NimbleAMS™

End User Training
User Manual

communitybrands®

03.10.2022

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03.10.2022

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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

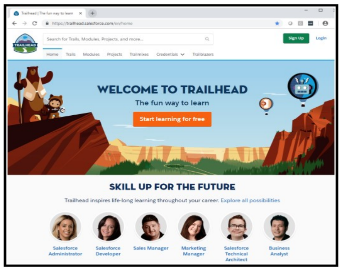
Nimble AMS Client Training Website: For the most up to date Class Schedule, Class Summaries, Downloadable Class Descriptions, and Contact Forms to inquire about or arrange for training, please visit: **https://nimble-ams-training.communitybrands.com/**.

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.

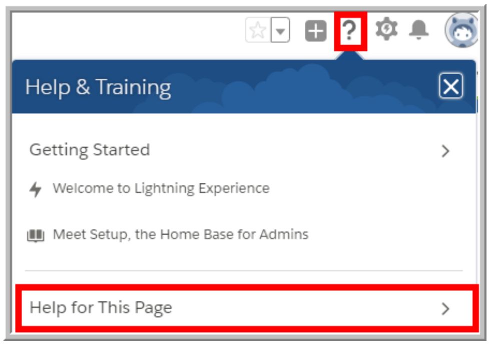
Salesforce Trailheads: As an additional Nimble AMS resource, Salesforce provides a Trailheads service to all clients. Trailheads involve step-by-step instructions on all Salesforce specific functions and are an excellent way of understanding all levels of Salesforce's capabilities. Users can create a 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**.


WELCOME TO TRAILHEAD
The fun way to learn
Start learning for free
SKILL UP FOR THE FUTURE
Salesforce Administrator
Salesforce Developer
Sales Manager
Marketing Manager
Salesforce Technical Architect
Business Analyst

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:


Help & Training
Getting Started
Welcome to Lightning Experience
Meet Setup, the Home Base for Admins
Help for This 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

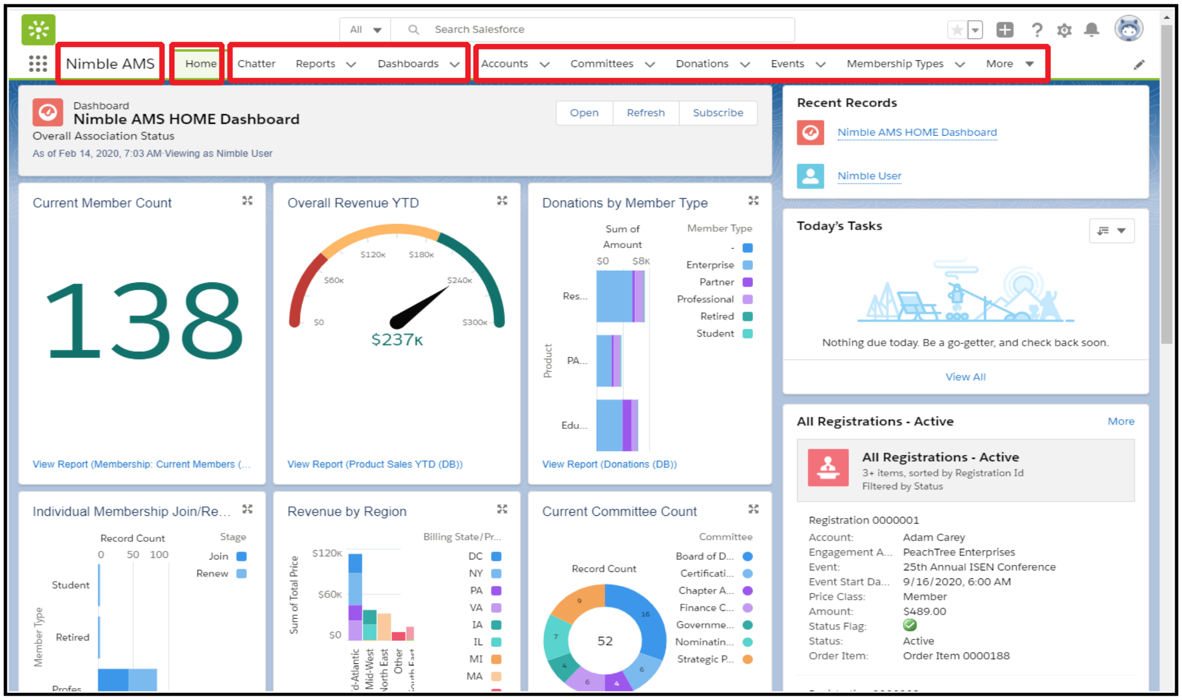
When Nimble AMS opens, users will notice a strip of possible options across the top of the screen; this is Nimble AMS's **Navigation Bar**. The Navigation Bar contains the following distinct sections from **Left to Right**. Each section is explained in detail on the following pages:

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.


All
Search Salesforce
Nimble AMS
Home
Chatter
Reports
Dashboards
Accounts
Committees
Donations
Events
Membership Types
More
Dashboard
Nimble AMS HOME Dashboard
Overall Association Status
As of Feb 14, 2020, 7:03 AM·Viewing as Nimble User
Open
Refresh
Subscribe
Recent Records
Nimble AMS HOME Dashboard
Nimble User
Current Member Count
138
View Report (Membership: Current Members (...
Overall Revenue YTD
$0
$60K
$120K
$180K
$240K
$300K
$237K
View Report (Product Sales YTD (DB))
Donations by Member Type
Sum of Amount
$0
$8K
Member Type
-
Enterprise
Partner
Professional
Retired
Student
Product
Res...
PA...
Edu...
View Report (Donations (DB))
Today's Tasks
Nothing due today. Be a go-getter, and check back soon.
View All
All Registrations - Active
More
All Registrations - Active
3+ items, sorted by Registration Id
Filtered by Status
Individual Membership Join/Re...
Record Count
0
50
100
Stage
Join
Renew
Member Type
Student
Retired
Profes...
Revenue by Region
Billing State/Pr...
$120K
$60K
$0
Sum of Total Price
DC
NY
PA
VA
IA
IL
MI
MA
d-Atlantic
Mid-West
North East
Other
outh East
Current Committee Count
Committee
Record Count
Board of D...
Certificati...
Chapter A...
Finance C...
Governme...
Nominatin...
Strategic P...
52
9
16
7
4
6
6
4
6

Registration 0000001
Account: Adam Carey
Engagement A... PeachTree Enterprises
Event: 25th Annual ISEN Conference
Event Start Da... 9/16/2020, 6:00 AM
Price Class: Member
Amount: $489.00
Status Flag: ✓
Status: Active
Order Item: Order Item 0000188

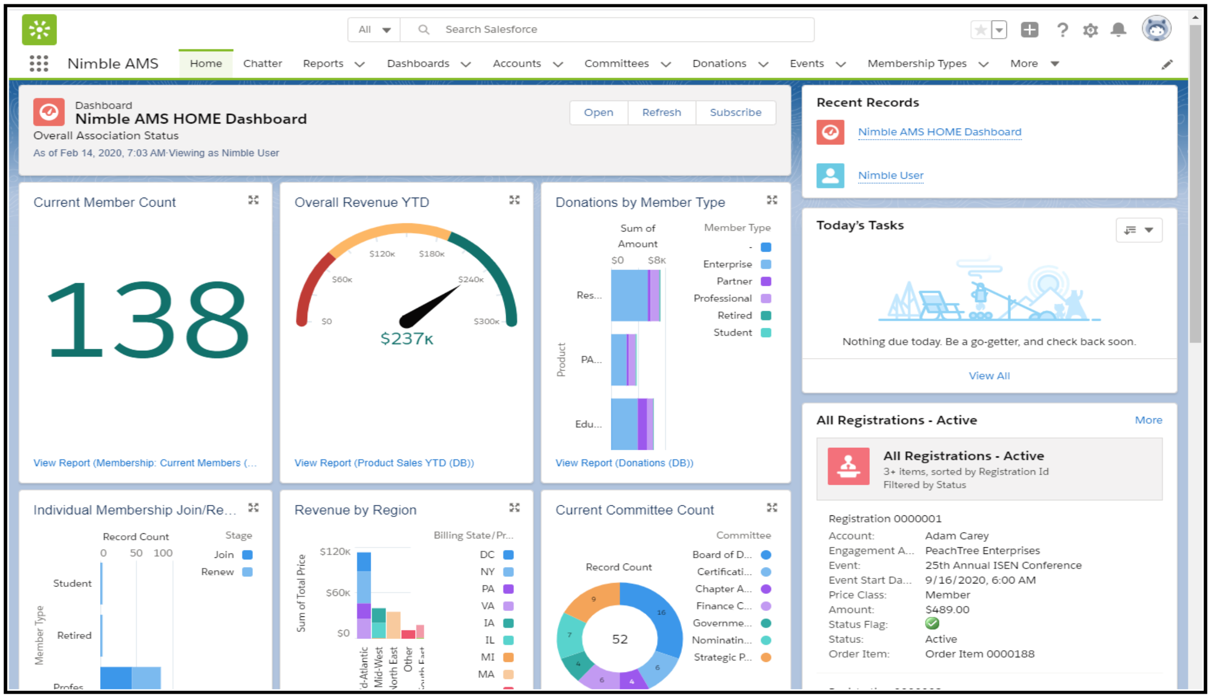
Home

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
    - Todays' 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.


All
Search Salesforce
Nimble AMS
Home
Chatter
Reports
Dashboards
Accounts
Committees
Donations
Events
Membership Types
More
Dashboard
Nimble AMS HOME Dashboard
Overall Association Status
Open
Refresh
Subscribe
Current Member Count
138
View Report (Membership: Current Members (...
Overall Revenue YTD
$0
$60K
$120K
$180K
$240K
$300K
$237K
View Report (Product Sales YTD (DB))
Donations by Member Type
Sum of Amount
$0
$8K
Member Type
Enterprise
Partner
Professional
Retired
Student
Product
Res...
PA...
Edu...
View Report (Donations (DB))
Recent Records
Nimble AMS HOME Dashboard
Nimble User
Today's Tasks
View All
All Registrations - Active
More
All Registrations - Active
3+ items, sorted by Registration Id
Filtered by Status
Individual Membership Join/Re...
Record Count
0
50
100
Stage
Join
Renew
Member Type
Student
Retired
Profes...
Revenue by Region
Billing State/Pr...
Sum of Total Price
$120K
$60K
$0
DC
NY
PA
VA
IA
IL
MI
MA
d-Atlantic
Mid-West
North East
Other
outh East
Current Committee Count
Committee
Record Count
Board of D...
Certificati...
Chapter A...
Finance C...
Governme...
Nominatin...
Strategic P...
52
9
16
7
4
6
6
4

As of Feb 14, 2020, 7:03 AM·Viewing as Nimble User

Nothing due today. Be a go-getter, and check back soon.

Registration 0000001
Account: Adam Carey
Engagement A...: PeachTree Enterprises
Event: 25th Annual ISEN Conference
Event Start Da...: 9/16/2020, 6:00 AM
Price Class: Member
Amount: $489.00
Status Flag: ✓
Status: Active
Order Item: Order Item 0000188

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.

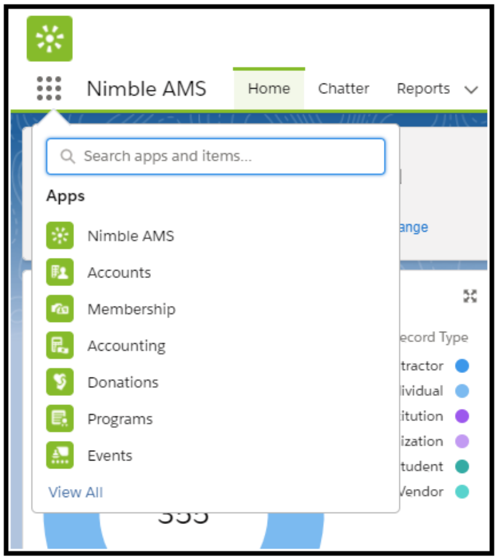
Once an Application displays, it remains permanent along with its associated Items until manually changed via the App Launcher. This is regardless of whether the user logs in/out, shuts down their computer, or accesses Nimble AMS from another device.

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.

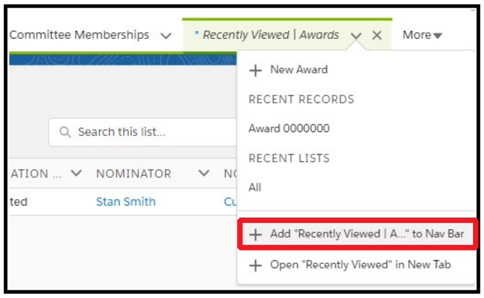
Adding Items

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.

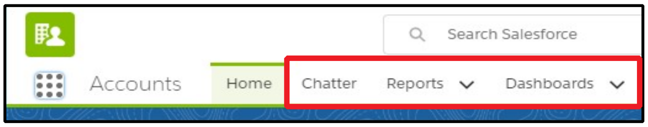
In this **exercise**, users will add the Awards item permanently to their current App:

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.


Committee Memberships
* Recently Viewed | Awards
More
New Award
RECENT RECORDS
Award 0000000
RECENT LISTS
All
Add "Recently Viewed | A..." to Nav Bar
Open "Recently Viewed" in New Tab
Search this list...
ATION ...
NOMINATOR
NC
ted
Stan Smith
Cu

CRD - Chatter, Reports, and Dashboards

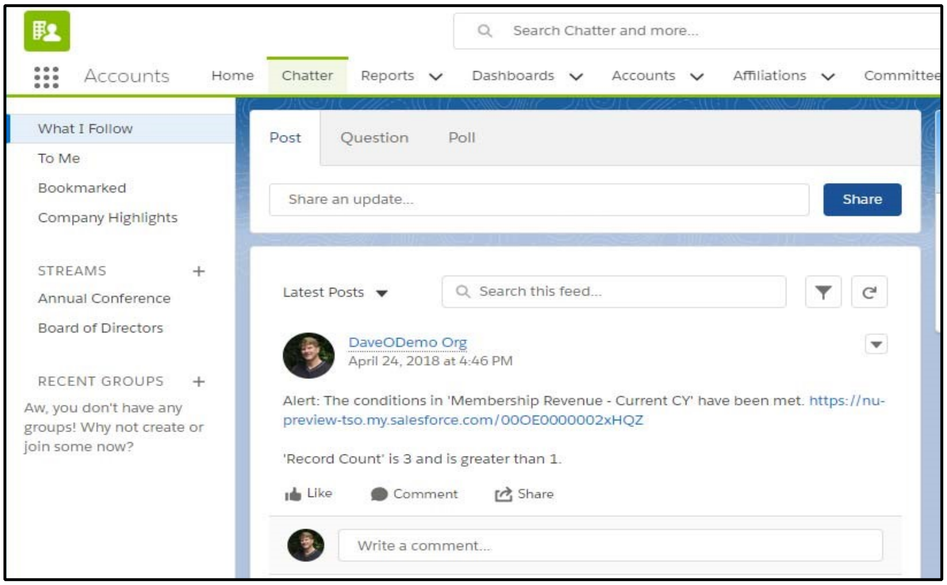
Chatter, **Reports**, and **Dashboards** are three items that are by default included in EVERY App. They display initially as the first three items to the right of **Home** on the Navigation bar. They can be moved if desired.


Search Salesforce
Accounts
Home
Chatter
Reports
Dashboards

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.


Search Chatter and more...
Accounts
Home
Chatter
Reports
Dashboards
Accounts
Affiliations
Committee
What I Follow
To Me
Bookmarked
Company Highlights
STREAMS
Annual Conference
Board of Directors
RECENT GROUPS
Post
Question
Poll
Share an update...
Share
Latest Posts
Search this feed...
Like
Comment
Share
Write a comment...

Aw, you don't have any groups! Why not create or join some now?

DaveODemo Org
April 24, 2018 at 4:46 PM

Alert: The conditions in 'Membership Revenue - Current CY' have been met. https://nu-preview-tso.my.salesforce.com/00OE0000002xHQZ

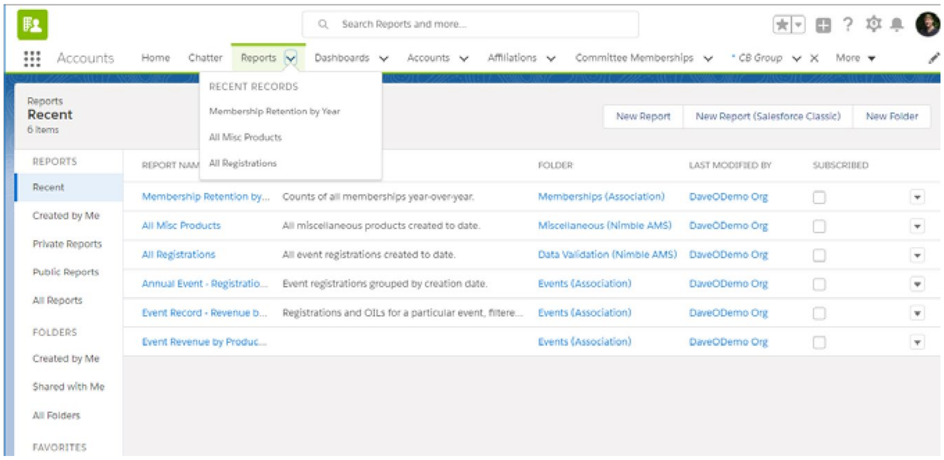
'Record Count' is 3 and is greater than 1.

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.


Search Reports and more...
Accounts
Home
Chatter
Reports
Dashboards
Accounts
Affiliations
Committee Memberships
* CB Group
More
RECENT RECORDS
Membership Retention by Year
All Misc Products
All Registrations
Reports
Recent
6 Items
New Report
New Report (Salesforce Classic)
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
Created by Me
Shared with Me
All Folders
FAVORITES

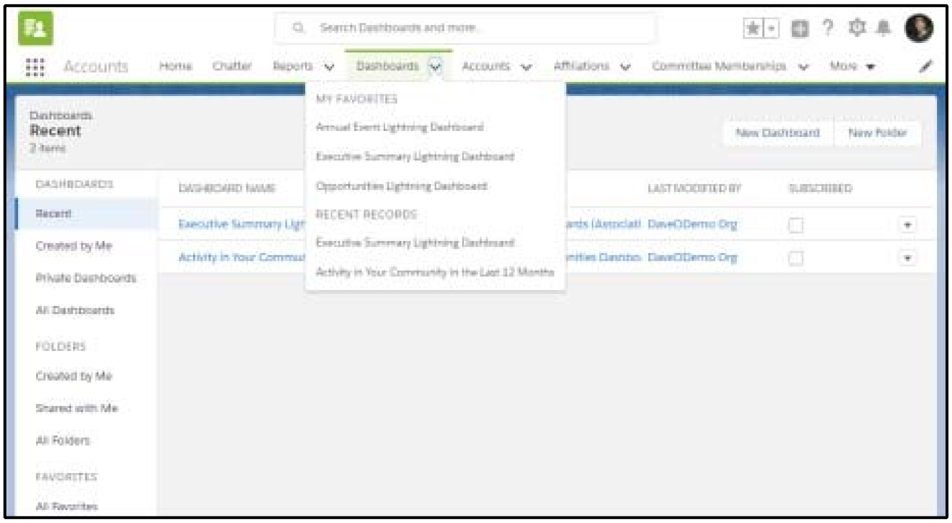
REPORT NAM		FOLDER	LAST MODIFIED BY	SUBSCRIBED
Membership Retention by...	Counts of all memberships year-over-year.	Memberships (Association)	DaveODemo Org	☐
All Misc Products	All miscellaneous products created to date.	Miscellaneous (Nimble AMS)	DaveODemo Org	☐
All Registrations	All event registrations created to date.	Data Validation (Nimble AMS)	DaveODemo Org	☐
Annual Event - Registratio...	Event registrations grouped by creation date.	Events (Association)	DaveODemo Org	☐
Event Record - Revenue b...	Registrations and OILs for a particular event, filtere...	Events (Association)	DaveODemo Org	☐
Event Revenue by Produc...		Events (Association)	DaveODemo Org	☐

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.

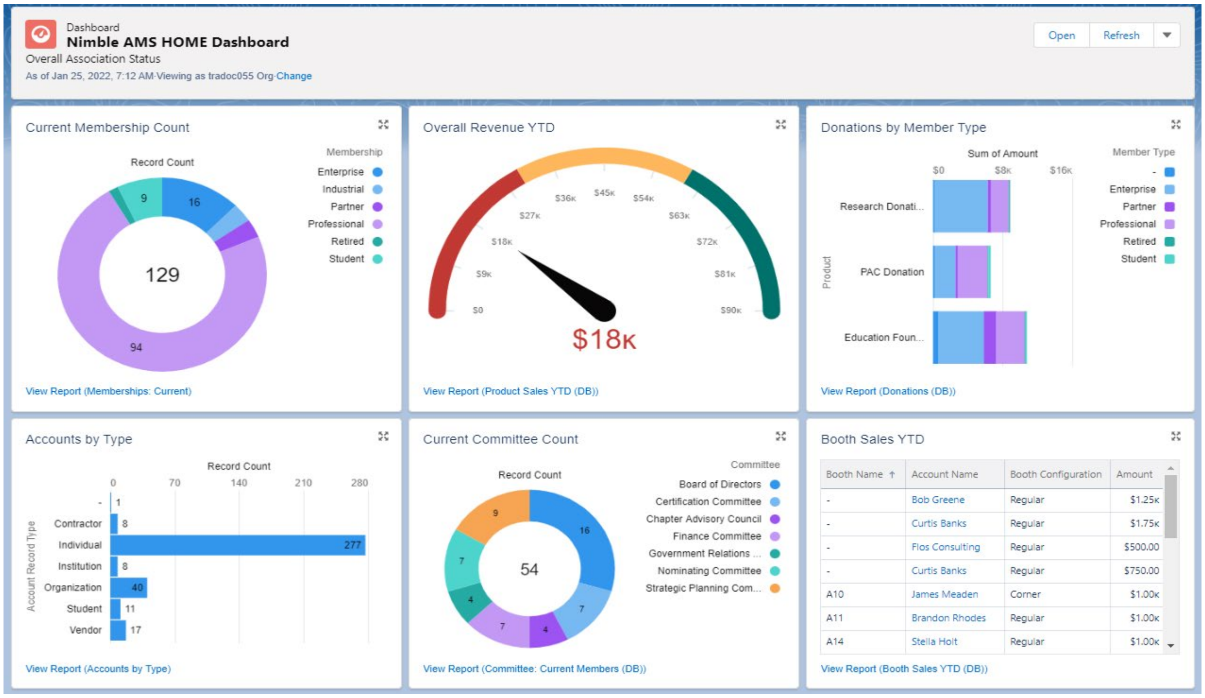
Reports covered in depth in **Chapter 4** of this manual.

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.


Search Dashboards and more
Accounts
Home
Chatter
Reports
Dashboards
Accounts
Affiliations
Committee Memberships
More
MY FAVORITES
Annual Event Lightning Dashboard
Executive Summary Lightning Dashboard
Opportunities Lightning Dashboard
RECENT RECORDS
Executive Summary Lightning Dashboard
Activity in Your Community in the Last 12 Months
Dashboards
Recent
2 items
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
Created by Me
Shared with Me
All Folders
FAVORITES
All Favorites
DASHBOARD NAME
LAST MODIFIED BY
SUBSCRIBED
Executive Summary Ligh
Activity in Your Commu
DaveODemo Org
DaveODemo Org

Click on the additional Dashboard link to display the **Nimble AMS HOME Dashboard**.


