagement for the Organization or it could be the Membership Directory when a Membership for an Organization is purchased.

Cross-Selling vs. Upselling

It is easy to confuse cross-selling with upselling. Cross-selling involves offering the constituent a related product(s) or service(s), while upselling typically involves trading up to a better version or more benefits of what is being purchased.

Default Cross-sell Carousel logic is based on:

- **Community Hub Store**- based on Account tags
- **Product Details** –based on Product tags
- **Donate Now** –Membership Products tags
- **Upcoming Events** –based on Account tags
- **Checkout** –based on Products in the cart
- **Order Summary** –based on Purchased products

In Community Hub, the below exercise is for the “You also might Like” - “Carousel” that is displayed at the bottom of Community Hub Store page.

1. In Nimble, open **James Meaden’s** Account.
2. **Log into Community Hub** as User.
3. Click the **Store** tab in the navigation bar to display the items available for purchase.
4. The **Store** screen displays listing all available products.
5. **Observe** the “Carousel” when user scrolls to the bottom of the page.

Note: Clicking on the Left and Right arrow would revolve the Carousel if there are more than four products. Currently in the training Org, there are only 4 items in the Carousel.

6. Select the “**Accounting Principles**” Product.
7. Click the **Add to Cart** button.
8. As “Tags” are applied by Administrators and Organization staff in conjunction with constituents ordering related items; the Carousel will update with new merchandise recommendations related to the products sold previously.

Note: Instruction on setting up Cross-Selling and Products Tags functionality is covered in the Nimble Administrator class.



Best Practices!

- **Plan the Tagging system.** What Tags are needed?
- **Error on the Side of Simplicity but be descriptive.** Avoid Acronyms and codes.
- **Use consistent naming conventions.**
- **Categorize the Tags.** “i.e., Book - Accounting”
- **“Prune” the Tags regularly.** Even with a plan, users find that a list of tags continuously expands. Remove Tags that are redundant or unnecessary.

Note: For additional information about Cross Selling please refer to Chapter 7.13 - Products: Cross-Selling Products.

CHAPTER

16 Basic Accounting

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Entities.....	16.3
Entity Record.....	16.4
GL Accounts.....	16.9
Transactions.....	16.11
Batching.....	16.12
Accounting Reports.....	16.19
Accounting Dashboards.....	16.22

Objective

In this section, Users will understand the basics of Accounting in Nimble AMS.

This includes:

- Entities
- GLs
- Product GLs
- Transactions
- Accounting Dashboard
- Accounting Reports

Accounting Basics

In this chapter users will learn the basics of the Nimble AMS Accounting structure from the ground up. Users will start at the foundation of all Accounting transactions, the Entity. They will then observe how GLs are linked to that Entity and tied to specific Products based on their purpose. Users will then process an order and navigate to the Orders and Payment Transactions that are generated as a result. Finally users will see the output of those Transactions into an automatic Batch.

More advanced Accounting scenarios such as the following topics will be covered in a separate Accounting class that is recommended during the Implementation of Nimble AMS but can also be taken at Scheduled intervals at a specified location.

Topics covered in the **Nimble AMS Accounting Class**:

- Settings and Best Practices interacting with Nimble AMS Entities
- Day to Day Accounting processes and Best Practices
- Set up of Deferred Products
- Tracking Transactions
- Creating, Editing, Posting, Exporting, and correcting Unhealthy Batches
- Monitoring outstanding Carts
- Reconciliation in Nimble

Entities

Each financial entity of an association managed within Nimble AMS is represented by an entity record. The entity holds a variety of settings and information used when entering orders and other financial processes, as well as analytics.

The following information can be recorded on the Entity and will be done in the initial setup of a specific client's Nimble AMS org:

- Entity name
- Logo URL
- Entity contact information—such as phone and website
- Main entity address
- Remittance address, which is optionally used on invoices and renewals
- Remittance text, which is optional text used on invoices and renewals
- Accounting settings such as bill me enablement, batch export configuration, and invoice terms
- Payment gateway settings
- Email template settings

Organizations can have more than one Entity record. For instance, in the Training DB, there are three distinct entities. Each entity represents a separate financial branch whose accounting must be kept separate:

- **International Society for the Exceptionally Nimble** - serves as the main entity for the ISEN Association and is under which most of the financial information and transactions are housed.
- **Nimble Foundation** - serves as the charitable arm of ISEN. Transactions and financial information that is part of that purpose are stored in this entity.
- **Political Action Account** - serves as the lobbying and influential financial arm of ISEN whose records need to be kept distinct from the other two entities.

Each entity has its own particular purpose and as such must have its financial information tracked separately.

Entity Record

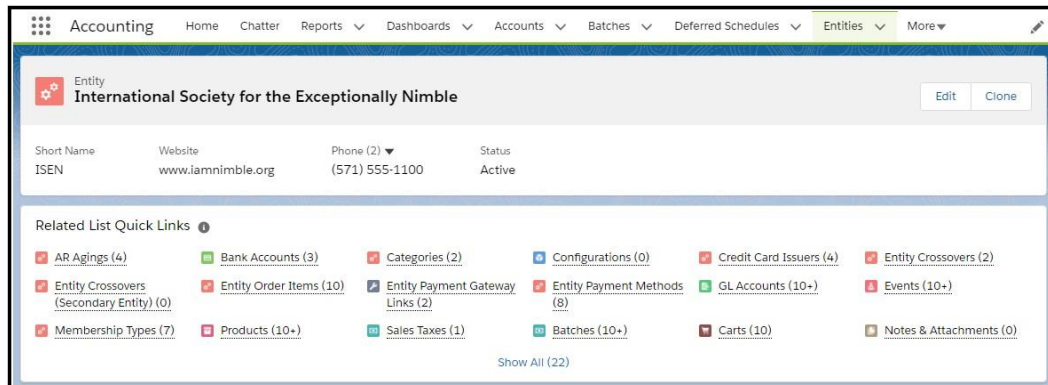
In this exercise, users will locate and open the ISEN main Entity. Users will then partake of a brief tour and description of that entity.

For more advanced treatment of Entity setup, settings, and configuration, users should take the more advanced Nimble AMS Accounting class.

1. Open the **App Launcher**.
2. Select the **Accounting** app.
3. Click on the **Entities** Item.
4. Click on the **All Entities** list view.
5. Click on the **International Society for the Exceptionally Nimble** entity.


Record Summary and Related List Quick Links

1. The entity **Record Summary** runs along the top of the record and contains basic, self explanatory information.
2. The **Related List Quick Links** contain significant connections that link the entity to financial Items. Some of the most impacting are:
 - AR Aging
 - Bank Accounts
 - Credit Card Issuers
 - Payment Gateway Links
 - Payment Methods
 - GL Accounts
 - Membership Types



Top, Logo, and Address Information

1. The Details Topmost area summarizes the entity.
2. The Logo holds the specific organizations logo that can be distributed throughout the system.
3. The specific entity's Address information is stored in the Address area.

Related	Details	Build	Order
Entity Name		Short Name ⓘ	
International Society for the Exceptionally Nimble		ISEN	
Status			
Active			
Phone		Fax	
(571) 555-1100		(571) 555-1150	
Website			
www.iamnimble.org			
Self Service URL			
▼ Logo			
Logo URL			
https://c.na38.content.force.com/servlet/servlet.ImageServer?id=0154400000BzKKy&oid=00DE00000000kMFG			
Logo ⓘ			
			
▼ Address			
Street			
950 N Washington St			
City ⓘ		State	
Alexandria		VA	
Postal Code		Country ⓘ	
22314		USA	

Remittance, Shipment, and Accounting Information

1. The **Remittance** area contains the remittance address and message information that will display on a generated invoice.
2. The **Shipment** area contains the default postal code from where merchandise is shipped.
3. The **Accounting** area fields control:
 - **Tax ID** - Entity's tax identifier
 - **Bill Me Enabled** - Allows the Bill Me option during Community Hub checkout if checked
 - **Batch Export Configuration** - Identifies the batch export format by the name of the Accounting System of Record for the entity
 - **Invoice Term** - Default number of days added to the invoice date to calculate the invoice length.

The screenshot displays the configuration interface for an entity record, organized into three main sections: Remittance, Shipment, and Accounting. Each section contains several fields with edit icons.

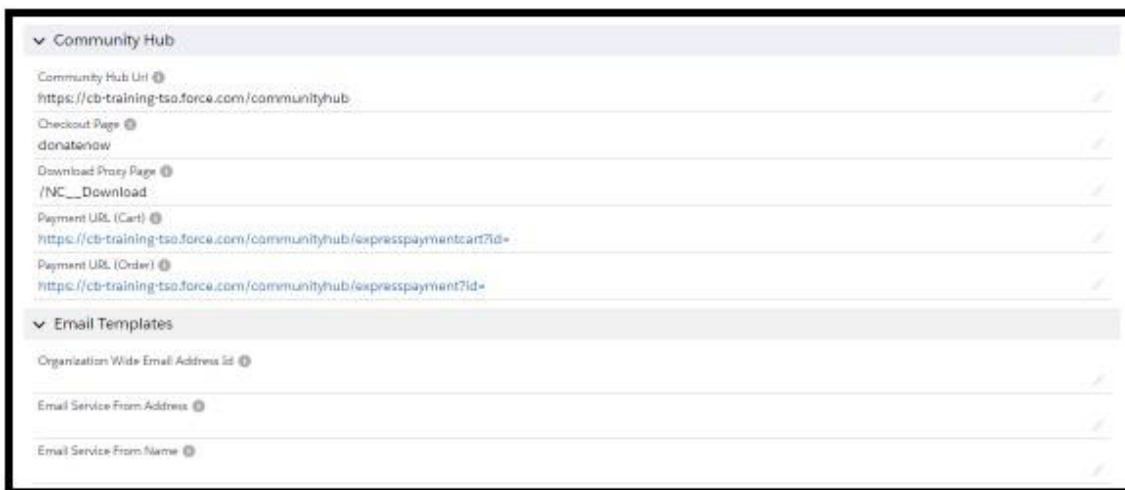
Remittance	
Remittance Street	950 N Washington St
Remittance City	Alexandria
Remittance Postal Code	22314
Remittance Enabled	<input checked="" type="checkbox"/>
Remittance State	VA
Remittance Country	USA
Remittance Text	Please pay your invoice promptly. If you have any questions about your invoice please call and request to speak with our accounting department.

Shipment	
Ship From Postal Code	

Accounting	
Tax Id	
Batch Export Configuration	Microsoft Dynamics GP
Bill Me Enabled	<input type="checkbox"/>
Invoice Term	30

Community Hub and Email Templates

1. The **Community Hub** area contains elements that directly configure portions of the organization (Entity's) Community Hub page:
 - **Community Hub URL** - Contains the URL for the entity's Community Hub site. Can be used elsewhere in Nimble AMS to calculate other URL based fields.
 - **Checkout Page** - Community Hub page name used by the Appeal Link and Product Items for generating isolated checkout URLs.
 - **Download Proxy Page** - Community Hub page name used to validate access to downloadable content.
 - **Payment URL (Cart)** - URL of a page to handle cart payment.
 - **Payment URL (Order)** - URL of a page to handle order payment.
2. The **Email Templates** area contains the default email settings for communication purposes:
 - **Organization Wide Email Address ID** - If filled in, will override any Nimble AMS generated, FROM sender's email address whether Global or User specific settings have been previously chosen. IF this field AND Global settings are blank, the sender's FROM email address will default.
 - **Email Service From Address** - Overrides the Global setting for the FROM address to use when sending emails via a third party service.
 - **Email Service From Name** - Overrides the Global setting for the FROM display name to use when sending emails via a third party service.



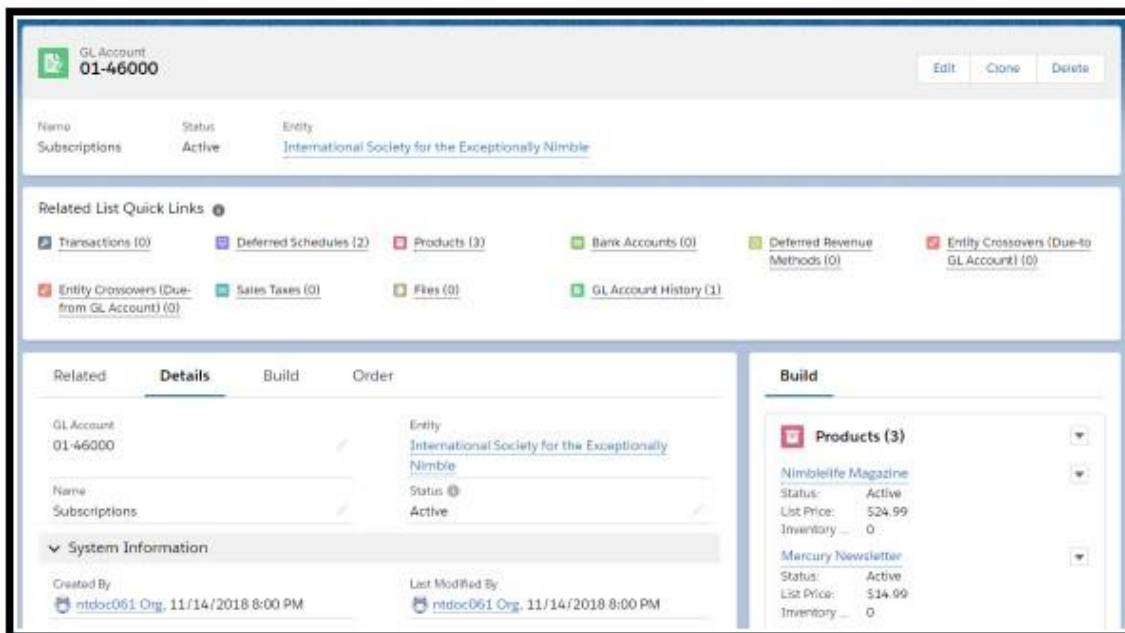
GL Accounts

GL Accounts are initially set up and linked to a specific entity. They are then linked to each product and embedded on transactions to create an accurate financial tracking of all accounting data.

This section will cover where GLs are located on both the entity and products.

GL Account Record

1. Open the **ISEN** entity.
2. Click on the **GL Accounts**, Related Quick Links item.
 - Observe the scrollable list of all the GL Accounts associated with this entity.
3. Click on the link for GL Account **01-41000** for **Individual Dues**.
4. Observe the fields located on the **Individual Dues**.
5. Float over the following **Related List Quick Links**:
 - **Transactions** – display all Transactions linked to this GL.
 - **Deferred Schedules** – display all Deferred Schedules generated from this GL.



Product GLs

Each Entity also contains a list of all Products tied to it as a result of a cross-reference to both its entity name and its GLs being stamped on that Product.

1. Click on the **Professional Dues** Products link to the right under the **Build** section of the ISEN entity.
 - The **Build - Products** section displays all **Products** linked to GL **01-41000**
 - Users could also enter the desired products name in **Search** to locate/open
2. Scroll down to the **Financial** area.
 - Observe the **Revenue GL Account** field value of GL Account **01-41000**. The system will automatically create transactions based on this GL for this Product.

Financial	
List Price ⓘ \$500.00	Revenue GL Account ⓘ 01-41100
Taxable ⓘ <input type="checkbox"/>	Is Fee ⓘ <input type="checkbox"/>
Entity ⓘ International Society for the Exceptionally Nimble	

Transactions

Once an order is taken against a specific product, transactions are generated for both orders, and if applicable, payments - keep in mind, not all orders immediately have payments, so those payment transactions will only be generated if payment is made at the time of an order.

This section will cover the generation of transactions and look at both order and payment transactions.

1. Enter and then select Order **0000281** in the Search.
2. Click on the **Transactions**, Related List Quick Link.

Transaction Id	Date	Amount	GL Account	Bill To	Refere... ↓	Category	Type	Batch	Deferred Schedule
1 Transaction 0001087	9/27/2019	\$10.00	01-12000	Ruby Harris	332	Credit	Income	0000065	Deferred Schedule 0000014
2 Transaction 0001088	9/27/2019	\$500.00	01-12000	Ruby Harris	332	Credit	Income	0000065	Deferred Schedule 0000015
3 Transaction 0001089	9/27/2019	\$510.00	01-10000	Ruby Harris	332	Debit	Payment	0000065	

[View All](#)

3. Click on the **Transaction 0001089** link for a **Payment** Transaction.
4. Observe the **Financial**, **Order**, **Deferred**, and **Batch** sections.
 - Users can see all relevant information and links concerning the transaction

[Ruby Harris](#)

Date ①
9/27/2019

Product Code ①
National Bank

[Ruby Harris](#)

Summary Account ①
International Society for the Exceptionally Nimble_Payment_National Bank

▼ Financial

Entity
[International Society for the Exceptionally Nimble](#)

Amount ①
\$510.00

GL Account
[01-10000](#)

Prepayment ①

▼ Order

Order ①
[Order 0000281](#)

Order Item ①
[Order Item 0000380](#)

Order Item Line ①

Payment Line ①
[Payment Line 0000307](#)

Order Type ①
New

▼ Deferred

Deferred Schedule ①

Deferred Amount ①

Deferred Revenue Transaction ①

▼ Batch

Batch
[0000065](#)

Batch Status ①
Exported

Batching

In Nimble AMS, all financial transactions are associated with a batch. With batches users can group financial transactions by entity and transaction date. Batches are posted to finalize the transactions within the batch, and users can export them from Nimble AMS for import into the financial management software.

Entities & Batching

Batches are auto-generated (or manually generated if necessary) for each entity daily. For example, a Nimble AMS client might have THREE Entities: **Main** entity, a **Foundation** entity, and a **PAC** entity. In this case they would have THREE daily batches to execute – one for each Entity. There is also a separate batch generated for online users of Community Hub, from the Source **Self-Service**; this one batch contains all online transactions to be batched.

Batch Record Types

Batch record types are used to record how a batch was created within Nimble AMS. There are two main types of Batches: Automatic and Manual.

Automatic – Automatically created by system during a 24 hour day cycle once the first order is taken during that cycle:

- When a User enters the first order of the day in **Staff Nimble AMS**. That batch is then used for remainder of day by all internal staff.
- When a constituent places the first order of the day in **Community Hub**.
- By **Automated Processes** within Nimble AMS. For example, a batch that is created when an inter-entity transaction is created.

Manual:

- Physically Created by Users by going to Batches and creating New.
- Used to collect orders by specific bank deposits or some other related grouping.

Batch Record Type found at the top of the Batch record in the Summary section.

Batch Status	Transaction Date	Record Type	Total Cash Value	Source	Health
Pending	9/11/2018	Automatic	\$10.00	Salesforce	✔

Automatic Batch Updates

Batches auto-update fields when batch items change due to Status or Order Adjustments:

Date fields - update when the Batch Status changes:

- **Pending On** date updates when Batch Status is set to Pending.
- **Posted On** date updates when Batch Status is set to Posted.
- **Exported On** date updates when Batch Status is set to Exported.

Batch Date Fields found under the Information section of the Batch record.

Related		Details	
Information			
Batch Id	0000000	Entity	International Society for the Exceptionally Nimble
Title	Salesforce	Transaction Date	9/11/2018
Source	Salesforce	Batch Status	Pending
Display Name	20180911-Salesforce-0	Pending On	10/29/2018
		Posted On	
		Exported On	

Batch Total fields – update when an order adjusted (done by scheduled Apex job).

- **Total Cash Value** updates to reflect the sum of payments in the batch.
- **Revenue** updates to reflect the sum of income in the batch.
- **Totals Last Updated** updates to reflect Date/Time the totals updated.

Note: It may take up to 5 minutes for the batch totals to reflect any changes.

Batch Total Fields found under the Financial section of the Batch record.

Financial			
Expected Total Cash Value	\$10.00	Revenue	\$830.00
Total Cash Value	\$10.00	AR Impact	\$820.00
Difference Cash Value	\$0.00	Totals Last Updated	9/11/2018, 4:48 AM

Key Fields on a Batch

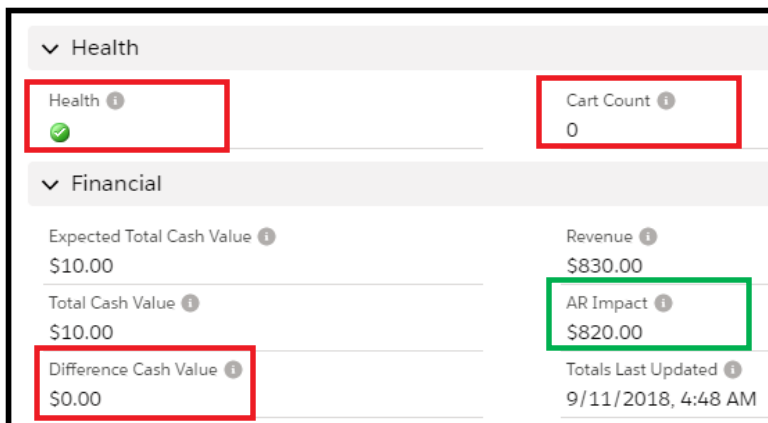
Batch Health

A batch must be considered healthy before it can be posted and exported. Healthy batches have a **Health** represented by a green checkbox.

An Unhealthy batch is represented by a red x in the Health field. This occurs if:

- **Difference Cash Value** is not equal to \$0.00
- **Cart Count** is greater than 0

Batch Health Fields found under the Health & Financial sections of the Batch record.



Accounts Receivable (AR) Impact

Nimble AMS calculates the amount that accounts receivable impacted per batch. Users can review the AR Impact for each batch to understand how the batch will affect the AR balance. When a batch posted and exported, the GL import document generated may have an impact on the AR balance in your GL accounts.

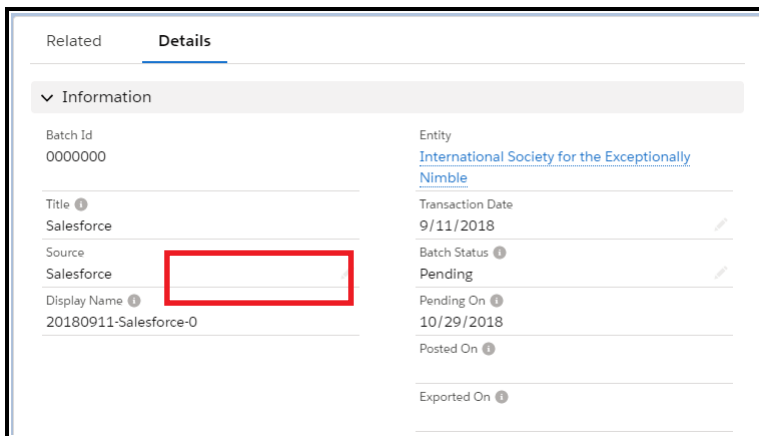
AR Impact Field found under the Financial section of the Batch record. See GREEN outlined box in previous screenshot above.

Batch Source

The batch Source indicates where the batch was created:

- **Salesforce:** Batch created by users in **Staff facing Nimble AMS**. Could be an Automatic OR Manual batch type.
- **Self Service:** Batch automatically created by first order of day in **Community Hub**.
- **System:** Batch created by an **Automated Process** in Nimble AMS.

Batch Date Source Field found under the Information section of the Batch record.

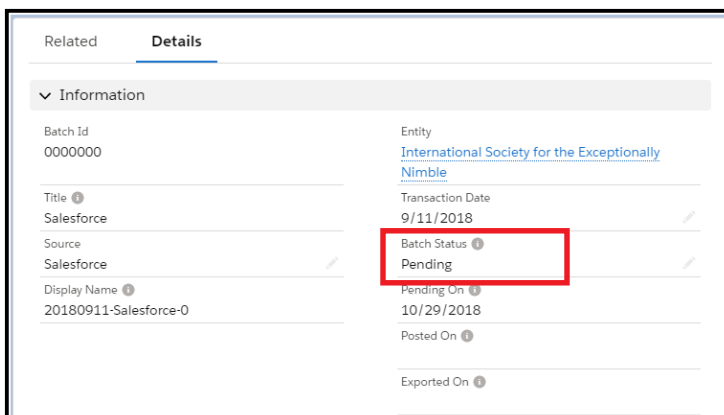


Batch Status

As a batch moves from active in Nimble AMS to exported to the Accounting System of record, the Batch Status updates to reflect that process. Typically, a batch moves from **Open** to **Pending**, to **Posted**, and finally to **Exported**. Users change the batch status manually as it moves from one level to another (that process demonstrated exercises shortly). An explanation of each Batch status type explained for reference below:

- **Open:** Users can add carts or transactions to the batch.
- **Pending:** (Optional) Users are prevented from adding carts or transactions to the batch. This status is useful if the association has decentralized the entry of transactions and users need a method of communicating to the accounting department when the batch is ready for review or posting. If another transaction added to the batch, the Batch Status can be changed back to Open. Users can ignore this status and go directly to a Posted.
- **Posted:** The transactions within the batch are finalized and additional transactions cannot be added to the batch. Once in the Posted status, the Batch Status may not be changed back to Open or Pending. Instead, Users can export the batch to the general ledger. When in this status, adjustments to transactions within the batch must be completed in a new batch.
- **Exported:** Final stage in the batch life cycle. When a batch is exported, a document containing the transactions from the batch is created (CSV, Excel, etc). The export document may be down-loaded and imported into the general ledger at anytime.

Batch Date Source Field found under the Information section of the Batch record AND as first field in Summary section at top of record.



Processing a Daily Batch

In the following exercises. Users will progress a healthy batch from Open to Export to understand the entire daily processing of a normal daily batch. The resolution of unhealthy batches, reconciliation of transactions, handling of outstanding carts, etc, are handled in detail during the separate Accounting class and manual.

In this **exercise**, users will process a daily, open batch, change its status from Open to Posted and then export it to the accounting system of record.

