



NIMBLE AMS FAMILIARIZATION CLASS DESCRIPTION

Duration

1.5 - 2 Days

Class starts promptly at 9:00 am. There will be a 15-minute morning break, an hour lunch break, and a 15-minute afternoon break each day. Class will end no later than 4:00 PM every day, but this may vary depending on questions and student projects. The Class Agenda can be edited to fit client needs; some topics can be added/deleted depending on client needs. This class will be conducted ON SITE at Client Location, face to face with a designated Trainer.

Class is more effective if conducted at client location but can be held virtually if client prefers (due to health concerns). Sessions can be recorded and distributed upon request.

Hours Estimates

All hours listed in parenthesis are **estimates** - the actual time may differ based on many variables:

- Student Abilities
- Questions/Side Discussions
- Agenda/Number of Topics Selected

NOTE: An additional Three (3) Hours of Prep Time will be assigned to the total training hours assessed for this class for all Implementation (pre Go-Live) classes due to the setup of the Training orgs & agenda communications.

Overview

The Nimble AMS Familiarization class functions as a new, pre-Go Live client's introduction to Nimble AMS stock features. Department representatives, leaders, executives, and IT personnel are invited to participate in this class which occurs as soon in the Nimble AMS implementation cycle (post Sale) as possible. The instruction is scheduled prior to/at same time as clients are completing the Nimble Discovery Workbooks so attendees become "familiar" with the major features and functions of stock Nimble AMS. Clients are then able to more effectively complete workbooks, reference features, and converse with Nimble service personnel. Clients will also be able to contribute more efficiently regarding Nimble AMS services build of the client configured system and its migration through the Staging and Production orgs.

Clients receive continued access to the Nimble AMS Training Org on which the training occurs for 30 days from the day of Training. A Nimble AMS End User manual (in PDF) is delivered to each attendee prior to training and reflects the content of the Nimble AMS training org. The manual also replicates with step-by-step instructions the trainer's daily lessons as well as chronicles best practices of Nimble AMS. It can be used to replicate exercises and attempt additional ones while exploring the Training org, the Staging org, and the eventual Production org. It is also a valuable reference guide for usage post Go-Live.

Who Should Attend

This course intended for:

- Subject Matter Experts (SMEs)
- Department Managers
- Project Managers
- Database Administrators
- Database Developers



Prerequisites

Class ONLY for Department leaders, Subject Matter Experts (SMEs), and designated Client personnel actively interacting with the Nimble team during Discovery.

Nimble AMS End User Training Manual included with attendance

Day 1

Navigation (45 minutes)

- Navigation, Terminology, & Hierarchy
- Displaying Apps, Items, & Records
- Dashboards – Home & Application
- Finding Data
- Favorites – Creating and Maintaining
- Personalizing the Navigation Bar

Accounts (1 Hour)

- Accounts Overview
- Accounts (Persons & Organizations)
- Address information
- Creating New Accounts
- Affiliations
- Activities

List Views (45 minutes)

- Understanding List Views
- Using Existing List Views
- Creating a New List View
- Updating Records via a List View

Reports (1 Hour)

- Understanding Reports
 - Using Existing Reports
 - Creating a New Report
 - Report Options
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Dashboards (30 minutes)

- Understanding Dashboards
- Viewing and Editing Existing Dashboards
- Creating New Dashboards

Chatter (15 minutes)

- Understanding Chatter
- Chatter Publisher
- Chatter Posts
- Chatter Questions
- Chatter Polls

Committees (30 minutes)

- Committees Records
 - Creating Committee Membership Records
 - Committee Views, Reports, and Dashboards
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Day 2

Products (30 minutes)

- Understanding the Products Form
- Understanding Pricing
- Creating Special Prices
- Category Links
- Inventory & Quantities
- Shipping
- Merchandise Product Categories
- Product Views, Reports, and Dashboards

Orders & Payments (45 minutes)

- Types of Orders
- Ordering a Product
- Reading the Order Form
- Adjusting Orders – Edit, Pay, Cancel
- Editing & Deleting Carts
- Bulk Invoicing and Order Confirmation
- Order Views, Reports, and Dashboards

Membership (45 minutes)

- Membership Types
 - Membership Type Product Links
 - Membership Products
 - Purchasing Membership and Results
 - Viewing Updated Membership Information
 - Membership Views, Reports, and Dashboards
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Events (45 minutes)

- Creating an Event
- Event Product Links
- Event Session Groups & Session Product Links
- Event Badges & Questions
- Creating Event Registrations
- Checking Event Registrations
- Canceling an Event Registration
- Closing an Event
- Event & Registration Views, Reports, and Dashboards

Donations (30 Min)

- Understanding Donations
- Review Product Setup
- Creating an Appeal
- Cloning an Appeal
- Creating an Appeal Product Link
- Processing Donation Orders
- Donation Views, Reports, and Dashboards

Community Hub (30 minutes)

- Community Hub Tour
- Profile
- Orders
- Registrations
- Store
- Donate Now

Basic Accounting (45 minutes)

- Entities
 - GLs
 - Product GLs
 - Order Transactions
 - Payment Transactions
 - Accounting Dashboard
 - Accounting Views, Reports, and Dashboards
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Additional Topics – Optional

Exhibitors (30 Min)

- Understanding Exhibitors
- Review Product Setup
- Processing Exhibitors Orders
- Updating Exhibitors Orders with Details
- Exhibitors Reports and Dashboards

Sponsorships (30 Min)

- Understanding Subscriptions
- Review Product Setup
- Processing Subscription Orders
- Results of a Subscription Purchase
- Viewing Subscriptions from Accounts
- Subscription Reports and Dashboards

Awards (30 Min)

- Award Types
- Awards Records
- Designating Award Winners

Advertising (30 Min)

- Understanding Advertising
- Review Product Setup
- Processing Advertising Orders
- Updating Advertising Orders with Details
- Advertising Reports and Dashboards

Subscriptions (30 Min)

- Understanding Subscriptions
 - Creating a Subscription
 - Purchasing a Subscription
 - Results of a Subscription Purchase
 - Viewing Subscriptions from Accounts
 - Subscription Reports and Dashboards
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Programs (30 Min)

- Creating Program Types
- Creating Program Products and Links
- Creating Component Types
- Creating Milestone Types
- Linking Components to Milestones
- New Program Enrollment
- Viewing and Updating Program Components
- Program Views, Reports, and Dashboards

Surveys (30 minutes)

- Enabling the Surveys Item
- Creating Surveys
- Configuring Survey Pages
- Sending Surveys
- Creating Survey Reports

Deals (30 Min)

- Creating Deal Records
 - Converting Deals to Orders
 - Updating Deal Records
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