Open
Refresh
Current Membership Count
Record Count
Membership
Enterprise
Industrial
Partner
Professional
Retired
Student
9
16
129
94
View Report (Memberships: Current)
Overall Revenue YTD
$0
$9K
$18K
$27K
$36K
$45K
$54K
$63K
$72K
$81K
$90K
$18K
View Report (Product Sales YTD (DB))
Donations by Member Type
Sum of Amount
$0
$8K
$16K
Member Type
-
Enterprise
Partner
Professional
Retired
Student
Product
Research Donati...
PAC Donation
Education Foun...
View Report (Donations (DB))
Accounts by Type
Record Count
0
70
140
210
280
Account Record Type
-
Contractor
Individual
Institution
Organization
Student
Vendor
1
8
277
8
40
11
17
View Report (Accounts by Type)
Current Committee Count
Record Count
Committee
Board of Directors
Certification Committee
Chapter Advisory Council
Finance Committee
Government Relations ...
Nominating Committee
Strategic Planning Com...
9
16
7
54
4
7
4
7
View Report (Committee: Current Members (DB))
View Report (Booth Sales YTD (DB))

Dashboard
Nimble AMS HOME Dashboard
Overall Association Status
As of Jan 25, 2022, 7:12 AM·Viewing as tradoc055 Org·Change

Booth Sales YTD

Booth Name ↑	Account Name	Booth Configuration	Amount
-	Bob Greene	Regular	$1.25K
-	Curtis Banks	Regular	$1.75K
-	Flos Consulting	Regular	$500.00
-	Curtis Banks	Regular	$750.00
A10	James Meaden	Corner	$1.00K
A11	Brandon Rhodes	Regular	$1.00K
A14	Stella Holt	Regular	$1.00K

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

Items and List Views

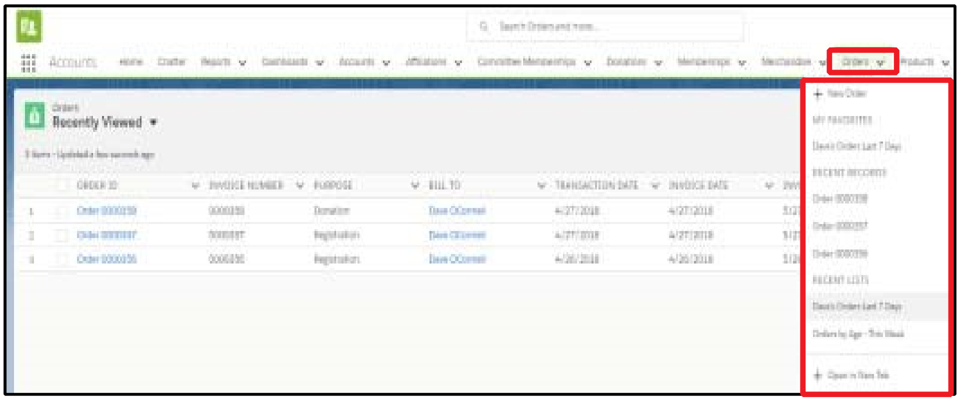
Items

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.

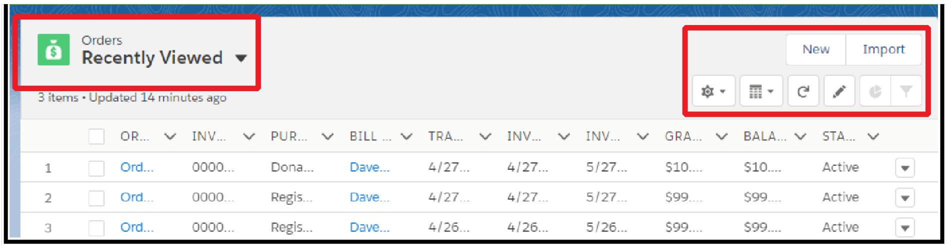
In the screen shot below, the **Accounts** App is active, and the **Orders** item selected. By default, the **Recently Viewed** list view displays in the viewing area.

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.



Orders
Recently Viewed
3 items • Updated 14 minutes ago

	☐	OR...	INV...	PUR...	BILL ...	TRA...	INV...	INV...	GRA...	BALA...	STA...	
1	☐	Ord...	0000...	Dona...	Dave...	4/27...	4/27...	5/27...	$10....	$10....	Active	▾
2	☐	Ord...	0000...	Regis...	Dave...	4/27...	4/27...	5/27...	$99....	$99....	Active	▾
3	☐	Ord...	0000...	Regis...	Dave...	4/26...	4/26...	5/26...	$99....	$99....	Active	▾

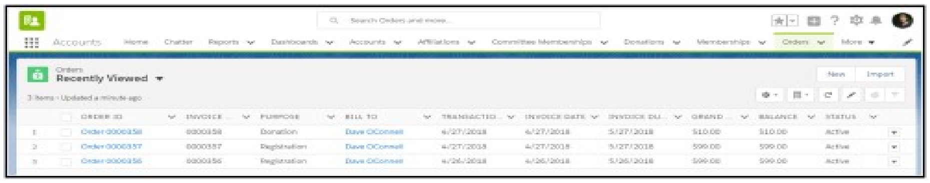
3. Clicking on the dropdown to the right of the **Recently Viewed** list view title, displays additional **Orders** list views from **Recent List Views** or from **All Other Lists**. This provides users with a library of possible list views.

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.

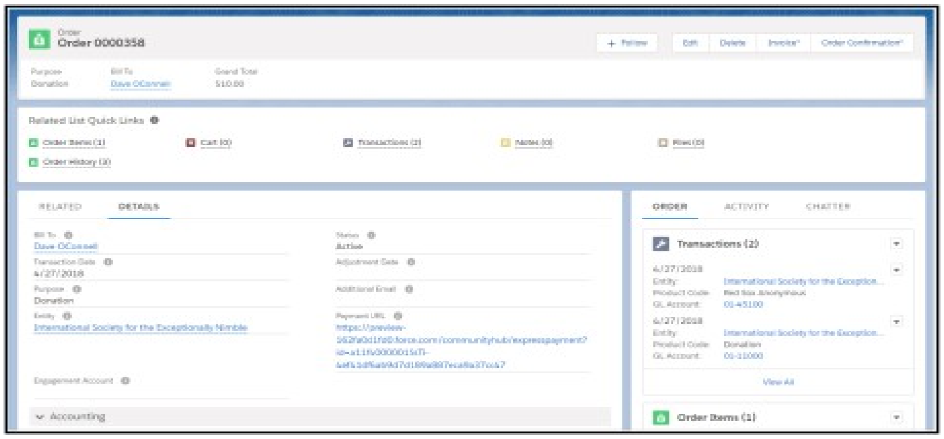

Search Orders and more...
Accounts
Home
Chatter
Reports
Dashboards
Accounts
Affiliations
Committee Memberships
Donations
Memberships
Orders
More
Orders
Recently Viewed
New
Import

3 items · Updated a minute ago

	ORDER ID	INVOICE ...	PURPOSE	BILL TO	TRANSACTIO...	INVOICE DATE	INVOICE DU...	GRAND ...	BALANCE	STATUS
1	Order 0000358	0000358	Donation	Dave OConnell	4/27/2018	4/27/2018	5/27/2018	$10.00	$10.00	Active
2	Order 0000357	0000357	Registration	Dave OConnell	4/27/2018	4/27/2018	5/27/2018	$99.00	$99.00	Active
3	Order 0000356	0000356	Registration	Dave OConnell	4/26/2018	4/26/2018	5/26/2018	$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.


Order
Order 0000358
+ Follow
Edit
Delete
Invoice
Order Confirmation
Related List Quick Links
Order Items (1)
Cart (0)
Transactions (2)
Notes (0)
Files (0)
Order History (3)
RELATED
DETAILS
ORDER
ACTIVITY
CHATTER
Transactions (2)
View All
Accounting
Order Items (1)

Purpose: Donation
Bill To: Dave OConnell
Grand Total: $10.00

Bill To: Dave OConnell
Transaction Date: 4/27/2018
Purpose: Donation
Entity: International Society for the Exceptionally Nimble
Engagement Account:
Status: Active
Adjustment Date:
Additional Email:

4/27/2018
Entity: International Society for the Exception...
GL Account: 01-45100

4/27/2018
Entity: International Society for the Exception...
Product Code: Donation
GL Account: 01-11000

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.

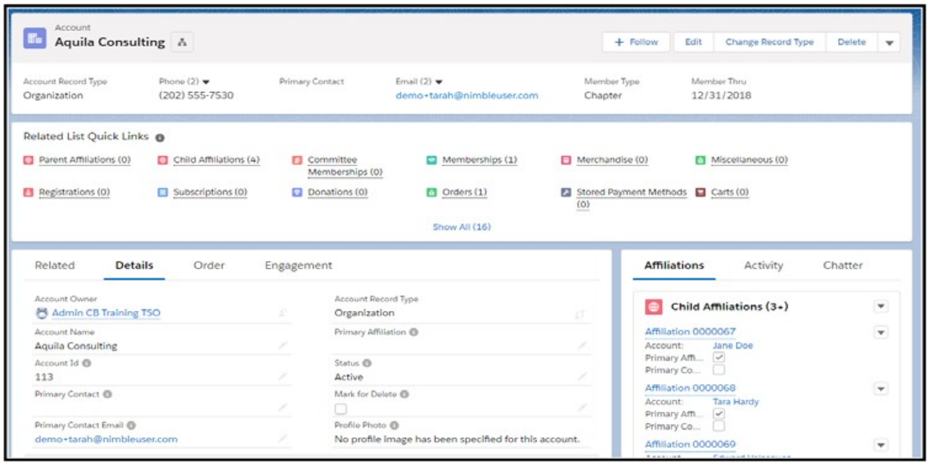
The information contained in an Account displays in sections and is stored in fields. Accounts are the hub of the Nimble AMS system since they are the foundation around which all other transactions, searches, and activity revolve. Accounts can represent Organizations or Individuals, Members or Non-Members, 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.


+ Follow
Edit
Change Record Type
Delete
Related List Quick Links
Parent Affiliations (0)
Child Affiliations (4)
Committee Memberships (0)
Memberships (1)
Merchandise (0)
Miscellaneous (0)
Registrations (0)
Subscriptions (0)
Donations (0)
Orders (1)
Stored Payment Methods (0)
Carts (0)
Show All (16)
Related
Details
Order
Engagement
Affiliations
Activity
Chatter

Account
Aquila Consulting

Account Record Type: Organization
Phone (2): (202) 555-7530
Primary Contact:
Email (2): demo+tarah@nimbleuser.com
Member Type: Chapter
Member Thru: 12/31/2018

Account Owner: Admin CB Training TSO
Account Record Type: Organization
Account Name: Aquila Consulting
Primary Affiliation:
Account Id: 113
Status: Active
Primary Contact:
Mark for Delete: ☐
Primary Contact Email: demo+tarah@nimbleuser.com
Profile Photo: No profile image has been specified for this account.

Child Affiliations (3+)
Affiliation 0000067
Account: Jane Doe
Primary Affi... ☑
Primary Co... ☐
Affiliation 0000068
Account: Tara Hardy
Primary Affi... ☑
Primary Co... ☐
Affiliation 0000069

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

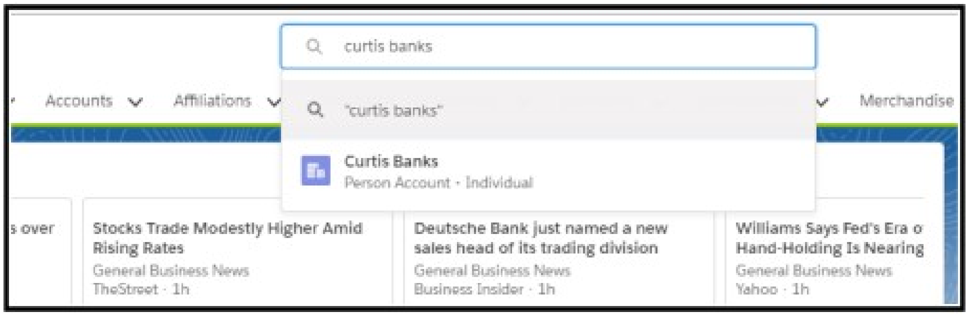
Only **Search** covered in the following section - users will be reviewing List Views, Reports and Dashboards in detail in Chapters 3, 4, & 5.

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**.


curtis banks
Accounts
Affiliations
Merchandise
"curtis banks"
Curtis Banks
Person Account • Individual

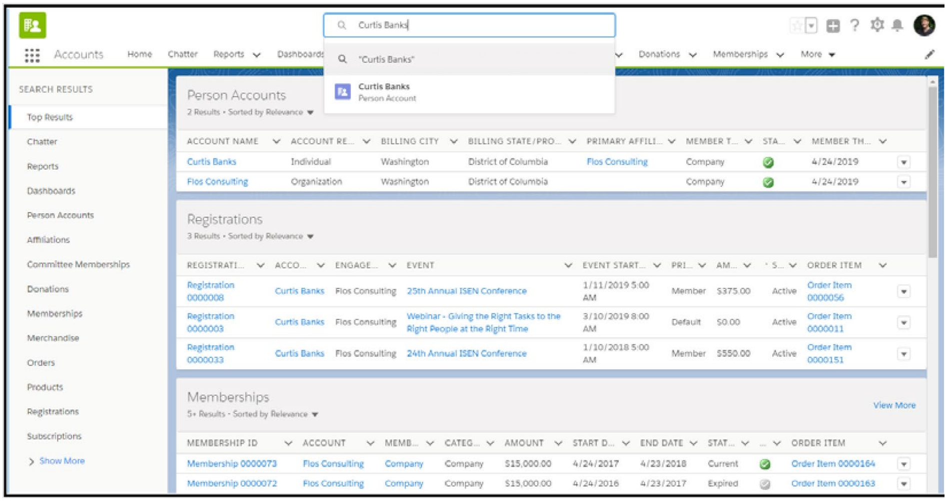
s over

Stocks Trade Modestly Higher Amid Rising Rates
General Business News
TheStreet · 1h

Deutsche Bank just named a new sales head of its trading division
General Business News
Business Insider · 1h

Williams Says Fed's Era o Hand-Holding Is Nearing
General Business News
Yahoo · 1h

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.


Curtis Banks
Accounts
Home
Chatter
Reports
Dashboards
Donations
Memberships
More
"Curtis Banks"
Curtis Banks
Person Account
SEARCH RESULTS
Top Results
Chatter
Reports
Dashboards
Person Accounts
Affiliations
Committee Memberships
Donations
Memberships
Merchandise
Orders
Products
Registrations
Subscriptions
Show More

Person Accounts
2 Results • Sorted by Relevance

ACCOUNT NAME	ACCOUNT RE...	BILLING CITY	BILLING STATE/PRO...	PRIMARY AFFILI...	MEMBER T...	STA...	MEMBER TH...
Curtis Banks	Individual	Washington	District of Columbia	Flos Consulting	Company	✓	4/24/2019
Flos Consulting	Organization	Washington	District of Columbia		Company	✓	4/24/2019

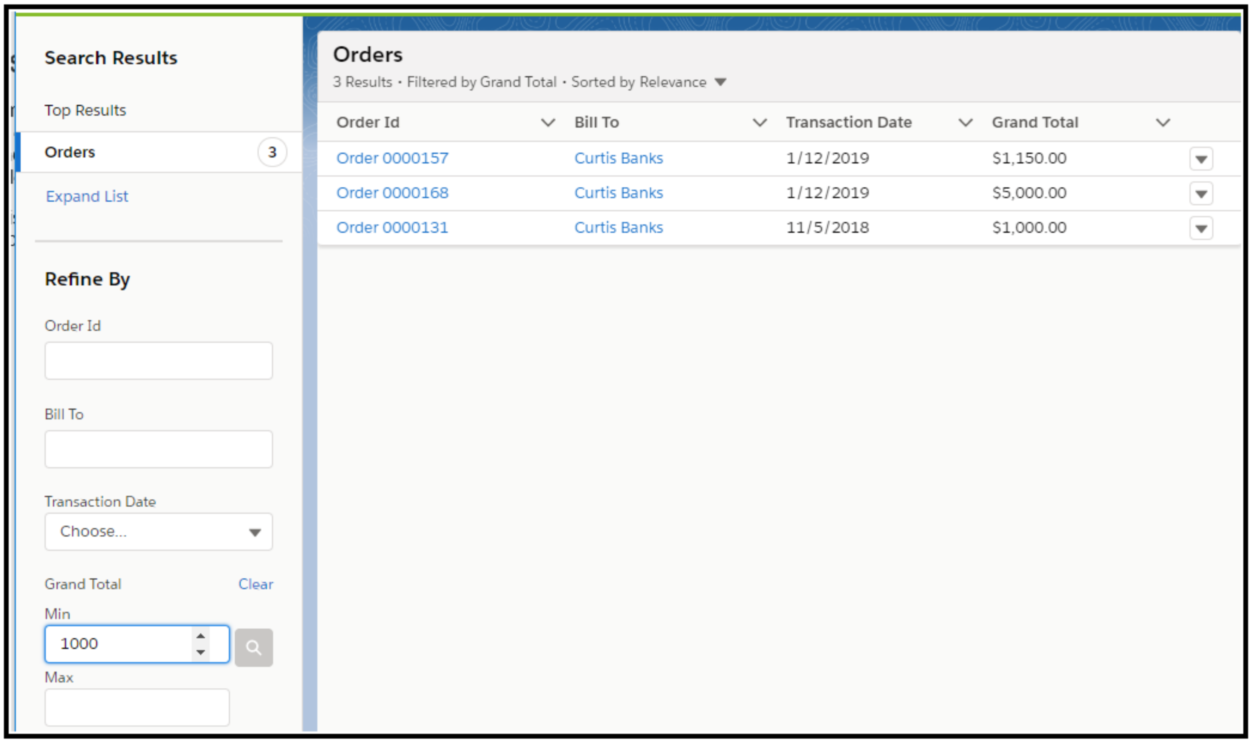
Registrations
3 Results • Sorted by Relevance

REGISTRATI...	ACCO...	ENGAGE...	EVENT	EVENT START...	PRI...	AM...	' S...	ORDER ITEM
Registration 0000008	Curtis Banks	Flos Consulting	25th Annual ISEN Conference	1/11/2019 5:00 AM	Member	$375.00	Active	Order Item 0000056
Registration 0000003	Curtis Banks	Flos Consulting	Webinar - Giving the Right Tasks to the Right People at the Right Time	3/10/2019 8:00 AM	Default	$0.00	Active	Order Item 0000011
Registration 0000033	Curtis Banks	Flos Consulting	24th Annual ISEN Conference	1/10/2018 5:00 AM	Member	$550.00	Active	Order Item 0000151

Memberships
5+ Results • Sorted by Relevance
View More

MEMBERSHIP ID	ACCOUNT	MEMB...	CATEG...	AMOUNT	START D...	END DATE	STAT...	...	ORDER ITEM
Membership 0000073	Flos Consulting	Company	Company	$15,000.00	4/24/2017	4/23/2018	Current	✓	Order Item 0000164
Membership 0000072	Flos Consulting	Company	Company	$15,000.00	4/24/2016	4/23/2017	Expired	✓	Order Item 0000163

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**.



Order Id

Bill To

Transaction Date: Choose...

Grand Total Clear

Min: 1000

Max

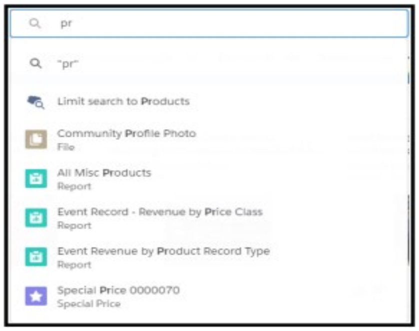
Orders

3 Results • Filtered by Grand Total • Sorted by Relevance

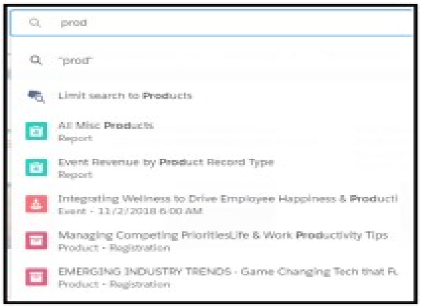
Order Id	Bill To	Transaction Date	Grand Total
Order 0000157	Curtis Banks	1/12/2019	$1,150.00
Order 0000168	Curtis Banks	1/12/2019	$5,000.00
Order 0000131	Curtis Banks	11/5/2018	$1,000.00

10. Return to the **Search**.

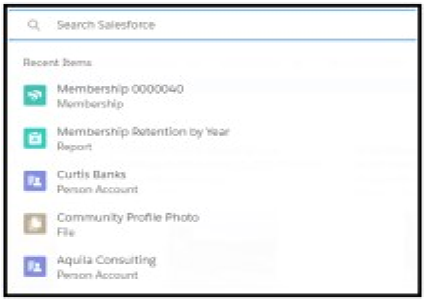
11. In **Search**, enter the letters **p-r-o-d** slowly and observe results for each letter.
    - Each combination of letter returns unique results.
    - Search returns the top 5 results Event the criteria.
    - Search targets the most popular category at the very top - in this case, **products**.


pr
"pr"
Limit search to Products
Community Profile Photo
File
All Misc Products
Report
Event Record - Revenue by Price Class
Report
Event Revenue by Product Record Type
Report
Special Price 0000070
Special Price

12. **Observe** the results of prod:
    - Two Reports
    - One Event
    - Two Registrations


prod
"prod"
Limit search to Products
All Misc Products
Report
Event Revenue by Product Record Type
Report
Integrating Wellness to Drive Employee Happiness & Producti
Event - 11/2/2018 6:00 AM
Managing Competing PrioritiesLife & Work Productivity Tips
Product - Registration
EMERGING INDUSTRY TRENDS - Game Changing Tech that R
Product - Registration

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


Search Salesforce
Recent Items
Membership 0000040
Membership
Membership Retention by Year
Report
Curtis Banks
Person Account
Community Profile Photo
File
Aquila Consulting
Person Account

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**.

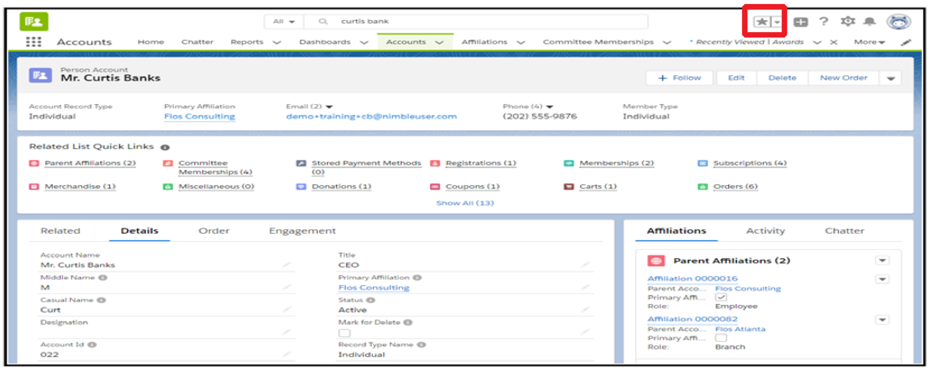
Favorites provide:

- 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.


All
curtis bank
Accounts
Home
Chatter
Reports
Dashboards
Accounts
Affiliations
Committee Memberships
* Recently Viewed | Awards
More
+ Follow
Edit
Delete
New Order
Related List Quick Links
Parent Affiliations (2)
Committee Memberships (4)
Stored Payment Methods (0)
Registrations (1)
Memberships (2)
Subscriptions (4)
Merchandise (1)
Miscellaneous (0)
Donations (1)
Coupons (1)
Carts (1)
Orders (6)
Show All (13)
Related
Details
Order
Engagement
Affiliations
Activity
Chatter

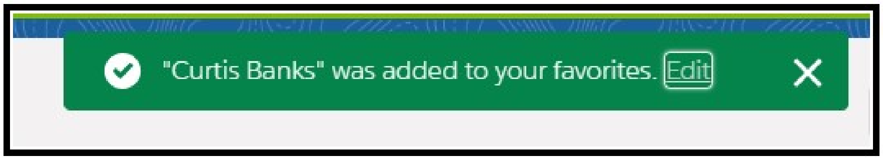
Person Account
Mr. Curtis Banks

Account Record Type: Individual
Primary Affiliation: Flos Consulting
Email (2): demo+training+cb@nimbleuser.com
Phone (4): (202) 555-9876
Member Type: Individual

Account Name: Mr. Curtis Banks
Middle Name: M
Casual Name: Curt
Designation:
Account Id: 022
Title: CEO
Primary Affiliation: Flos Consulting
Status: Active
Mark for Delete: ☐
Record Type Name: Individual

Parent Affiliations (2)
Affiliation 0000016
Parent Acco...: Flos Consulting
Primary Affi...: ☑
Role: Employee
Affiliation 0000082
Parent Acco...: Flos Atlanta
Primary Affi...: ☐
Role: Branch

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:

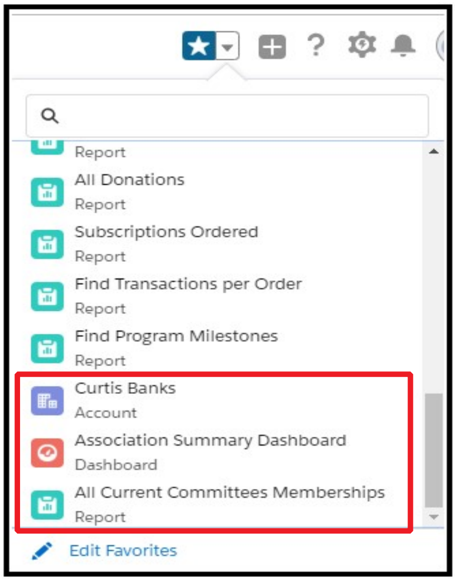


"Curtis Banks" was added to your favorites. Edit

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.