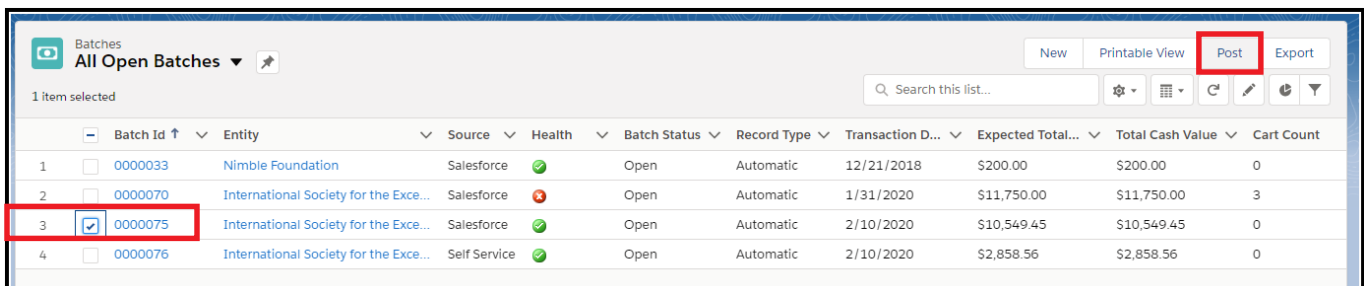
POSTING A BATCH

1. Ensure that the **Accounting** application selected.
2. Click on the **Batches** Item.
3. Click on the **Recently Viewed** dropdown and select **All Open Batches**.
4. Check the **box** next to **Batch ID 0000075**.

Four batches are available in the Training Org. IF stock processes for Nimble AMS Batching are followed, many different batches could present on a daily basis. For example:

- MAIN ENTITY Daily Nimble AMS Staff Batch
- FOUNDATION ENTITY Daily Nimble AMS Staff Batch
- PAC ENTITY Daily Nimble AMS Staff Batch
- SELF-SERVICE Community Hub Batch (online users)
- MANUAL (any manual Batches that were created)

5. Click on the **Post** button.



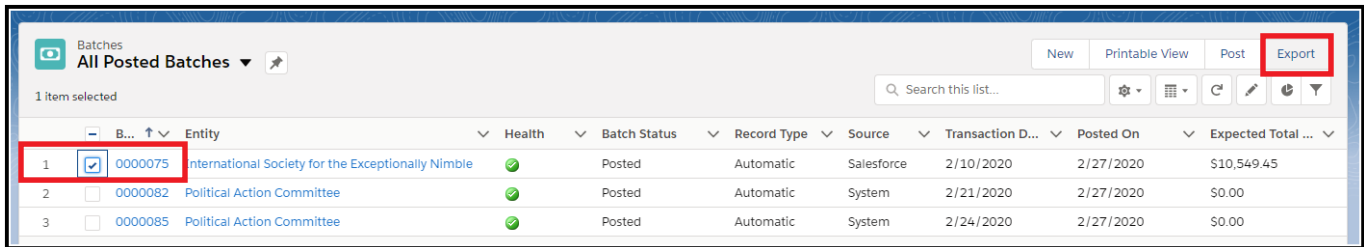
	Batch Id ↑	Entity	Source	Health	Batch Status	Record Type	Transaction D...	Expected Total...	Total Cash Value	Cart Count
1	<input type="checkbox"/> 0000033	Nimble Foundation	Salesforce	✔	Open	Automatic	12/21/2018	\$200.00	\$200.00	0
2	<input type="checkbox"/> 0000070	International Society for the Exce...	Salesforce	✘	Open	Automatic	1/31/2020	\$11,750.00	\$11,750.00	3
3	<input checked="" type="checkbox"/> 0000075	International Society for the Exce...	Salesforce	✔	Open	Automatic	2/10/2020	\$10,549.45	\$10,549.45	0
4	<input type="checkbox"/> 0000076	International Society for the Exce...	Self Service	✔	Open	Automatic	2/10/2020	\$2,858.56	\$2,858.56	0

6. Observe the **AR Impact Warning**; Click on the **Post Batch** button.

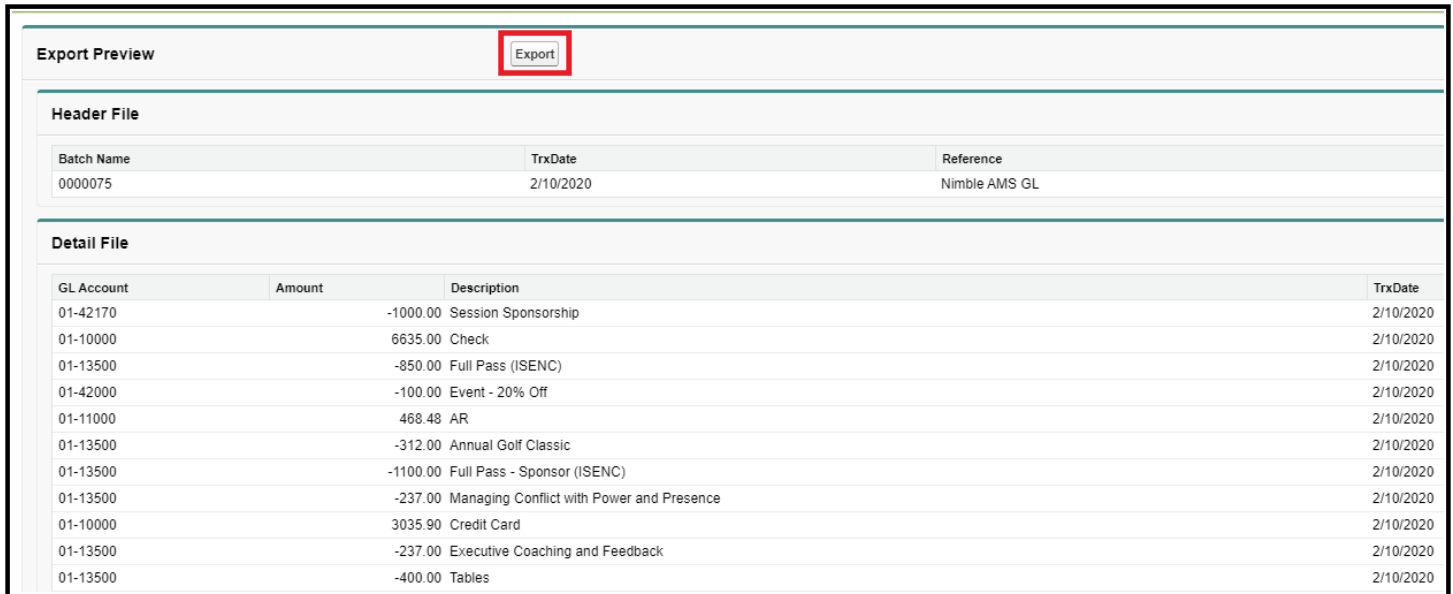
7. Click **[close]** button at the **Success** message.

EXPORTING A BATCH

1. Click on the **Recently Viewed** dropdown and select **All Posted Batches**.
2. Check the **box** next to **Batch ID 0000075**.
3. Click on the **Export** button.



4. Observe the **Export Preview** displayed.
 - Users have a final chance to review the file.
 - Each **Transaction** listed under the **Detail File** section.
5. Click on the **Export** button.



6. On the **Export warning** pop-up, click **OK**.
7. Observe the **Success** Message.
8. In a client configured system, the last step would be to access the exported file from a pre-determined shared drive/folder location, and import it to the accounting system of record.

Accounting Reports

Nimble AMS includes a variety of standard reports that can assist an association with its accounting reconciliation requirements. These reports can also serve as great templates to meet the specific reconciliation needs or focus of an association. Here are a variety of standard Nimble AMS reports that can help process daily, weekly, or monthly reconciliations.

Reports include Outstanding AR, Payments and Income.

To run the **Transactions per Batch FIND** report:

1. Navigate to the **Reports** Item.
2. Select the **Accounting (Nimble AMS)** folder.
3. Select the **Batching (Nimble AMS)** sub-folder.
4. Select the **Transactions per Batch FIND** report.

Transactions per Batch FIND Report

Batch Id	Batch Status	Batch Exported	Source	Entity	Trans Date	Type	GL Account	Account	Product
Total Records: 1,512		Total Amount: \$510,464.54							
0000000 (5)	Pending (5)		- Salesforce	International Society for the Exceptionally Nimble	9/11/2018	Payment	01-10000	Ted Williams	National Bank VISA
			- Salesforce	International Society for the Exceptionally Nimble	9/11/2018	Income	01-44100	Ted Williams	Accounting Handbook - Digital Download
			- Salesforce	International Society for the Exceptionally Nimble	9/11/2018	AR	01-11000	Ted Williams	Merchandise
			- Salesforce	International Society for the Exceptionally Nimble	9/11/2018	Income	01-13500	James Meaden	Full Pass
			- Salesforce	International Society for the Exceptionally Nimble	9/11/2018	AR	01-11000	James Meaden	Registration
	Subtotal								
Subtotal									
0000001 (4)	Pending (4)		- Self Service	International Society for the Exceptionally Nimble	9/11/2018	Payment	01-10000	James Meaden	National Bank VISA
			- Self Service	International Society for the Exceptionally Nimble	9/11/2018	Payment	01-10000	James Meaden	National Bank VISA
			- Self Service	International Society for the Exceptionally Nimble	9/11/2018	Income	01-44100	James Meaden	Accounting Handbook
			- Self Service	International Society for the Exceptionally Nimble	9/11/2018	AR	01-11000	James Meaden	Registration
	Subtotal								
Subtotal									
0000002 (2)	Exported (2)	1/30/2020	Self Service	International Society for the Exceptionally Nimble	9/14/2018	Payment	01-10000	Curtis Banks	National Bank VISA
		1/30/2020	Self Service	International Society for the Exceptionally Nimble	9/14/2018	Income	01-44100	Curtis Banks	Accounting Handbook - Digital Download
	Subtotal								
Subtotal									

- Displays Batch ID, Status, Entity and Transaction info including Pay Details.
- Prompt able through filters for a specific Batch ID.
- Similar **Transactions per Order report** can be run that groups info by order.

To run the **AR Snapshot with Aging** report:

1. Navigate to the **Reports** Item.
2. Select the **Accounting (Nimble AMS)** folder.
3. Select the **AR Snapshot (Nimble AMS)** sub-folder.
4. Select the **AR Snapshot with Aging** report.

AR Snapshot with Aging

Report: AR Snapshots with Orders and Products										
AR Snapshot with Aging										
AR Aging grouped by total days passed for Orders with past due balances. Users MUST Periodically (Weekly/Monthly) run the AR Trial Balance object wizard in order to generate AR Snapshot records to popul...										
Total Records		Total Days Outstanding		Total Total Payment						
66		16,703		\$1,646.65						
AR Aging ↑	Order Transaction Date	Bill To: Account Name	Product Type	AR Snapshot Id	Balance	Days Outstanding	Order: Order Id	Total Payment	Created Date	
0 to 30 Days - Current (22)	1/19/2020	Josephine Robertson	Membership	S-00000321	\$510.00	18	Order 0000274	\$0.00	2/25/2020	
	1/19/2020	Leroy Taylor	Membership	S-00000324	\$510.00	18	Order 0000251	\$0.00	2/25/2020	
	1/19/2020	Manuel Palmer	Membership	S-00000325	\$510.00	18	Order 0000278	\$0.00	2/25/2020	
	1/29/2020	Michelle Boucher	Miscellaneous	S-00000326	\$35.00	8	Order 0000308	\$0.00	2/25/2020	
	1/19/2020	Morris Ryan	Membership	S-00000327	\$510.00	18	Order 0000280	\$0.00	2/25/2020	
	1/21/2020	MPO SF	Membership	S-00000328	\$1,000.00	16	Order 0000295	\$0.00	2/25/2020	
	1/19/2020	Andre Douglas	Membership	S-00000336	\$510.00	18	Order 0000257	\$0.00	2/25/2020	
	1/31/2020	Ben Peterson	Registration	S-00000337	\$800.00	6	Order 0000314	\$0.00	2/25/2020	
	1/19/2020	Calvin Wade	Membership	S-00000338	\$510.00	18	Order 0000259	\$0.00	2/25/2020	
	1/31/2020	Herman Daniels	Registration	S-00000341	\$500.00	6	Order 0000322	\$0.00	2/25/2020	
	1/18/2020	Jack Willis	Membership	S-00000342	\$160.00	19	Order 0000233	\$0.00	2/25/2020	
	2/6/2020	Ben Peterson	Donation	S-00000297	\$100.00	0	Order 0000332	\$0.00	2/25/2020	
	2/4/2020	Bill Bryson	Exhibitor	S-00000298	\$1,750.00	2	Order 0000324	\$0.00	2/25/2020	

- Grouped by AR Aging to display overdue Orders.
- Reflects AR Aging categories set up on the Entity's, AR Aging Related List Quick Links.

To run the **DR Snapshot with Schedule** report:

1. Navigate to the **Reports** Item.
2. Select the **Accounting (Nimble AMS)** folder.
3. Select the **DR Snapshot (Nimble AMS)** sub-folder.
4. Select the **DR Snapshot with Schedule** report.

DR Snapshot with Schedule

Total Records	Total Recognized	Total Unrecognized	Total Period 1	Total Period 2	Total Period 3	Total Period 4	Total Period 5
20	\$0.00	\$4,224.95	\$50.38	\$50.38	\$50.38	\$50.38	\$50.38

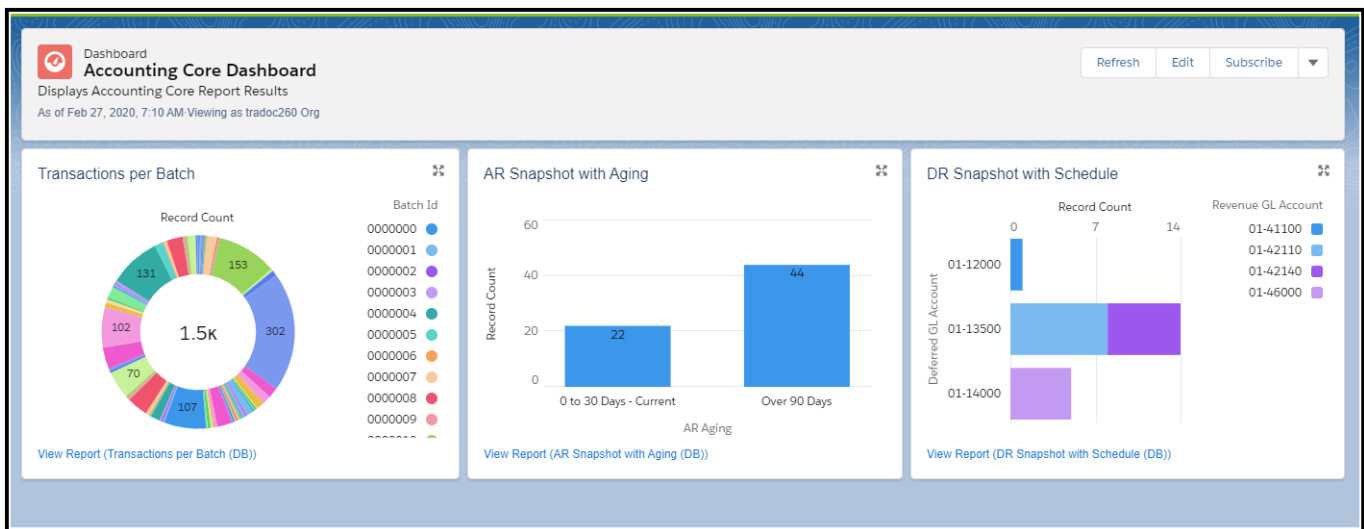
Deferred GL Account	Revenue GL Account	Bill To	Order Item Line: Product	Recognized	Unrecognized	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6
01-12000 (1)	01-41100 (1)	Marcus Stroman	Professional Dues	\$0.00	\$500.00	\$41.66	\$41.66	\$41.66	\$41.66	\$41.66	\$41.66
	Subtotal			\$0.00	\$500.00	\$41.66	\$41.66	\$41.66	\$41.66	\$41.66	\$41.66
	Subtotal			\$0.00	\$500.00	\$41.66	\$41.66	\$41.66	\$41.66	\$41.66	\$41.66
01-13500 (14)	01-42110 (8)	Adam Carey	Full Pass (ISENC)	\$0.00	\$450.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		Virgil Watts	Full Pass (ISENC)	\$0.00	\$450.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		Marian Wade	Day 2 Pass (ISENC)	\$0.00	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		Marian Wade	Day 1 Pass (ISENC)	\$0.00	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		Helen Bell	Full Pass (ISENC)	\$0.00	\$450.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		Leroy Taylor	Full Pass (ISENC)	\$0.00	\$450.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		Jack Willis	Full Pass (ISENC)	\$0.00	\$450.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		Ben Peterson	Full Pass (ISENC)	\$0.00	\$550.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	Subtotal			\$0.00	\$3,400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	01-42140 (6)	Adam Carey	Annual Golf Classic	\$0.00	\$39.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		Virgil Watts	Annual Golf Classic	\$0.00	\$39.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		Leroy Taylor	Annual Golf Classic	\$0.00	\$39.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- Grouped by Deferred GL Account and sub-grouped by Revenue GL Account for impacts.
- Displays all recognized and unrecognized revenue across all periods.

Accounting Dashboards

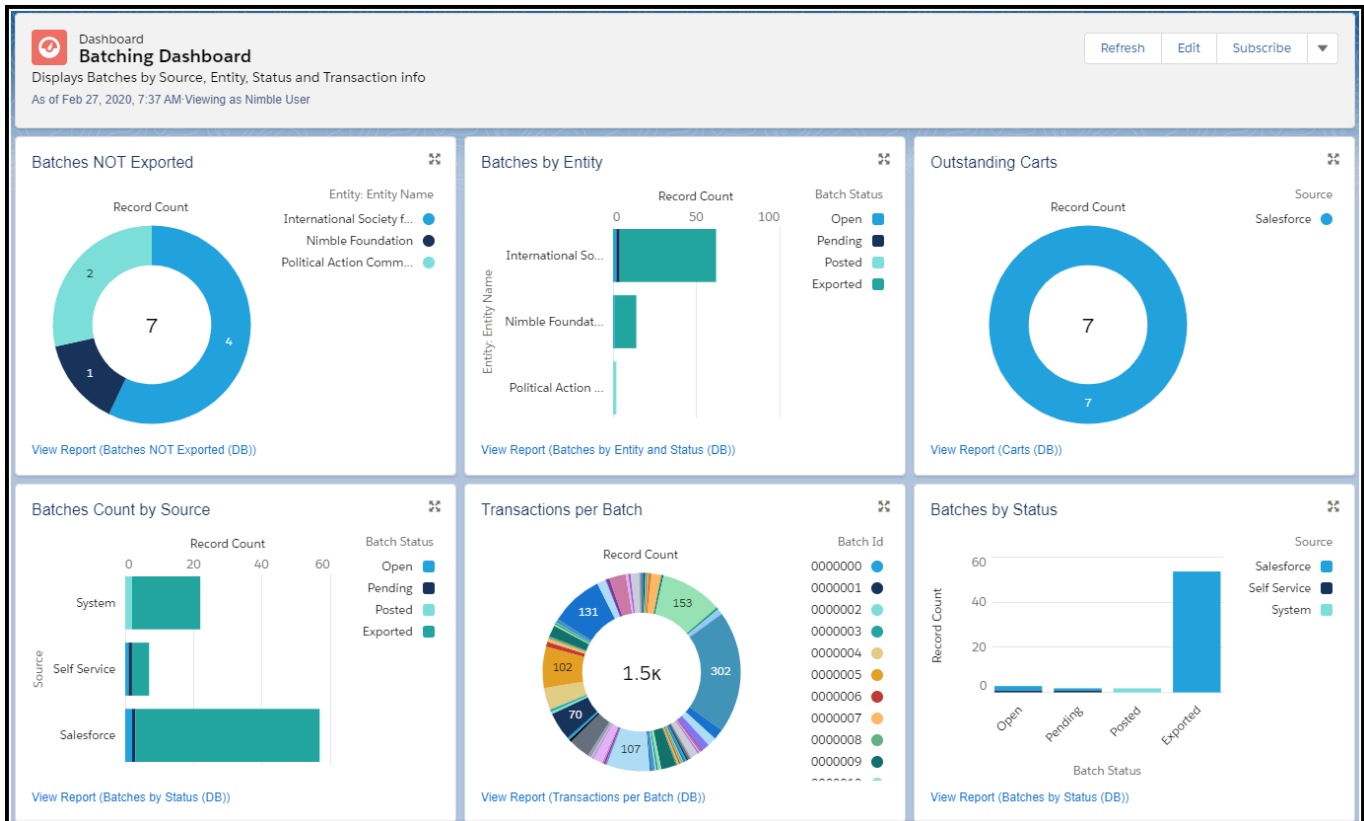
To display the **Accounting Core Dashboard**:

1. Click the **Dashboards** Item.
2. Click the **Dashboards (Nimble AMS)** folder.
3. Click on the **Accounting Core Dashboard**.



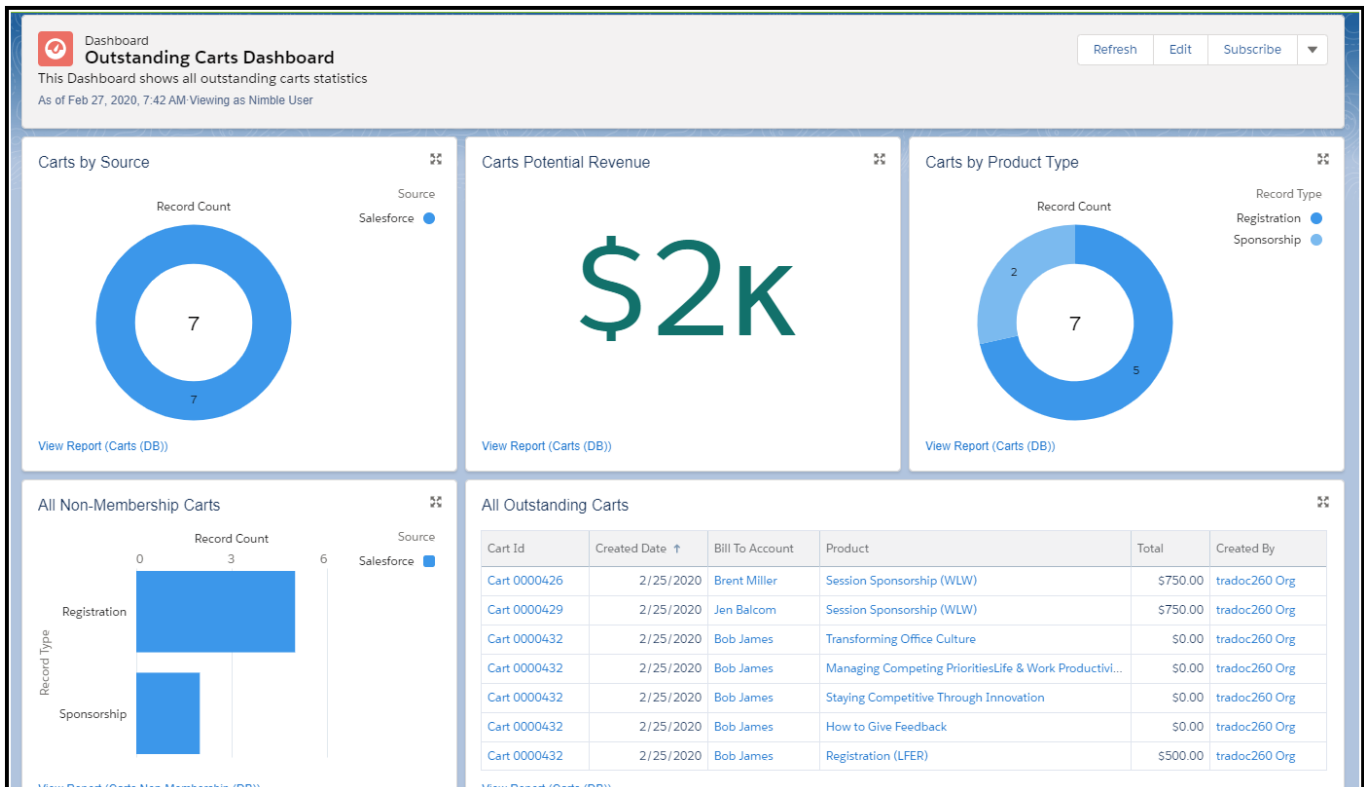
To display the **Batching Dashboard**:

1. Click the **Dashboards** Item.
2. Click the **Dashboards (Nimble AMS)** folder.
3. Click on the **Accounting Core Dashboard**.



To display the **Outstanding Carts Dashboard**:

1. Click the **Dashboards** Item.
2. Click the **Dashboards (Nimble AMS)** folder.
3. Click on the **Outstanding Carts Dashboard**.



APPENDIX

A Advertising

Objective.....	A.1
Overview.....	A.1
Advertising Item	A.2
Understanding Advertising	A.3
Advertising Record.....	A.4
Advertising Product.....	A.5
Ordering an Advertising Product	A.6
Updating Advertising Records.....	A.10
Advertising Reports and Dashboard.....	A.11

Objective

Upon completion of this training, users will be able to:

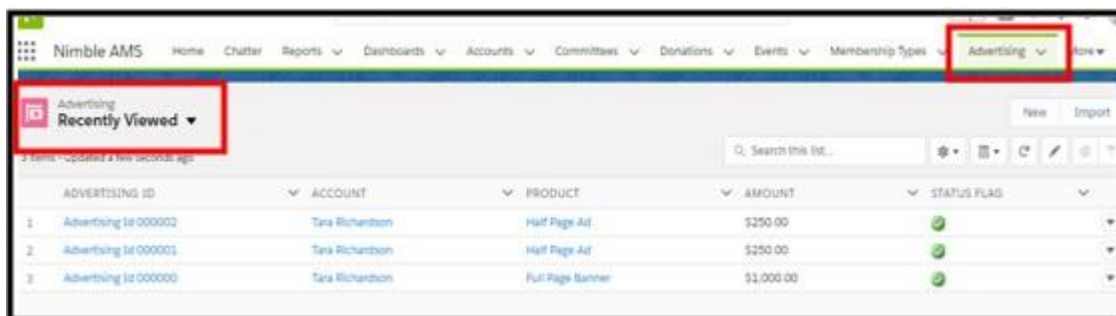
- Understand Advertising Object in Nimble AMS
- View Advertising record
- Order an Advertising record
- View Advertising reports & dashboards

Overview

Through Advertising, users promote/ publicize on banners, magazines etc. In Nimble AMS, Advertising item is associated with members purchasing Advertising products.