Report
All Donations
Report
Subscriptions Ordered
Report
Find Transactions per Order
Report
Find Program Milestones
Report
Curtis Banks
Account
Association Summary Dashboard
Dashboard
All Current Committees Memberships
Report
Edit Favorites

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.

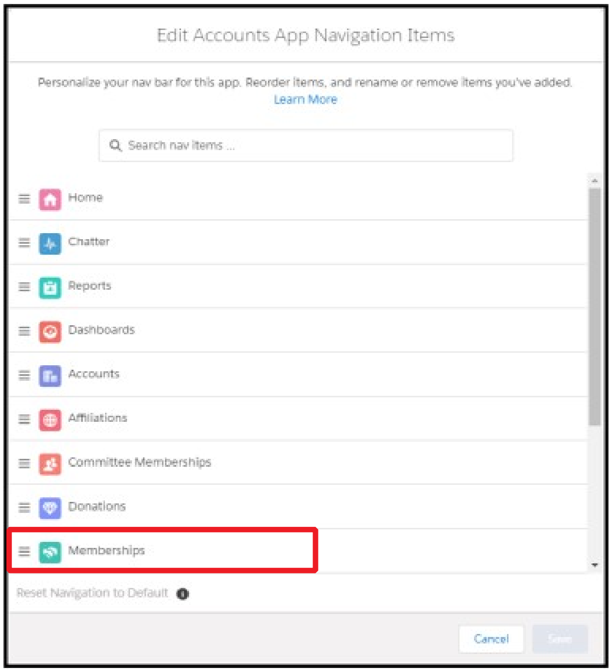
Personalizing the Navigation Bar

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).

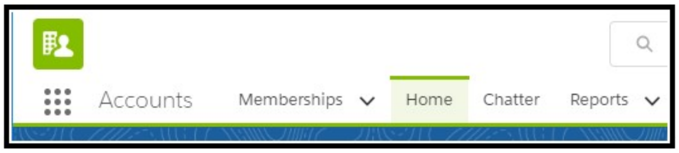


Edit Accounts App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.

Learn More
Search nav items ...
Home
Chatter
Reports
Dashboards
Accounts
Affiliations
Committee Memberships
Donations
Memberships
Reset Navigation to Default
Cancel
Save

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.


Accounts
Memberships
Home
Chatter
Reports

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

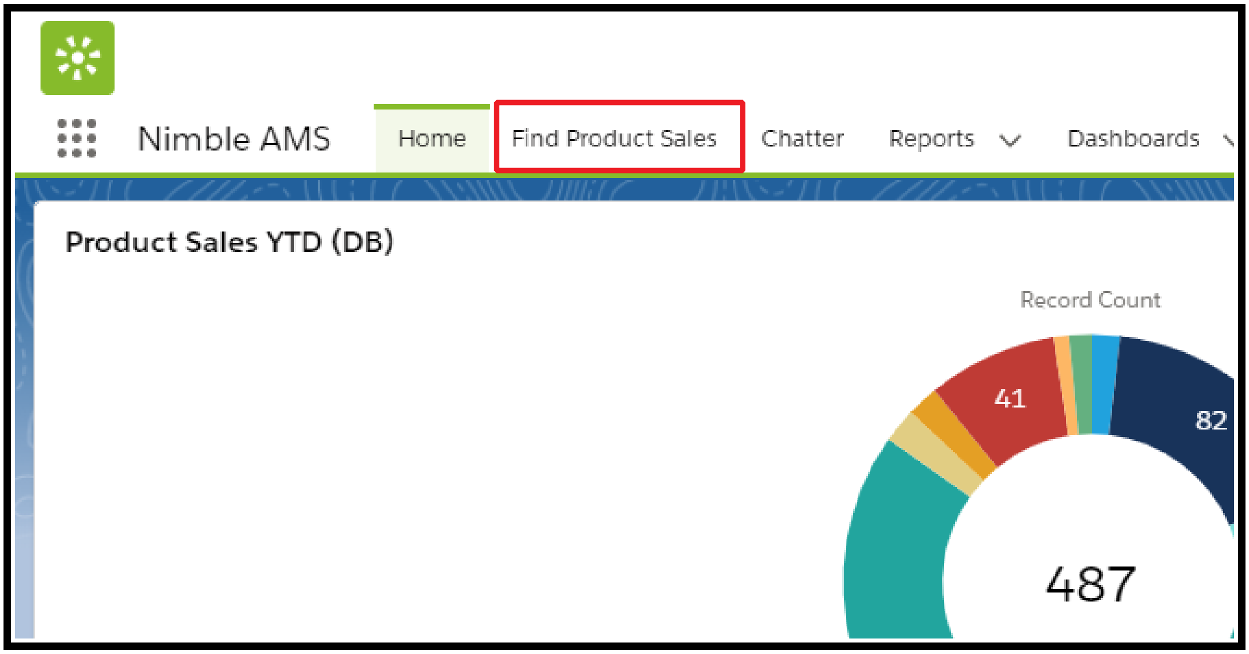
If a different Application selected, Membership would not be visible in that position, in the newly selected App. However, it will remain in that position when user returned to Accounts.

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

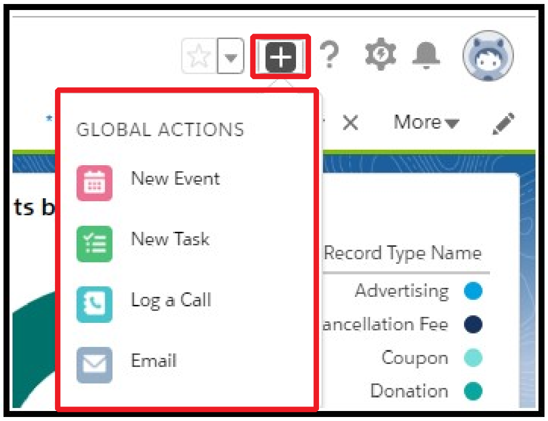
Global Actions

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

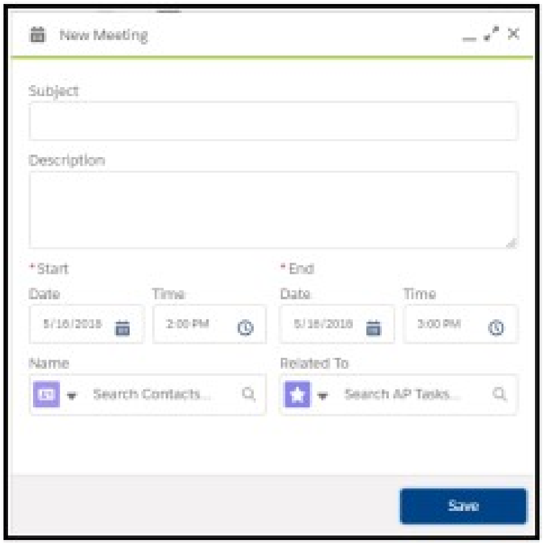
- New Event
- New Task
- Log a Call
- Email

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.


GLOBAL ACTIONS
New Event
New Task
Log a Call
Email
More
Record Type Name
Advertising
ancellation Fee
Coupon
Donation
ts b

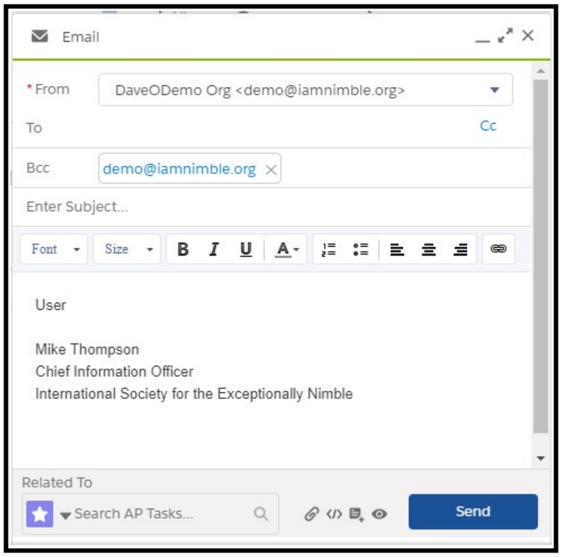
2. Click on the **New Event** button.



*Start Date 5/16/2018 Time 2:00 PM
*End Date 5/16/2018 Time 3:00 PM
Name: Search Contacts...
Related To: Search AP Tasks...

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**.



*From: DaveODemo Org <demo@iamnimble.org>
Bcc: demo@iamnimble.org
Enter Subject...

User

Mike Thompson
Chief Information Officer
International Society for the Exceptionally Nimble

Related To: Search AP Tasks...

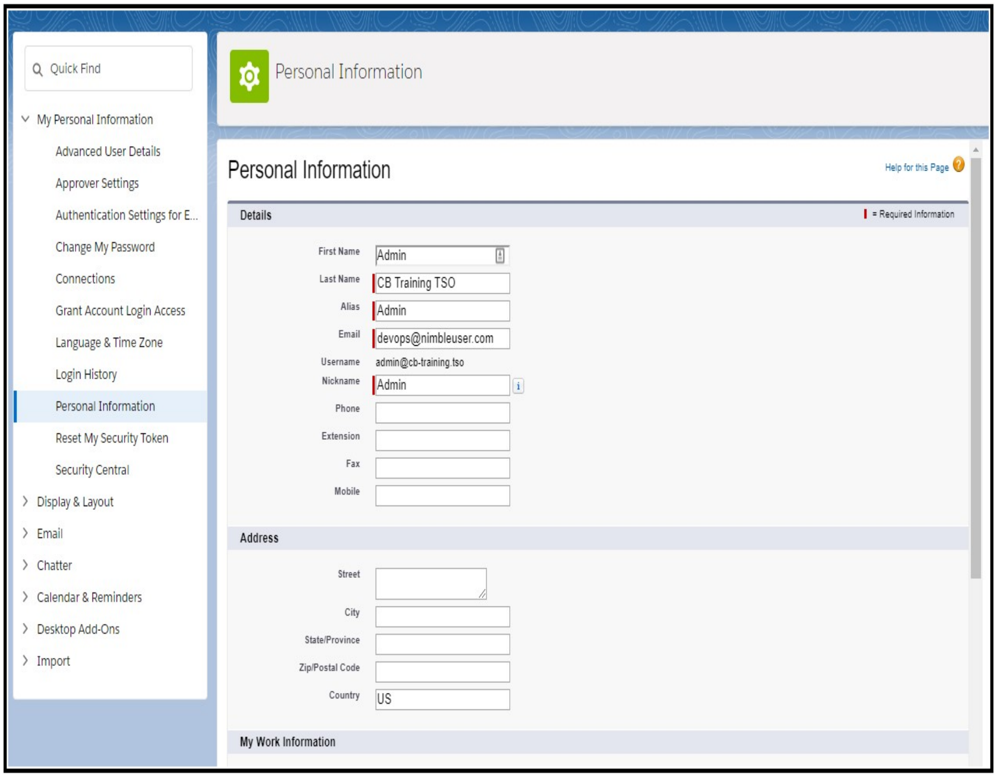
7. Users can Add a Person or Organization Record to the **Related To** field to track links.
8. Click on the **Close** button (**x** in upper right-hand corner of Record).

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.


Quick Find
My Personal Information
Advanced User Details
Approver Settings
Authentication Settings for E...
Change My Password
Connections
Grant Account Login Access
Language & Time Zone
Login History
Personal Information
Reset My Security Token
Security Central
Display & Layout
Email
Chatter
Calendar & Reminders
Desktop Add-Ons
Import
Personal Information
Help for this Page
= Required Information
Phone
Extension
Fax
Mobile
Street
City
State/Province
Zip/Postal Code
My Work Information

Personal Information

Details

First Name: Admin

Last Name: CB Training TSO

Alias: Admin

Email: devops@nimbleuser.com

Username: admin@cb-training.tso

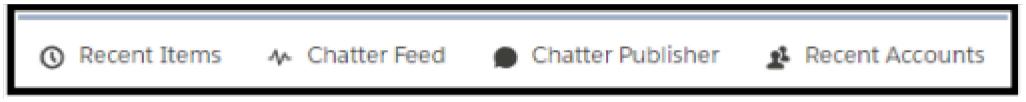
Nickname: Admin

Address

Country: US

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:

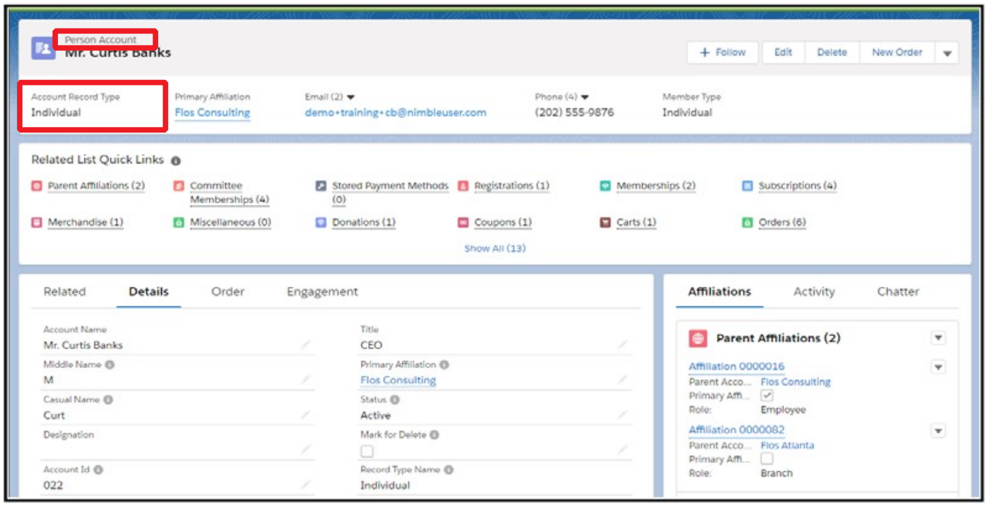
Persons Accounts – **Individual, Student** & **Consultant**
Accounts – **Organization, Institution,** & **Vendor**

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.



Person Account
+ Follow
Edit
Delete
New Order
Related List Quick Links
Parent Affiliations (2)
Committee Memberships (4)
Stored Payment Methods (0)
Registrations (1)
Memberships (2)
Subscriptions (4)
Merchandise (1)
Miscellaneous (0)
Donations (1)
Coupons (1)
Carts (1)
Orders (6)
Show All (13)
Related
Details
Order
Engagement
Affiliations
Activity
Chatter
Parent Affiliations (2)

Mr. Curtis Banks

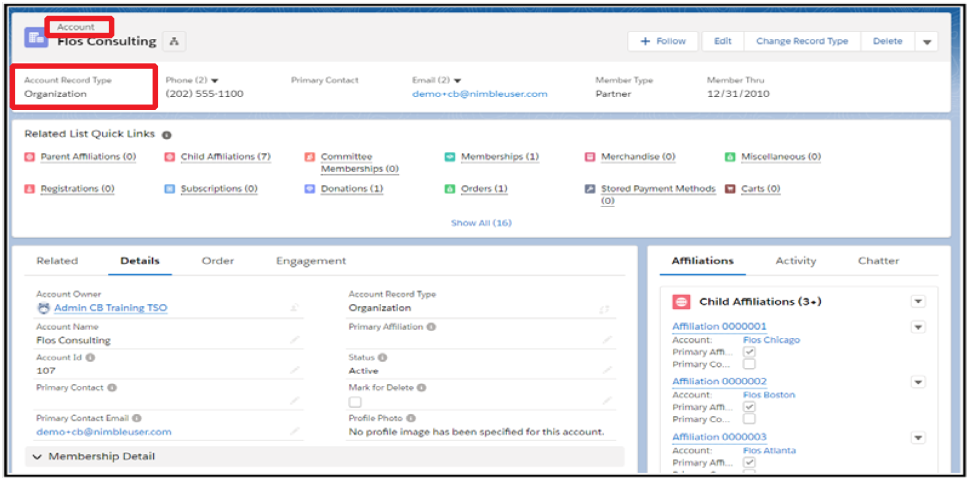
Account Record Type: Individual
Primary Affiliation: Flos Consulting
Email (2): demo+training+cb@nimbleuser.com
Phone (4): (202) 555-9876
Member Type: Individual

Account Name: Mr. Curtis Banks
Title: CEO
Middle Name: M
Primary Affiliation: Flos Consulting
Casual Name: Curt
Status: Active
Designation:
Mark for Delete: ☐
Account Id: 022
Record Type Name: Individual

Affiliation 0000016
Parent Acco...: Flos Consulting
Primary Affi...: ☑
Role: Employee

Affiliation 0000082
Parent Acco...: Flos Atlanta
Primary Affi...: ☐
Role: Branch

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



Account
+ Follow
Edit
Change Record Type
Delete
Related List Quick Links
Parent Affiliations (0)
Child Affiliations (7)
Committee Memberships (0)
Memberships (1)
Merchandise (0)
Miscellaneous (0)
Registrations (0)
Subscriptions (0)
Donations (1)
Orders (1)
Stored Payment Methods (0)
Carts (0)
Show All (16)
Related
Details
Order
Engagement
Affiliations
Activity
Chatter
Child Affiliations (3+)
Membership Detail

Flos Consulting

Account Record Type: Organization
Phone (2): (202) 555-1100
Primary Contact:
Email (2): demo+cb@nimbleuser.com
Member Type: Partner
Member Thru: 12/31/2010

Account Owner: Admin CB Training TSO
Account Record Type: Organization
Account Name: Flos Consulting
Primary Affiliation:
Account Id: 107
Status: Active
Primary Contact:
Mark for Delete: ☐
Primary Contact Email: demo+cb@nimbleuser.com
Profile Photo: No profile image has been specified for this account.

Affiliation 0000001
Account: Flos Chicago
Primary Affi...: ☑
Primary Co...: ☐

Affiliation 0000002
Account: Flos Boston
Primary Affi...: ☑
Primary Co...: ☐

Affiliation 0000003
Account: Flos Atlanta
Primary Affi...: ☑

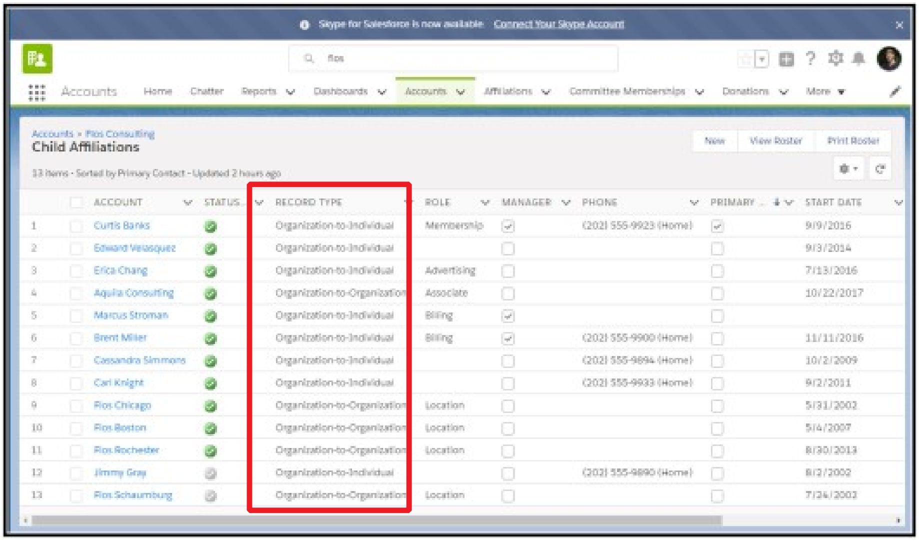
IMPORTANT NOTE: The Account Record Types listed/displayed above are Training Org examples, NOT Stock. Clients can define Names/Layouts of Account Record types they require.

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.



Accounts > Flos Consulting

Child Affiliations

13 Items · Sorted by Primary Contact - Updated 2 hours ago

	☐	ACCOUNT	STATUS...	RECORD TYPE	ROLE	MANAGER	PHONE	PRIMARY ...	START DATE
1	☐	Curtis Banks	✓	Organization-to-Individual	Membership	☑	(202) 555-9923 (Home)	☑	9/9/2016
2	☐	Edward Velasquez	✓	Organization-to-Individual		☐		☐	9/3/2014
3	☐	Erica Chang	✓	Organization-to-Individual	Advertising	☐		☐	7/13/2016
4	☐	Aquila Consulting	✓	Organization-to-Organizatio	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-Organizatio	Location	☐		☐	5/31/2002
10	☐	Flos Boston	✓	Organization-to-Organizatio	Location	☐		☐	5/4/2007
11	☐	Flos Rochester	✓	Organization-to-Organizatio	Location	☐		☐	8/30/2013
12	☐	Jimmy Gray	○	Organization-to-Individual		☐	(202) 555-9890 (Home)	☐	8/2/2002
13	☐	Flos Schaumburg	○	Organization-to-Organizatio	Location	☐		☐	7/24/2002

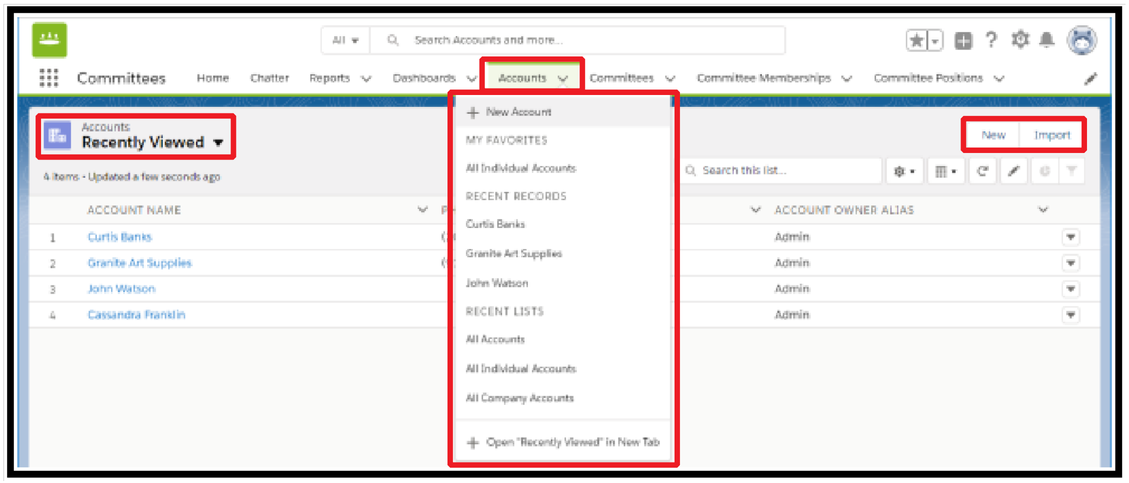
Affiliated accounts display whether the connection is **Organization to Individual**, **Organization to Organization**, or **Individual to Individual**.

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.


All
Search Accounts and more...
Committees
Home
Chatter
Reports
Dashboards
Accounts
Committees
Committee Memberships
Committee Positions
Accounts
Recently Viewed
4 items • Updated a few seconds ago
New Account
MY FAVORITES
All Individual Accounts
RECENT RECORDS
Curtis Banks
Granite Art Supplies
John Watson
RECENT LISTS
All Accounts
All Individual Accounts
All Company Accounts
Open "Recently Viewed" in New Tab
New
Import
Search this list...
ACCOUNT NAME
ACCOUNT OWNER ALIAS
1 Curtis Banks Admin
2 Granite Art Supplies Admin
3 John Watson Admin
4 Cassandra Franklin Admin

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.

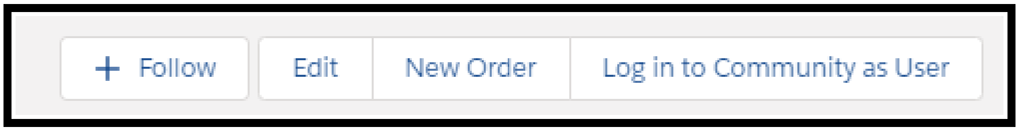
This section will provide an overview of the following for a **Person** Account:

- 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:



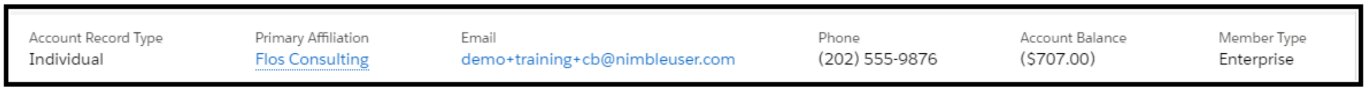
- **+ Follow** - Enables users to see Streams and Feeds the Person is following.
- **Edit** - Opens the record in Edit mode for users to change/add values.
- **New Order** - Creates a new Order for the Person Account.
- **Log in to Community as User** - Enables the Nimble AMS user to act as the selected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

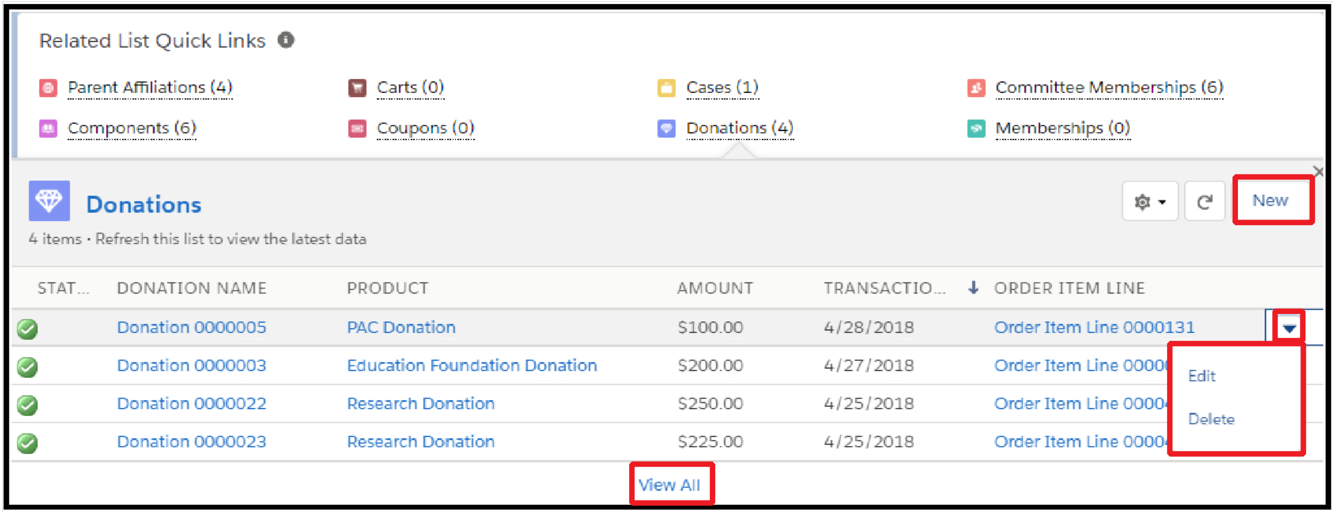


Account Record Type	Primary Affiliation	Email	Phone	Account Balance	Member Type
Individual	Flos Consulting	demo+training+cb@nimbleuser.com	(202) 555-9876	($707.00)	Enterprise

- 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.


Related List Quick Links
Parent Affiliations (4)
Carts (0)
Cases (1)
Committee Memberships (6)
Components (6)
Coupons (0)
Donations (4)
Memberships (0)
Donations
4 items • Refresh this list to view the latest data
New
Edit
Delete
View All

STAT...	DONATION NAME	PRODUCT	AMOUNT	TRANSACTIO...	ORDER ITEM LINE
✓	Donation 0000005	PAC Donation	$100.00	4/28/2018	Order Item Line 0000131
✓	Donation 0000003	Education Foundation Donation	$200.00	4/27/2018	Order Item Line 0000
✓	Donation 0000022	Research Donation	$250.00	4/25/2018	Order Item Line 0000
✓	Donation 0000023	Research Donation	$225.00	4/25/2018	Order Item Line 0000

With Related Lists, Users can:

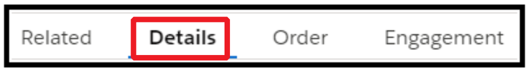
- Hover over RLQL to see up to 10 related records quickly
- Can Create a **New** record from the list (with permissions)
- Click on a linked record to examine an individual item closer
- Click on **View All** at bottom to see the full list of related records

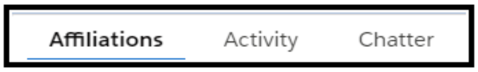
Some of the more significant RLQLs for persons are:

- **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.



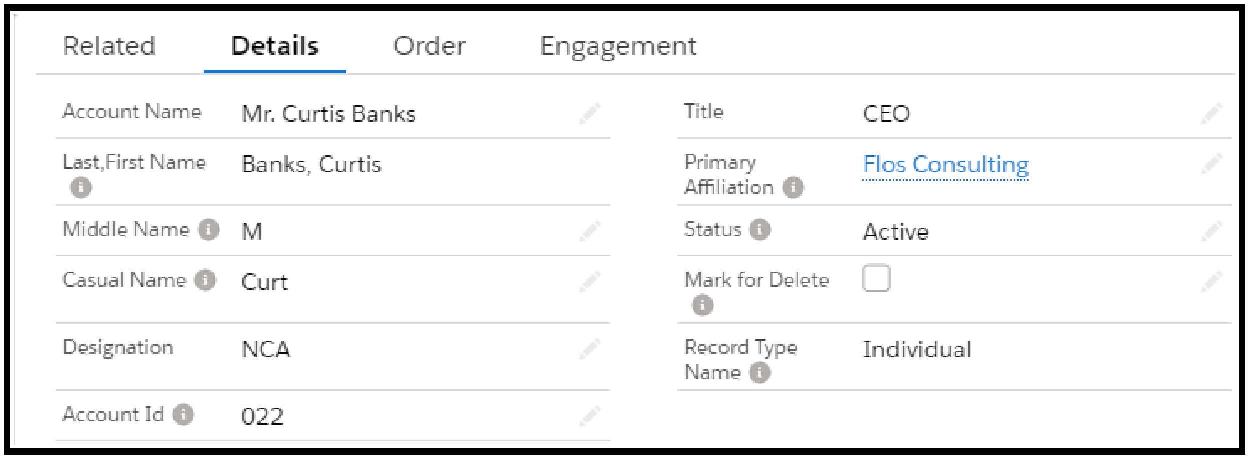


Details TAB

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.

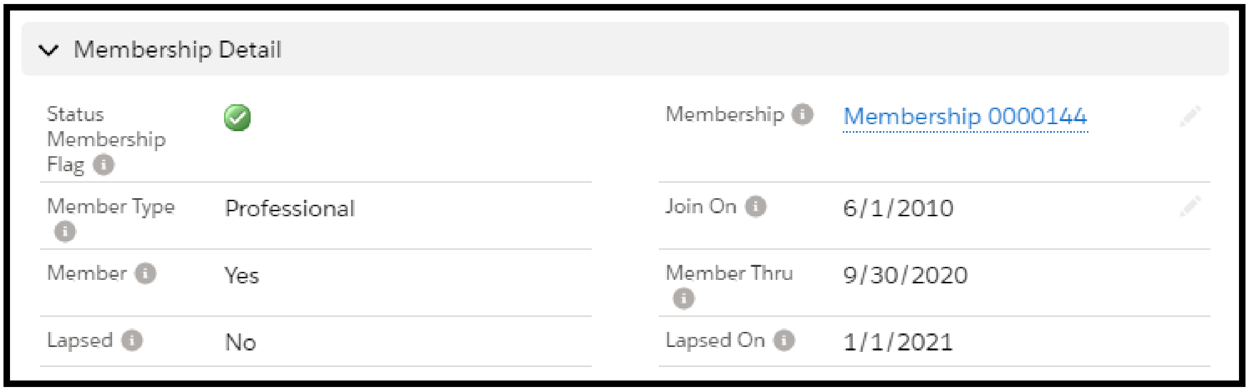
Name and Professional Information



Account Name	Mr. Curtis Banks	Title	CEO
Last,First Name	Banks, Curtis	Primary Affiliation	Flos Consulting
Middle Name	M	Status	Active
Casual Name	Curt	Mark for Delete	☐
Designation	NCA	Record Type Name	Individual
Account Id	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

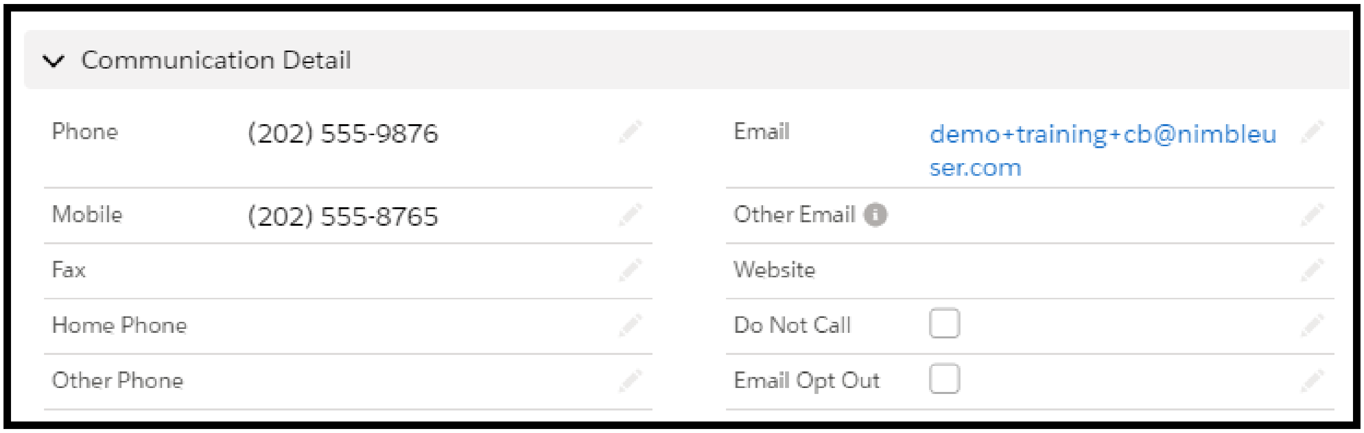
Status Membership Flag	✓	Membership	Membership 0000144
Member Type	Professional	Join On	6/1/2010
Member	Yes	Member Thru	9/30/2020
Lapsed	No	Lapsed On	1/1/2021

- **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

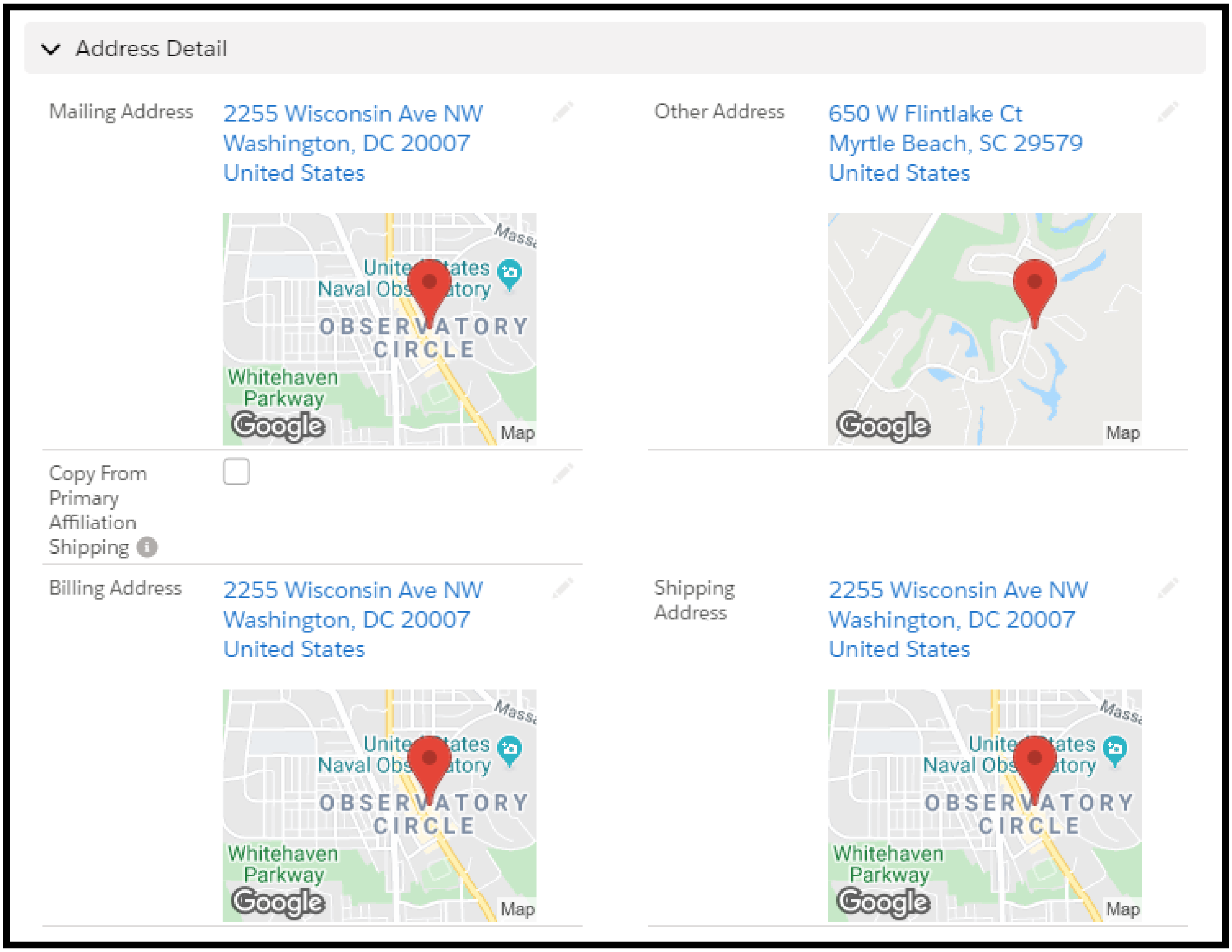
Phone	(202) 555-9876	Email	demo+training+cb@nimbleuser.com
Mobile	(202) 555-8765	Other Email	
Fax		Website	
Home Phone		Do Not Call	☐
Other Phone		Email Opt Out	☐

- **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



Address Detail

Mailing Address: 2255 Wisconsin Ave NW
Washington, DC 20007
United States

Other Address: 650 W Flintlake Ct
Myrtle Beach, SC 29579
United States

Copy From Primary Affiliation Shipping: ☐

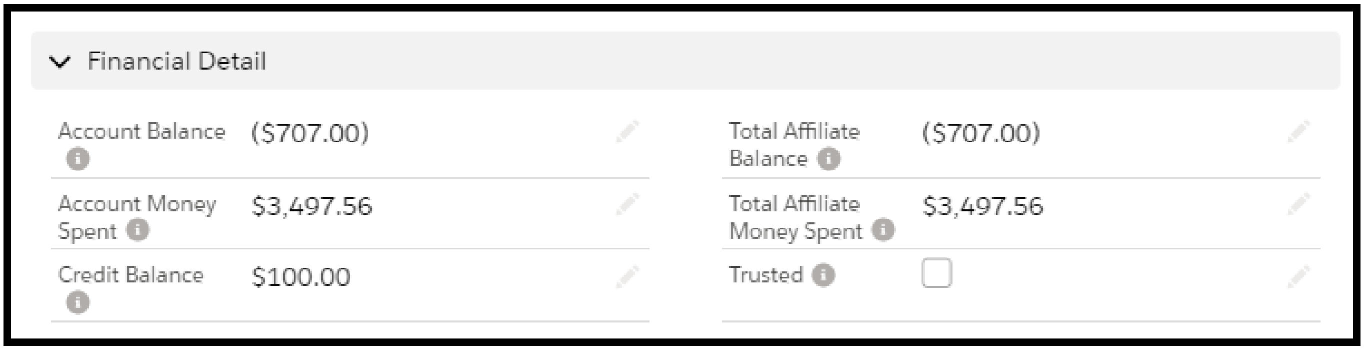
Billing Address: 2255 Wisconsin Ave NW
Washington, DC 20007
United States

Shipping Address: 2255 Wisconsin Ave NW
Washington, DC 20007
United States

- **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

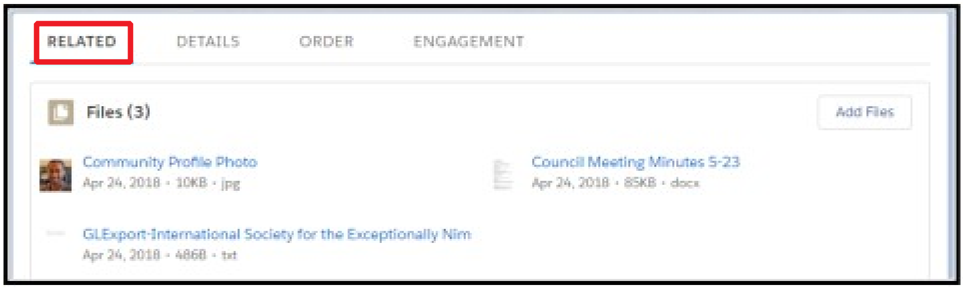


Financial Detail

Account Balance	($707.00)	Total Affiliate Balance	($707.00)
Account Money Spent	$3,497.56	Total Affiliate Money Spent	$3,497.56
Credit Balance	$100.00	Trusted	☐

- **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.



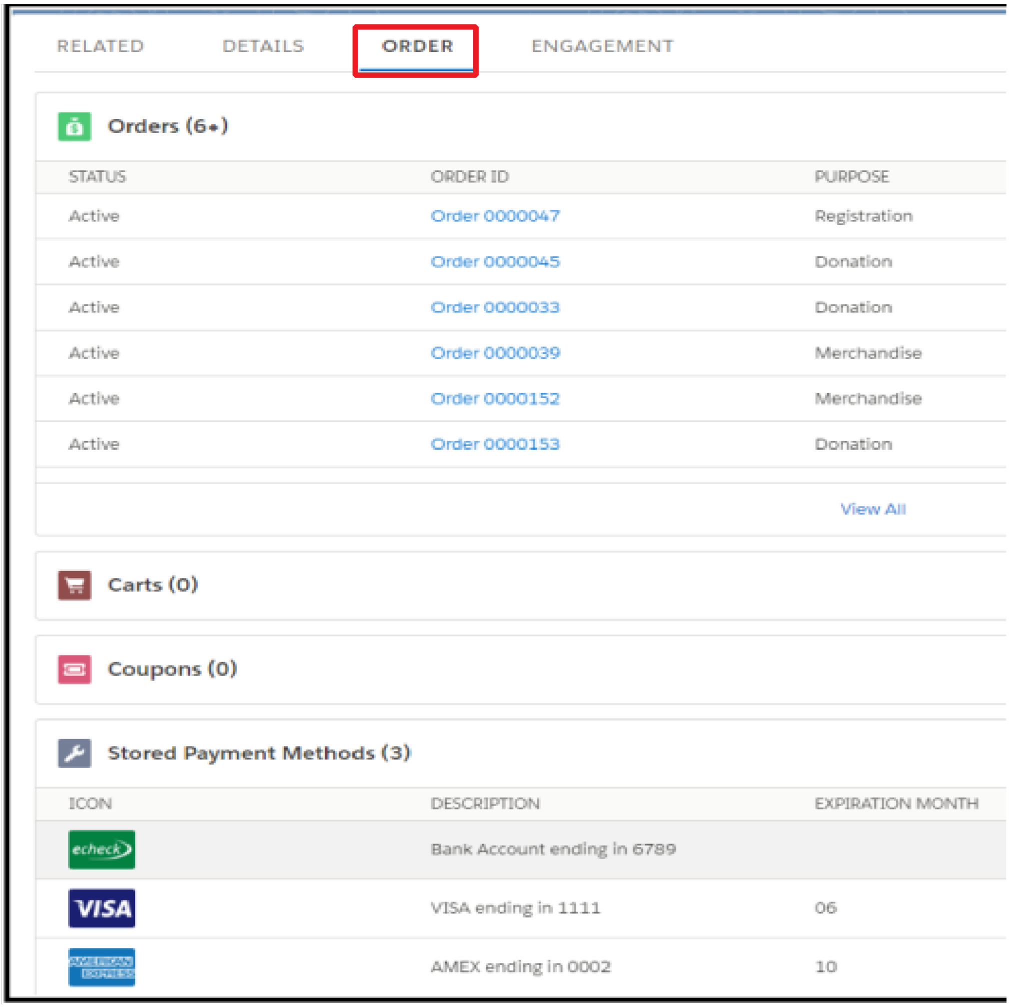
Community Profile Photo
Apr 24, 2018 • 10KB • jpg

Council Meeting Minutes 5-23
Apr 24, 2018 • 85KB • docx

GLExport-International Society for the Exceptionally Nim
Apr 24, 2018 • 486B • txt

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**.



Orders (6+)

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

View All

Carts (0)

Coupons (0)

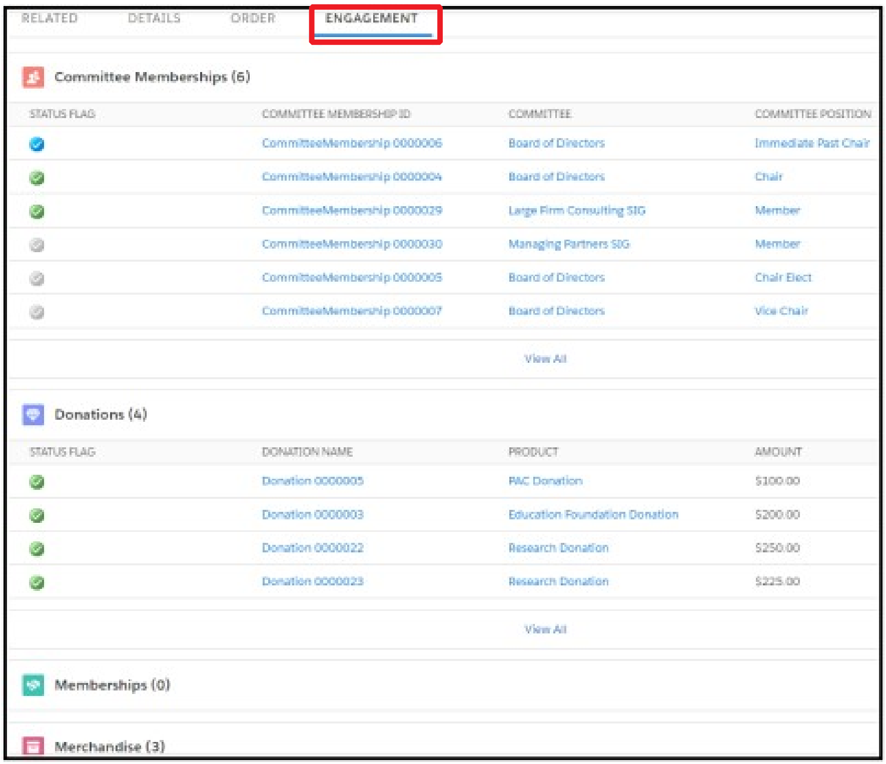
Stored Payment Methods (3)

ICON	DESCRIPTION	EXPIRATION MONTH
echeck	Bank Account ending in 6789	
VISA	VISA ending in 1111	06
AMERICAN EXPRESS	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.