Advertising Item

The **Advertising Item** provides several different ways of finding, organizing, and interfacing with **Advertising** information.



From the **TOP RIGHT HAND**, **Actions** area, Users can:

- Import data to Advertising

Note: Users should NOT create a new **Advertising** from the **New** button; Advertising is transactional and should be created via an order.

From the **TOP MIDDLE**, **Advertising** Item drop down, Users can:

- Create a **New** Advertising
- Use **Recent Records** to return to a previously accessed Advertising
- Use **Recent Lists** to return to a previously accessed List View of Advertising

From the **TOP LEFT**, **Advertising Recently Viewed** drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

Understanding Advertising

In Nimble AMS Advertising, revenue is generated, based on the configuration and subsequent location of Advertising in the targeted subscription product; magazine, journal, placard, billboard, etc. For example: to advertise on a Magazine, members purchase from the available/ linked products like inside front page, half a facing page, black & white or colored etc.

Advertising Products are ordered using the order process and Users can enable Advertising products to be purchased on Community Hub. When orders are submitted, historical records are created for the product record type (Advertising) and linked to the product and the account.

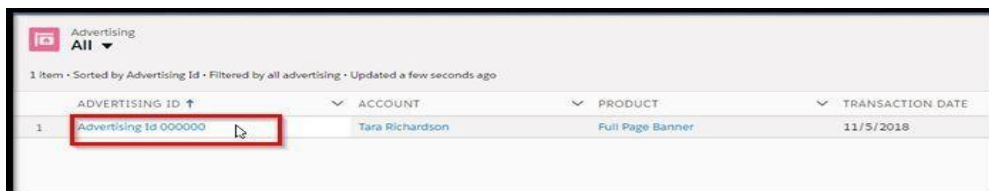
Advertising Record

In Nimble AMS, Advertising records are created by placing an order for the Advertising Product.

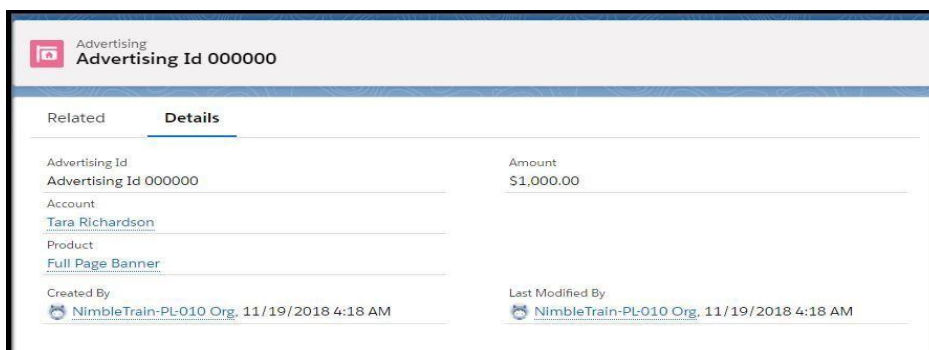
1. Go to **App** launcher and search or scroll to find **Advertising** Item.
2. On the **Navigation Bar**, click **Advertising** Item.
3. Click the **list view selection drop-down** and change the view to **All Advertising**.



4. Click **Advertising ID 000000** in the list of **Advertising**.



5. The **Advertising** record 000000 is displayed.
6. The **Details** section displays the basic information for an advertising record.
 - **Advertising ID** is automatically generated, once the Advertisement order is successfully placed.
 - **Account** field uses the Person Account name of the member who places the order for this advertisement. This field is same as Order **Bill To** field.
 - **Amount** is the Price of the Advertising Product selected and purchased by the member for Advertising
 - **Product** field uses the Advertising product that the user purchases using order wizard.



Advertising Product

In Nimble AMS, at the time of creating an Advertising product, users must select the **product record type** as **'Advertising'** which controls the way the product aligns with the Advertising record on order entry.

The screenshot shows a 'New Product' form with a section titled 'Select a record type'. There are seven radio button options: Merchandise, Advertising, Cancellation Fee, Coupon, Donation, and Exhibitor. The 'Advertising' option is selected and highlighted with a red box. Below each option is a brief description of what that record type represents.

IMPORTANT NOTE: Observe an existing Advertising product **Half Page Ad**. Advertising type record stores information like **Product and Financial details**.

The screenshot shows the 'Half Page Ad' product details page. It has tabs for 'Related', 'Details', 'Order', and 'Engagement'. The 'Details' tab is active. The page displays various fields for product information, including Product Name, Short Name, Description, Status, Display Order, Quantity Limit, List Price, Is Fee, Revenue GL Account, and Deferred Revenue Method.

The Advertising product can also be tied to a related event by adding the **Event details**. In the inventory section, users manage the **product inventory**.

The screenshot shows two sections: 'Event Detail' and 'Inventory Detail'. The 'Event Detail' section shows the event name '25th Annual ISEN Conference'. The 'Inventory Detail' section shows fields for 'Track Inventory' (unchecked), 'Inventory Used' (0), 'Inventory' (0), and 'Inventory On Hand' (0).

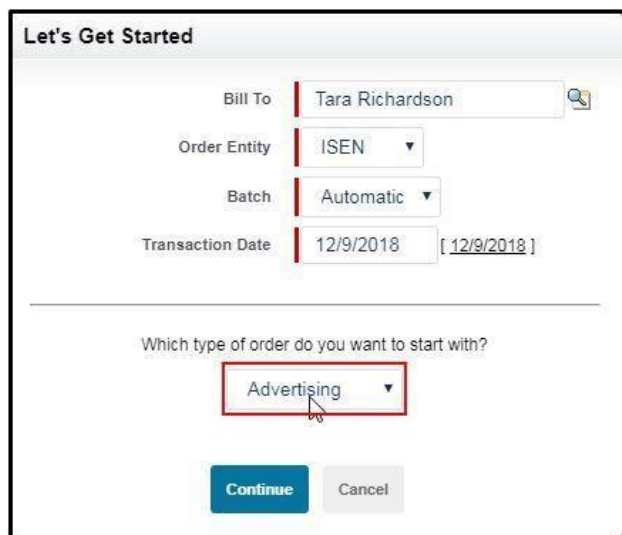
Ordering an Advertising Product

In this section, users will learn how to order an Advertising Product.

1. In the **Search box**, enter and select **Tara Richardson**.
2. Click the **New Order** button from the upper right corner.

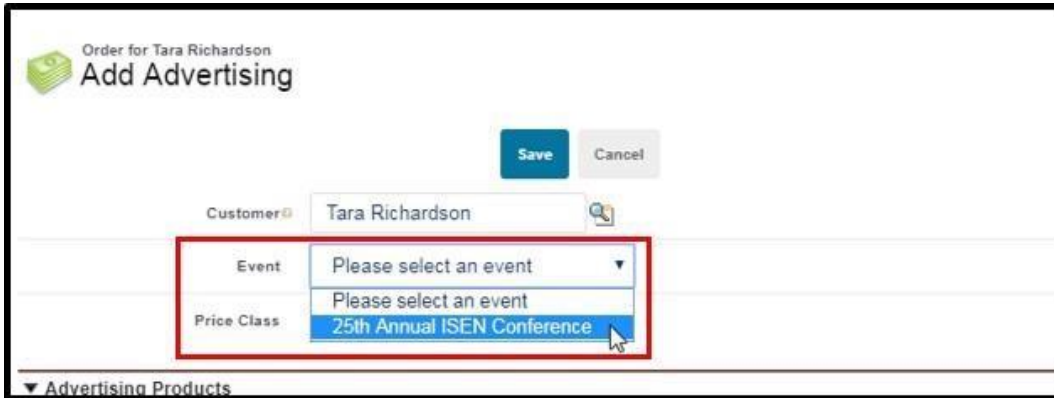


3. Select **Advertising** for the **Which Type of order do you want to start with?** field drop-down

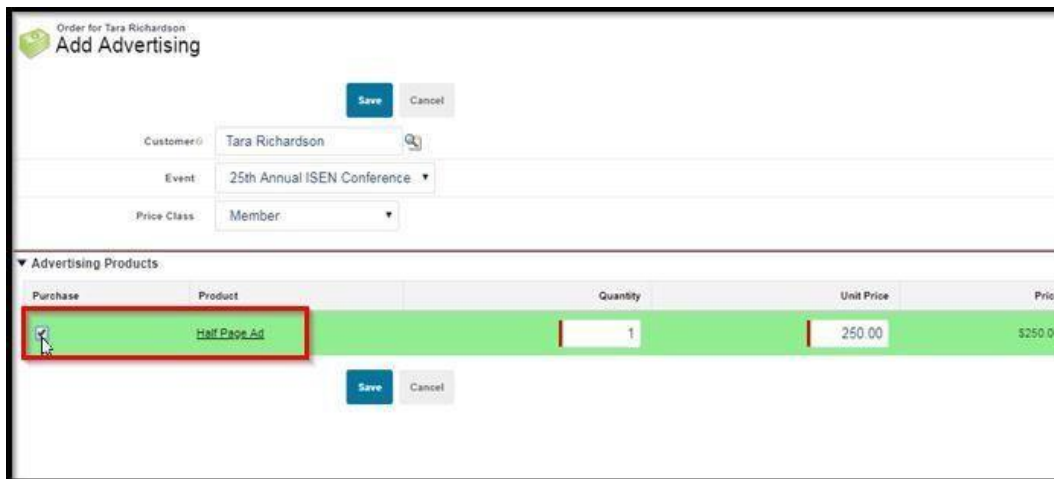


4. Click **Continue**

5. Select the **25th Annual ISEN Conference** from the Event dropdown.
 - The Advertising product could be linked to an Event but does NOT have to be.



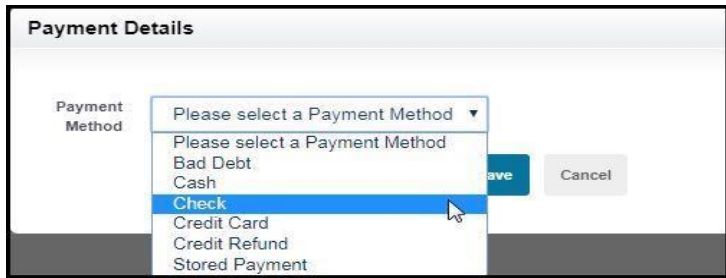
6. Check the box for **the Half Page Ad**.



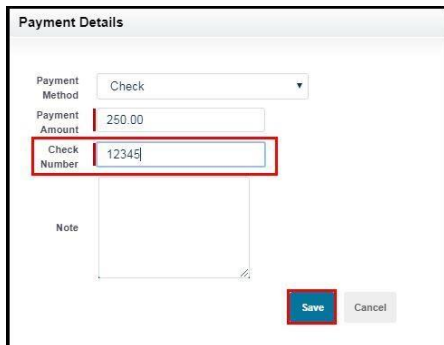
7. Click **Save**.
8. Click on **Go to Payment** button (lower right).
9. **Review** the order.
10. Click **Pay Now**.



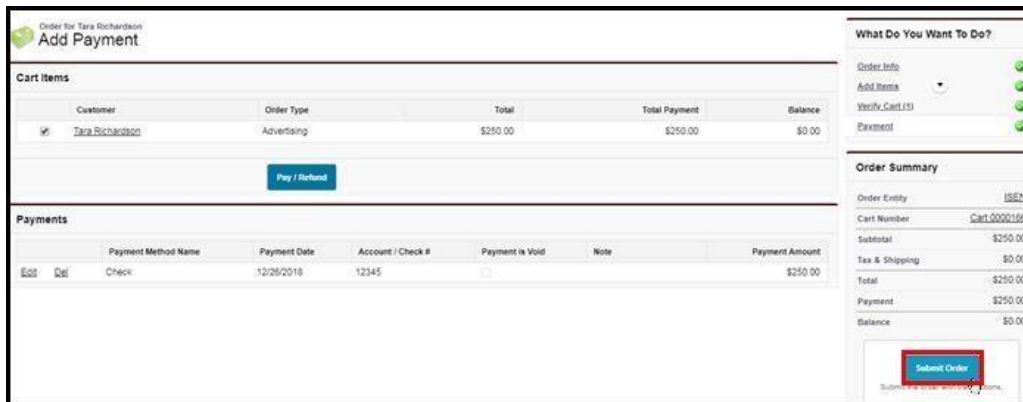
11. Select **Check** from **Payment Method** drop down.



12. Enter **12345** in the Check Number field.

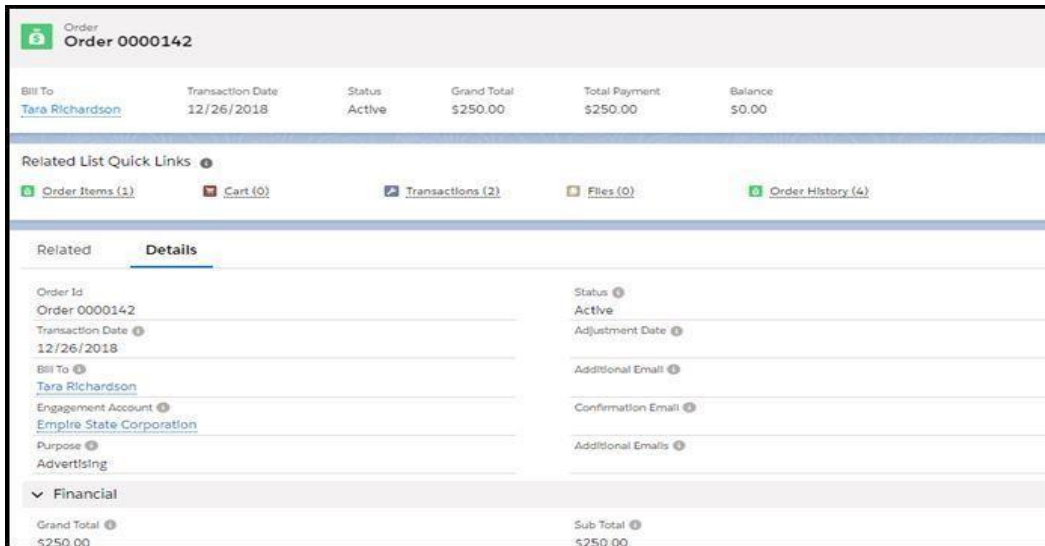


13. Click **Save** and then on **Submit Order** button (lower right)



Result of Ordering the Advertising Product

- On purchasing the Advertising product, an Order record generates with overall order details including the Order Item details, transaction details, purpose, financial etc.
- Users can log in to **Tara Richardson's** account to verify the same.



Updating Advertising Records

Once an Order for a Advertising is processed, a separate Advertising record (via an Order Line Item) is created. These Advertising records are stored under the Advertisings Item.

Advertising records also contain unique and updateable fields that display information pertinent to that specific Advertising. This information is NOT updateable during the normal Order Process, but IS, once the Order is taken, on the new Advertising record.

The updateable fields and values (if picklist) found under the Advertising record are:

- **Color** - Black & White, Color, Digital
- **Size** - ½ Page (Vertical), ¼ Page (Column), Full Page, 2-Page Spread, Classified (one size for all)
- **Position** - Inside Front Cover, Back Cover, Random
- **Frequency** - 1X, 2X, 3X

IMPORTANT NOTE: Fields listed above are typical of those adopted by a Client; unique, client specific fields can be added, edited, and deleted.

In this **exercise**, users will update an Advertising record with an Advertising preference.

1. Click the **Advertising** Item.
2. From the **Available List Views**, select the **Find Advertising** list view.
3. If needed, sort by the latest **Transaction Date**.
4. Select **Tara Richardson's** Advertising record created in the previous exercise.
5. Click on the pencil icon to the right of each of the following fields and update with the designated value:
 - **Color** – Color
 - **Size** – Full Page
 - **Position** – Inside Front Cover
 - **Frequency** – 1X
6. Click on **Save** (bottom of screen); observe the changes to the **Advertising** record.

Advertising Reports and Dashboard

Advertising Reports

To run an Advertising report:

1. Click the **Reports** Item.
2. Select the **All Folders** section under **Folders**.
3. Click the **Advertising (Nimble AMS)** folder.
4. Click on the **Advertising ALL** report.

Report: Accounts with Advertising with Products
Advertising ALL
 All Advertising.

Total Records: 12 Total Amount: \$5,300.00

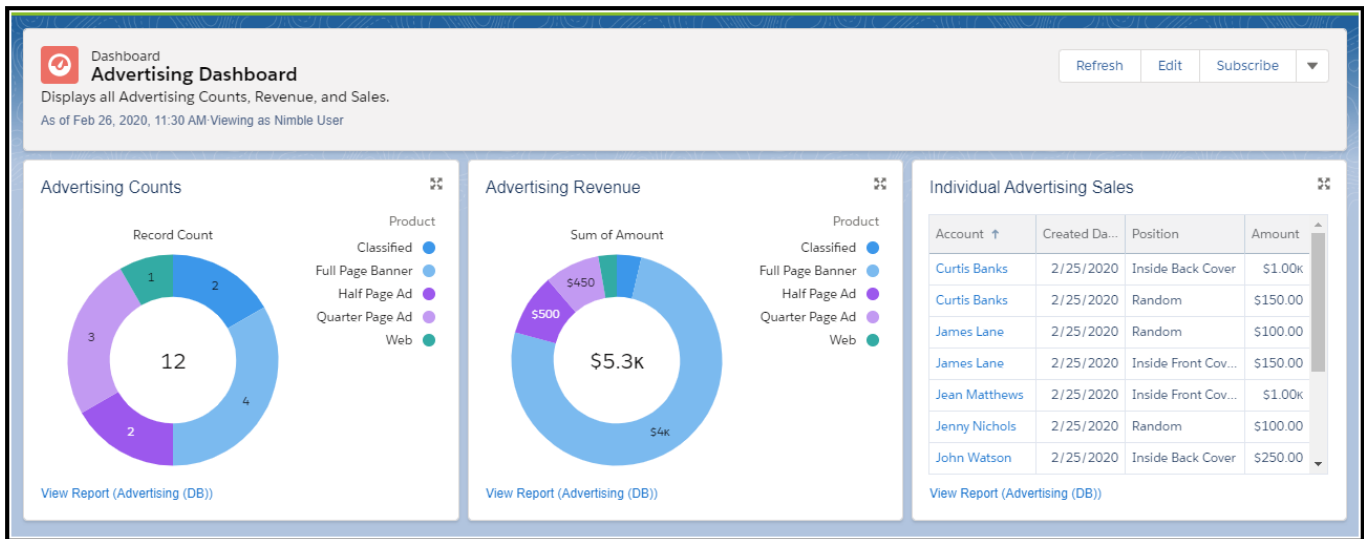
Product	Created Date	Account	Primary Affiliation	Member Type	SMF	Platform: Product Name	Color	Position	Frequency
Classified (2)	2/25/2020	Jenny Nichols	-			Mercury Newsletter	-	Random	1x
	2/25/2020	James Lane	Empire State Corporation	Enterprise	✓	Nimblelife Magazine	-	Random	1x
Subtotal									
Full Page Banner (4)	2/25/2020	Tara Richardson	Empire State Corporation	Enterprise	✓	Nimblelife Magazine	Black & White	Inside Front Cover	1x
	2/25/2020	Curtis Banks	Flos Consulting	Enterprise	✓	Mercury Newsletter	Black & White	Inside Back Cover	1x
	2/25/2020	Jean Matthews	Flos Chicago	Enterprise	✓	Nimblelife Magazine	Color	Inside Front Cover	1x
	2/25/2020	Mark Donnellan	-			Nimblelife Magazine	Black & White	Inside Back Cover	1x
Subtotal									
Half Page Ad (2)	2/25/2020	Stella Holt	-	Retired	✓	Nimblelife Magazine	Color	Inside Front Cover	1x
	2/25/2020	John Watson	-	Professional	✓	Mercury Newsletter	Color	Inside Back Cover	1x
Subtotal									
Quarter Page Ad (3)	2/25/2020	James Lane	Empire State Corporation	Enterprise	✓	Nimblelife Magazine	Color	Inside Front Cover	1x
	2/25/2020	Curtis Banks	Flos Consulting	Enterprise	✓	Nimblelife Magazine	Black & White	Random	2x
	2/25/2020	John Watson	-	Professional	✓	Nimblelife Magazine	Color	Random	3x
Subtotal									
Web (1)	2/25/2020	Robert James	Granite Art Supplies	Enterprise	✓	Performance Consulting - Digital Download	-	Random	1x
Subtotal									
Total (12)									

Row Counts Detail Rows Subtotals Grand Total

Advertising Dashboard

To display an Advertising dashboard: Click the **Dashboards** tab.

1. Click on the **All Folders** section.
2. Click the **Advertising (Nimble AMS)** folder.
3. Click on the **Advertising Dashboard**.



APPENDIX

B Awards

Objective.....	B.1
Overview.....	B.1
Awards Item.....	B.2
Understanding Awards.....	B.3
Awards' Record.....	B.4
Awards Reports and Dashboard	B.9

Objective

In this section, users will learn to manage the Awards Item in Nimble AMS This includes:

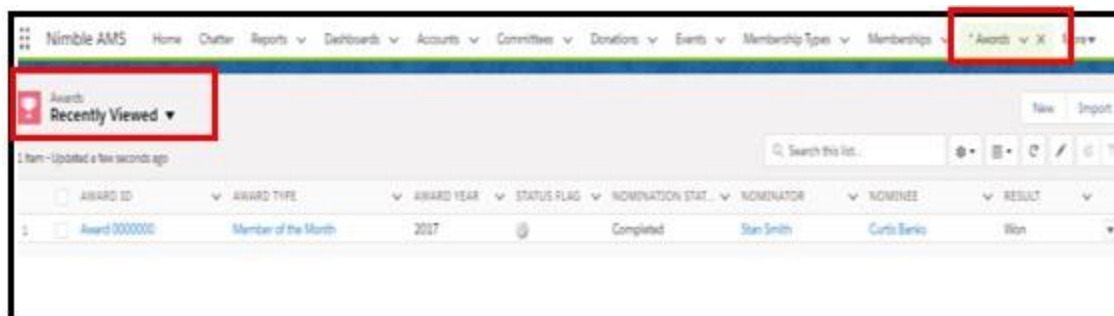
- Understanding and managing Awards Item
- Editing, viewing, finding Awards Record
- Awards Reports and Dashboards

Overview

Through a variety of programs, associations honor individuals and organizations for their achievements and contributions. Nimble AMS enables associations to track and record these Awards details. In the Awards Item, records are created by creating a new Awards record. Awards records are primarily used to store information related to nominations, results etc. Through a series of exercises in this training, users will focus on finding and understanding the functionalities of Awards Item.

Awards Item

The **Awards Item** provides several different ways of finding, organizing, and interfacing with **Awards** information.



From the **TOP RIGHT HAND**, **Actions** area, Users can:

- Create a **New** Award
- **Import data to** Awards

From the **TOP MIDDLE**, **Awards** Item drop down, Users can:

- Create a **New** Award
- Use **Recent Records** to return to a previously accessed Awards
- Use **Recent Lists** to return to a previously accessed List View of Awards

From the **TOP LEFT**, **Awards Recently Viewed** drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

Understanding Awards

An Awards Item stores details like information, nomination, selection process, presentation etc. and, applies on Awards record. Administrators create a separate Item called an Awards Type to define the Awards record. Using that Award type, End Users create an Awards record, which stores the details such as Results, Nomination status etc. Using the Awards Item, Users can also observe other fields that are linked fields from Contacts and Award Type Item records.

On locating the Awards views folder, users can select the Awards record to review information that is stored, or edit, update details as necessary. In the Awards record, users can manage nominations and results field data. Nimble AMS captures the record information and displays in reports and dashboards.

In Nimble AMS, the Awards Item allows Users to manage the process of tracking different types of Awards, the related Nomination process and the award details that is actually granted to the Organization or the Individual. The Awards Item Record details can generate reports to analyze and consolidate the Award types & nomination process at one glance.

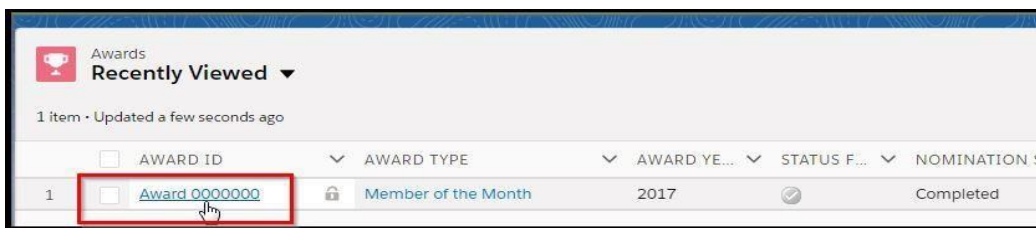
Awards' Record

Viewing Awards

1. Go to the **App launcher** and search or scroll to find **Awards Item**.
2. On the Navigation Bar, click **Awards Item**.
3. Click the list view selection drop-down and change the view to **All Awards**.



4. Click **Award 0000000** in the list of **Awards**. This opens the selected Awards' record.



5. The **Details** section displays the basic information for Award type. Information is edited by clicking the edit icon on the right of each field.
 - **Award Type** is the name given to the Award type. User creates different award types and link it to the award.
 - **Award Year** field is used to mention the year of the Award.
6. The **Nomination** section allows users to update data related to Nominee, Nominator and Nomination Status etc. fields
 - **Nominee & Nominator fields** are **linked fields** and bring back results from existing records.
 - **Nomination Status drop down** menu gives users the option to choose the current status as well as change as necessary.