Committee Memberships (6)

STATUS FLAG	COMMITTEE MEMBERSHIP ID	COMMITTEE	COMMITTEE POSITION
✓	CommitteeMembership 0000006	Board of Directors	Immediate Past Chair
✓	CommitteeMembership 0000004	Board of Directors	Chair
✓	CommitteeMembership 0000029	Large Firm Consulting SIG	Member
✓	CommitteeMembership 0000030	Managing Partners SIG	Member
✓	CommitteeMembership 0000005	Board of Directors	Chair Elect
✓	CommitteeMembership 0000007	Board of Directors	Vice Chair

View All

Donations (4)

STATUS FLAG	DONATION NAME	PRODUCT	AMOUNT
✓	Donation 0000005	PAC Donation	$100.00
✓	Donation 0000003	Education Foundation Donation	$200.00
✓	Donation 0000022	Research Donation	$250.00
✓	Donation 0000023	Research Donation	$225.00

View All

Memberships (0)

Merchandise (3)

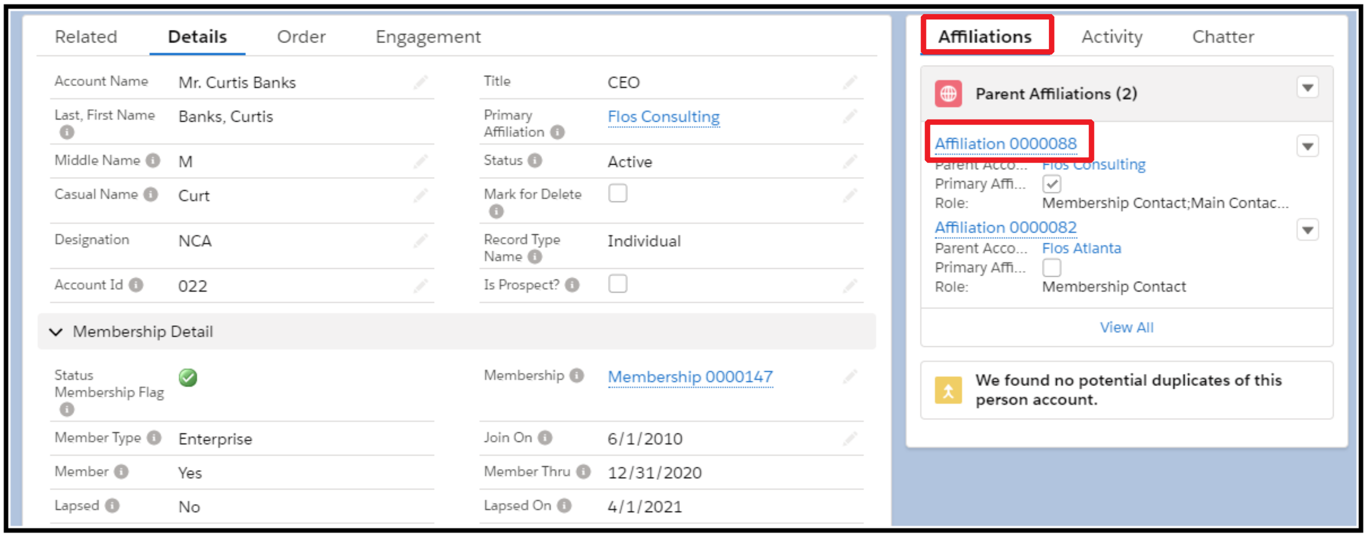
Engagement provides a method by which a user can quickly review the latest records created for the major Items in Nimble AMS for this Account.

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 0000088.**



Account Name	Mr. Curtis Banks	Title	CEO
Last, First Name	Banks, Curtis	Primary Affiliation	Flos Consulting
Middle Name	M	Status	Active
Casual Name	Curt	Mark for Delete	☐
Designation	NCA	Record Type Name	Individual
Account Id	022	Is Prospect?	☐

Membership Detail

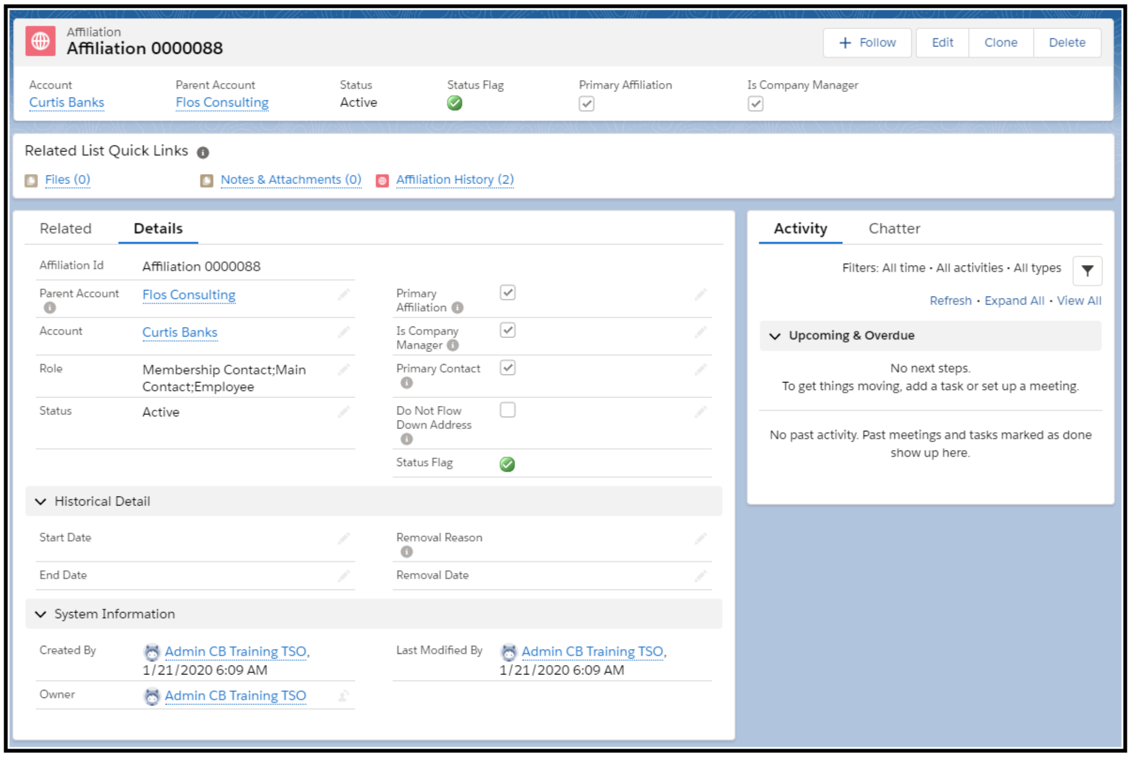
Status Membership Flag	✓	Membership	Membership 0000147
Member Type	Enterprise	Join On	6/1/2010
Member	Yes	Member Thru	12/31/2020
Lapsed	No	Lapsed On	4/1/2021

Parent Affiliations (2)

Affiliation 0000088
Parent Acco... Flos Consulting
Primary Affi... ☑
Role: Membership Contact;Main Contac...

Affiliation 0000082
Parent Acco... Flos Atlanta
Primary Affi... ☐
Role: Membership Contact

We found no potential duplicates of this person account.



Affiliation
Affiliation 0000088

Account	Parent Account	Status	Status Flag	Primary Affiliation	Is Company Manager
Curtis Banks	Flos Consulting	Active	✓	☑	☑

Related List Quick Links
Files (0) Notes & Attachments (0) Affiliation History (2)

Affiliation Id	Affiliation 0000088		
Parent Account	Flos Consulting	Primary Affiliation	☑
Account	Curtis Banks	Is Company Manager	☑
Role	Membership Contact;Main Contact;Employee	Primary Contact	☑
Status	Active	Do Not Flow Down Address	☐
		Status Flag	✓

Historical Detail

Start Date		Removal Reason	
End Date		Removal Date	

System Information

Created By	Admin CB Training TSO, 1/21/2020 6:09 AM	Last Modified By	Admin CB Training TSO, 1/21/2020 6:09 AM
Owner	Admin CB Training TSO		

Filters: All time • All activities • All types

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

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

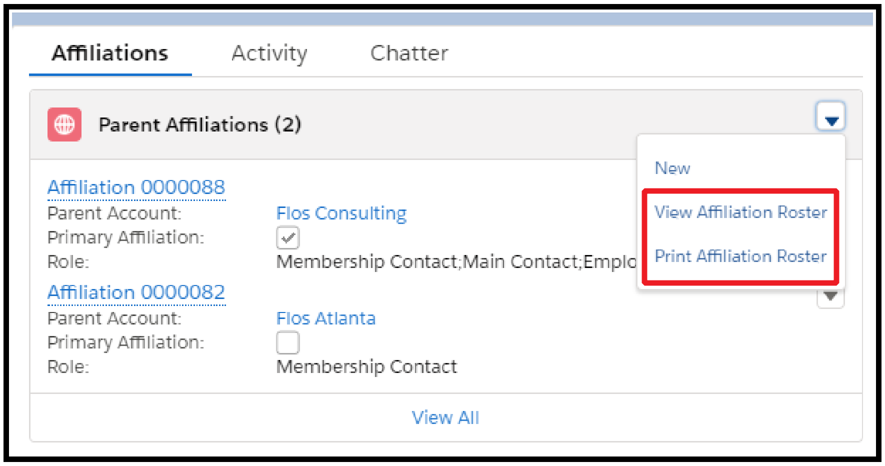
- **Start Date** – Date Account began Affiliation.
- **End Date** - Date Account ended Affiliation; if enabled, could automate record Status being marked as Inactive.
- **Removal Reason** – Dropdown providing reasons for Ending Affiliation relationship.
- **Removal Date** – Date Affiliation was permanently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

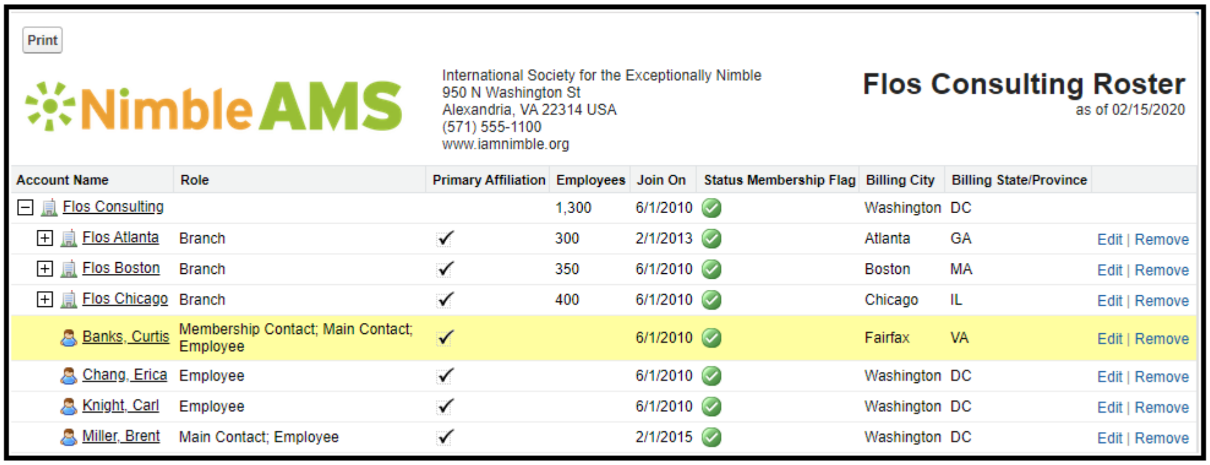
1. Under **Affiliations** (right hand tab), click on the **Parent Affiliations (2)** dropdown.
2. Select **View Affiliation Roster**.



Affiliation 0000088
Parent Account: Flos Consulting
Primary Affiliation: ☑
Role: Membership Contact;Main Contact;Emplo

Affiliation 0000082
Parent Account: Flos Atlanta
Primary Affiliation: ☐
Role: Membership Contact

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



International Society for the Exceptionally Nimble
950 N Washington St
Alexandria, VA 22314 USA
(571) 555-1100
www.iamnimble.org

Flos Consulting Roster
as of 02/15/2020

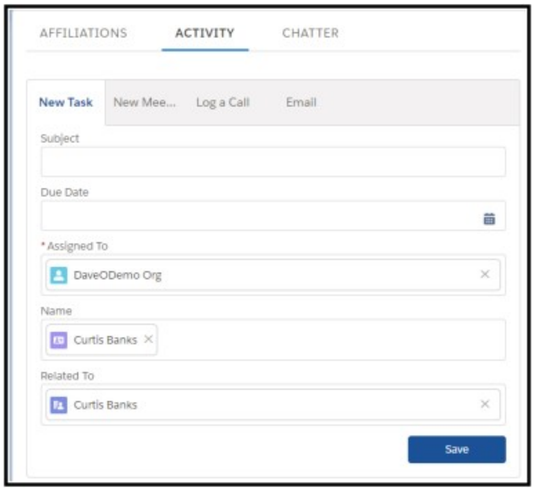
Account Name	Role	Primary Affiliation	Employees	Join On	Status Membership Flag	Billing City	Billing State/Province	
⊟ Flos Consulting			1,300	6/1/2010	✓	Washington	DC	
⊞ Flos Atlanta	Branch	✓	300	2/1/2013	✓	Atlanta	GA	Edit | Remove
⊞ Flos Boston	Branch	✓	350	6/1/2010	✓	Boston	MA	Edit | Remove
⊞ Flos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

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


AFFILIATIONS
ACTIVITY
CHATTER
New Task
New Mee...
Log a Call
Email
Save

Subject

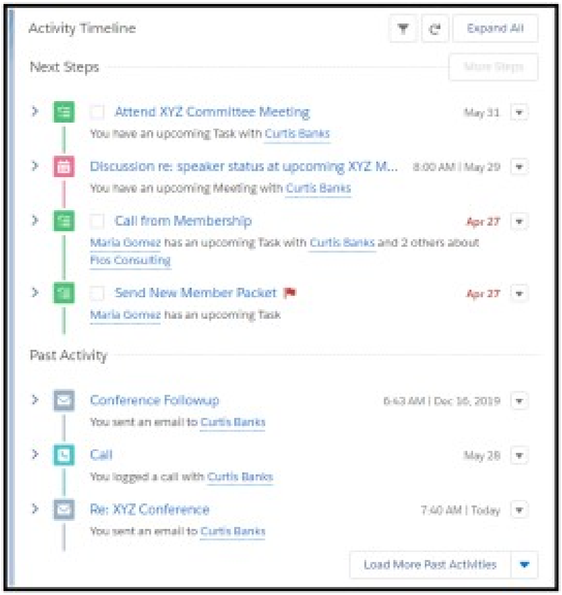
Due Date

*Assigned To: DaveODemo Org

Name: Curtis Banks

Related To: Curtis Banks

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.


Activity Timeline
Expand All
Next Steps
More Steps
Past Activity
Load More Past Activities

Attend XYZ Committee Meeting — May 31
You have an upcoming Task with Curtis Banks

Discussion re: speaker status at upcoming XYZ M... — 8:00 AM | May 29
You have an upcoming Meeting with Curtis Banks

Call from Membership — Apr 27
Maria Gomez has an upcoming Task with Curtis Banks and 2 others about Flos Consulting

Send New Member Packet — Apr 27
Maria Gomez has an upcoming Task

Conference Followup — 6:43 AM | Dec 16, 2019
You sent an email to Curtis Banks

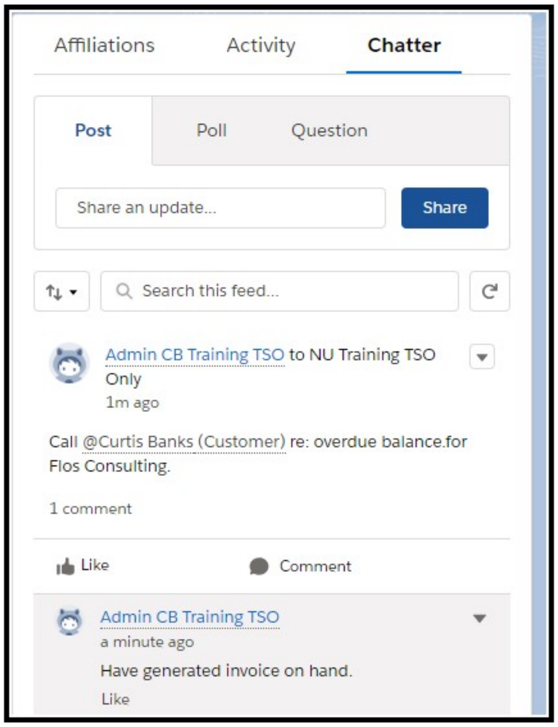
Call — May 28
You logged a call with Curtis Banks

Re: XYZ Conference — 7:40 AM | Today
You sent an email to Curtis Banks

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.


Affiliations
Activity
Chatter
Post
Poll
Question
Share an update...
Share
Search this feed...
Like
Comment
Like

Admin CB Training TSO to NU Training TSO Only
1m ago

Call @Curtis Banks (Customer) re: overdue balance.for Flos Consulting.

1 comment

Admin CB Training TSO
a minute ago
Have generated invoice on hand.

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.

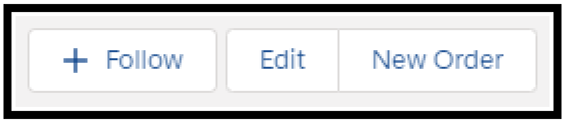
This section will provide an overview of the following for an Account:

- 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:



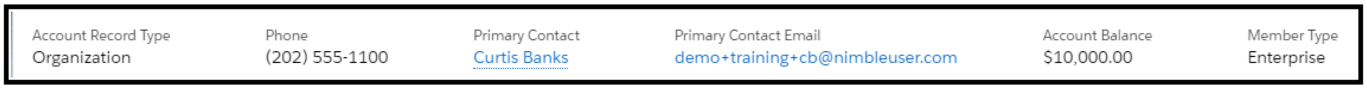
- **+ Follow** - Enables users to see Streams and Feeds the Person is following.
- **Edit** - Opens the record in Edit mode for users to change/add values.
- **New Order** - Creates a new Order for the Person Account.

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 **Flos 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.

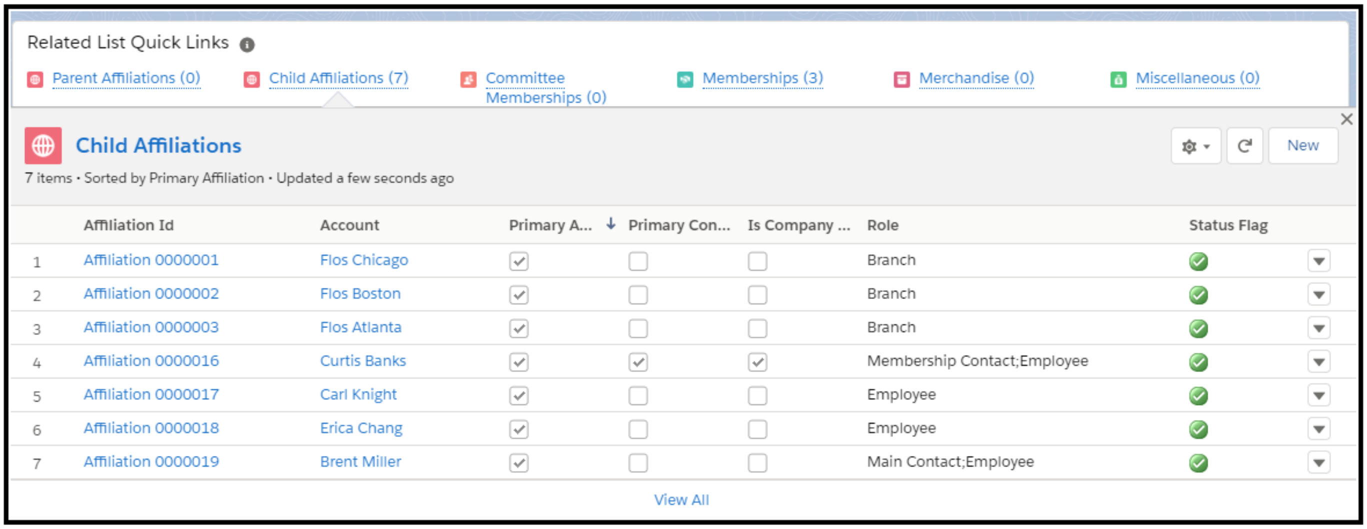


Account Record Type	Phone	Primary Contact	Primary Contact Email	Account Balance	Member Type
Organization	(202) 555-1100	Curtis Banks	demo+training+cb@nimbleuser.com	$10,000.00	Enterprise

- 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.



Related List Quick Links

Parent Affiliations (0) · Child Affiliations (7) · Committee Memberships (0) · Memberships (3) · Merchandise (0) · Miscellaneous (0)

Child Affiliations

7 items • Sorted by Primary Affiliation • Updated a few seconds ago

	Affiliation Id	Account	Primary A...	Primary Con...	Is Company ...	Role	Status Flag
1	Affiliation 0000001	Flos Chicago	☑	☐	☐	Branch	✓
2	Affiliation 0000002	Flos Boston	☑	☐	☐	Branch	✓
3	Affiliation 0000003	Flos Atlanta	☑	☐	☐	Branch	✓
4	Affiliation 0000016	Curtis Banks	☑	☑	☑	Membership Contact;Employee	✓
5	Affiliation 0000017	Carl Knight	☑	☐	☐	Employee	✓
6	Affiliation 0000018	Erica Chang	☑	☐	☐	Employee	✓
7	Affiliation 0000019	Brent Miller	☑	☐	☐	Main Contact;Employee	✓

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.

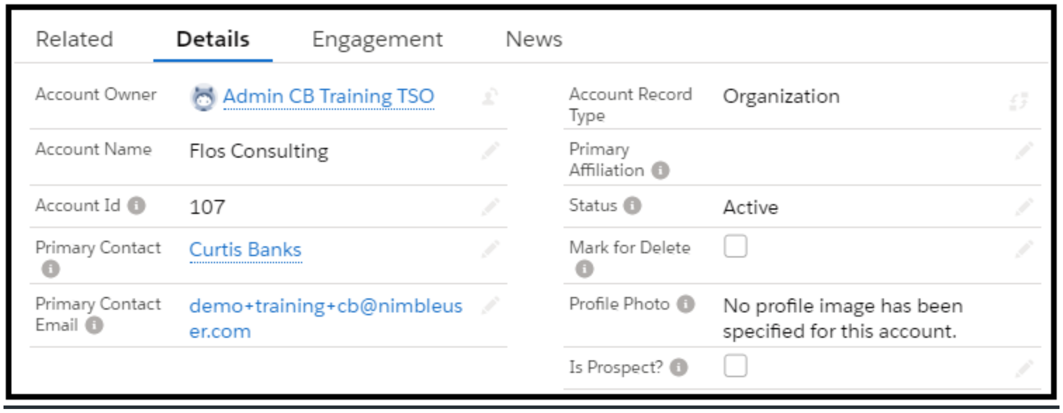
Related
Details
Engagement
News

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.