7. The **Result** section is used to display the final outcome of the Award.

- **Result drop down** menu gives users the option to select between **Won, Lost & TBD (To be decided)**

The screenshot displays the 'Award 0000000' details page. At the top, there is a header with a trophy icon and the text 'Award 0000000'. Below this, there are two tabs: 'Related' and 'Details', with 'Details' being the active tab. The main content area is divided into several sections:

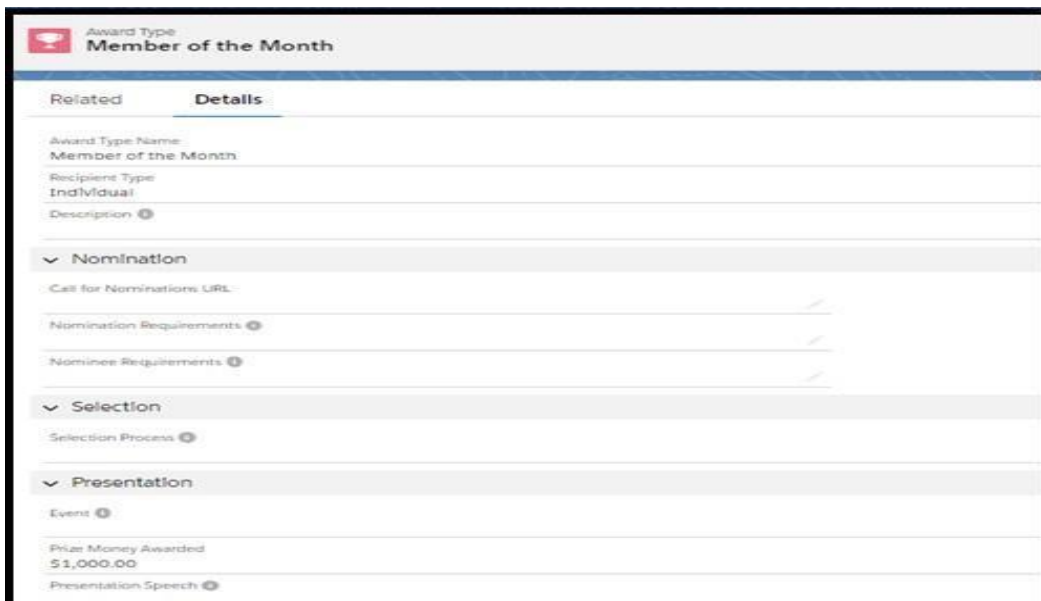
- Award Type:** Member of the Month
- Award Year:** 2017
- Nomination:**
 - Status Flag:** (indicated by a checkmark icon)
 - Nominee:** Curtis Banks
 - Nomination Status:** Completed
 - Nominator:** Stan Smith
- Result:** Won

Viewing Award Types

1. Go to **All Apps** ellipses and search or scroll to find **Award types Item**.
2. On the Navigation Bar, click **Award Types Item**.
3. Click the list view selection drop-down and change the view to **All Awards**.
4. Click **Member of the Month** in the list of **Award types**. The Award type controls the categories of Awards that the association recognizes their members and associated organizations with some common examples include monthly, yearly contributions, performance & achievements related awards.

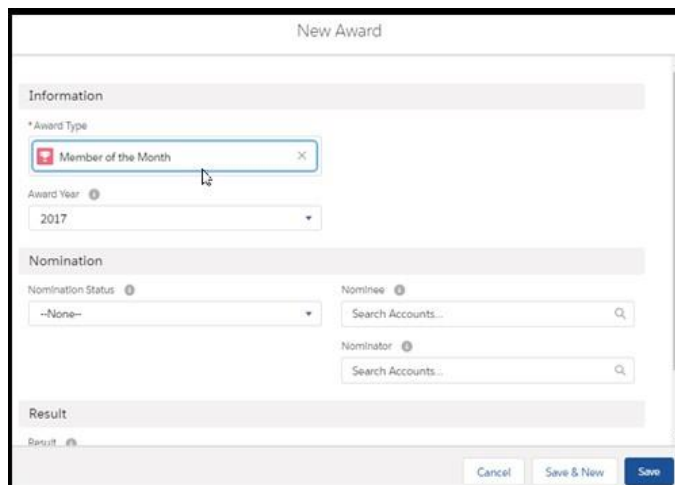


5. This opens the selected **Award type**.



Creating Awards

1. From the **Awards' Item**, click **new button** from upper right corner.
2. **Fill** in the **appropriate information** into the New Award page.

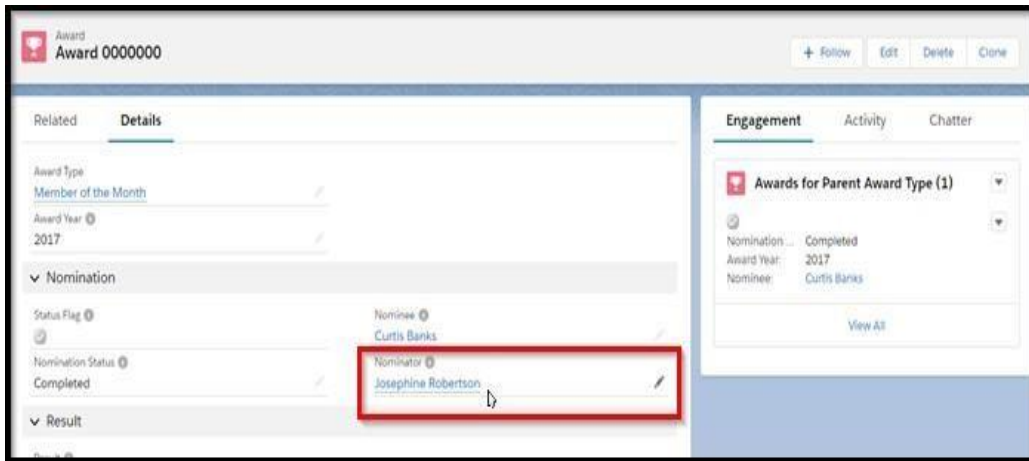


3. Click **Save**.

Editing Awards

1. Select the **Edit** button at the top of the page or, if in line editing is enabled, double click the field to modify.
2. Edit the form slightly by changing the current entry in the **Nominator field**. By clicking on the edit icon on the right side of the field, type and select **Josephine Robertson**.
3. Click **Save**.

4. The **Awards** type 'Member of the Month' is displayed with the updated data.



Cloning Awards Record

1. Navigate to an **Award** record.
2. Click the **Clone** button at the top of the page.



3. Make the appropriate changes to **the new Award record**.
4. Click **Save**.

Awards Reports and Dashboard

Awards Reports

To run an Awards report:

1. Click the **Reports** Item.
2. Select the **All Folders** section under **Folders**.
3. Click the **Awards (Nimble AMS)** folder.
4. Click on the **Awards ALL** report.

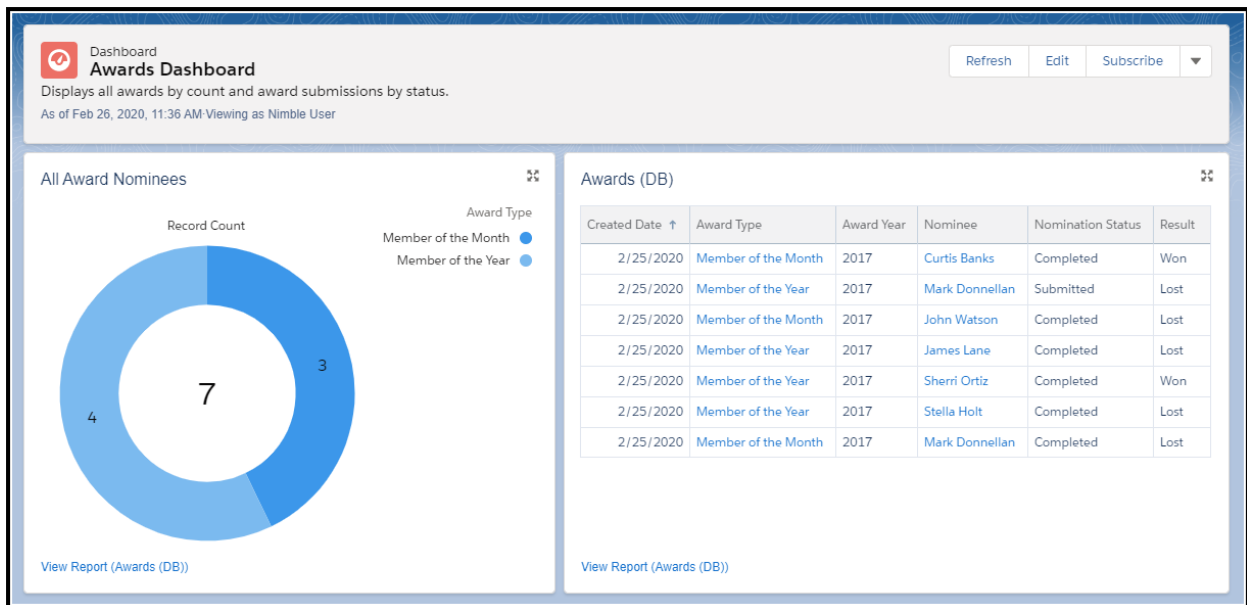
The screenshot shows a web interface for an 'Awards ALL' report. At the top, it says 'Report: Accounts with Awards' and 'Awards ALL'. Below this, it indicates 'All Awards' and 'Total Records: 7'. The main part of the interface is a table with columns for Award Type, Created Date, Nominee, Award Year, Nomination Status, Result, Status Flag, Nominee Phone, and Nominee Email. The table is grouped into two sections: 'Member of the Month (3)' and 'Member of the Year (4)'. Each section has a 'Subtotal' row. The 'Total (7)' row is at the bottom of the table.

Award Type	Created Date	Nominee	Award Year	Nomination Status	Result	Status Flag	Nominee Phone	Nominee Email
Member of the Month (3)	2/25/2020	Curtis Banks	2017	Completed	Won	✔	(202) 555-9876	demo+training+cb@nimbleuser.com
	2/25/2020	John Watson	2017	Completed	Lost	✔	-	demo+johnw@nimbleuser.com
	2/25/2020	Mark Donnellan	2017	Completed	Lost	✔	(202) 536-6724	demo+markd@nimbleuser.com
Subtotal								
Member of the Year (4)	2/25/2020	Mark Donnellan	2017	Submitted	Lost	⚠	(202) 536-6724	demo+markd@nimbleuser.com
	2/25/2020	James Lane	2017	Completed	Lost	✔	(646) 645-7465	demo+jamesl@nimbleuser.com
	2/25/2020	Sherri Ortiz	2017	Completed	Won	✔	(617) 864-4786	demo+sherrio@nimbleuser.com
	2/25/2020	Stella Holt	2017	Completed	Lost	✔	-	demo+stellah@nimbleuser.com
Subtotal								
Total (7)								

Awards Dashboard

To display an Awards dashboard:

1. Click the **Dashboards** tab.
2. Click on the **All Folders** section.
3. Click the **Awards (Nimble AMS)** folder.
4. Click on the **Awards** Dashboard.



APPENDIX

C Deals

Objective.....	C.1
Overview.....	C.1
Deals Item.....	C.2
Understanding Deals.....	C.3
Deals' Record	C.4
Deals Reports and Dashboard	C.8

Objective

In this section, users will learn to manage the Deals Item in Nimble AMS. This includes:

- Understanding and managing Deals Item
- Viewing, creating, editing, cloning Deals Records
- Deals reports and dashboards

Overview

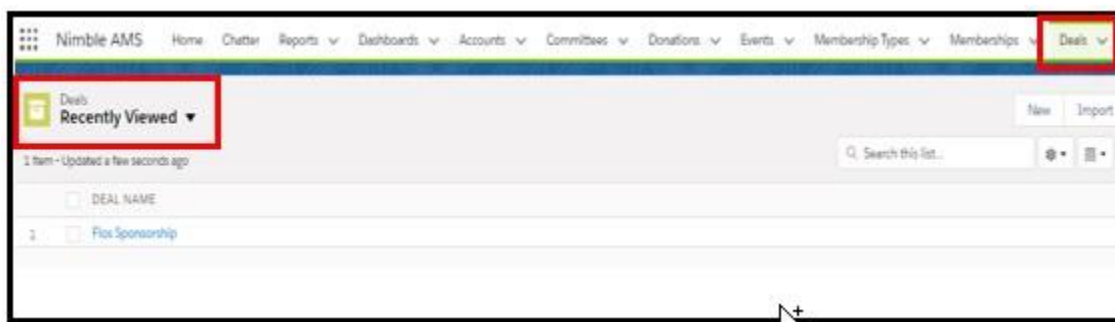
Deals in Nimble AMS enables users to manage pipeline and sales opportunities. It is a great first step for prospectus to be turned into actual orders. Deals connects together the sales cultivation on accounts to complete and finalize orders. Managing Deals is quite a simple process.

Note: Deals and Opportunities are separate Items; however share the functionality of converting into an order when approved.

Deals Item

The **Deals Item** provides several different ways of finding, organizing, and interfacing with **Deals** information.

The process of managing the Deals Item is, generally, quite a simple process - this is a separate Item from Opportunities that shares the functionality of being able to convert into an Order when it has been accepted by a Constituent.



From the TOP RIGHT HAND, **Actions** area, Users can:

- Create a **New Deal**
- **Import data to Deals**

From the TOP MIDDLE, **Deals** Item drop down, Users can:

- Create a **New Deal**
- Use **Recent Records** to return to a previously accessed Deals
- Use **Recent Lists** to return to a previously accessed List View of Deals

From the TOP LEFT, **Deals Recently Viewed** drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

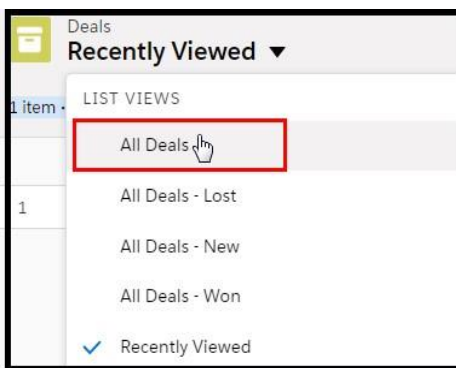
Understanding Deals

Deals allow users to record data and manage current, future & past sales opportunities. In Nimble AMS, Deals are tied to different products: Membership Deals, Sponsorship Deals, or Subscription Deals.

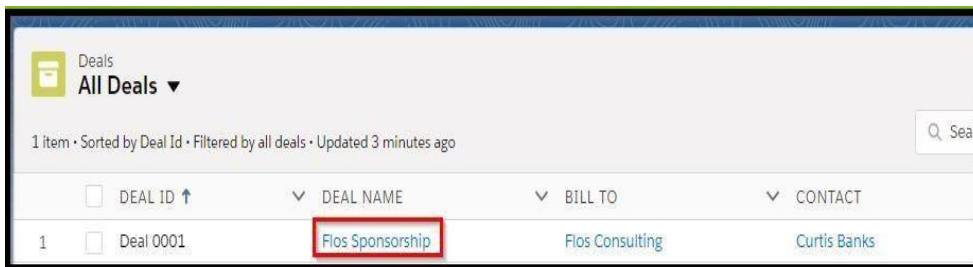
Deals' Record

Viewing Deals

1. Go to **All Apps** ellipses and search or scroll to find **Deals Item**.
2. On the Navigation Bar, click **Deals Item**.
3. Click the **list view selection drop-down** and change the view to **All Deals**.



4. Click **Flos Sponsorship** in the list of **Deals**.



5. The **Deals** type record is displayed as **Sponsorship**.

6. The **Details** section displays the basic information like Deal name; information here can be edited by clicking the edit icon on the right of each field.
 - **Deal Name** is the **given name** to this Deal
 - **Bill To** is a **linked field** and allows users to type and select an existing organization record
 - **Contact** field is the name of the **contact person** for this particular Deal
 - **Deal Status** is a field with drop down menu options from New, Contacted, Lost, Ready for Convert, Won
 - **Price** field is for noting the price of this Deal
7. The **Cultivation** section contains the **Next Step** field allows users to manually add the next step of action they intend to take.

Flos Sponsorship

Related **Details**

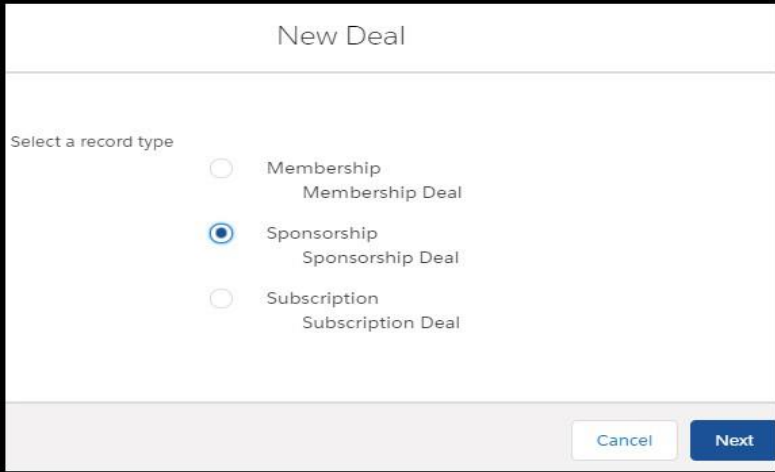
Deal Id	Deal 0001	Owner	NimbleTrain-PL-011 Org
Deal Name	Flos Sponsorship	Deal Status	New
Bill To	Flos Consulting	Price	\$1,000.00
Contact	Curtis Banks		

▼ Cultivation

Next Step	Create SOW
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Creating Deals

1. From the **Deals** Item, click **new button** from upper right corner
2. Select the **record type**. The record type controls the classification of a Deal. It accurately storea information under different groups: Membership, Subscription, Sponsorship.



The screenshot shows a form titled "New Deal". Below the title, there is a section labeled "Select a record type". This section contains three radio button options:

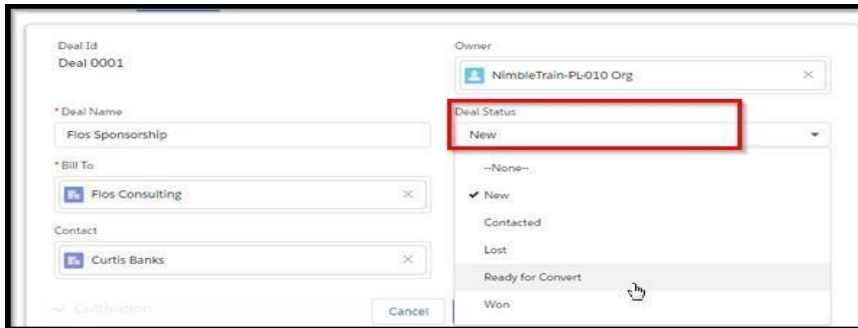
- Membership
Membership Deal
- Sponsorship
Sponsorship Deal
- Subscription
Subscription Deal

At the bottom right of the form, there are two buttons: "Cancel" and "Next".

3. **Fill** in the **appropriate information** into the New Deal page.
4. Click **Save**.

Editing Deals

1. Select the **Edit** button at the top of the page or, double click the field to modify, if inline editing is enabled.
2. Edit the **form** slightly by changing the current entry in the **Deal Status** field. Select **'Ready to Convert'** from the drop-down menu.



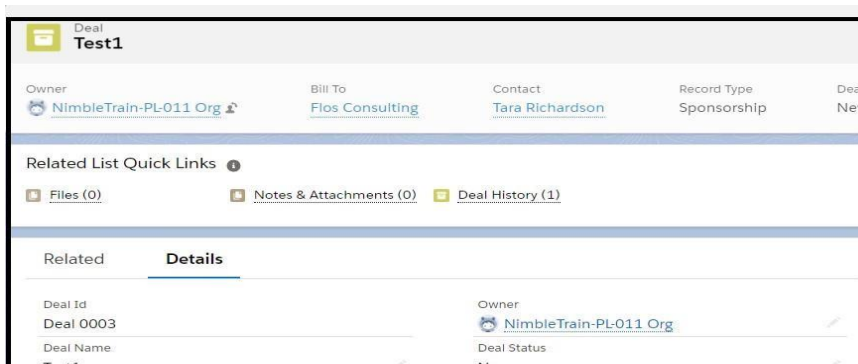
3. Click **Save**.

Cloning Deals

1. Navigate a **Deal record**.
2. Click the **Clone** button at the top of the page.



3. Make the appropriate changes to the **new Deal**.



4. Click **Save**.

Deals Reports and Dashboard

Deals Reports

To run a Deals report:

1. Click the **Reports** Item.
2. Select the **All Folders** section under **Folders**.
3. Click the **Deals (Nimble AMS)** folder.
4. Click on the **Deals** report.

Deals Dashboard

To display a Deals dashboard:

1. Click the **Dashboards** Item.
2. Click on the **All Folders** section.
3. Click the **Deals (Nimble AMS)** folder.
4. Click on the **Deals** Dashboard.

APPENDIX

D Exhibitors

Objective.....	D.1
Exhibitors Item	D.2
Understanding Exhibitors	D.3
Exhibitor Record	D.4
Exhibitor Product.....	D.5
Ordering an Exhibitor Product.....	D.6
Updating Exhibitor Records	D.9
Exhibitors Reports and Dashboard	D.10

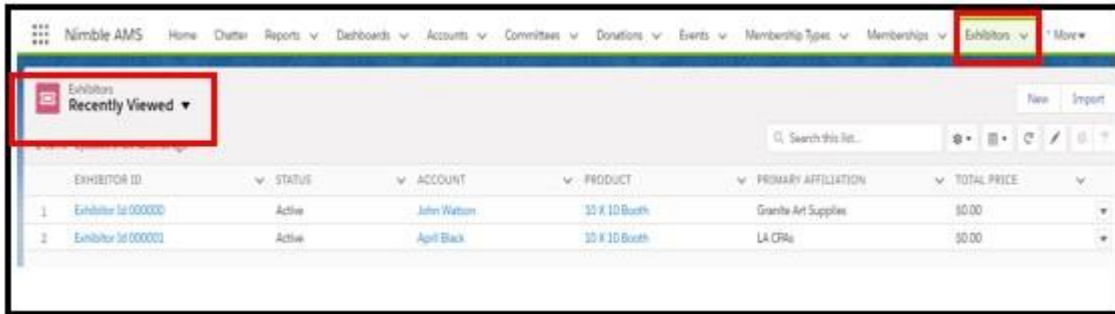
Objective

Upon completion of this training, users will be able to:

- Understand Exhibitors Item in Nimble AMS
- View Exhibitor record and product
- Order an Exhibitor product
- View Exhibitor reports & dashboards

Exhibitors Item

The **Exhibitors Item** provides several different ways of finding, organizing, and interfacing with **Exhibitors** information.



From the TOP RIGHT HAND, **Actions** area, Users can:

- Create a **New** Exhibitor record
- **Import data to** Exhibitors

From the TOP MIDDLE, **Exhibitors** Item drop down, Users can:

- Create a **New** Exhibitor record
- Use **Recent Records** to return to a previously accessed Exhibitors
- Use **Recent Lists** to return to a previously accessed List View of Exhibitors

From the TOP LEFT, **Exhibitors Recently Viewed** drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

Understanding Exhibitors

Exhibitors are the persons that use booths to market their items at Meetings, trade-shows etc. Association members get to experience the diverse marketplace of products, solutions and learn about the latest trends in the industry and technology by perusing Exhibitor's booths. The Nimble AMS Exhibitors Item captures data related to the sale of an Exhibitor's booth. Information such as booth size, location, amenities, as well as the price can be captured in the sale of an Exhibitor product.

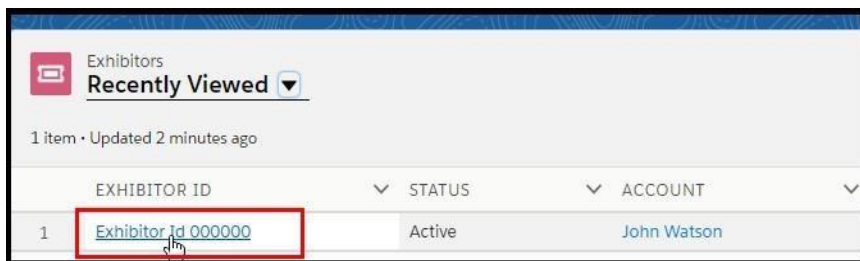
Exhibitor Record

In Nimble AMS, Exhibitor record type is created by placing an order for the Exhibitor product.

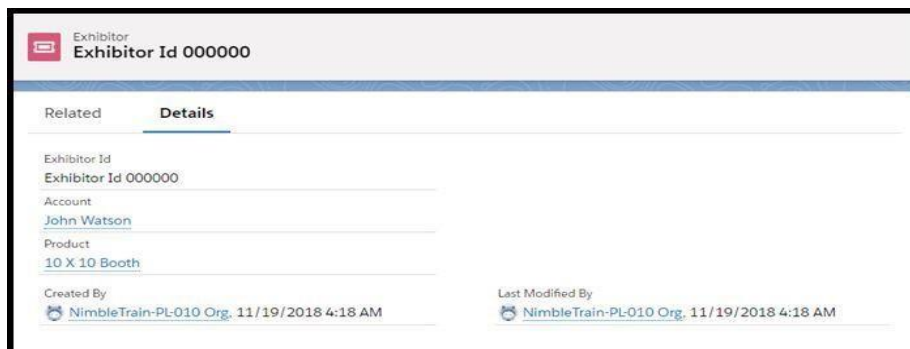
1. Go to the **App Launcher** and search or scroll to find **Exhibitor Item**.
2. On the Navigation Bar, click **Exhibitor Item**.
3. Click the list view selection drop-down and change the view to **All Exhibitors**.