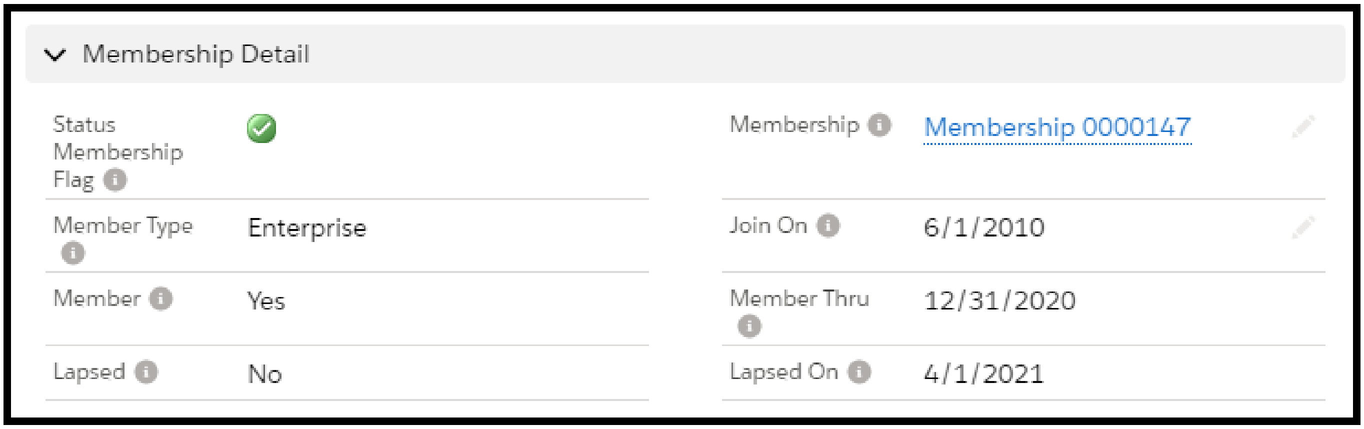
Name and Primary Information



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	☐
Primary Contact Email	demo+training+cb@nimbleuser.com	Profile Photo	No profile image has been specified for this account.
		Is Prospect?	☐

- **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

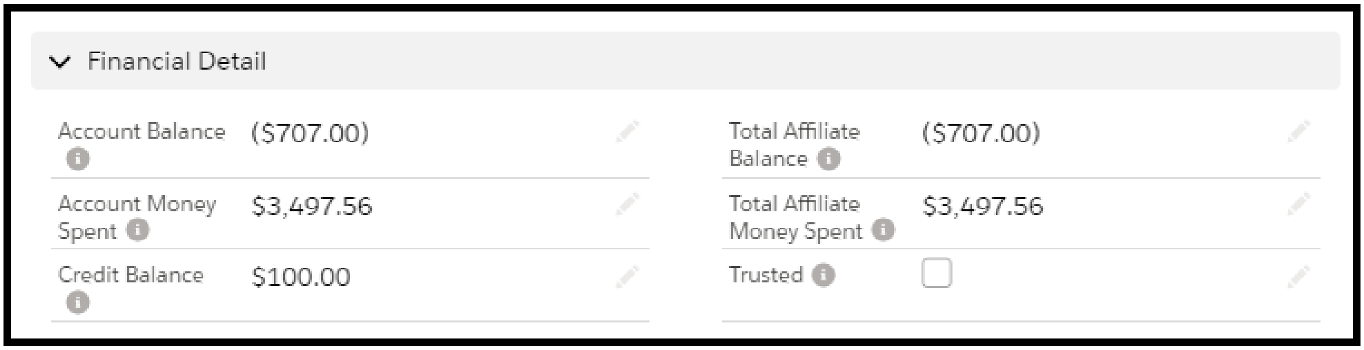


Membership Detail

Status Membership Flag	✓	Membership	Membership 0000147
Member Type	Enterprise	Join On	6/1/2010
Member	Yes	Member Thru	12/31/2020
Lapsed	No	Lapsed On	4/1/2021

- **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 Account’s latest Membership record.
- **Lapsed On** - Date generates off latest membership end date plus grace period.

Financial Detail

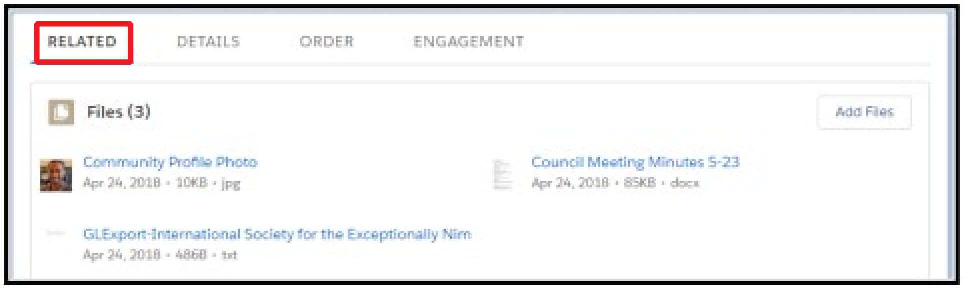


Financial Detail

Account Balance	($707.00)	Total Affiliate Balance	($707.00)
Account Money Spent	$3,497.56	Total Affiliate Money Spent	$3,497.56
Credit Balance	$100.00	Trusted	☐

- **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 will be invoiced.

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



Files (3)

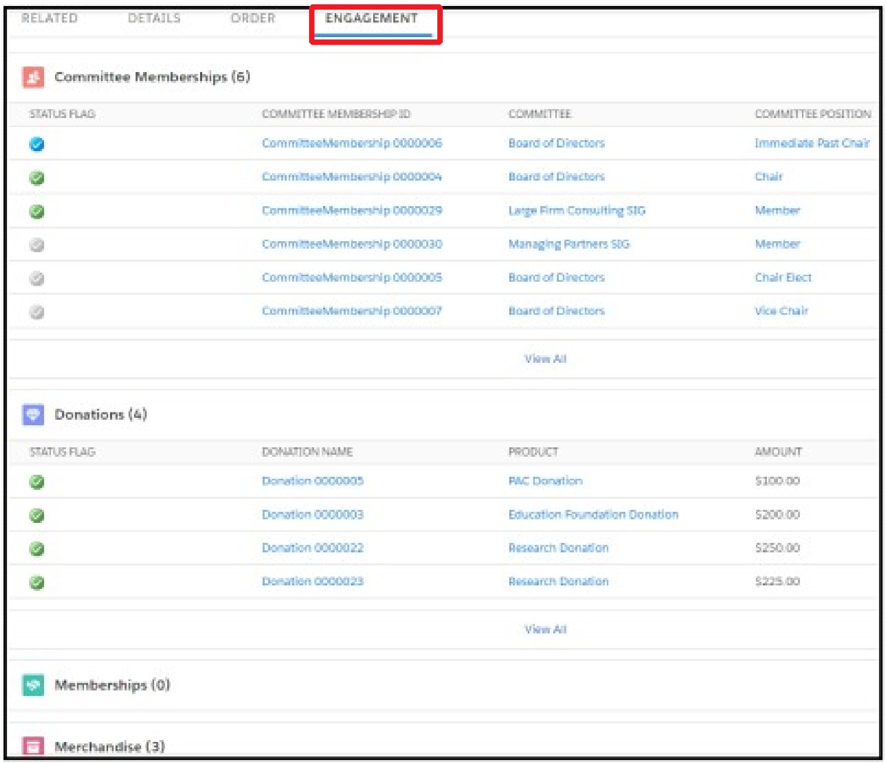
Community Profile Photo
Apr 24, 2018 • 10KB • jpg

Council Meeting Minutes 5-23
Apr 24, 2018 • 85KB • docx

GLExport-International Society for the Exceptionally Nim
Apr 24, 2018 • 486B • txt

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.

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.



Committee Memberships (6)

STATUS FLAG	COMMITTEE MEMBERSHIP ID	COMMITTEE	COMMITTEE POSITION
✓	CommitteeMembership 0000006	Board of Directors	Immediate Past Chair
✓	CommitteeMembership 0000004	Board of Directors	Chair
✓	CommitteeMembership 0000029	Large Firm Consulting SIG	Member
✓	CommitteeMembership 0000030	Managing Partners SIG	Member
✓	CommitteeMembership 0000005	Board of Directors	Chair Elect
✓	CommitteeMembership 0000007	Board of Directors	Vice Chair

Donations (4)

STATUS FLAG	DONATION NAME	PRODUCT	AMOUNT
✓	Donation 0000005	PAC Donation	$100.00
✓	Donation 0000003	Education Foundation Donation	$200.00
✓	Donation 0000022	Research Donation	$250.00
✓	Donation 0000023	Research Donation	$225.00

Memberships (0)

Merchandise (3)

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.

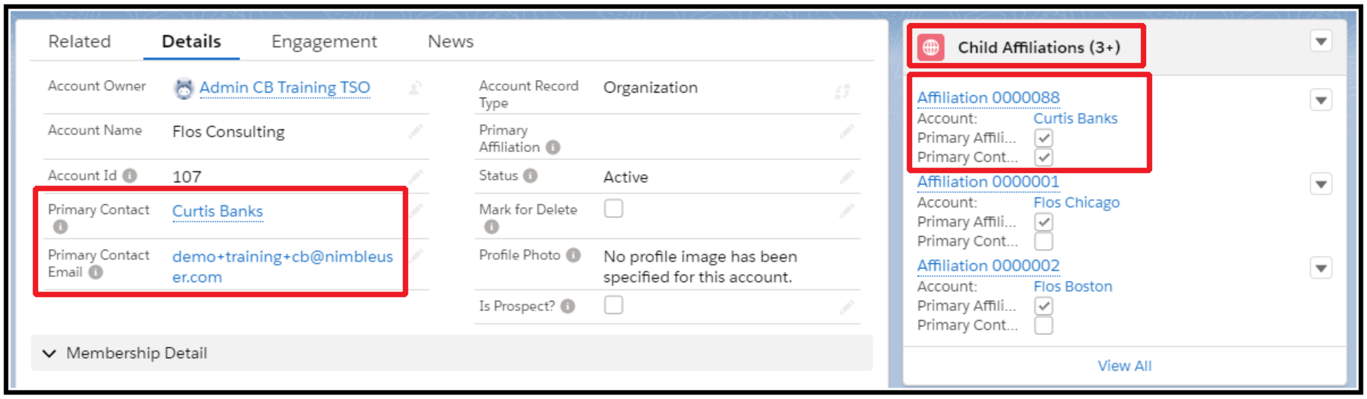
News: Link to Twitter Feed.

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.**


Related
Details
Engagement
News
Membership Detail
View All

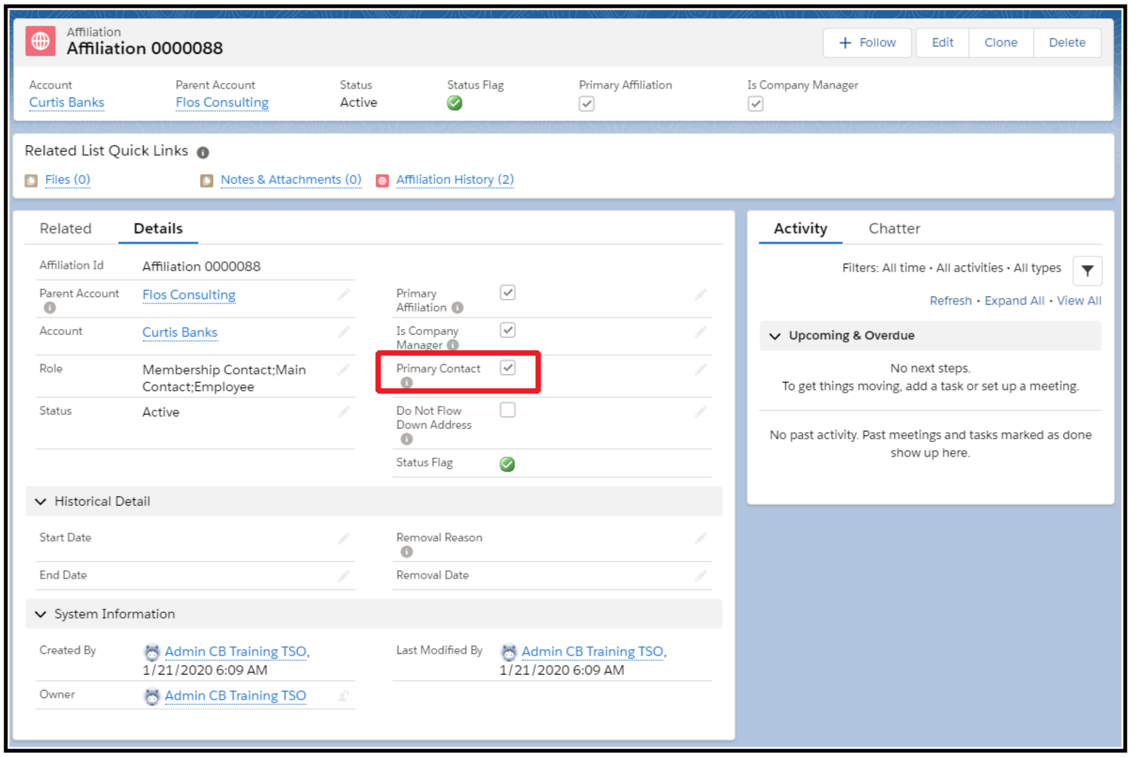
Account Owner: Admin CB Training TSO
Account Record Type: Organization
Account Name: Flos Consulting
Primary Affiliation:
Account Id: 107
Status: Active
Primary Contact: Curtis Banks
Mark for Delete: ☐
Primary Contact Email: demo+training+cb@nimbleuser.com
Profile Photo: No profile image has been specified for this account.
Is Prospect?: ☐

Child Affiliations (3+)

Affiliation 0000088
Account: Curtis Banks
Primary Affili... ☑
Primary Cont... ☑

Affiliation 0000001
Account: Flos Chicago
Primary Affili... ☑
Primary Cont... ☐

Affiliation 0000002
Account: Flos Boston
Primary Affili... ☑
Primary Cont... ☐


+ Follow
Edit
Clone
Delete
Related
Details
Activity
Chatter
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue
Historical Detail
System Information

Affiliation
Affiliation 0000088

Account: Curtis Banks
Parent Account: Flos Consulting
Status: Active
Status Flag: ✓
Primary Affiliation: ☑
Is Company Manager: ☑

Related List Quick Links
Files (0)
Notes & Attachments (0)
Affiliation History (2)

Affiliation Id: Affiliation 0000088
Parent Account: Flos Consulting
Primary Affiliation: ☑
Account: Curtis Banks
Is Company Manager: ☑
Role: Membership Contact;Main Contact;Employee
Primary Contact: ☑
Status: Active
Do Not Flow Down Address: ☐
Status Flag: ✓

Start Date:
Removal Reason:
End Date:
Removal Date:

Created By: Admin CB Training TSO, 1/21/2020 6:09 AM
Last Modified By: Admin CB Training TSO, 1/21/2020 6:09 AM
Owner: Admin CB Training TSO

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

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 as needed: Membership Contact, Exhibits Contact, Finance Contact etc.

Historical Detail

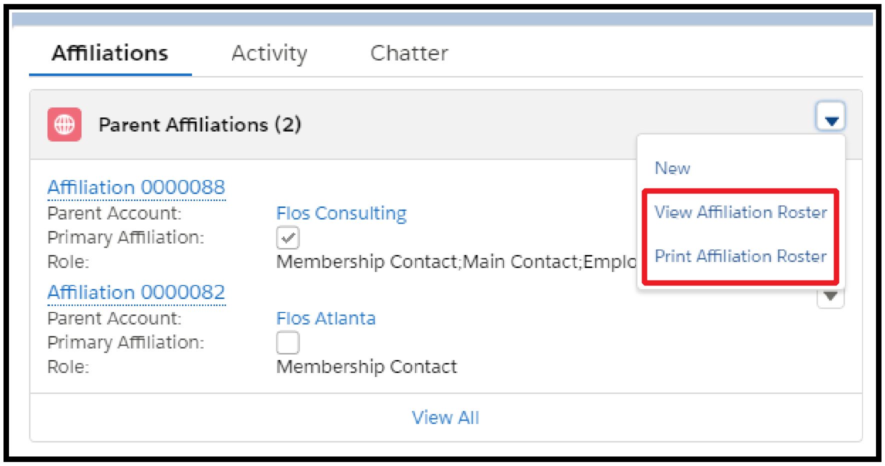
- **Start Date** – Date Account began Affiliation.
- **End Date** - Date Account ended Affiliation; if enabled, could automate record Status being marked as Inactive.
- **Removal Reason** – Dropdown providing reasons for Ending Affiliation relationship.
- **Removal Date** – Date Affiliation was permanently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

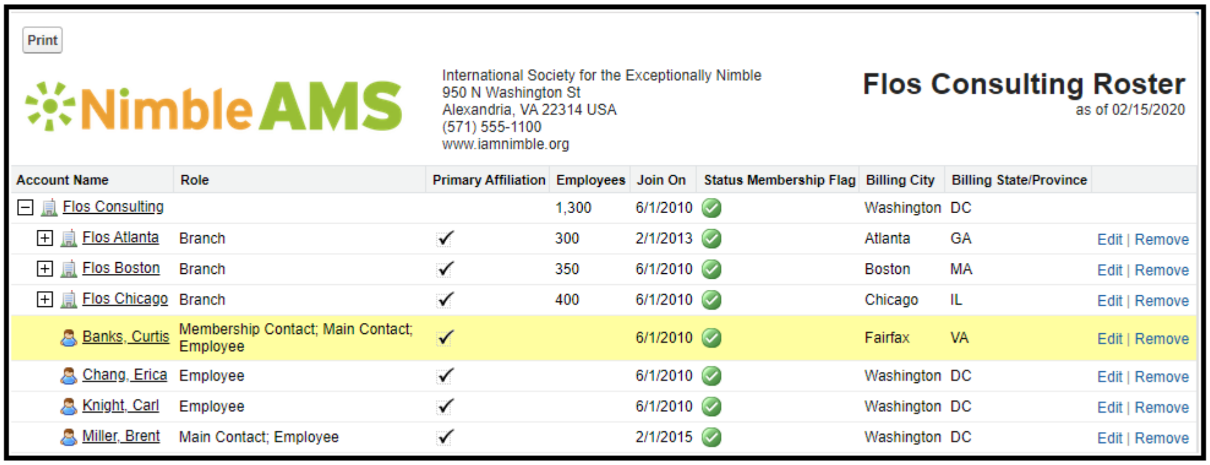
1. Under **Affiliations** (right hand tab), click on the **Parent Affiliations (2)** dropdown.
2. Select **View Affiliation Roster**.



Affiliation 0000088
Parent Account: Flos Consulting
Primary Affiliation: ☑
Role: Membership Contact;Main Contact;Emplo

Affiliation 0000082
Parent Account: Flos Atlanta
Primary Affiliation: ☐
Role: Membership Contact

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



International Society for the Exceptionally Nimble
950 N Washington St
Alexandria, VA 22314 USA
(571) 555-1100
www.iamnimble.org

Flos Consulting Roster
as of 02/15/2020

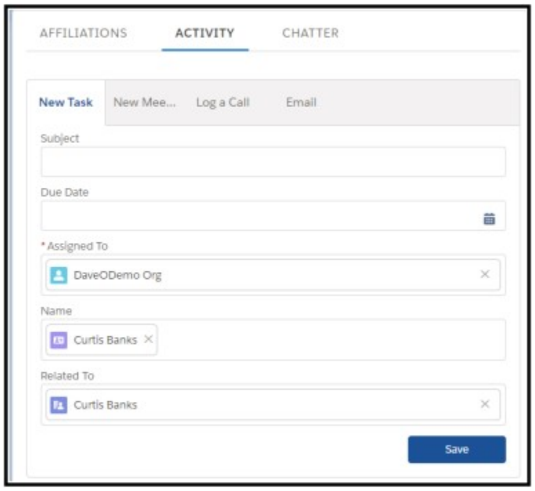
Account Name	Role	Primary Affiliation	Employees	Join On	Status Membership Flag	Billing City	Billing State/Province	
⊟ Flos Consulting			1,300	6/1/2010	✓	Washington	DC	
⊞ Flos Atlanta	Branch	✓	300	2/1/2013	✓	Atlanta	GA	Edit | Remove
⊞ Flos Boston	Branch	✓	350	6/1/2010	✓	Boston	MA	Edit | Remove
⊞ Flos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

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


AFFILIATIONS
ACTIVITY
CHATTER
New Task
New Mee...
Log a Call
Email
Save

Subject

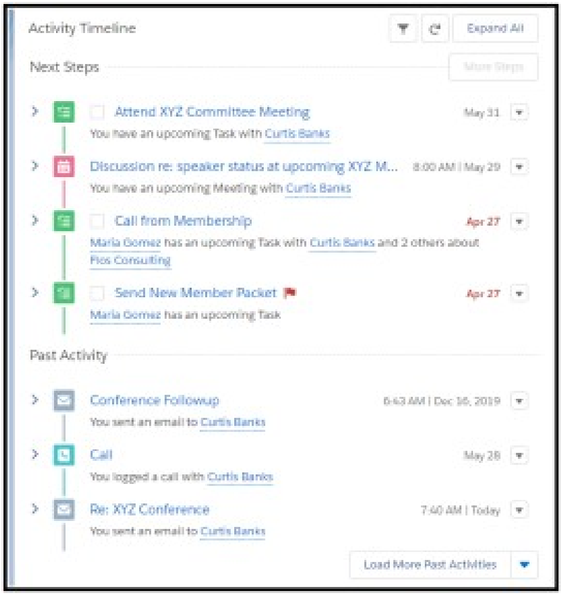
Due Date

*Assigned To
DaveODemo Org

Name
Curtis Banks

Related To
Curtis Banks

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.


Activity Timeline
Expand All
More Steps
Load More Past Activities

Next Steps

Attend XYZ Committee Meeting — May 31
You have an upcoming Task with Curtis Banks

Discussion re: speaker status at upcoming XYZ M... — 8:00 AM | May 29
You have an upcoming Meeting with Curtis Banks

Call from Membership — Apr 27
Maria Gomez has an upcoming Task with Curtis Banks and 2 others about Pios Consulting

Send New Member Packet — Apr 27
Maria Gomez has an upcoming Task

Past Activity

Conference Followup — 6:43 AM | Dec 16, 2019
You sent an email to Curtis Banks

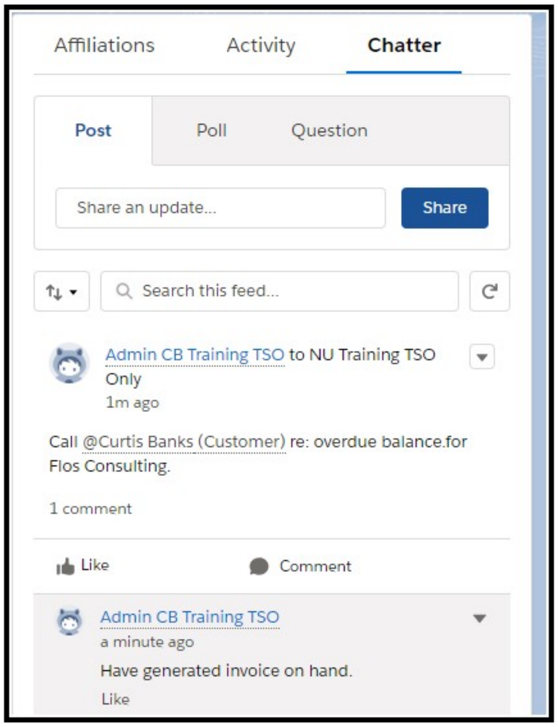
Call — May 28
You logged a call with Curtis Banks

Re: XYZ Conference — 7:40 AM | Today
You sent an email to Curtis Banks

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.


Affiliations
Activity
Chatter
Post
Poll
Question
Share an update...
Share
Search this feed...
Like
Comment
Like

Admin CB Training TSO to NU Training TSO Only
1m ago

Call @Curtis Banks (Customer) re: overdue balance.for Flos Consulting.

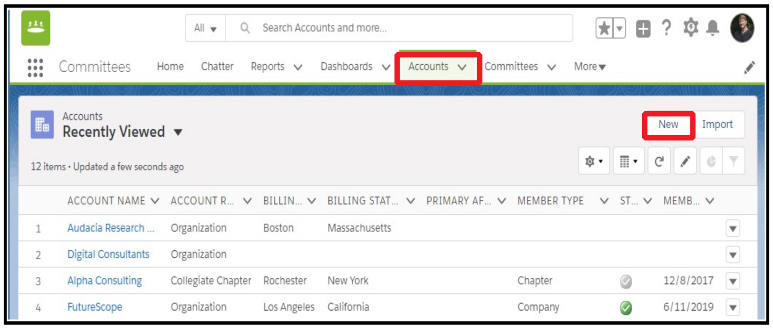
1 comment

Admin CB Training TSO
a minute ago
Have generated invoice on hand.

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.

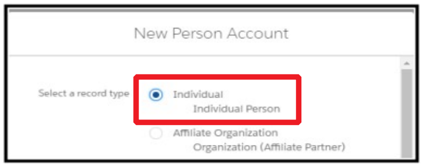
1. Click on the **Accounts** tab from the **Navigation Bar**.
2. Click on the **New** button.


All
Search Accounts and more...
Committees
Home
Chatter
Reports
Dashboards
Accounts
Committees
More
Accounts
Recently Viewed
New
Import

12 items • Updated a few seconds ago

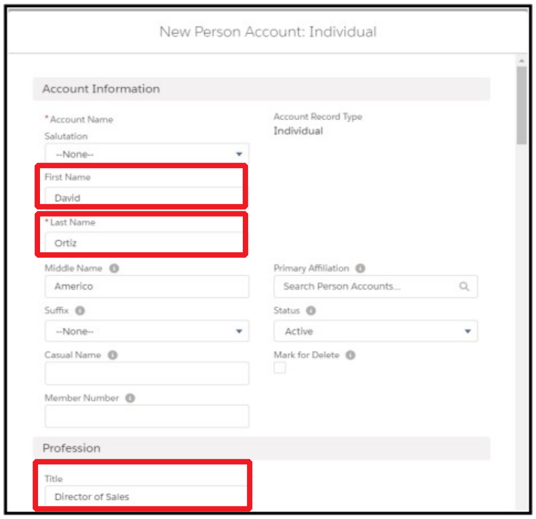
	ACCOUNT NAME	ACCOUNT R...	BILLIN...	BILLING STAT...	PRIMARY AF...	MEMBER TYPE	ST...	MEMB...
1	Audacia Research ...	Organization	Boston	Massachusetts				
2	Digital Consultants	Organization						
3	Alpha Consulting	Collegiate Chapter	Rochester	New York		Chapter	✓	12/8/2017
4	FutureScope	Organization	Los Angeles	California		Company	✓	6/11/2019

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


New Person Account

Select a record type
● Individual
Individual Person
○ Affiliate Organization
Organization (Affiliate Partner)

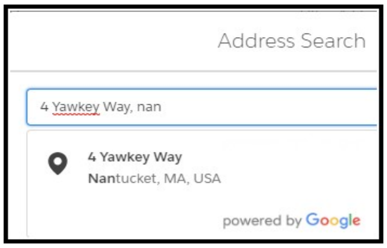
4. Fill out the **First Name** field with a **desired value**.
5. Fill out the **Last Name** field with a **desired value**.
6. In the **Title** field, enter **Director of Sales**.


New Person Account: Individual
Account Information
Profession

*Account Name
Salutation: --None--
First Name: David
*Last Name: Ortiz
Middle Name: Americo
Suffix: --None--
Casual Name:
Member Number:
Account Record Type: Individual
Primary Affiliation: Search Person Accounts...
Status: Active
Mark for Delete: ☐
Title: Director of Sales

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

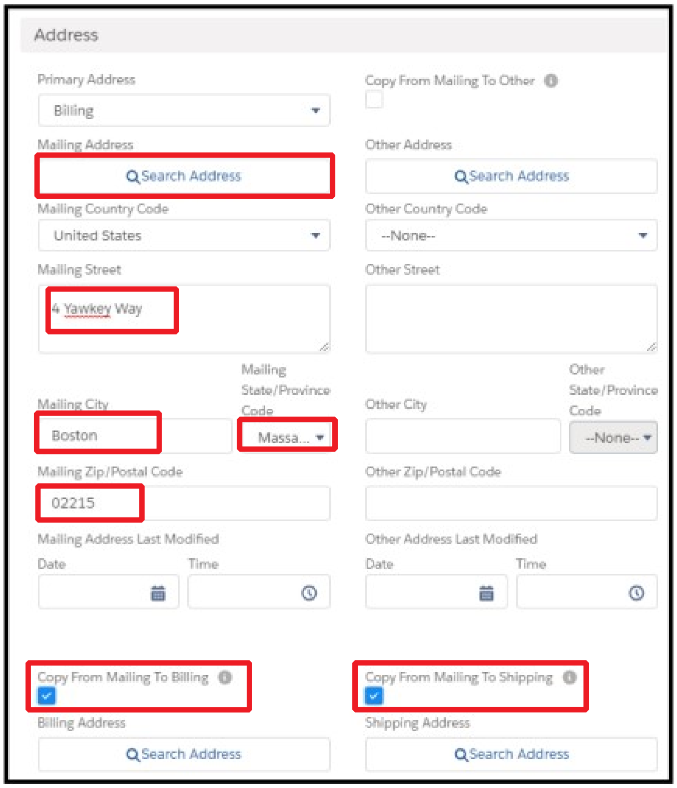
8. Enter a familiar **Number** & **Street** into the **Mailing Address** field that contains the **Google Address Search** dialog box.
9. Once the address comes up identified, select it.
    - The **City**, **State**, and **Zip** should auto complete.


Address Search
powered by Google

4 Yawkey Way, nan

4 Yawkey Way
Nantucket, MA, USA

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


Address
Mailing Address
Search Address
Other Address
Search Address
Other Street
Other City
Other Zip/Postal Code
Mailing Address Last Modified
Date
Time
Other Address Last Modified
Date
Time
Billing Address
Search Address
Shipping Address
Search Address

Primary Address: Billing

Copy From Mailing To Other ☐

Mailing Country Code: United States

Other Country Code: --None--

Mailing Street: 4 Yawkey Way

Mailing City: Boston

Mailing State/Province Code: Massa...

Other State/Province Code: --None--

Mailing Zip/Postal Code: 02215

Copy From Mailing To Billing ☑

Copy From Mailing To Shipping ☑

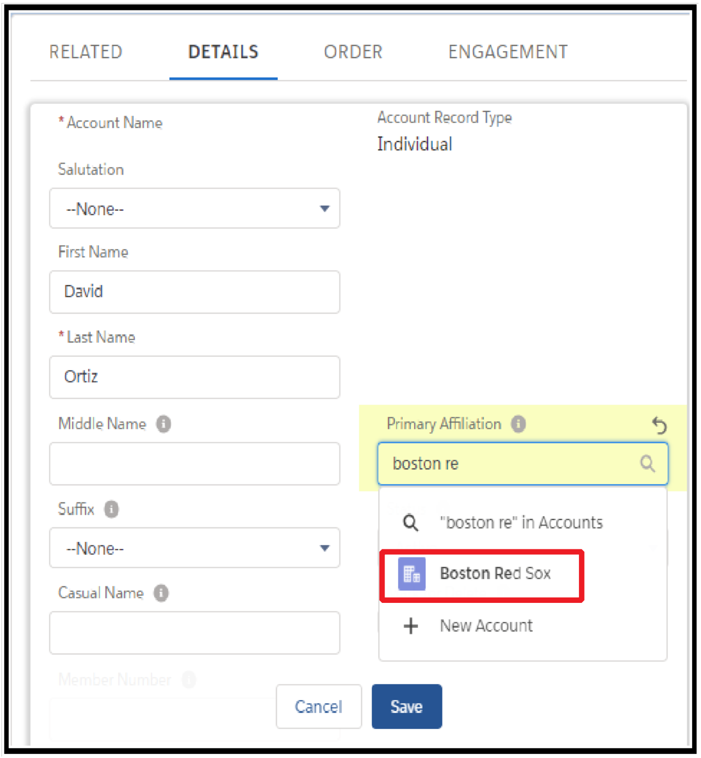
12. Scroll to the bottom of the form and **Save** the record.

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**.



* Account Name

Account Record Type
Individual

Salutation
--None--

First Name
David

* Last Name
Ortiz

Middle Name

Primary Affiliation
boston re

"boston re" in Accounts
Boston Red Sox

Suffix
--None--

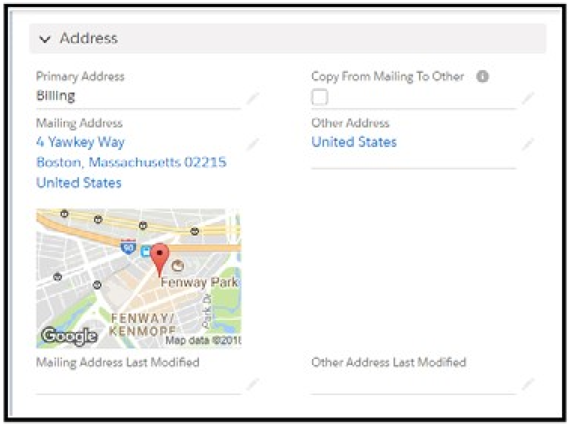
Casual Name

Member Number

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.



Primary Address
Billing

Copy From Mailing To Other
☐

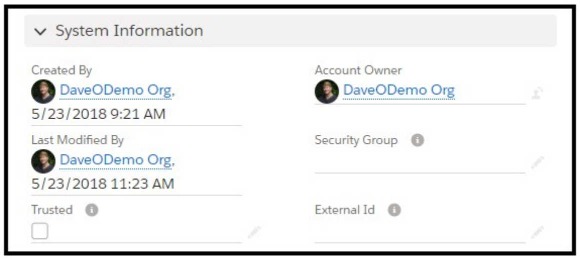
Mailing Address
4 Yawkey Way
Boston, Massachusetts 02215
United States

Other Address
United States

Mailing Address Last Modified

Other Address Last Modified

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**.



Created By
DaveODemo Org, 5/23/2018 9:21 AM

Account Owner
DaveODemo Org

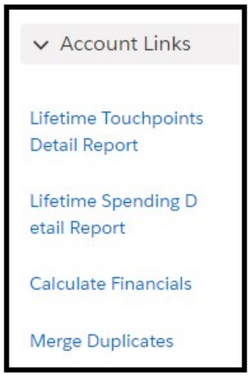
Last Modified By
DaveODemo Org, 5/23/2018 11:23 AM

Security Group

Trusted
☐

External Id

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



Account Links

Lifetime Touchpoints Detail Report

Lifetime Spending D etail Report

Calculate Financials

Merge Duplicates

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

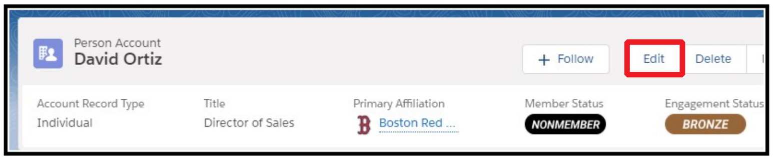
Activity logging and display enables users to conduct the following operations directed at the person and update, edit, and track them under this tab:

- 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.

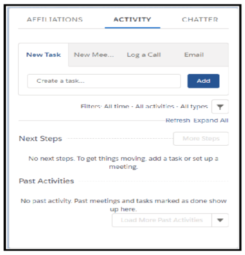
New Task

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.


Person Account
David Ortiz
+ Follow
Edit
Delete

Account Record Type: Individual
Title: Director of Sales
Primary Affiliation: Boston Red ...
Member Status: NONMEMBER
Engagement Status: BRONZE

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


AFFILIATIONS
ACTIVITY
CHATTER
New Task
New Mee...
Log a Call
Email
Create a task...
Add
Refresh
Expand All
More Steps
Load More Past Activities

Filters: All time · All activities · All types

Next Steps

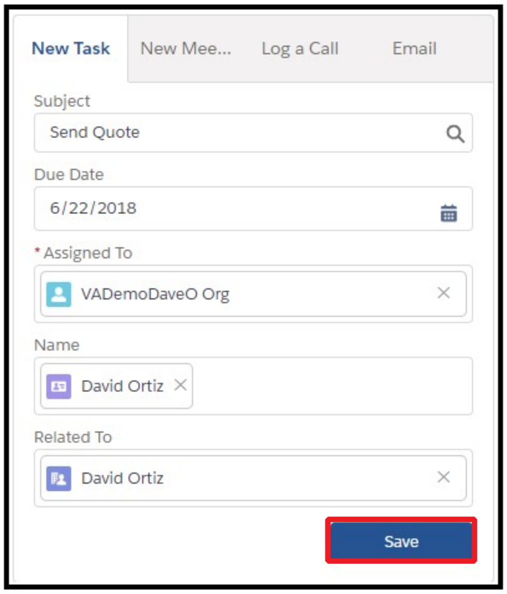
No next steps. To get things moving, add a task or set up a meeting.

Past Activities

No past activity. Past meetings and tasks marked as done show up here.

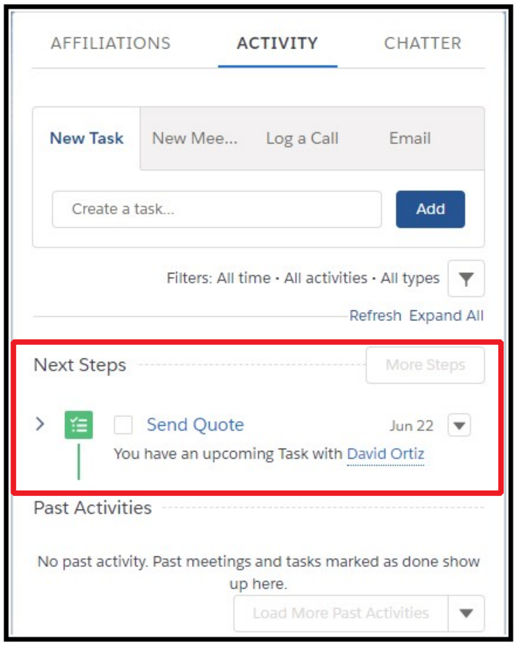
6. Click in the **Create a Task** field.
7. Select **Send Quote** in the **Subject** lookup.
8. Select the next **Friday** for the **Due Date**.

9. The system automatically defaults the following fields:
    - **Assigned To**: logged in user
    - **Name**: the current record
    - **Related To**: any related record


New Task
New Mee...
Log a Call
Email
Save

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

10. Click on the **Save** button.
11. The **Task** becomes logged in the **Next Steps** area.


AFFILIATIONS
ACTIVITY
CHATTER
New Task
New Mee...
Log a Call
Email
Create a task...
Add
Refresh
Expand All
Next Steps
More Steps
Past Activities
Load More Past Activities

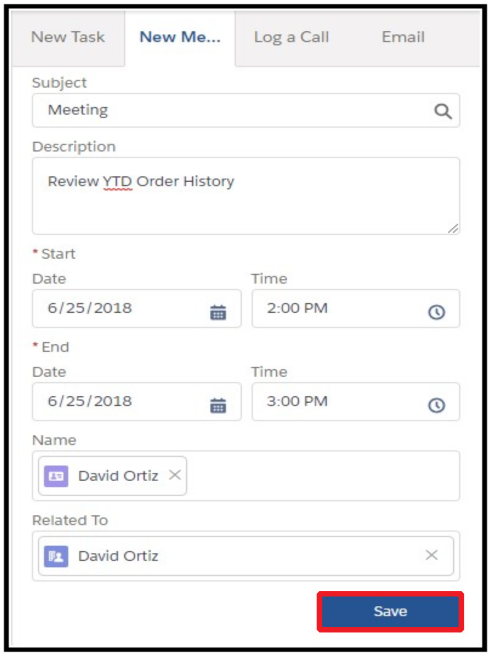
Filters: All time • All activities • All types

Send Quote Jun 22
You have an upcoming Task with David Ortiz

No past activity. Past meetings and tasks marked as done show up here.

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.



Subject: Meeting

Description: Review YTD Order History

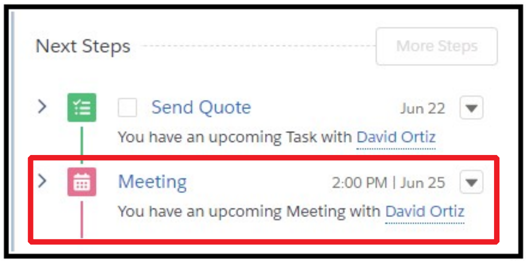
*Start
Date: 6/25/2018
Time: 2:00 PM

*End
Date: 6/25/2018
Time: 3:00 PM

Name: David Ortiz

Related To: David Ortiz

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

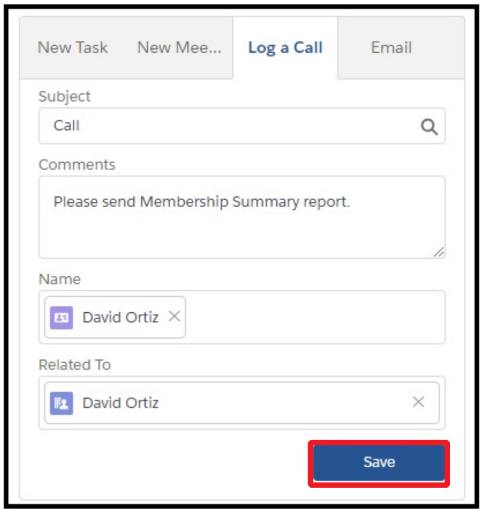


Send Quote — Jun 22
You have an upcoming Task with David Ortiz

Meeting — 2:00 PM | Jun 25
You have an upcoming Meeting with David Ortiz

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.


New Task
New Mee...
Log a Call
Email

Subject

Call

Comments

Please send Membership Summary report.

Name

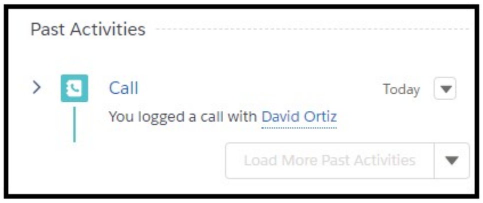
David Ortiz

Related To

David Ortiz

Save

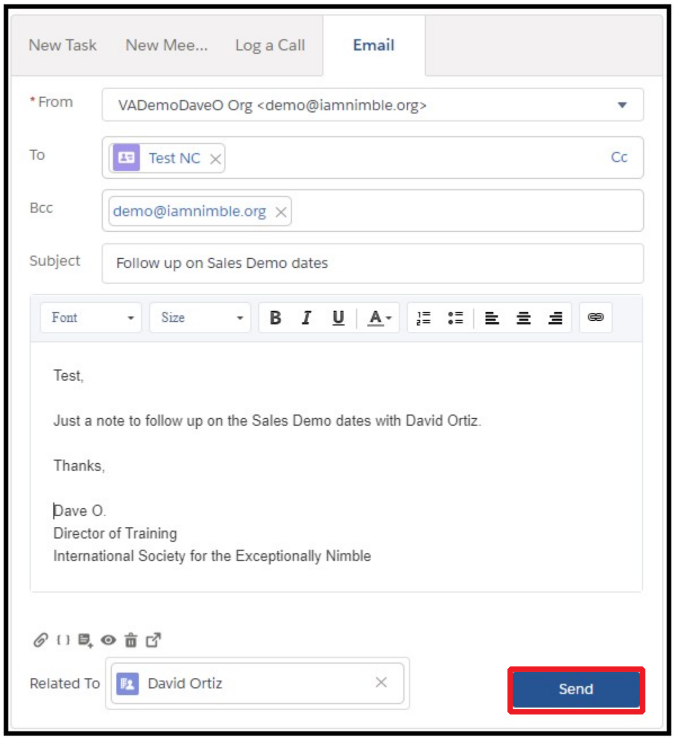
5. Click the **Save** button.
6. The **Call** becomes logged in the **Past Activities** area.


Past Activities
Call
Today
Load More Past Activities

You logged a call with David Ortiz

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.



*From: VADemoDaveO Org <demo@iamnimble.org>

To: Test NC

Bcc: demo@iamnimble.org

Subject: Follow up on Sales Demo dates

Test,

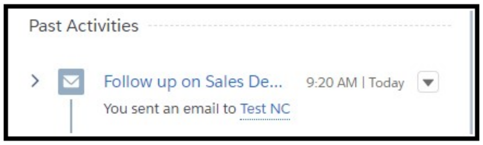
Just a note to follow up on the Sales Demo dates with David Ortiz.

Thanks,

Dave O.
Director of Training
International Society for the Exceptionally Nimble

Related To: David Ortiz

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



Past Activities

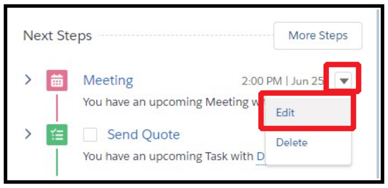
Follow up on Sales De... 9:20 AM | Today

You sent an email to Test NC

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.

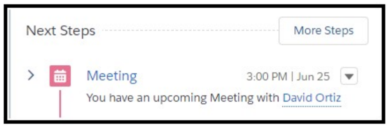
1. Click on logged **Meeting** drop down under the **Next Steps** section.
2. Select **Edit**.


Next Steps
More Steps
Meeting
2:00 PM | Jun 25
Edit
Delete
Send Quote

You have an upcoming Meeting w

You have an upcoming Task with D

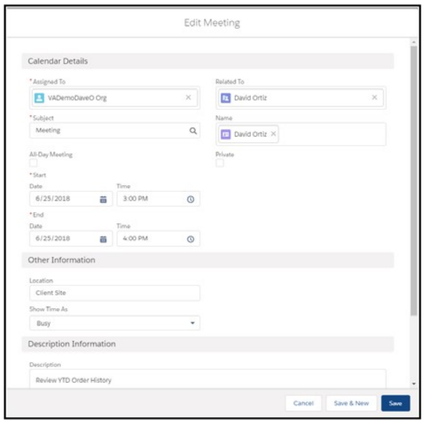
3. Change the (**Start**) **Time** field value to **3:00 PM**.


Next Steps
More Steps
Meeting
3:00 PM | Jun 25

You have an upcoming Meeting with David Ortiz

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

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


Edit Meeting
Calendar Details
Other Information
Description Information
Cancel
Save & New
Save

*Assigned To
VADemoDaveO Org

Related To
David Ortiz

*Subject
Meeting

Name
David Ortiz

All-Day Meeting
☐

Private
☐

*Start
Date
6/25/2018
Time
3:00 PM

*End
Date
6/25/2018
Time
4:00 PM

Location
Client Site

Show Time As
Busy

Description
Review YTD Order History

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

Accounts Reports and Dashboard

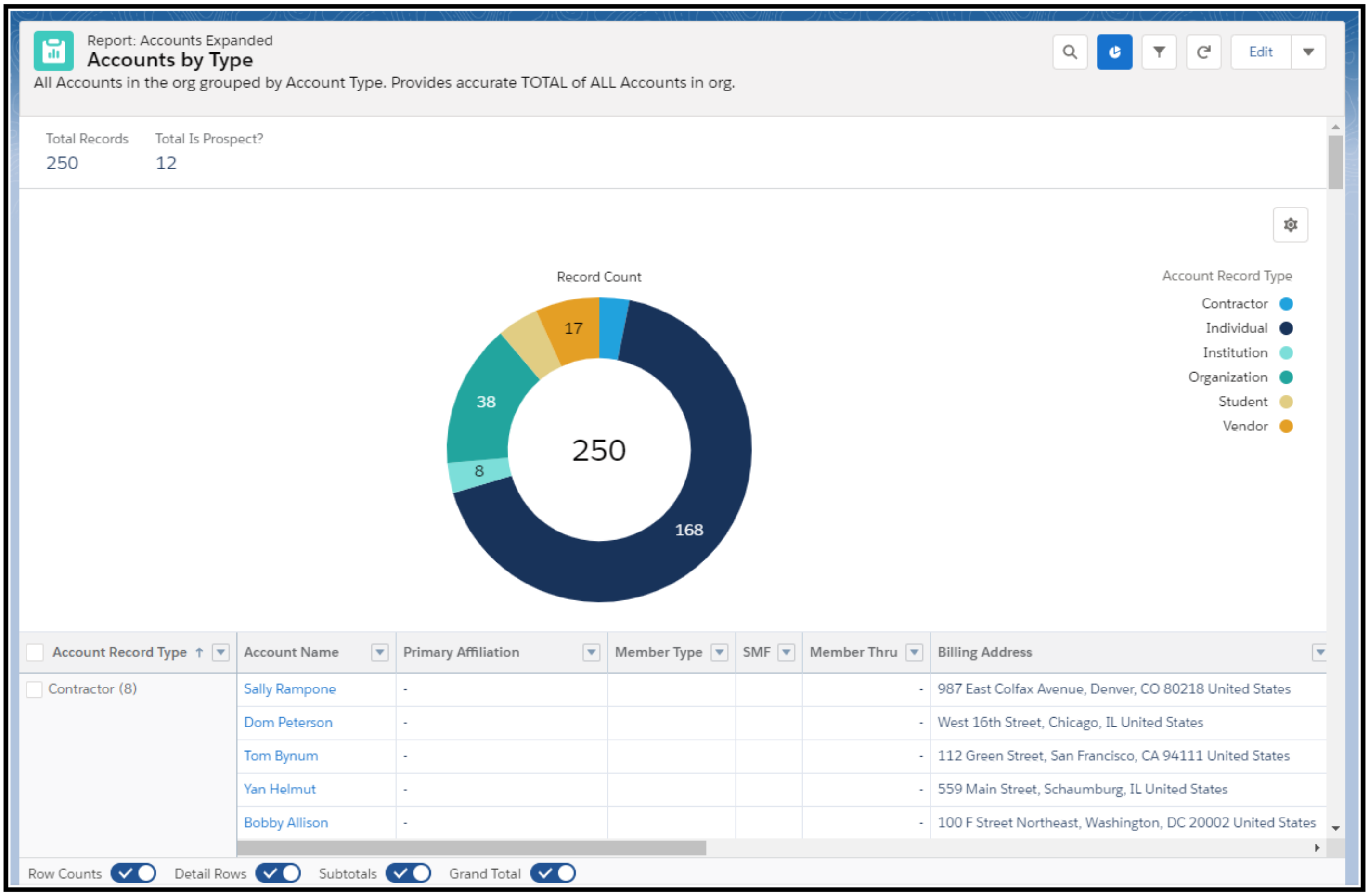
Accounts Reports

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



Report: Accounts Expanded

Accounts by Type

All Accounts in the org grouped by Account Type. Provides accurate TOTAL of ALL Accounts in org.