4. Click **Exhibitor ID 000000** in the list of **Exhibitors**.

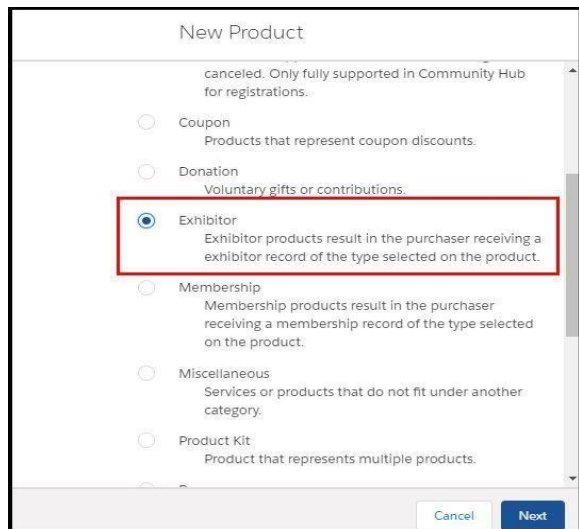


5. The **Exhibitors** record 000000 is displayed.
6. The **Details** section displays the basic information for the **Exhibitor** record.
 - **Exhibitor ID** automatically generated once the Exhibitors order successfully placed.
 - **Account** field uses the Person Account name is of the member who places the order. This field is same as Order Bill To field.
 - **Product** field uses the Exhibitor product that the user purchases using order wizard.

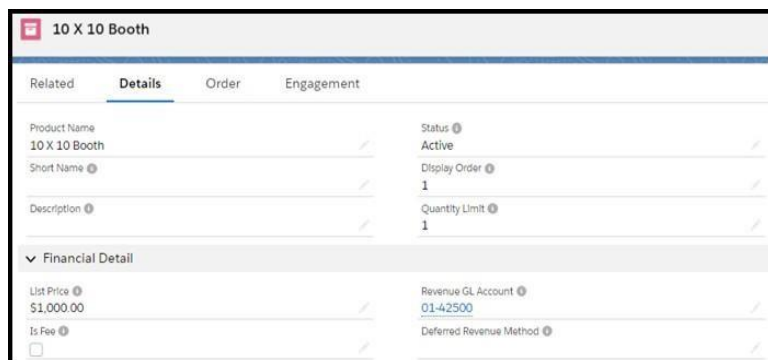


Exhibitor Product

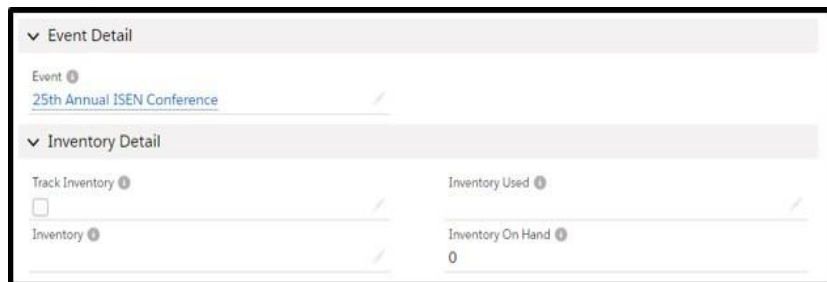
User creates an Exhibitor **product** by selecting **Product record type** as **Exhibitor**. The record type controls the way the product aligns with the Exhibitor record on order entry.



IMPORTANT NOTE: Observe an existing Sponsorship product Session Exhibitor. Exhibitor type record stores information like Product and Financial details.



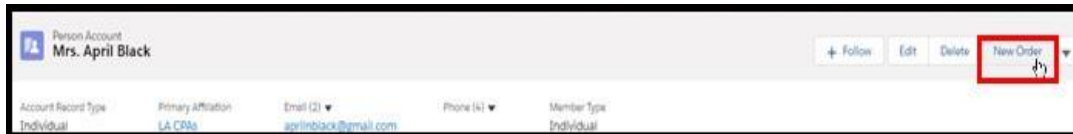
The Exhibitor product linked to a related event by adding the **Event details**. In the inventory section, users manage the **product inventory**.



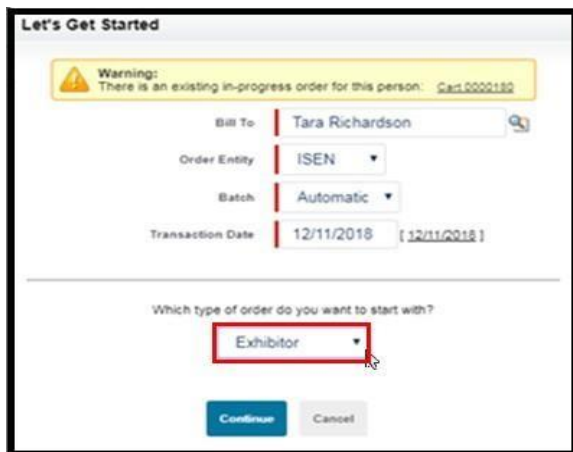
Ordering an Exhibitor Product

In this section, users will learn how to order an Exhibitor Product

1. In the **Search box**, enter and select **Tara Richardson**.
2. **Click** on the **New Order** button from the upper right corner.

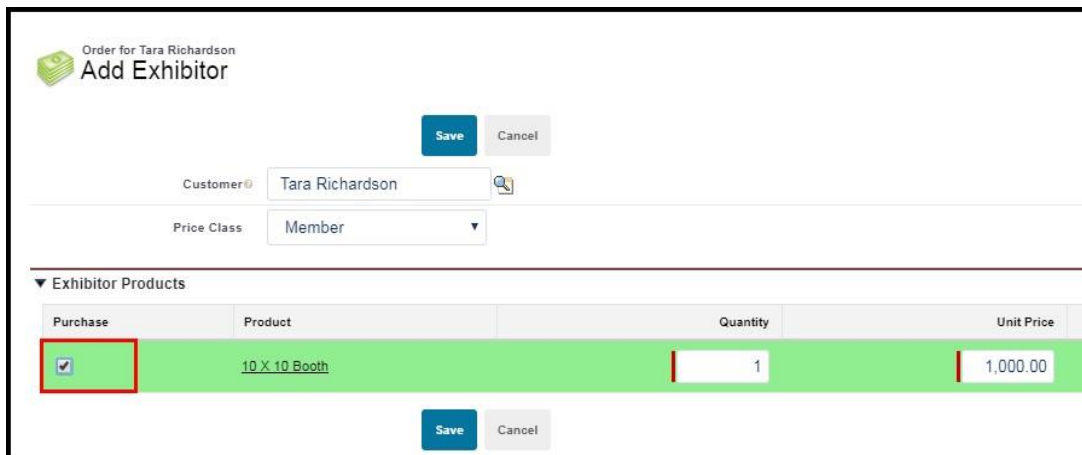


3. Select **Exhibitor** for the **Which type of order do you want to start with?** field drop- down



4. Click **Continue**.

Note: Review the details and select the Exhibitor product **10X10 Booth** by checking the **purchase box**.



5. Click **Save** and then click on **Go to Payment** button (lower right).

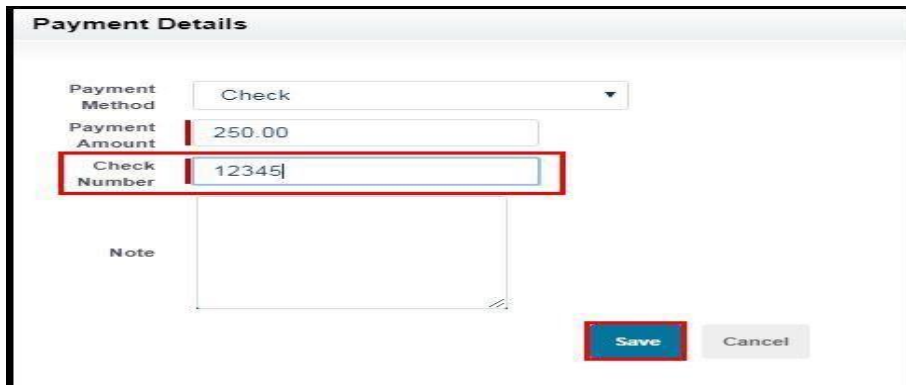
6. Click **Pay Now**.



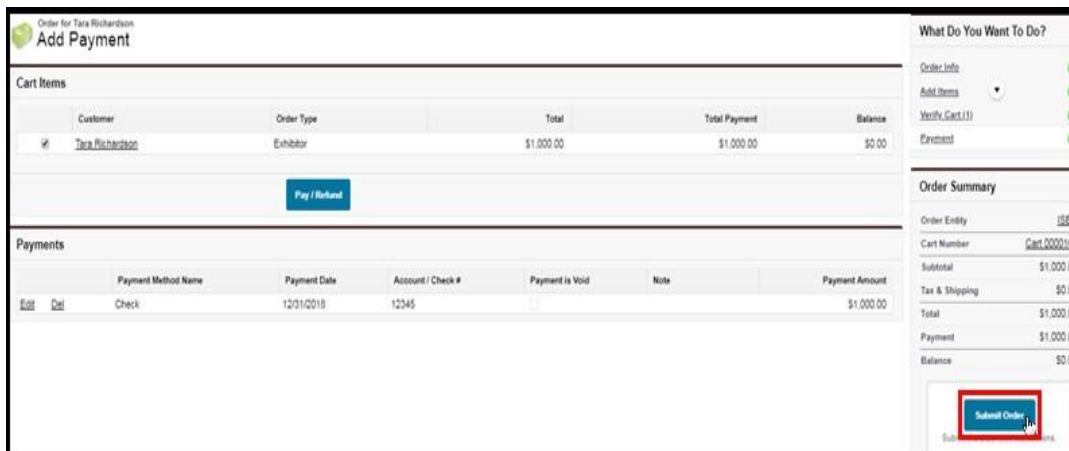
7. Select **Check** from **Payment Method** drop down.



8. Enter **12345** in the **Check Number** field.

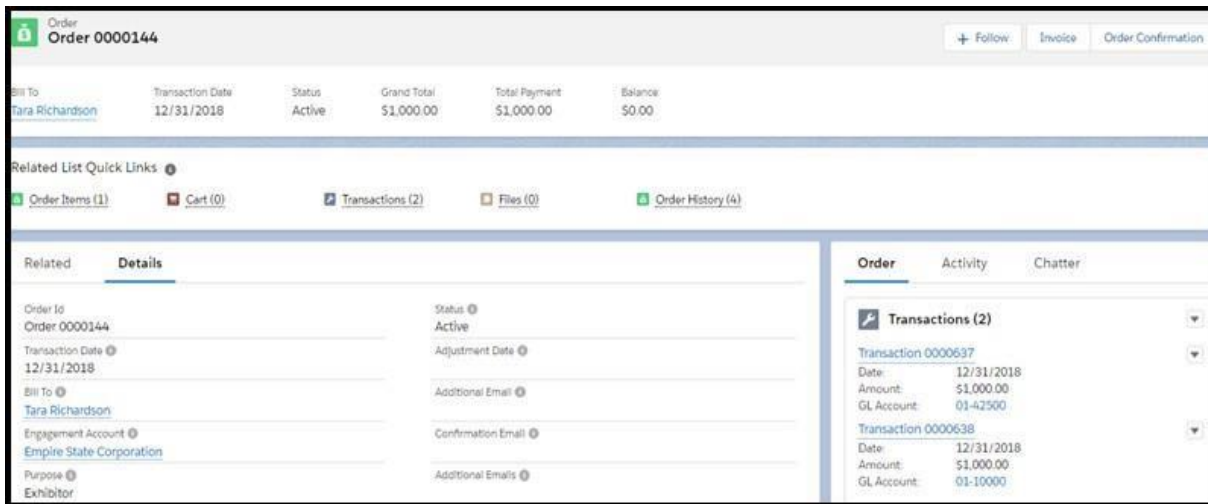


9. Click **Save** and then **Submit Order** (lower right).



Result of Purchasing the Exhibitor Product

- On purchasing the Exhibitor product, an Order record is generated with overall order details including the Order Item details, transaction details, purpose, financial etc.
- Users can log in to Tara Richardson’s account to verify the same.



Updating Exhibitor Records

Once an Order for a Exhibitor is processed, a separate Exhibitor record (via an Order Line Item) is created. These Exhibitor records are stored under the Exhibitors Item.

Exhibitor records also contain unique and updateable fields that display information pertinent to that specific Exhibitor. This information is NOT updateable during the normal Order Process, but IS, once the Order is taken, on the new Exhibitor record.

The updateable fields and values (if picklist) found under the Exhibitor record are:

- **Booth Name**
- **Booth Configuration** – Regular, High Traffic, Corner, Split
- **Paid Passes**
- **Free Passes**

IMPORTANT NOTE: Fields listed above are typical of those adopted by a Client; unique, client specific fields can be added, edited, and deleted.

In this **exercise**, users will update an Exhibitor record with an Exhibitor preference.

1. Click the **Exhibitor** Item.
2. From the **Available List Views**, select the **Find Exhibitor** list view.
3. If needed, sort by the latest **Transaction Date**.
4. Select the latest **Exhibitor record** created in the previous exercise.
5. Click on the **pencil icon** to the right of each of the following fields and update with the designated value:
 - **Booth Name** – A33
 - **Booth Configuration** – Regular
 - **Paid Passes** - 1
 - **Free Passes** - 1
6. Click on **Save** (bottom of screen); observe the changes to the **Exhibitor** record.

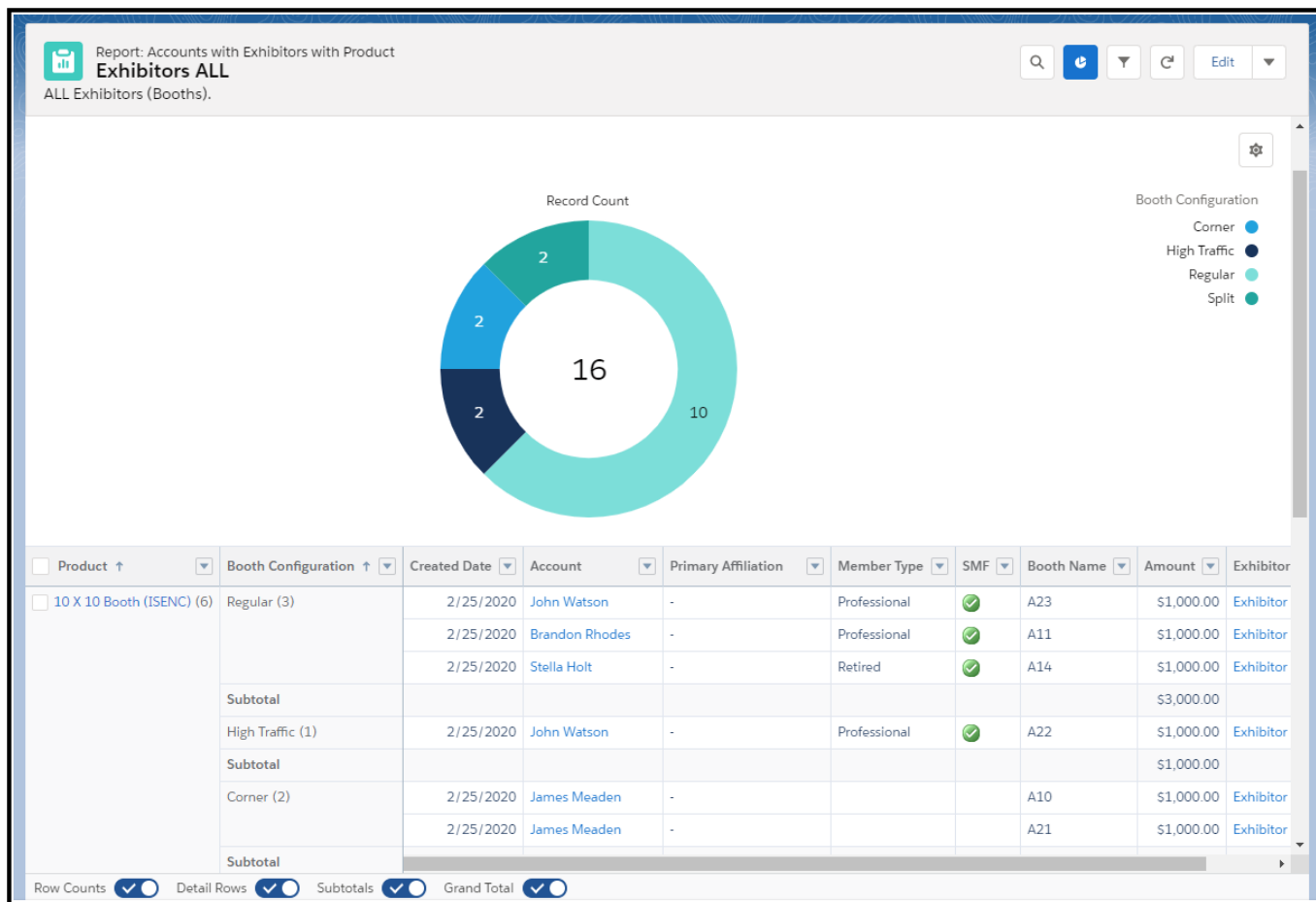
Exhibitors Reports and Dashboard

Exhibitors Reports

To run an Exhibitors report:

1. Click the **Reports** Item.
2. Select the **All Folders** section under **Folders**.
3. Click the **Exhibitors (Nimble AMS)** folder.
4. Click on the **Exhibitors ALL** report.

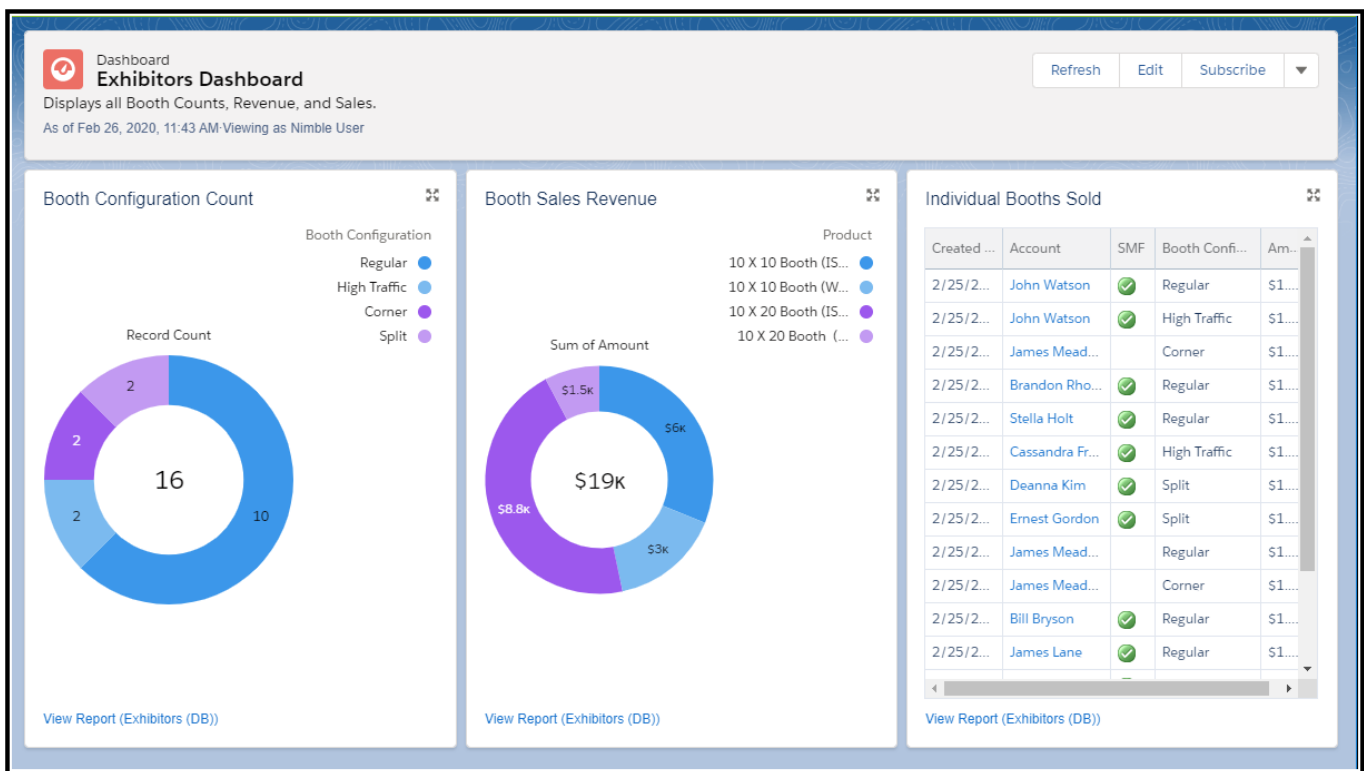
Exhibitors ALL



Exhibitors Dashboard

To display an Exhibitors dashboard:

1. Click the **Dashboards** Item.
2. Click on the **All Folders** section.
3. Click the **Exhibitors (Nimble AMS)** folder.
4. Click on the **Exhibitors** Dashboard.



APPENDIX

E Programs

Objective.....	E.1
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Program Type Parts.....	E.5
Program Enrollment.....	E.9
View Program Enrollments.....	E.11
Updating Program Components.....	E.12
Programs Reports and Dashboard.....	E.14

Objective

In this chapter, users will:

- Set up a Program
- Understand Program Types
- Understand Program Type Parts
- Program Enrollment
- Updating Program Components

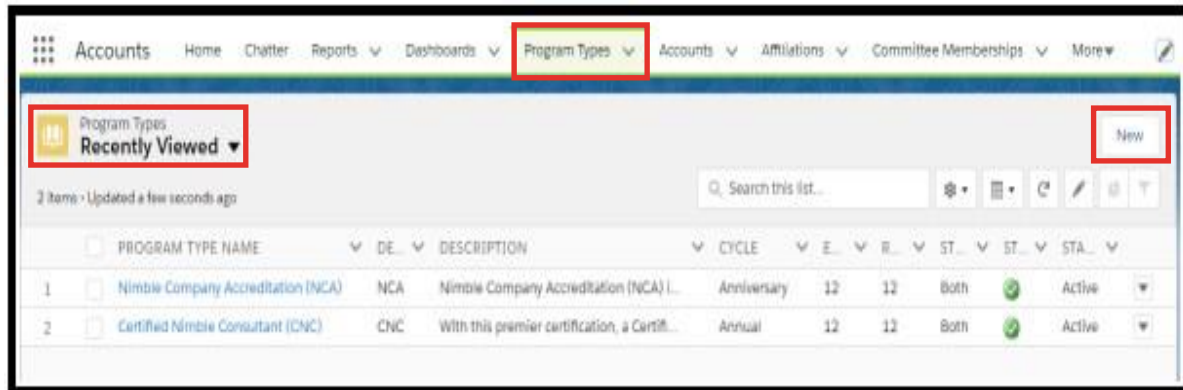
Overview

Nimble AMS Programs allow associations to track term-based education, accreditation, and certification programs. Program records are created in Nimble AMS through the order wizard, whether the program is cost-based or complimentary. This training focuses on individual certifications, but the process is the same for setting up and processing education and accreditation programs.

Program Type records are the repositories of the specific setup and functionality of that Program. These records control how a program operates and performs after the program is purchased.

Program Type Item

The **Program Type** Item provides several different ways of finding, organizing, and interfacing with **Program Type** information.



From the **TOP RIGHT HAND**, **Actions** area, Users can:

- Create a **New** Program Type

From the **TOP MIDDLE**, **Program Types** Item drop down, Users can:

- Create a **New** Program Type
- Use **Recent Records** to return to a previously accessed Program Types
- Use **Recent Lists** to return to a previously accessed List View of Program Types

From the **TOP LEFT**, **Program Types Recently Viewed** drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

Understanding Program Types

The program type record controls the details of the program the applicant is enrolling in. Program types can include a variety of programs, like certification, re-certification, accreditation, and more. Remember, this guide examines programs from a certification perspective, but an organization may use it for other purposes.

Program types are made up of:

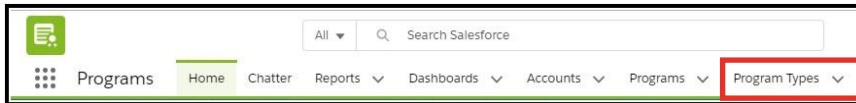
- Program Types
- Program Type Product Links
- Program Products
- Milestone Types
- Milestone Type Component Links
- Component Types

Each of these parts works in conjunction with the other to move a person who purchases a program (joins or renews) through the programs steps.

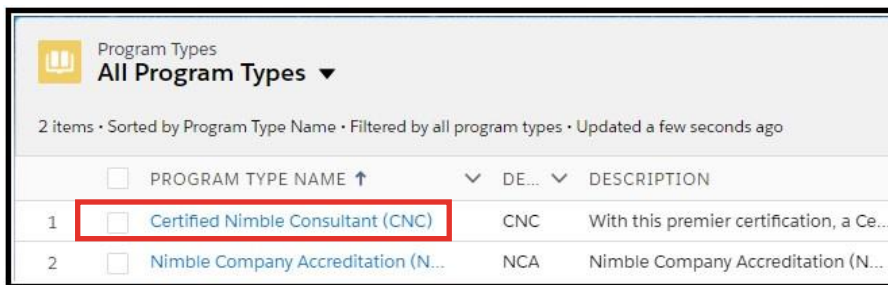
In this chapter, users will look at how to join a program and how a user is progressed through this process.

Program Type Parts

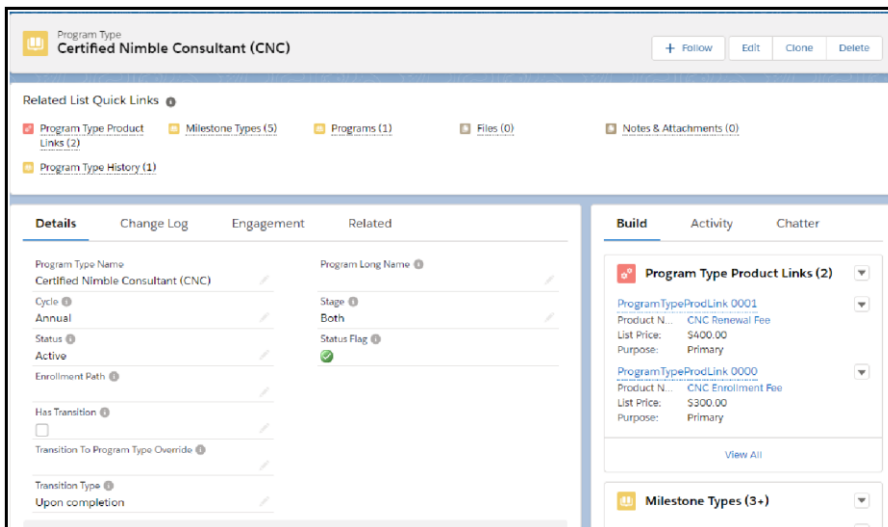
1. Navigate to the **Programs App** using the app launcher.
2. On the Navigation Bar, click **Program Types**.



3. Click the view selection drop-down and change the view to **All Program Types**.
4. Click **Certified Nimble Consultant** in the list of program types.



5. The program type record is displayed. The top of the screen displays the record information, including the program name, stage, cycle, and status.



6. The **Details** section displays the basic information for the program type, information here can be edited by clicking the edit icon to the right of each field.
 - **Program Type Name** is the name given to the program type.
 - **Program Long Name** allows Users to give a full name to the program type.
 - **Enrollment Path** dictates if enrollment should be based on coursework, experience, or neither.
 - **Program Icon URL** allows Users to attach an icon to the program type. The image linked here will display on the web.
 - **Status** must be set to Active for the program to be available for enrollment.
 - **Stage** indicates if the program type is used for initial enrollment, renewal, or both.
 - **Cycle** controls if the program is available on a calendar or anniversary basis.
7. The next section displays description and transition information for the program type.
 - **Description** is used to describe the program, and who may be eligible for enrollment.
 - **Has Transition:** Program Type transitions are used when upon completing this program or program term, the applicant is moved to another program type. This box enables that transition.
 - **Transition Type** determines if the transition occurs when this program type is completed or when the program term ends.
 - **Transition to Program Type Override** allows users to set which program type to transition to.

8. Scrolling down we see the Term and Designation fields.

- **The Start Date Control (Day)** field allows Users to select which date to use as the cut over for program enrollment.

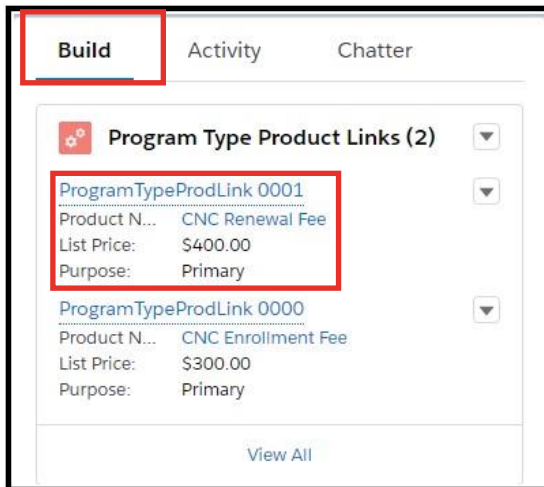
For example, if an applicant signs up for the program on the 14th of the month, and this field is set to 15, the applicant's program will begin the first of the current month. If the applicant signs up for the program on the 16th of the month, the program will begin on the first of the next month.

- The **Annual Start Month** field displays the numeric start month for annual based programs.
- The **Enrollment Term (Months)** field controls how long the program enrollment lasts.
- **Enrollment Grace Period** allows Users to set a grace period at the end of the program term.
- The **Renew Term (Months)** field controls how long the program renewal lasts.
- **Renew Grace Period** allows Users to set a grace period at the end of the program renewal term.
- **Program Join On** allows Users to set a date for all program enrollments to be active.
- The **Designation Acronym** field dictates what designation is added.
- The **Automatic Designation** box controls if an applicant should be awarded the designation automatically when enrolled in the program.
- The **Automated Designation Manager** controls how Nimble AMS will assign the designation to the applicant.

9. The **Financial** section controls which **Entity** the program is assigned to.

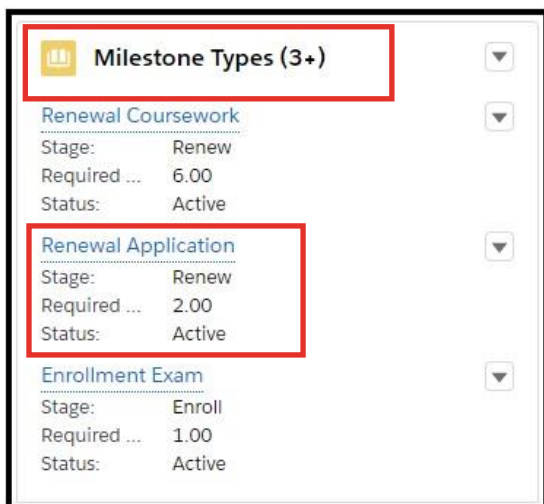
10. To the right of the Details/Engagement Section we see the **Build** section. The first item we see is the **Program Type Product Links**.

- This section lists products linked to this program type.
- Typically this will include Enrollment Fees and/or Renewal Fees, depending on program type.
- Users can see the product by clicking the product name.



11. Scrolling down in the Build section, we see the program **Milestone Types** that are linked to this program.

- Milestone Types are groups of program components that mark distinct stages of program completion.
- Users can view each milestone by clicking the name.



Program Enrollment

Add New Program Enrollment

1. Navigate to the account for **Josephine Robertson**.
2. Click the drop down in the upper right corner, then click **New Order**.
3. The **Let's Get Started** window displays with the individual defaulted in the Bill To field.
 - **Entity:** Select **ISEN**.
 - **Batch** is **Automatic**.
 - **Transaction date** is **today's date**.
 - On the **Order Type** drop down, select **Program**.

The screenshot shows a window titled "Let's Get Started" with the following fields and options:

- Bill To:** Josephine Robertson (with a search icon)
- Order Entity:** ISEN (dropdown menu)
- Batch:** Automatic (dropdown menu)
- Transaction Date:** 11/20/2018 (with a calendar icon and a date range indicator [11/20/2018])

Below these fields, there is a question: "Which type of order do you want to start with?". The dropdown menu for this question is set to "Program" and is highlighted with a red box. At the bottom of the window, there are two buttons: "Continue" (highlighted in blue) and "Cancel".

4. Click **Continue**.
5. Select **Certified Nimble Consultant** from the **Program Type** drop down.

6. Observe that the **CNC Enrollment Fee** is automatically added as the **Program Product**.

Order for Josephine Robertson
Add Program

Save Cancel

Customer Josephine Robertson

Program Type Certified Nimble Consultant (CNC)

Price Class Member

Stage Renew

▼ Program Products

Purchase	Product	Stage	Start Date	End Date	Price
<input checked="" type="radio"/>	CNC Renewal Fee	Renew	1/1/2019	12/31/2019	400.00

Save Cancel

7. Complete the payment and submit the order.

View Program Enrollments

Now that Josephine has enrolled, users will want to manage her enrollment as she provides or completes each component. First, users will access her program record.

1. Click the **Programs** Item.
2. The list of all program enrollments will display. Users can create **List Views** to display only the enrollments needed, such as new enrollments this week or with a specific status, etc. For further analysis users can access the **Reports** listed as the end of this section.
 - Click the **Program ID** for **Josephine Robertson**.

	PROGRAM ID	PROGRAM TYPE	ACCOUNT	STAGE	START D...	END DATE	ST...	STATUS	AMOU...
1	Program 000004	Certified Nimble Consultant (CNC)	Josephine Robertson	Renew	1/1/2019	12/31/2019	✓	Enrolled	\$400.00
2	Program 000002	Certified Nimble Consultant (CNC)	Stan Smith	Enroll	1/1/2018	12/31/2018	✓	Enrolled	\$300.00
3	Program 000001	Certified Nimble Consultant (CNC)	Curtis Banks	Enroll	1/1/2018	12/31/2018	✓	Enrolled	\$300.00

3. The program record displays, where Users can see information about the program and the order. We see in the Engagement section that Josephine has three milestones to complete.

Program 000000

Related List Quick Links: Milestones (3), Order Item Lines (1), Files (0), Notes & Attachments (0), Program History (3)

Details | Change Log | Standard.Tab.DSCLOrder | Related

Program ID: Program 000000 | Program Type: Certified Nimble Consultant (CNC)

Account: Josephine Robertson | Stage: Enroll

Notes: Search

Term: Start Date: 1/1/2018 | End Date: 12/31/2018 | Lapsed On: 1/1/2019 | End Date Override: | Manual Status Override: | Status Flag: Enrolled

Engagement | Activity | Chatter

Milestones (3)

- Milestone 000002: Milestone Type: Enrollment Exam, Units Earned: 1.00, Required Units: 1.00
- Milestone 000001: Milestone Type: Enrollment Coursework, Units Earned: 0.00, Required Units: 30.00
- Milestone 000000: Milestone Type: Enrollment Application, Units Earned: 0.00, Required Units: 3.00

View All

Updating Program Components

1. The next step is to update the components with Josephine’s activity for the program.
 - Click the **Components** Item to display all components.
 - Change the View to **All Components - Pending Approval**.
 - Click on the **ID** next to Stan’s **Paid Fees** component.

COMPONENT ID	COMPONENT TYPE	COMPO...	COMPONENT...	STATUS	ACCOUNT	UNITS E...	EVENT ...
1	Component 000000	Approved Documents	1/1/2018	Pending Approval	Josephine Robertson	1.00	
2	Component 000001	Approved Documents	1/1/2018	Pending Approval	Josephine Robertson	1.00	
3	Component 000003	Approved Letter of Recommendation	1/1/2018	Pending Approval	Josephine Robertson	1.00	
4	Component 000004	Paid Fees	1/1/2018	Pending Approval	Josephine Robertson	1.00	

2. The component record displays.
3. Click the **Edit** icon on the **Status** field.
4. Change the status to **Approved**.

Details | Change Log | Related

Component Id: Component 000004

Component Date: 1/1/2018

Account: Josephine Robertson

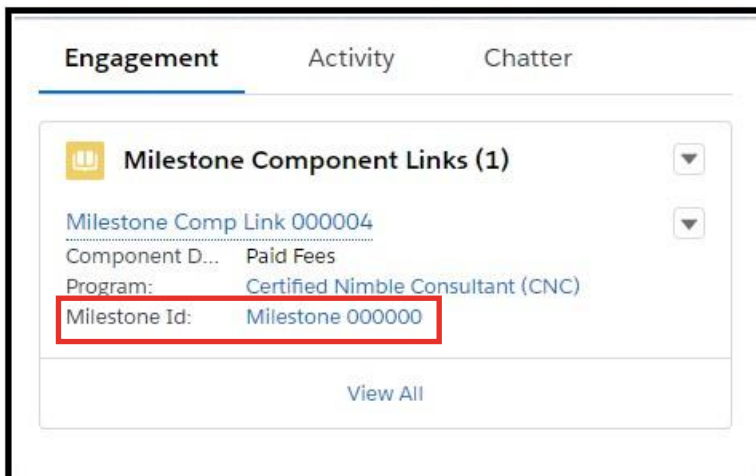
Component Type: Paid Fees

Status: **Approved**

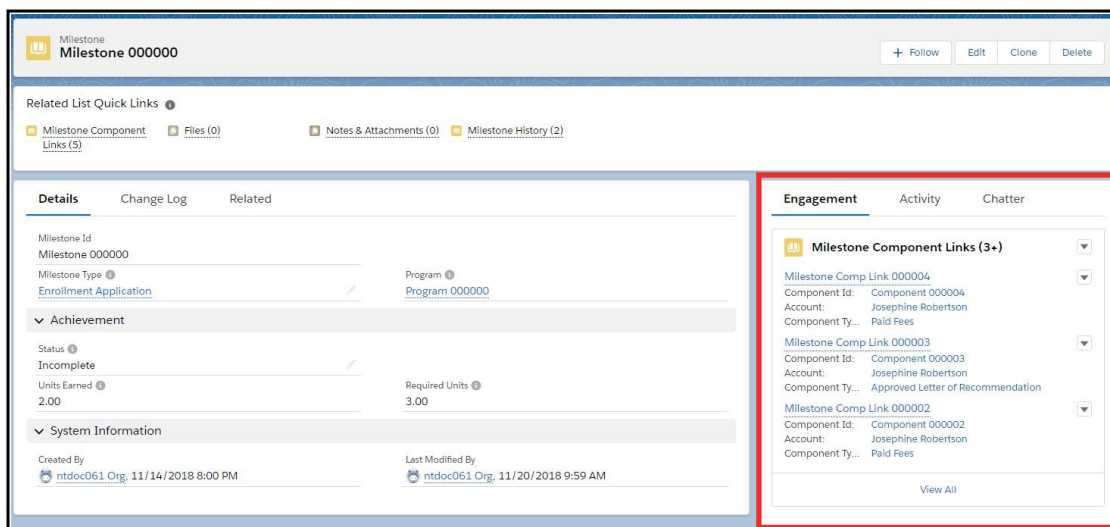
Component Type Category: Search Component Type Categories...

5. Click **Save**.

- To ensure that the milestone has been updated, users can click the **Milestone ComponentID** in the **Engagement** section.



The Enrollment Application Milestone record is displayed along with the three Milestone Component links that must be fulfilled to complete this Component.



- Users can also upload documents such as recommendation letters, proof of employment, and education history. These documents can be uploaded in the **Related** section of the Program or Component levels.
- Users will make the same changes on the other components as Josephine completes each piece. When she has completed all components and all the accompanying milestones, her program will be marked as complete, and any automatic designations will be added to her Account.

Programs Reports and Dashboard

A variety of program reports are available from the Reports Item.

To run a Programs Report:

1. Navigate to the **Reports** Item.
2. Click on the **All Folders** section.
3. Select the **Programs (Nimble AMS)** folder.
4. Select the **Program Participants & Status ALL** report.

Program Participants & Status ALL

Report: Programs with Milestones and Components
Program Participants & Status ALL
 Program Participants display with the status of their milestones, associated components, and units earned.

Total Records: 86 Total Units: 114.00 Total Required Units: 198.00

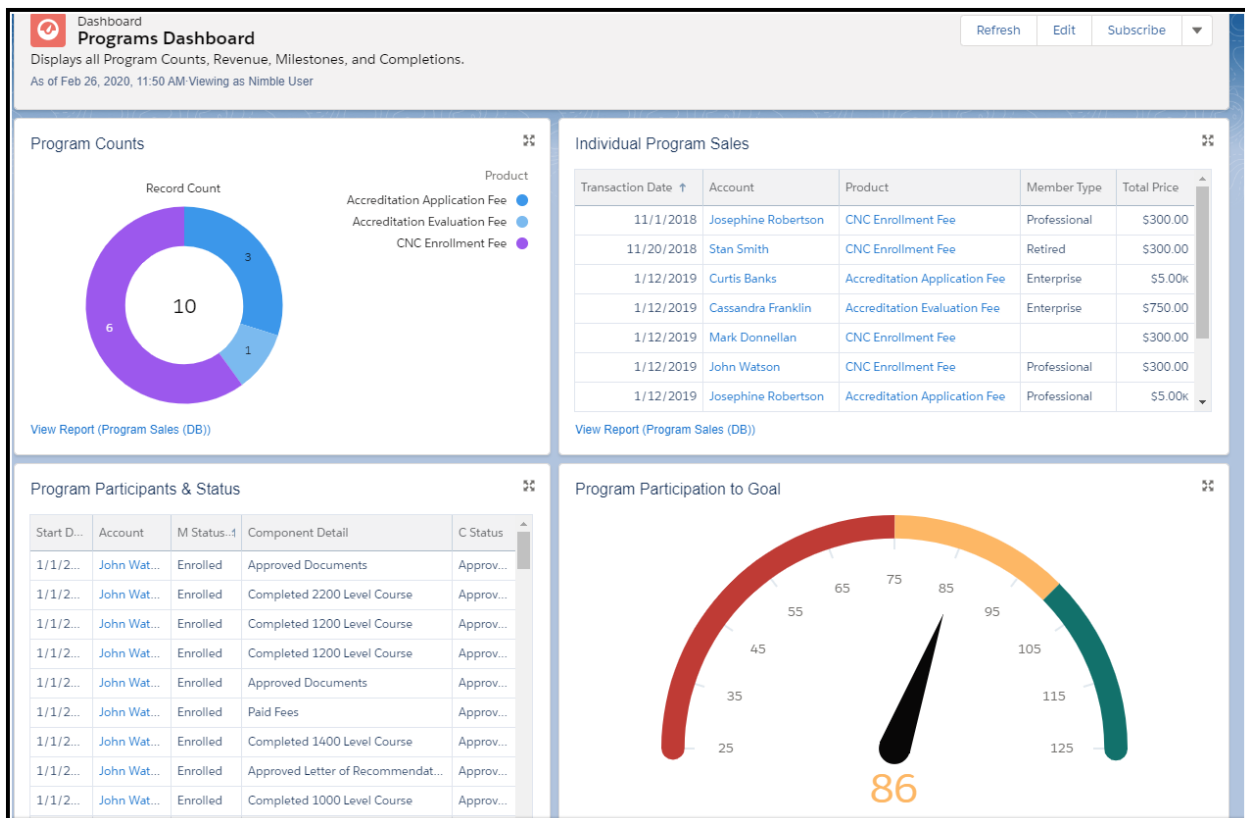
Program	Milestone	M Status	Start Date	Account	Component Detail	C Status	Units	Required Units	Stage	
Certified Nimble Consultant (CNC) (16)	Enrollment Application (5)	Enrolled	1/1/2019	Bob Wiley	Approved Documents	Approved	1.00	3.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Approved Documents	Approved	1.00	3.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Approved Letter of Recommendation	Approved	1.00	3.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Paid Fees	Approved	1.00	3.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Paid Fees	Approved	1.00	3.00	Enroll	
	Subtotal							5.00	3.00	
	Enrollment Coursework (10)	Enrolled	1/1/2019	Bob Wiley	Completed 1000 Level Course	Approved	1.00	30.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Completed 1000 Level Course	Approved	1.00	30.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Completed 1200 Level Course	Approved	1.00	30.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Completed 1200 Level Course	Approved	1.00	30.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Completed 1200 Level Course	Approved	1.00	30.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Completed 1400 Level Course	Approved	1.00	30.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Completed 2000 Level Course	Approved	1.00	30.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Completed 2000 Level Course	Approved	1.00	30.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Completed 2200 Level Course	Approved	1.00	30.00	Enroll	
		Enrolled	1/1/2019	Bob Wiley	Completed 2200 Level Course	Approved	1.00	30.00	Enroll	
Subtotal							10.00	30.00		
Enrollment Exam (1)	Enrolled	1/1/2019	Bob Wiley	Passed Exam	Approved	1.00	1.00	Enroll		
Subtotal							1.00	1.00		

Row Counts Detail Rows Subtotals Grand Total

Programs Dashboard

To display a **Programs** dashboard:

1. Click the **Dashboards** Item.
2. Click on the **All Folders** section.
3. Click the **Programs (Nimble AMS)** folder.
4. Click on the **Programs** Dashboard.



APPENDIX

F Sponsorships

Objective.....	F.1
Overview.....	F.1
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Understanding Sponsorships	F.3
Sponsorship Record	F.4
Sponsorship Product.....	F.6
Ordering a Sponsorship Product	F.8
Updating Sponsorship Records.....	F.11
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Objective

Upon completion of this training, users will be able to:

- Understand Sponsorship Item in Nimble AMS
- View Sponsorship Record and Product
- Order a Sponsorship Product
- View Sponsorship Reports & Dashboards

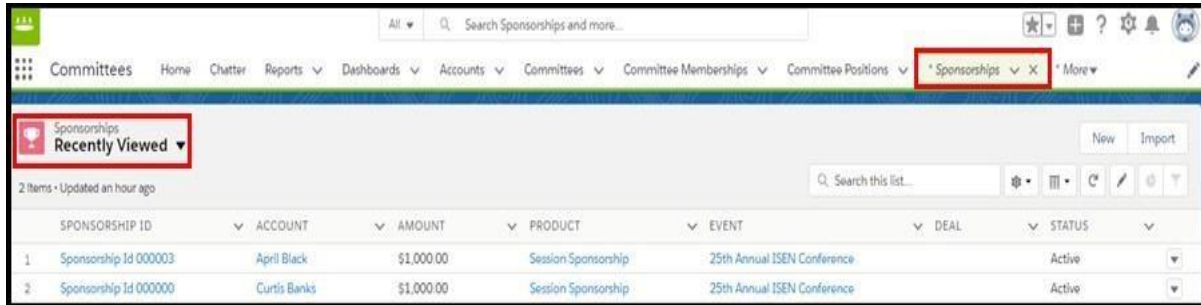
Overview

Nimble AMS **Sponsorships** record collects information about the sponsor, related events, Sponsorship products etc.

It is vital for associations to maintain sponsored events and related products' data in control. Sponsorships increase awareness, visibility, and position of organization as well as increases networking opportunities. In Nimble AMS, Sponsorship records are stored as products and tied to the related Events.

Sponsorships Item

The **Sponsorships Item** provides several different ways of finding, organizing, and interfacing with **Sponsorships** information.



From the **TOP RIGHT HAND**, **Actions** area, Users can:

- Create a **New** Sponsorship record
- **Import data to** Sponsorships

From the **TOP MIDDLE**, **Sponsorships** Item drop down, Users can:

- Create a **New** Sponsorship record
- Use **Recent Records** to return to a previously accessed Sponsorships
- Use **Recent Lists** to return to a previously accessed List View of Sponsorships

From the **TOP LEFT**, **Sponsorships Recently Viewed** drop down, Users can:

- Access any **Recently Viewed** records from the default List View
- Select to display a List View from their **Recent List Views**
- Select to display a List View from **All Other Lists (if available)**

Understanding Sponsorships

To optimize the data captured in the Sponsorships record, users create and link Sponsorship products and events.

The Sponsorship Item stores Account and Product related details in the record. On purchasing Sponsorship Product, users can open the Sponsorship Item record and view all the details like Account, Product, and Event etc.

Sponsorships usually have a close association with Registration products. This is because a Sponsorship is usually of a session or event related to an Event. Sponsorships sometimes involve sponsoring a golf hole during an association hosted outing, sponsoring a table at a black-tie event, or sponsoring a session at a conference.

Sponsorship Record

In Nimble AMS, upon successful purchase of the Sponsorship product, the system automatically generates a Sponsorship record, where users can verify the details like the product & event name etc.

1. Go to the **App Launcher** and search or scroll to find **Sponsorship Item**.
2. On the Navigation Bar, click **Sponsorship Item**.
3. Click the list view selection drop-down and change the view to **All Sponsorships**.



4. Click **Sponsorship ID 000000** in the list of **Sponsorships**.



5. The **Sponsorships** record 000000 is displayed.

6. The **Details** section displays the basic information for the **Sponsorship** record.

- **Account** field uses the Person Account name of the member who places the order for this Sponsorship. This field is same as Order **Bill To** field.
- **Product** field uses the Sponsorship product that the user purchases using the **order wizard**.

Note: It is important that the **Sponsorship product** is marked as **Active** on the record. Inactive Sponsorship products cannot be purchased.

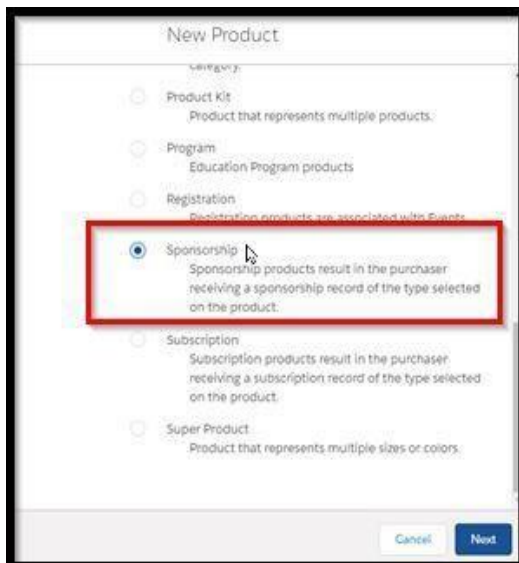
- **Event** field uses the existing Event's record that is linked to this Sponsorship.
- This is a linked field and users can click on the link and review the Event details before sponsoring.

The screenshot displays the 'Sponsorship' record details for 'Sponsorship Id 000000'. The page has a header with a trophy icon and the text 'Sponsorship Sponsorship Id 000000'. Below the header, there are two tabs: 'Related' and 'Details', with 'Details' being the active tab. The main content area lists several fields with their values and links:

- Sponsorship Id:** 000000
- Account:** [Curtis Banks](#)
- Product:** [Session Sponsorship](#)
- Event:** [25th Annual ISEN Conference](#)
- Created By:** [NimbleTrain-PL-010 Org](#), 11/19/2018 4:18 AM
- Last Modified By:** [NimbleTrain-PL-010 Org](#), 11/19/2018 4:18 AM

Sponsorship Product

- User creates a Sponsorship **product** by selecting **Product record type** as **Sponsorship**. The record type controls the way the product aligns with the Sponsorship record on order entry.



Note: Observe an existing Sponsorship product Session Sponsorship. Sponsorship type record stores information like Product and can be tied to a related event by adding the Event details. In the inventory section, users manage the product inventory.

The Sponsorship product includes **Financial details section**.

Session Sponsorship

Related **Details** Order Engagement

Product Name	Session Sponsorship	Status	Active
Short Name		Display Order	1
Description		Quantity Limit	1
▼ Inventory Detail			
Track Inventory	<input type="checkbox"/>	Inventory Used	
Inventory		Inventory On Hand	0
▼ Event Detail			
Event	25th Annual ISEN Conference		

Session Sponsorship

Event

[25th Annual ISEN Conference](#)

▼ Financial Detail

List Price	\$1,000.00	Revenue GL Account	01-42170
Is Fee	<input type="checkbox"/>	Deferred Revenue Method	

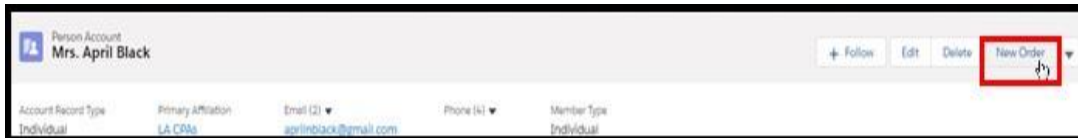
▼ Self Service Detail

Self Service Enabled	<input checked="" type="checkbox"/>	Web Product Image URL	
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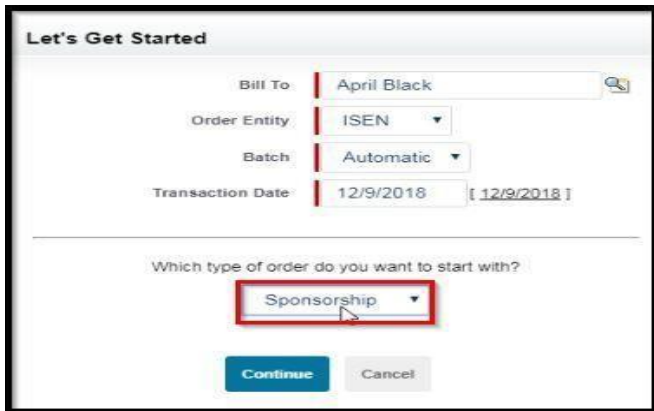
Ordering a Sponsorship Product

In this section, users will learn how to order a Sponsorship Product

1. In the **Search box**, enter and select **April Black**.
2. Click on the **New Order** button from the upper right corner.



3. Select **Sponsorship** for the “Which Type of order do you want to start with?” field drop- down.



4. Click **Continue**

Note: Observe that on selecting **25th Annual ISEN Conference** from the **Event drop-down** field, the related Sponsorship products are displayed in the below order-line. Review the details and select the **Session Sponsorship** product by checking the **purchase-box**.

Order for April Black
Add Sponsorship

Save Cancel

Customer: April Black

Event: Please select an event

Price Class: Please select an event

25th Annual ISEN Conference

Order for April Black
Add Sponsorship

Save Cancel

Customer: April Black

Event: 25th Annual ISEN Conference

Price Class: Member

Sponsorship Products

Purchase	Product	Quantity	Unit Price	Price
<input checked="" type="checkbox"/>	Session Sponsorship	1	1,000.00	\$1,000.00
<input type="checkbox"/>	Staff Meal Sponsorship	1	2,000.00	\$2,000.00

5. Click **Save** and then click on **Go to Payment** (lower right).

6. Click **Pay Now**.

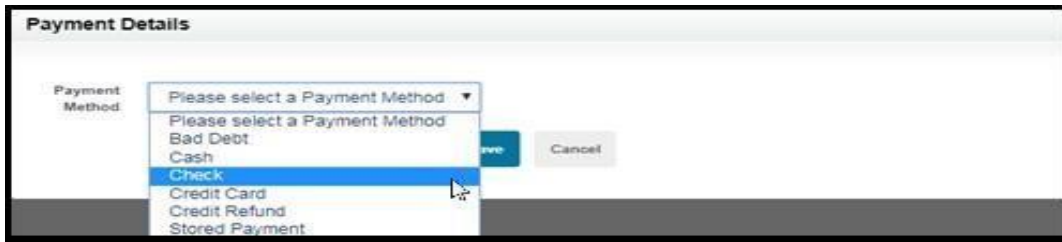
Order for April Black
Add Payment

Cart Items

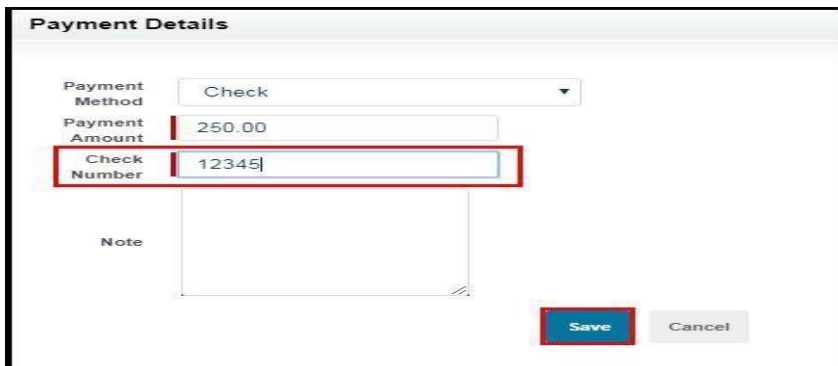
Customer	Order Type	Total	Total Payment	Balance
April Black	Sponsorship	\$1,000.00	\$0.00	\$1,000.00

Pay Now

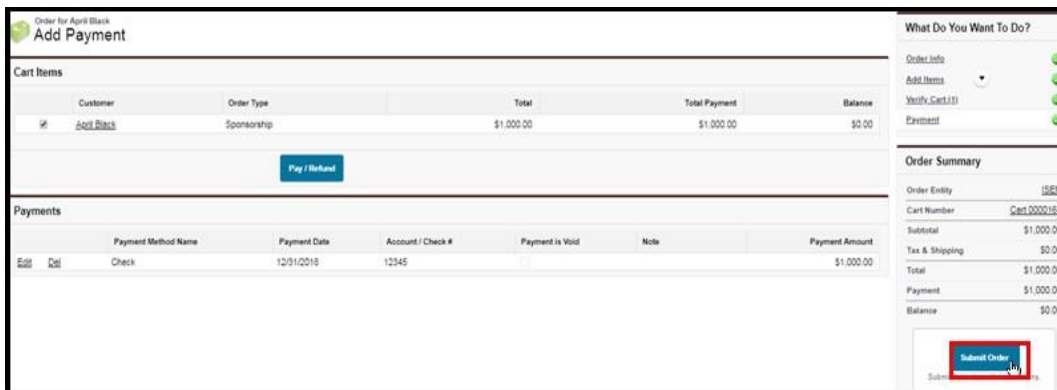
7. Select **Check** from **Payment Method** drop down.



8. Enter **12345** in the **Check Number** field.



9. Click **Save** and then **Submit Order** (lower right)



Updating Sponsorship Records

Once an Order for a Sponsorship is processed, a separate Sponsorship record (via an Order Line Item) is created. These Sponsorship records are stored under the Sponsorships Item.

Sponsorship records also contain unique and updateable fields that display information pertinent to that specific Sponsorship. This information is NOT updateable during the normal Order Process, but IS, once the Order is taken, on the new Sponsorship record.

In this **exercise**, users will open the Sponsorship record created as a result of the order taken in the previous exercise and update its unique information.

1. Click the **Sponsorships** Item.
2. From the default **Recently Viewed** list view, float over the **Session** column value for the **Sponsorship** created in the previous exercise's order.
3. Click on the **Pencil** icon that displays to the right of the **Session** field.
4. In the **Session** lookup field, start typing and then select, **Keynote Breakfast**.
5. Click on the **Save** button (displays at bottom of screen).
6. Observe the updated results.
 - Users can leverage the updated information in Reports to do in depth analysis of Sponsorships.
 - The **Appeals** field can also be updated post-order, even though it is an optional part of the Order process.

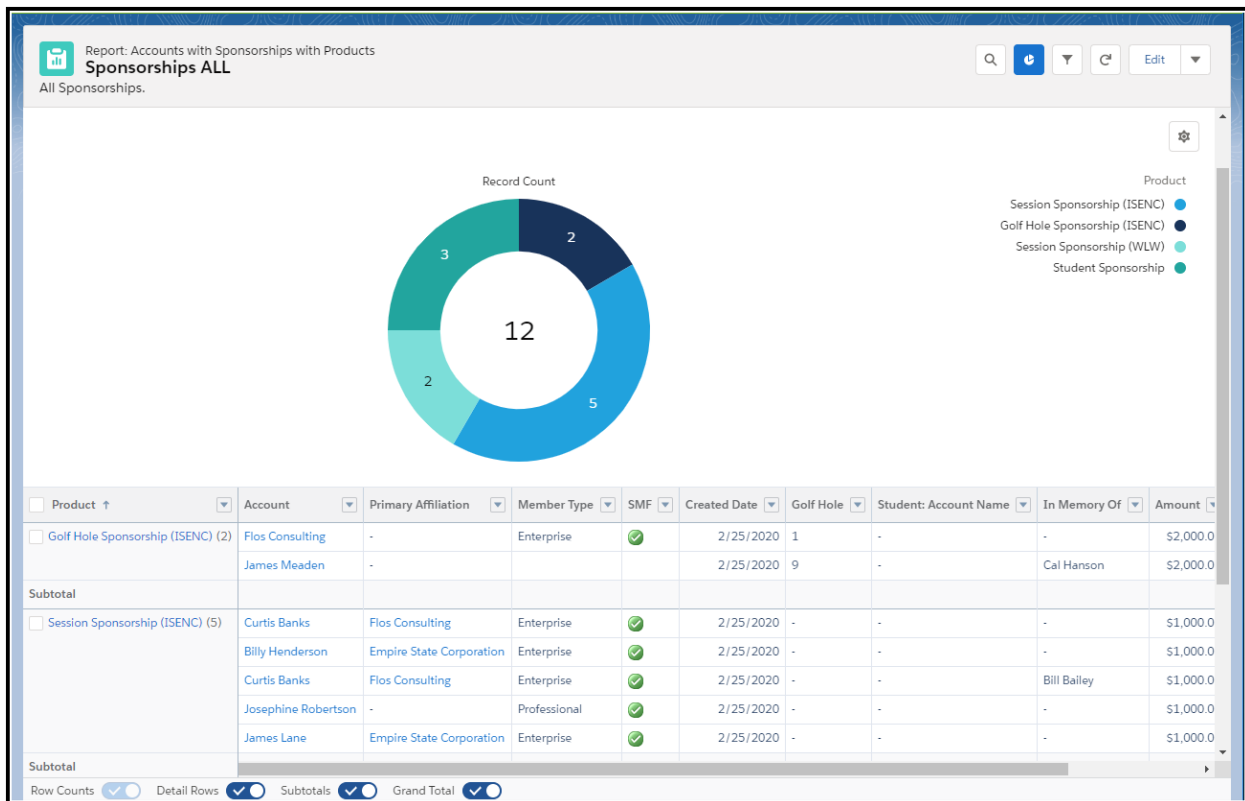
Sponsorships Reports and Dashboard

Sponsorships Reports

To run a Sponsorships report:

1. Click the **Reports** Item.
2. Select the **All Folders** section under **Folders**.
3. Click the **Sponsorships (Nimble AMS)** folder.
4. Click on the **Sponsorships ALL** report.

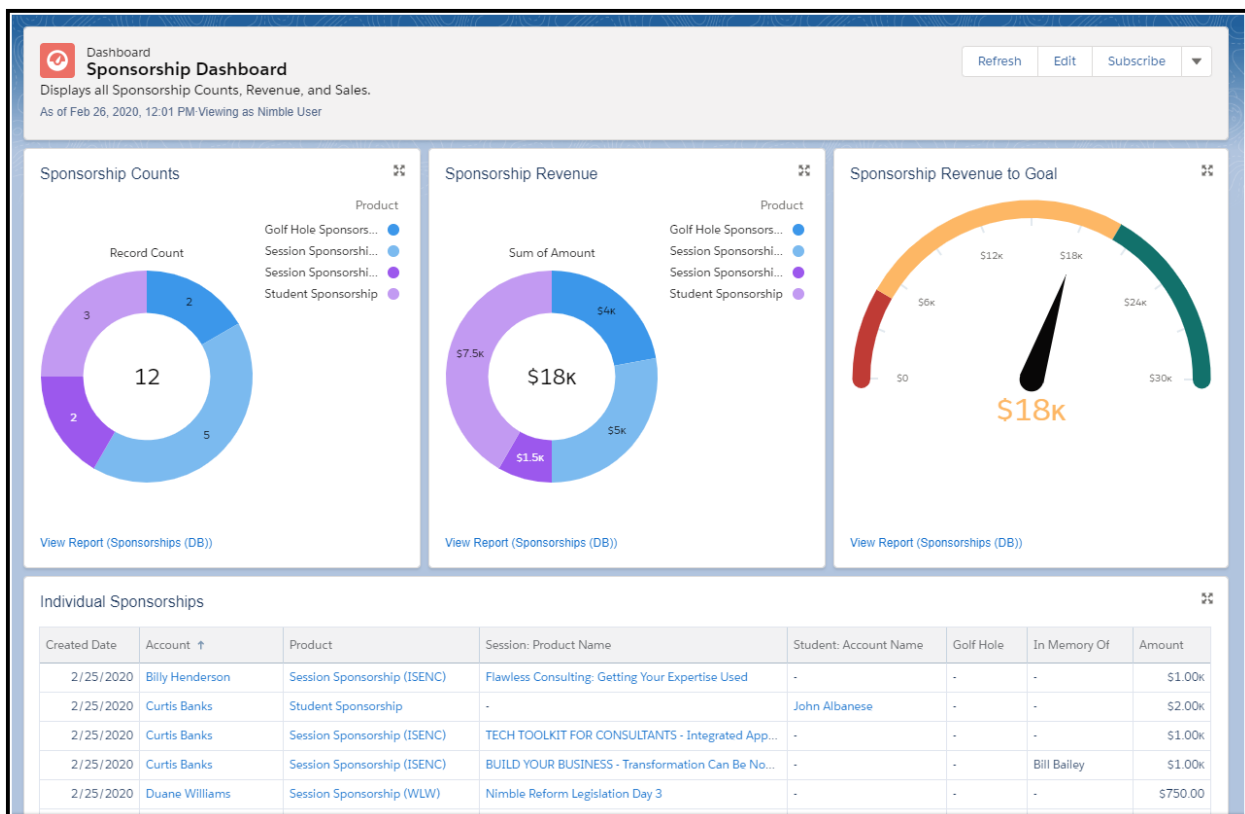
Sponsorships ALL



Sponsorships Dashboard

To display a Sponsorships dashboard:

1. Click the **Dashboards** Item.
2. Click on the **All Folders** section.
3. Click the **Sponsorships (Nimble AMS)** folder.
4. Click on the **Sponsorships** Dashboard.



APPENDIX

G Relative Date Values

Users can incorporate the following values into **List Views, Dashboards, & Reports** for use in **Date based filters**. Special date values enable users to filter for any conceivable date range.

In this exercise, users will use an **Orders** List View to test the usage of some of the values listed in the Chart below.

1. Click on the **Orders** Item.
2. Click on the **List View Controls** button in the List View that defaults as pinned.
3. Click on the **New** button.
4. Name the List View, **Find Orders by Date Range**.
5. Click on the **List View Controls** button.
6. Click the **Select Fields to Display** option.
7. Add Fields **below** AND put them in the following order under the Visible Fields section: **Invoice Date, Bill To, Purpose, Status, Grand Total**.
8. Click on the default **Filter by Owner (My orders)** filter, and change it to **All orders**.
9. Click **Done**.
10. Click **Save**.
11. Click on the **Add Filter** button under **Filters**.
12. Type **In**, in the **Field** dropdown.
13. Scroll to and select the **Invoice Date** field.
14. Keep **equals** in the **Operator** field.
15. Try entering, and then click **Done/Save** for each of the following in the **Value** field:
 - **YESTERDAY**
 - **TODAY**
 - **THIS MONTH**
 - **LAST n DAYS** - ("n") represents number; type - **LAST 100 DAYS** in Value as example

Examine the Chart on the following pages; try additional values and determine where these might be of use in List Views, Reports, or Dashboards.

IMPORTANT NOTE: Values are **NOT Case Sensitive**: Users can type, “yesterday”, in the Value field of a date based filter. The system will auto-correct to Upper Case when applying.

YESTERDAY	Starts at 12:00:00 a.m. on the day before the current day and continues for 24 hours.
TODAY	Starts at 12:00:00 a.m. on the current day and continues for 24 hours.
TOMORROW	Starts at 12:00:00 a.m. on the day after the current day and continues for 24 hours.
LAST WEEK	Starts at 12:00:00 a.m. on the first day of the week before the current week and continues for seven days.
	For Enterprise, Unlimited, Professional, and Developer Editions, the week is defined by the Locale drop-down list in your personal information settings at Your Name Setup My Personal Information Personal Information . For Contact Manager, Group, and Personal Editions, the week is defined by the Locale setting in the company profile at Your Name Setup Company Profile Company Information . For example, when the Locale is US English, a week runs Sunday to Saturday, whereas with UK English, a week spans Monday to Sunday.
THIS WEEK	Starts 12:00:00 am on the first day of the current week and continues for seven days.
	For Enterprise, Unlimited, Professional, and Developer Editions, the week is defined by the Locale drop-down list in your personal information settings at Your Name Setup My Personal Information Personal Information . For Contact Manager, Group, and Personal Editions, the week is defined by the Locale setting in the company profile at Your Name Setup Company Profile Company Information . For example, when the Locale is US English, a week runs Sunday to Saturday, whereas with UK English, a week spans Monday to Sunday.
NEXT WEEK	Starts 12:00:00 am on the first day of the week after the current week and continues for seven days.
	For Enterprise, Unlimited, Professional, and Developer Editions, the week is defined by the Locale drop-down list in your personal information settings at Your Name Setup My Personal Information Personal Information . For Contact Manager, Group, and Personal Editions, the week is defined by the Locale setting in the company profile at Your Name Setup Company Profile Company Information . For example, when the Locale is US English, a week runs Sunday to Saturday, whereas with UK English, a week spans Monday to Sunday.

LAST MONTH	Starts at 12:00:00 a.m. on the first day of the month before the current month and continues for all the days of that month.
THIS MONTH	Starts 12:00:00 am on the first day of the current month and continues for all the days of that month.
NEXT MONTH	Starts at 12:00:00 a.m. on the first day of the month after the current month and continues for all the days of that month.
LAST 90 DAYS	Starts at 12:00:00 a.m. 90 days before the current day and continues up to the current second. (The range includes today.)
NEXT 90 DAYS	Starts at 12:00:00 a.m. on the day after the current day and continues for 90 days. (The range does not include today.)
LAST <i>n</i> DAYS	Starts at 12:00:00 a.m. <i>n</i> days before the current day and continues up to the current second. (The range includes today.)
NEXT <i>n</i> DAYS	Starts at 12:00:00 a.m. on the next day and continues for the next <i>n</i> days. (The range does not include today.)
LAST QUARTER	Starts at 12:00:00 a.m. on the first day of the quarter before the current quarter and continues to the end of that quarter.
THIS QUARTER	Starts at 12:00:00 a.m. on the first day of the current quarter and continues to the end of the quarter.
NEXT QUARTER	Starts at 12:00:00 a.m. on the first day of the quarter after the current quarter and continues to the end of that quarter.
LAST <i>n</i> QUARTERS	Starts at 12:00:00 a.m. on the first day of the quarter <i>n</i> quarters ago and continues to the end of the quarter before the current quarter. (The range does not include the current quarter.)
NEXT <i>n</i> QUARTERS	Starts at 12:00:00 a.m. on the first day of the quarter after the current quarter and continues to the end of the quarter <i>n</i> quarters in the future. (The range does not include the current quarter.)
LAST YEAR	Starts at 12:00:00 a.m. on January 1 of the year before the current year and continues through the end of December 31 of that year.
THIS YEAR	Starts at 12:00:00 a.m. on January 1 of the current year and continues through the end of December 31 of the current year.
NEXT YEAR	Starts at 12:00:00 a.m. on January 1 of the year after the current year and continues through the end of December 31 of that year.

LAST <i>n</i> YEARS	Starts at 12:00:00 a.m. on January 1 of the year <i>n</i> years ago and continues through December 31 of the year before the current year.
NEXT <i>n</i> YEARS	Starts at 12:00:00 a.m. on January 1 of the year after the current year and continues through the end of December 31 of the <i>n</i> th year.
LAST FISCAL QUARTER	Starts 12:00:00 am on the first day of the fiscal quarter before the current fiscal quarter and continues through the last day of that fiscal quarter. The fiscal quarter is defined in the company profile at Your Name Setup Company Profile Fiscal Year .
THIS FISCAL QUARTER	Starts 12:00:00 am on the first day of the current fiscal quarter and continues through the end of the last day of the current fiscal quarter. The fiscal quarter is defined in the company profile at Your Name Setup Company Profile Fiscal Year .
NEXT FISCAL QUARTER	Starts 12:00:00 am on the first day of the fiscal quarter after the current fiscal quarter and continues through the last day of that fiscal quarter. (The range does not include the current quarter.) The fiscal quarter is defined in the company profile at Your Name Setup Company Profile Fiscal Year .
LAST <i>n</i> FISCAL QUARTERS	Starts 12:00:00 am on the first day of the fiscal quarter <i>n</i> fiscal quarters ago and continues through the end of the last day of the previous fiscal quarter. (The range does not include the current fiscal quarter.) The fiscal quarter is defined in the company profile at Your Name Setup Company Profile Fiscal Year .
NEXT <i>n</i> FISCAL QUARTERS	Starts 12:00:00 am on the first day of the fiscal quarter after the current fiscal quarter and continues through the end of the last day of the <i>n</i> th fiscal quarter. (The range does not include the current fiscal quarter.) The fiscal quarter is defined in the company profile at Your Name Setup Company Profile Fiscal Year .
LAST FISCAL YEAR	Starts 12:00:00 am on the first day of the fiscal year before the current fiscal year and continues through the end of the last day of that fiscal year. The fiscal year is defined in the company profile at Your Name Setup Company Profile Fiscal Year .
THIS FISCAL YEAR	Starts 12:00:00 am on the first day of the current fiscal year and continues through the end of the last day of the fiscal year. The fiscal year is defined in the company profile at Your Name Setup Company Profile Fiscal Year .
NEXT FISCAL YEAR	Starts 12:00:00 am on the first day of the fiscal year after the current fiscal year and continues through the end of the last day of that fiscal year. The fiscal year is defined in the company profile at Your Name Setup Company Profile Fiscal Year .

LAST n FISCAL
YEARS

Starts 12:00:00 am on the first day of the fiscal year n fiscal years ago and continues through the end of the last day of the fiscal year before the current fiscal year. (The range does not include the current fiscal year.) The fiscal year is defined in the company profile at **Your Name | Setup | Company Profile | Fiscal Year**.

NEXT n FISCAL
YEARS

Starts 12:00:00 am on the first day of the fiscal year after the current fiscal year and continues through the end of the last day of the n th fiscal year. (The range does not include the current fiscal year.) The fiscal year is defined in the company profile at **Your Name | Setup | Company Profile | Fiscal Year**.

Appendix G: Relative Date Values

APPENDIX

H Surveys

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Objective

In this chapter, users will:

- Enable the Survey Item and other settings
- Create a Survey
- Configure Survey pages
- Add Logic to a Survey
- Send a Survey
- Analyze Survey results
- Survey Report types

Why Surveys?

Surveys provide associations with an opportunity to assess contributions from both staff and members, as well as evaluate the programs and services they offer. Often because of the time and resources involved evaluations are often deprioritized. However, the benefits often outweigh time and resource challenges because the feedback received. Feedback data can promote recognition and motivate associations to provide the best to the members and stakeholders.

The primary goals of any performance evaluation system is to provide equitable measurement of the contribution, produce accurate appraisals documentation and to obtain a high level of quality and quantity of the work produced.

A performance evaluation system can be a key component of an associations structure. When implemented fairly, it ensures fairness and accountability, promotes growth and feedback and provides valuable insight an association may not have received otherwise.


Some examples of Surveys:

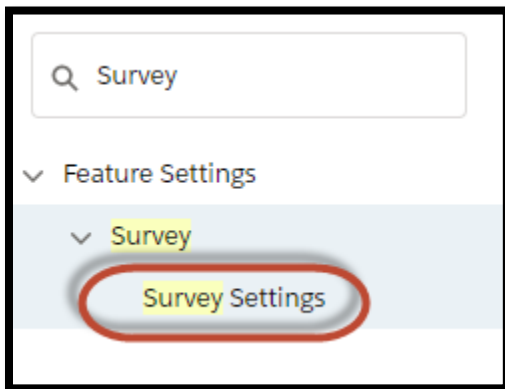
- Event evaluation survey
- Speaker/Instructor survey
- Services survey
- Facilities survey
- Product offering survey

Enable the Survey Item

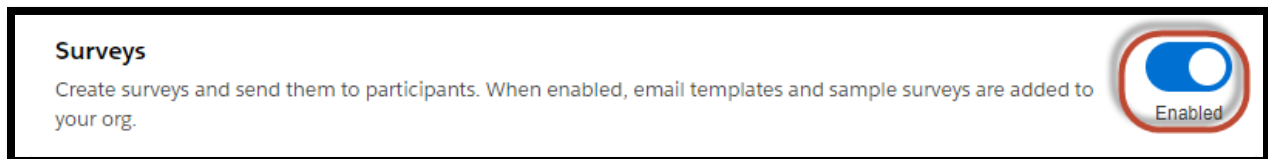
If users are going to start using Surveys in their day to day work in Nimble AMS, the survey Item must be enabled.

In this exercise users will turn on the Survey Item for use.

1. Click the **Setup Icon**,  and select **Setup**.
2. In the **Quick Find box** type, **Survey**.
3. Click on **Survey Settings**.



4. Toggle the Surveys Item to **Enabled**.



5. Select the **default community for creating public survey invitations** from the **drop-down box**.



6. Click on the Enabled button to turn on the **Survey Owners can Manage Responses** function.




IMPORTANT NOTE: Two out of the box surveys – Customer Satisfaction and Net Promoter Score – are added to the org when Surveys are enabled.

Survey Sharing

Survey creators should be able to see all the responses but not the participants. Surveys can contain sensitive customer/constituent or member information and in order for respondents to feel confident that their thoughts are not shared with anyone other than the survey owners – sharing settings need to be edited.

In this exercise users will assign Private settings to surveys.

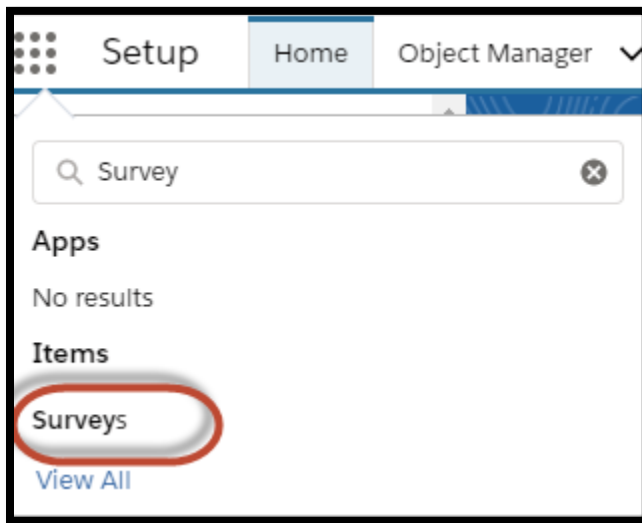
1. Click the **Setup icon**  and enter **Setup**.
2. Enter “**Sharing**” in the Quick Find box.
3. Click **Sharing Settings**.
4. Click the **Edit** button.
5. IF not already selected by default, choose **Private** next to Survey.
6. IF not already selected by default, choose **Private** next to Survey Invitation.
7. Click the **Save** button.

Create a Survey

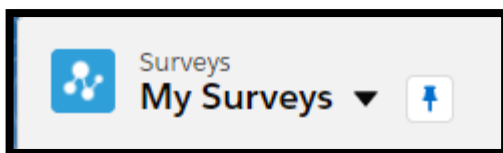
Now the Surveys Item is available for use, the next step will be to create an actual survey. Users will have to consider the following in creating: Name, Branding, and Style of the survey.

In this exercise users will create a new survey to deploy.

1. From the App Launcher , find and select the **Surveys** Item.



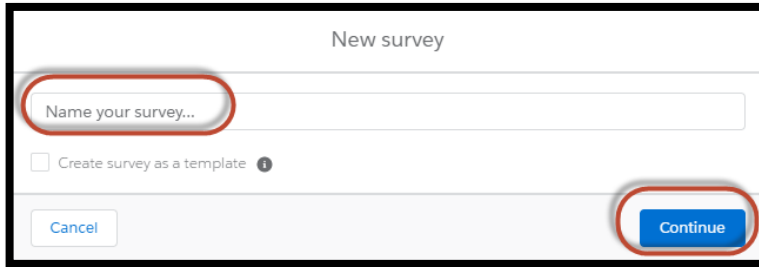
Observe : The Survey Item by default has 2 views - **My Surveys** and **Recent Surveys**.



2. Click the **New** button to create a new survey.



3. Enter the Survey name and click the **Continue** button.

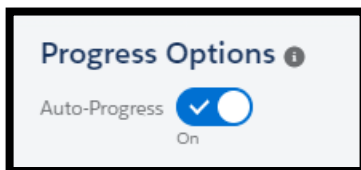


- Users can also click the **Create survey as a template** at this point. This checkbox enables the creation of a template that is automatically shared with users in the org. Users can view or copy the template based on permissions.

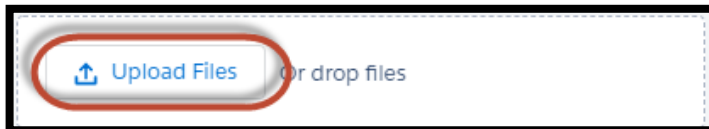
4. Click on the **Branding** button (upper left).



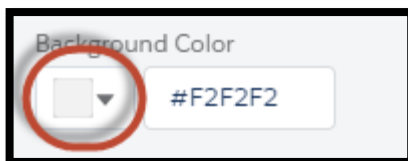
5. Turn on **Auto-Progress** to let survey participants automatically move to the next page after responding to the last question on a page.



6. In the **Background Image** section, click **Upload Files** and select a preferred image.



7. **Background** color, **Question** color, **Answer** color, and **Start**, **Next** and **Finish** button colors can be configured to represent any branding choices.



Configure Pages

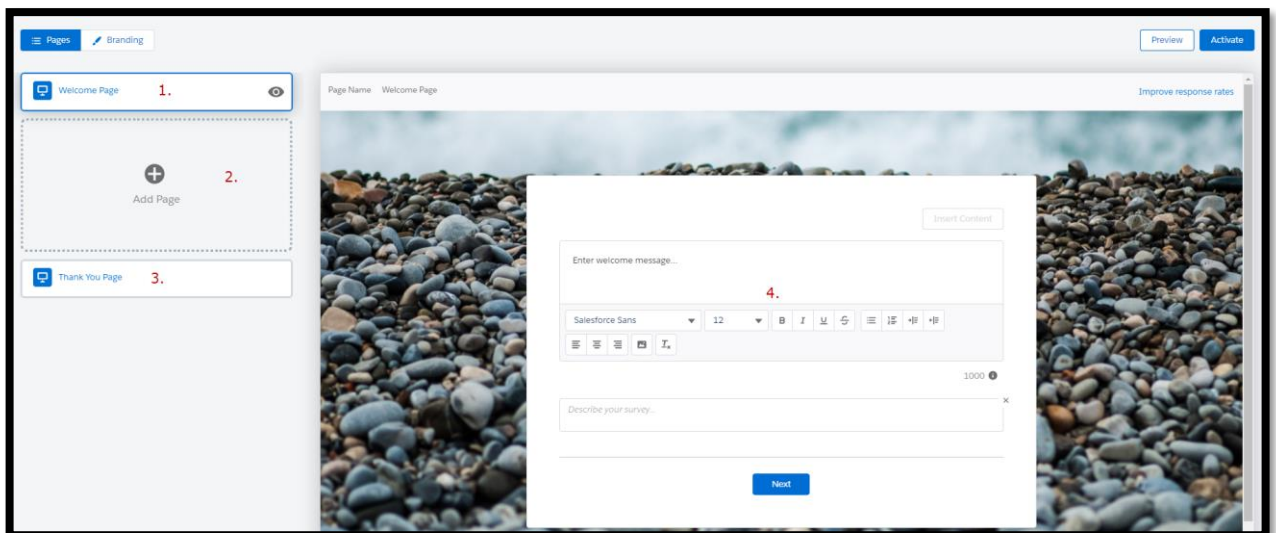
Configuring a survey pages enables users to add the actual questions that a survey will gather information from. It also enable users to set stylistic elements such as backgrounds and graphics on pages.

In this exercise, users will configure and add questions to three survey pages.

1. Click the **Pages** button (upper left).



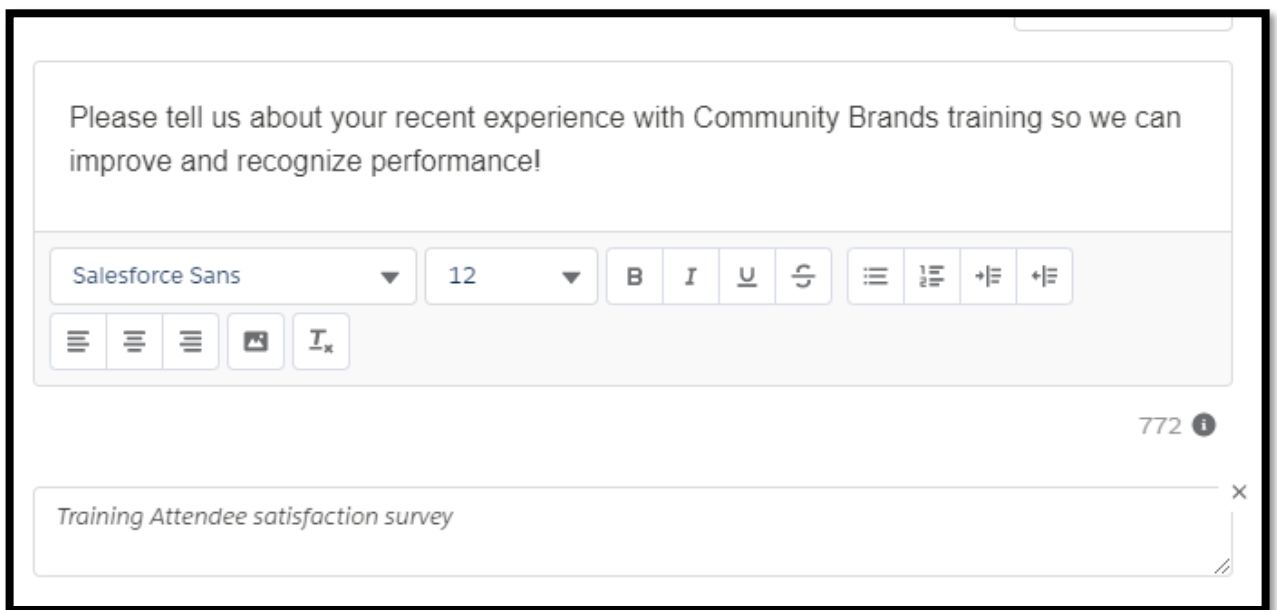
- **Welcome Page** (1.) The welcome page is the first page participants see when they start responding to a survey.
- **Add Page** (2.) A Page can contain one or more questions.
- **Thank you Page** (3.) This is the last page that participants see before they finish a survey.
- The **Canvas** area (4.) provides a preview of how the survey will appear.



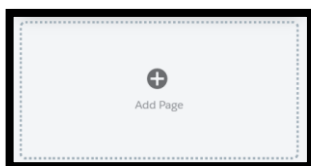
2. Click on the **Welcome Page**.
3. Enter the welcome message, **Please tell us about your recent experience with Community Brands training so we can improve and recognize performance!**

IMPORTANT NOTE: Click the  icon to disable the **Welcome** page for participants.

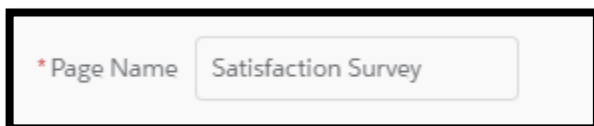
4. Enter a description: **Training Attendee satisfaction survey.**



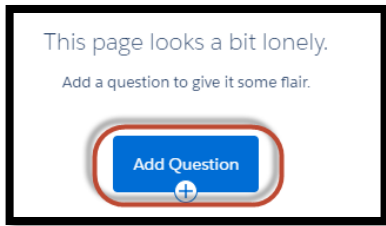
5. Click **Add Page**.



6. Enter the Page Name, **Satisfaction Survey**.

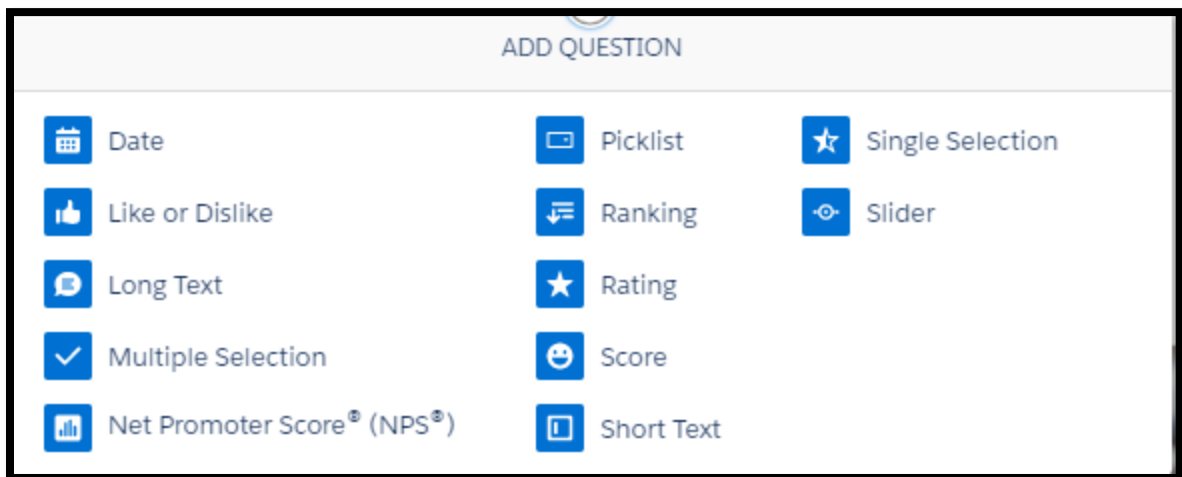


7. Click the **Add Question** button on the canvas.



8. Select **Rating** for this example.

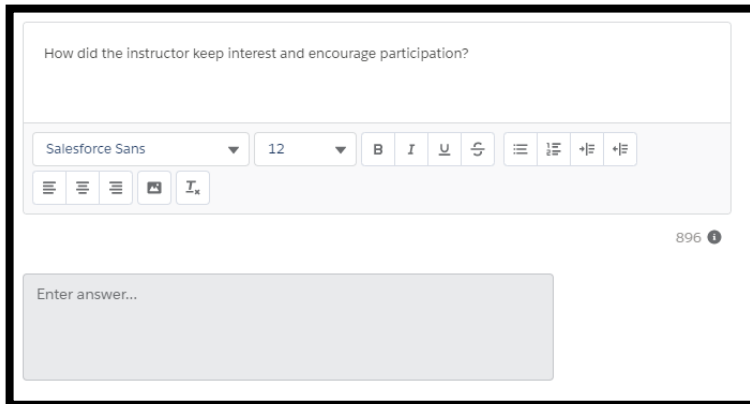
IMPORTANT NOTE: There are 12 different types of Survey questions including **NPS (Net Promoter Score)**.







9. Enter the **prompt/inquiry** or **question**, **Overall Instructor Rating**.
10. Set the **scale for a rating question**. In this example, keep the default of five stars.



11. Click the **Add Question** button.
12. Select **Long Text**.
13. Enter in the **Question** box the text, **How did the instructor keep interest and encourage participation?**



How did the instructor keep interest and encourage participation?

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896

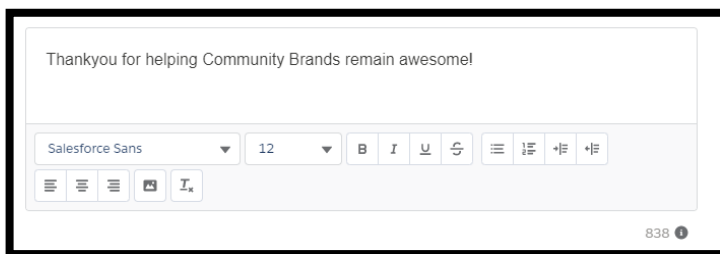
Enter answer...

14. Click the **Thank you Page** button.







 Thank You Page

15. Enter, **Thank you for helping Community Brands remain awesome!** in text box.

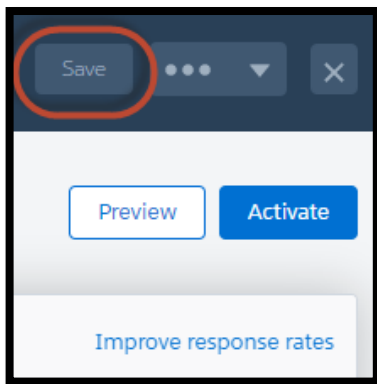


Thankyou for helping Community Brands remain awesome!

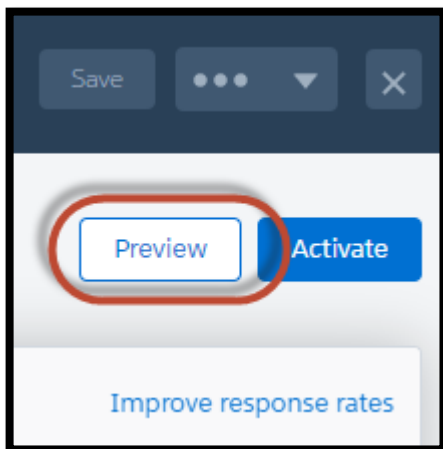
Salesforce Sans 12 B I U    

838

16. Click the **Save** button (upper right).



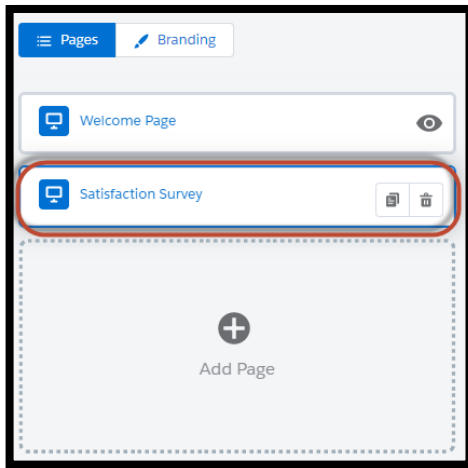
17. Click **Preview** to step through the survey just like a regular participant.



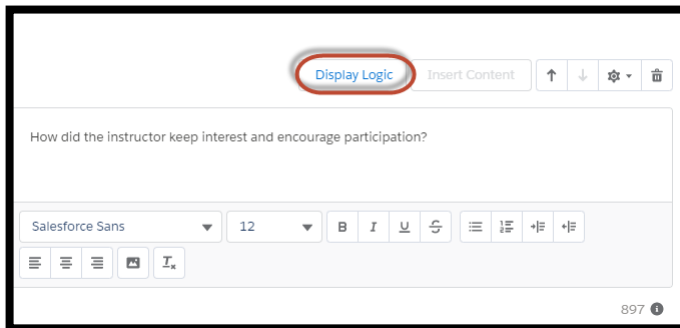
Add Logic to a Survey

Users can use question logic to decide if a question is displayed on a page layout based on responses to previous questions on the same page. In this exercise, users will add logic to a survey.

1. Click on the **Satisfaction Survey Page**.



2. Click **Display Logic** above the question that is logic eligible.

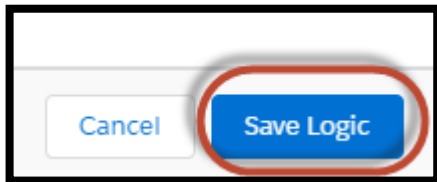


3. **Define the condition.** For this example provide the rules of behavior as outlined:

- **Select Condition** : All conditions are met
- **Selection Question**: “How did the instructor keep interest and encourage participation?”
- **Select Operator**: equals
- **Response**: 3

Note: Additional Conditions can be added until requirements of the survey are met.

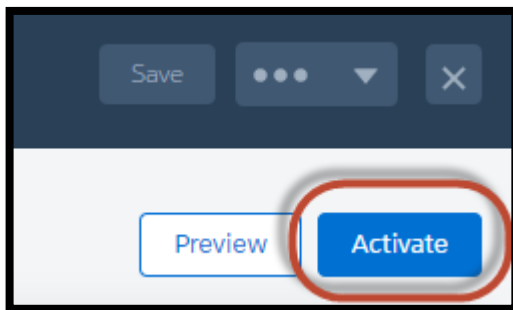
4. Click the **Save Logic** button.



5. Click the **Save** button.



6. **Activate** the Survey.



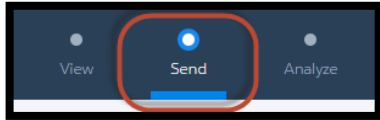
7. Observe the warning when clicking on the **Activate** button: Active surveys **CANNOT** be edited.

Send the Survey

Sending a survey solicits feedback from the survey participant.

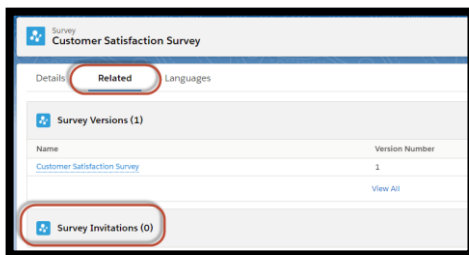
In this exercise users will send a survey to gather results.

1. If re-entering survey to send, users must go to the **Surveys** Item.
2. Open the desired survey by clicking on the link from a **List View**.
3. On the Survey record, click the **Open Latest Version** button (upper right).
4. At the top of Survey Builder, **click Send**.



5. Click **Send Email**. A survey creator can add up to 50 Individuals for either contacts or members of an org.

Note: At this step a survey invitation record is created and is located in the related items of the Survey Item. All invitations to the survey will also be located here.



6. Click on the **Select Content drop down** and **select Survey Link**.
7. Click the **Next** button.
8. Enter **recipients to receive** the survey. Click the **Next** button.

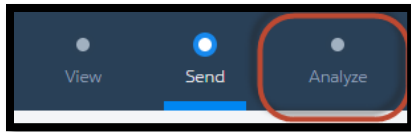
IMPORTANT NOTE: There are four Invitation link settings 1. Unique Link 2. Anonymize responses 3. Don't require authentication 4. Auto Expires.

9. Select **Anonymize responses** checkbox.
10. Choose **Auto-expire** the survey invitation to have the survey invitation expire on a certain date.
11. Click the **Send** button.

Analyze the Survey.

Data and survey responses mean nothing without analysis. In order for surveys to produce meaningful results that lead to decisions that ultimately improve an association, a user will Analyze the results and responses of a survey.

1. At the top of Survey Builder, **click Analyze**.



2. In survey builder, the **Analyze** feature provides a quick summary of the survey result. It only provides data for this one particular survey.

In order to review and track results from multiple surveys users should use the Reports Item and/or the Dashboard Item.

Survey Reports

Analyzing all the responses to a particular survey is possible by running a report from the Reports Item. Users can complete the following exercise to run a report from the training org.

In the following exercise users will locate and run the **Survey Results All** report.

1. Click the **Reports** tab.
2. Click on the **All Folders** option.
3. Click the **Surveys (Nimble AMS)** folder.
4. Select the **Survey Results ALL** report.


Survey	Question	Response Date	Response	Numeric Response	Responder
Training Evaluation Survey (5)	Please add any Comments you would like us to hear about the class. (1)	10/29/2020	Amazing!	-	Admin CB Training TSO
	Subtotal			Avg: 0	
	The classroom facilities were acceptable (physical or virtual)? (1)	10/29/2020	5	5	Admin CB Training TSO
	Subtotal			Avg: 5	
	The presentation materials - manuals, guides, and agendas was clear? (1)	10/29/2020	5	5	Admin CB Training TSO
	Subtotal			Avg: 5	
	What overall rating would you give the Instructor? (1)	10/29/2020	5	5	Admin CB Training TSO
	Subtotal			Avg: 5	
	Would you recommend our training to a friend or colleague? (1)	10/29/2020	10	10	Admin CB Training TSO
	Subtotal			Avg: 10	
Subtotal				Avg: 5	
Total (5)				Avg: 5	

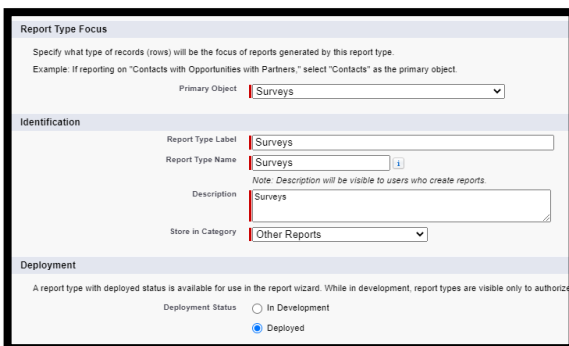
Creating the Survey Report Type (Optional)

For users to create report of Surveys, it may be necessary to create the appropriate **Report Type**, if it has not already been done. The following steps takes users through the creation of a **Survey Report Type** that enables end users to create Survey Reports.

NOTE: Not all users have the ability to create a new **Report Type** – users will need a user with **Administrator** rights to perform the following exercise.

In this exercise users will create a **Survey** Report Type.

1. Click the **Setup icon**  and enter **Setup**.
2. Enter **Report Types** in the **Quick Find Box**, then click **Report Types**.
3. IF prompted, click **Continue**.
4. Click the **New Custom Report Type** button.
5. Select **Survey Questions** from the **Primary Object** dropdown.
 - Do **NOT** select Surveys – that selection will prevent users from attaching distinct question responses to the report type.
6. Enter the **Report Type Label: Surveys**
7. Enter the **Report Type Name: Surveys**
8. Enter a description: **This is the object for analyzing survey results.**
9. Click the **Deployed** button at the bottom.



Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object

Primary Object: Surveys

Identification

Report Type Label: Surveys

Report Type Name: Surveys

Note: Description will be visible to users who create reports.

Description: Surveys

Store in Category: Other Reports

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized users.

Deployment Status: In Development Deployed

10. Click the **Next** button.
11. Select **Survey Question Responses** as the related object.

12. Click the **Save** button.

13. Users can also click on the **Edit Layout** on the saved Report Type and:

- Create Default fields to display
- Re-order the field order displayed
- Re-name the Display Name of the field
- Add Fields to Sections that do not display by default

14. Users should refer to the **Administrator** or **Reports and Dashboards** manual/classes for more information on the setup of **Report Types**.

IMPORTANT NOTE: Now reports can be generated in Reports where further data analysis can occur and reports can then be added to Dashboards.

Other options for evaluating surveys are also available:

- Survey Invitations
- Survey Question Choice
- Survey Question Responses
- Surveys
- Survey Question Scores
- Survey Responses
- Survey Subjects

https://nu-training-tso.my.salesforce.com/survey/runtimeApp.app?invitationId=0Ki2R0000000048&surveyName=training_evaluation_survey&UUID=167a5f49-5588-4be5-86ff-6ea9534abd75