Total Records: 250

Total Is Prospect?: 12

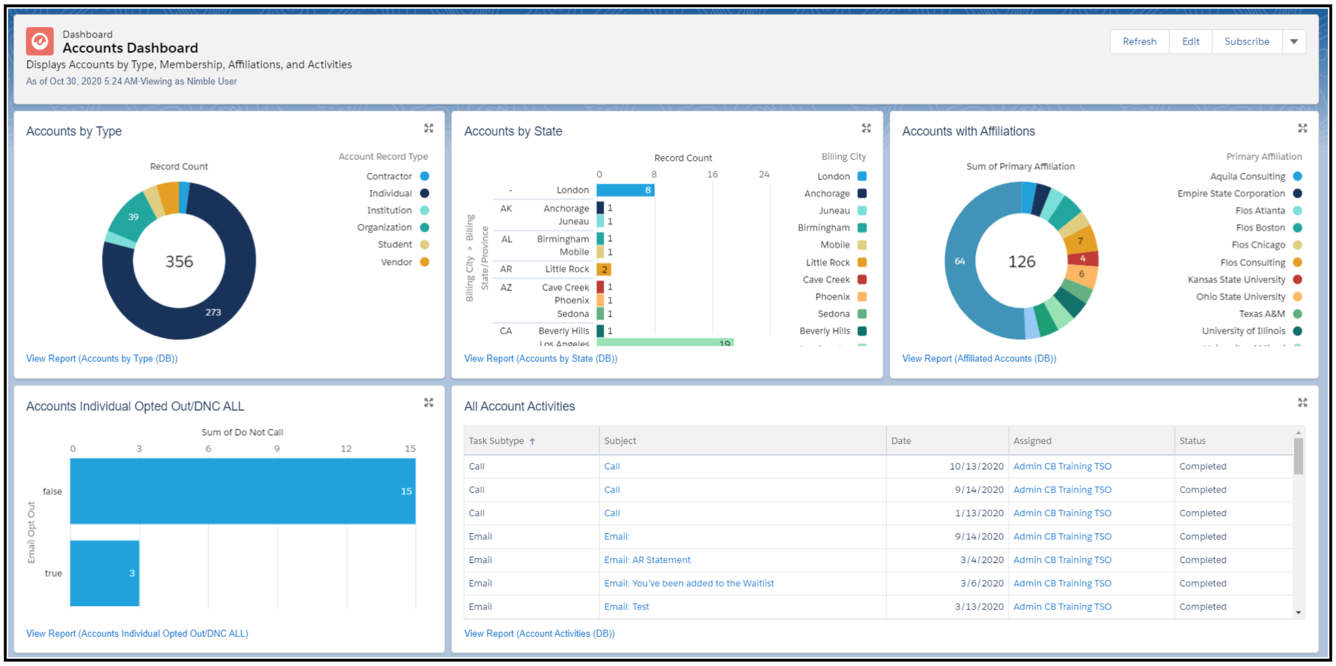
Edit
Record Count
17
38
8
250
168
Account Record Type
Contractor
Individual
Institution
Organization
Student
Vendor
Row Counts
Detail Rows
Subtotals
Grand Total

☐ Account Record Type ↑	Account Name	Primary Affiliation	Member Type	SMF	Member Thru	Billing Address
☐ Contractor (8)	Sally Rampone	-			-	987 East Colfax Avenue, Denver, CO 80218 United States
	Dom Peterson	-			-	West 16th Street, Chicago, IL United States
	Tom Bynum	-			-	112 Green Street, San Francisco, CA 94111 United States
	Yan Helmut	-			-	559 Main Street, Schaumburg, IL United States
	Bobby Allison	-			-	100 F Street Northeast, Washington, DC 20002 United States

Accounts Dashboard

To display the Accounts dashboard:

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



Refresh
Edit
Subscribe
Accounts by Type
Record Count
356
39
273
Account Record Type
Contractor
Individual
Institution
Organization
Student
Vendor
View Report (Accounts by Type (DB))
Accounts by State
Record Count
0
8
16
24
Billing City > Billing State/Province
-
London
8
AK
Anchorage
1
Juneau
1
AL
Birmingham
1
Mobile
1
AR
Little Rock
2
AZ
Cave Creek
1
Phoenix
1
Sedona
1
CA
Beverly Hills
1
Los Angeles
19
Billing City
London
Anchorage
Juneau
Birmingham
Mobile
Little Rock
Cave Creek
Phoenix
Sedona
Beverly Hills
View Report (Accounts by State (DB))
Accounts with Affiliations
Sum of Primary Affiliation
126
64
7
4
6
Primary Affiliation
Aquila Consulting
Empire State Corporation
Flos Atlanta
Flos Boston
Flos Chicago
Flos Consulting
Kansas State University
Ohio State University
Texas A&M
University of Illinois
View Report (Affiliated Accounts (DB))
Accounts Individual Opted Out/DNC ALL
Sum of Do Not Call
0
3
6
9
12
15
Email Opt Out
false
15
true
3
View Report (Accounts Individual Opted Out/DNC ALL)
All Account Activities
View Report (Account Activities (DB))

Dashboard
Accounts Dashboard
Displays Accounts by Type, Membership, Affiliations, and Activities
As of Oct 30, 2020 5:24 AM·Viewing as Nimble User

Task Subtype ↑	Subject	Date	Assigned	Status
Call	Call	10/13/2020	Admin CB Training TSO	Completed
Call	Call	9/14/2020	Admin CB Training TSO	Completed
Call	Call	1/13/2020	Admin CB Training TSO	Completed
Email	Email:	9/14/2020	Admin CB Training TSO	Completed
Email	Email: AR Statement	3/4/2020	Admin CB Training TSO	Completed
Email	Email: You've been added to the Waitlist	3/6/2020	Admin CB Training TSO	Completed
Email	Email: Test	3/13/2020	Admin CB Training TSO	Completed

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

Objective 3.1
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.

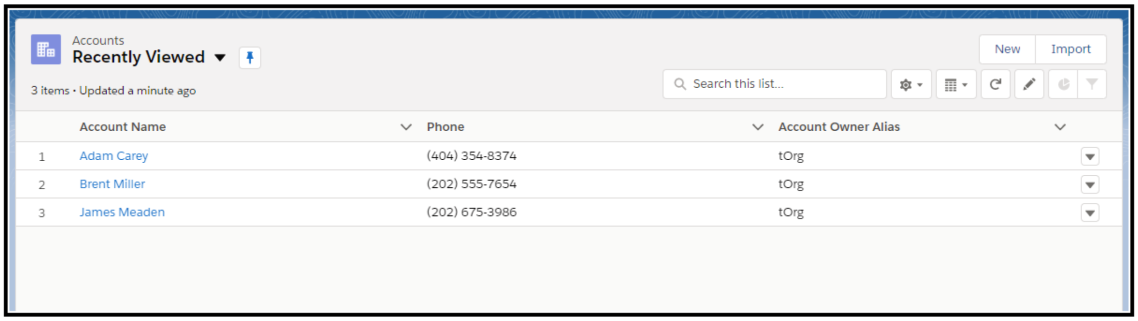
Existing List Views

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.

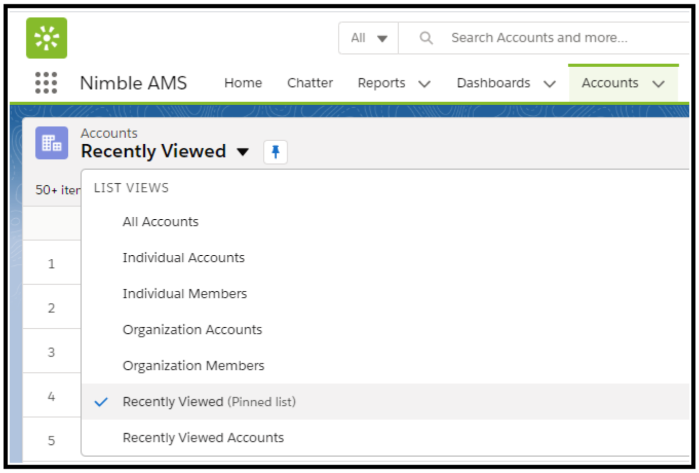
1. From the **Navigation** bar, click the **Accounts** tab.
    - This displays the default **Recently Viewed** view of Account records (upper left).


Accounts
Recently Viewed
New
Import
Search this list...

3 items • Updated a minute ago

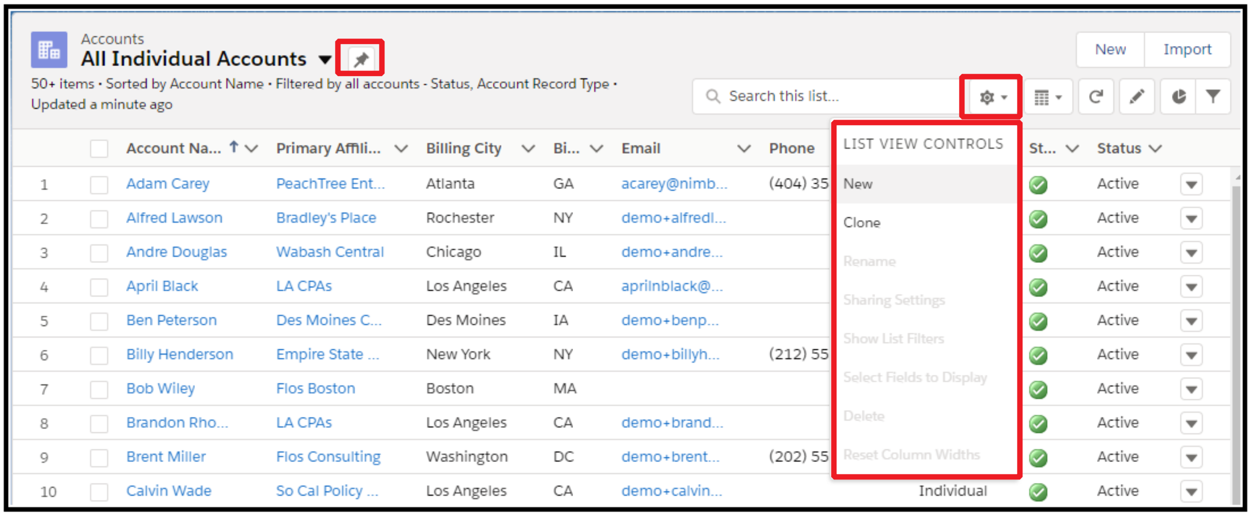
	Account Name	Phone	Account Owner Alias
1	Adam Carey	(404) 354-8374	tOrg
2	Brent Miller	(202) 555-7654	tOrg
3	James Meaden	(202) 675-3986	tOrg

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


All
Search Accounts and more...
Nimble AMS
Home
Chatter
Reports
Dashboards
Accounts
Accounts
Recently Viewed
50+ iter
LIST VIEWS
All Accounts
Individual Accounts
Individual Members
Organization Accounts
Organization Members
Recently Viewed (Pinned list)
Recently Viewed Accounts
1
2
3
4
5

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.

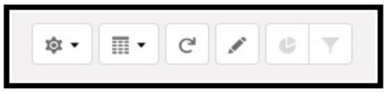
IMPORTANT NOTE: Only List View Owner has permissions to edit. End Users cannot edit:
1) Shared, “Stock” Nimble list views controlled by licensed Administrator level users
2) List views created by Administrators (or fellow End Users) that have been Shared.
However, ALL List Views CAN be Cloned and then edited for personal use by End Users.



50+ items • Sorted by Account Name • Filtered by all accounts - Status, Account Record Type • Updated a minute ago

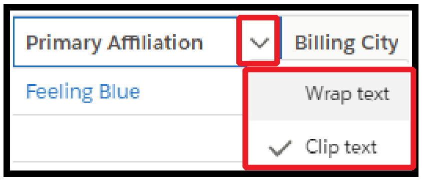
	Account Na...	Primary Affili...	Billing City	Bi...	Email	Phone		St...	Status
1	Adam Carey	PeachTree Ent...	Atlanta	GA	acarey@nimb...	(404) 35		✓	Active
2	Alfred Lawson	Bradley's Place	Rochester	NY	demo+alfredl...			✓	Active
3	Andre Douglas	Wabash Central	Chicago	IL	demo+andre...			✓	Active
4	April Black	LA CPAs	Los Angeles	CA	aprilnblack@...			✓	Active
5	Ben Peterson	Des Moines C...	Des Moines	IA	demo+benp...			✓	Active
6	Billy Henderson	Empire State ...	New York	NY	demo+billyh...	(212) 55		✓	Active
7	Bob Wiley	Flos Boston	Boston	MA				✓	Active
8	Brandon Rho...	LA CPAs	Los Angeles	CA	demo+brand...			✓	Active
9	Brent Miller	Flos Consulting	Washington	DC	demo+brent...	(202) 55		✓	Active
10	Calvin Wade	So Cal Policy ...	Los Angeles	CA	demo+calvin...		Individual	✓	Active

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.


Primary Affiliation
Billing City
Feeling Blue
Wrap text
✓ Clip text

10. Click on the **dividing line** between column headers.
11. Users can **expand/contract** the column size (similar to Excel).

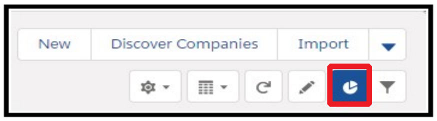
CHARTS

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.

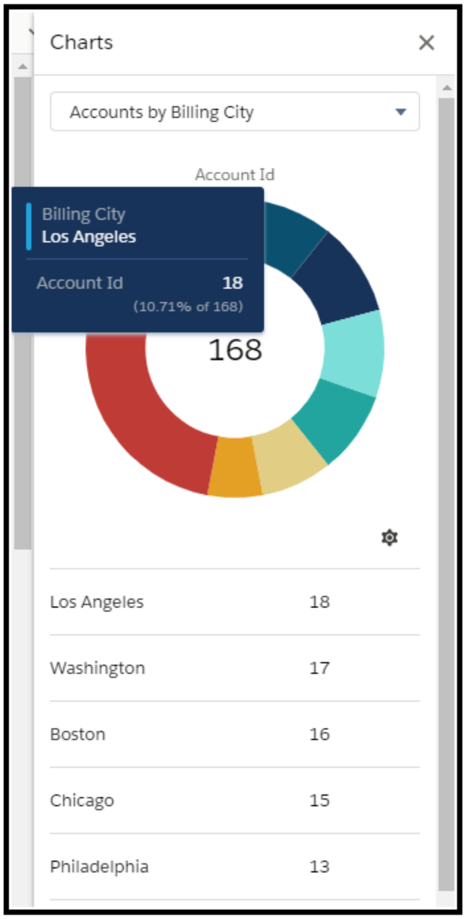
In this **exercise**, users will examine an existing chart and create a new chart.

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


New
Discover Companies
Import

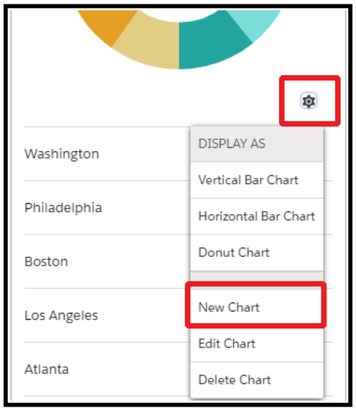
2. The **Accounts by City** chart displays.

   - 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.

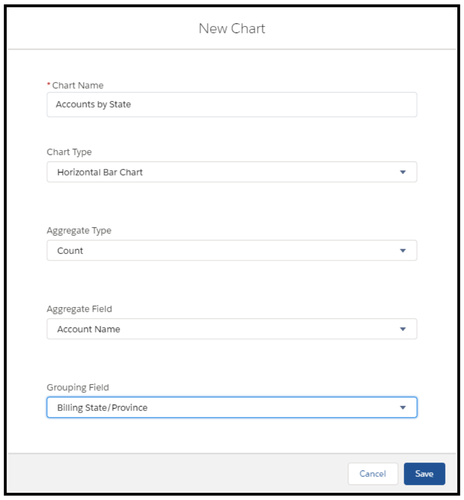

Charts
Accounts by Billing City
Account Id
Billing City
Los Angeles
Account Id
18
(10.71% of 168)
168

Los Angeles	18
Washington	17
Boston	16
Chicago	15
Philadelphia	13

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.


Washington
Philadelphia
Boston
Los Angeles
Atlanta
DISPLAY AS
Vertical Bar Chart
Horizontal Bar Chart
Donut Chart
New Chart
Edit Chart
Delete Chart

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**.


New Chart

* Chart Name: Accounts by State

Chart Type: Horizontal Bar Chart

Aggregate Type: Count

Aggregate Field: Account Name

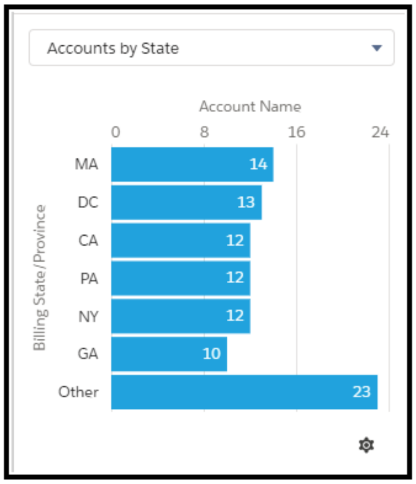
Grouping Field: Billing State/Province

Cancel
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.


Accounts by State
Account Name
0
8
16
24
Billing State/Province
MA
14
DC
13
CA
12
PA
12
NY
12
GA
10
Other
23

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.

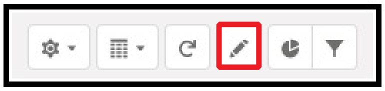
Editing List Views is especially useful when updating groups of Item records that require **updating immediately post-Order**. Item Records such as Exhibitors or Advertising require additional information such as Booth size and configuration for an Exhibitor, or Color and Position for Advertising. Users 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.

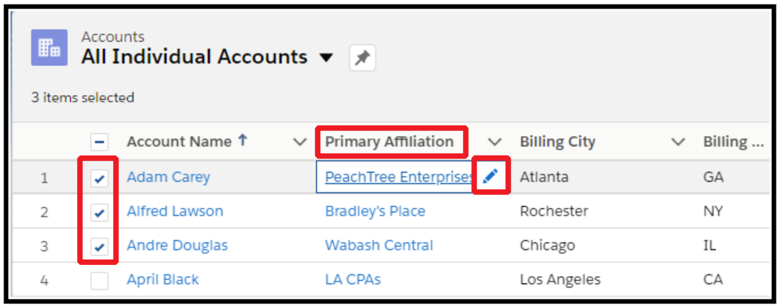
EDIT LIST – BULK UPDATE

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.



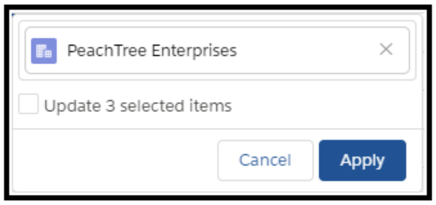
Accounts
All Individual Accounts

3 items selected

	☐	Account Name	Primary Affiliation	Billing City	Billing ...
1	☑	Adam Carey	PeachTree Enterprises	Atlanta	GA
2	☑	Alfred Lawson	Bradley's Place	Rochester	NY
3	☑	Andre Douglas	Wabash Central	Chicago	IL
4	☐	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.

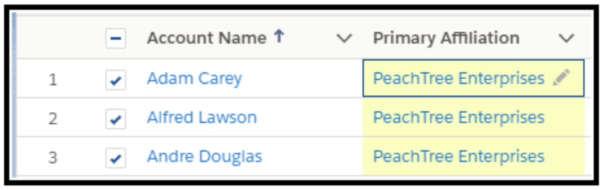
6. Check the **Update 3 selected Items** - records will be changed to **PeachTree Enterprises** since that is the value defaulting in the value field of the **Primary Affiliation**.



PeachTree Enterprises ×

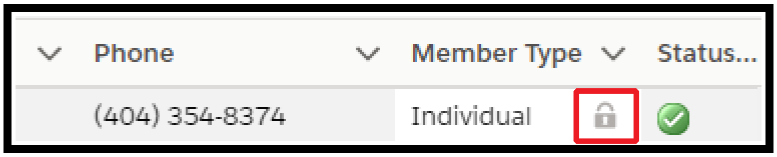
☐ Update 3 selected items

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



	☐	Account Name ↑	Primary Affiliation
1	☑	Adam Carey	PeachTree Enterprises
2	☑	Alfred Lawson	PeachTree Enterprises
3	☑	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**.



Phone	Member Type	Status...
(404) 354-8374	Individual 🔒	✓

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:

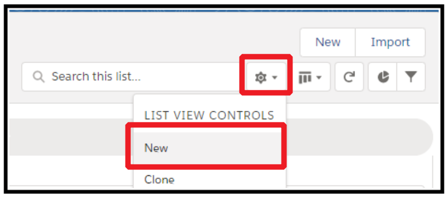
- Users **utilizing existing views** will understand options/configurations they can **request** for administrators building additional views.
- Users **creating views** will understand options/configurations options they can use to **build**.

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.

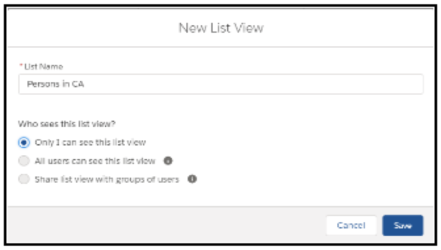
CREATING A NEW LIST VIEW

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.



* List Name: Persons in CA

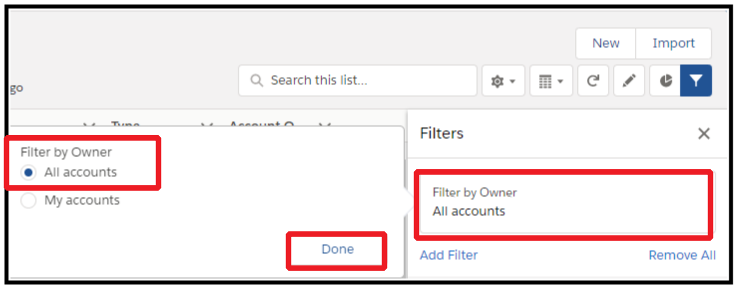
Who sees this list view?
● Only I can see this list view
○ All users can see this list view
○ Share list view with groups of users

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**.



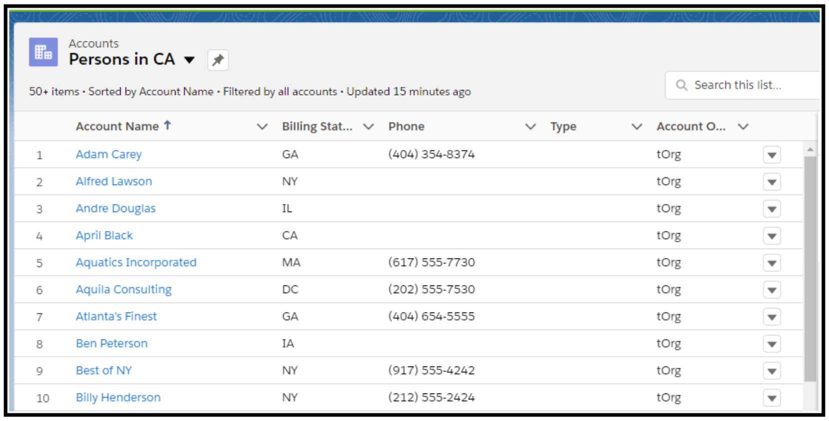
Filter by Owner

● All accounts

○ My accounts

Filters: Filter by Owner — All accounts

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.



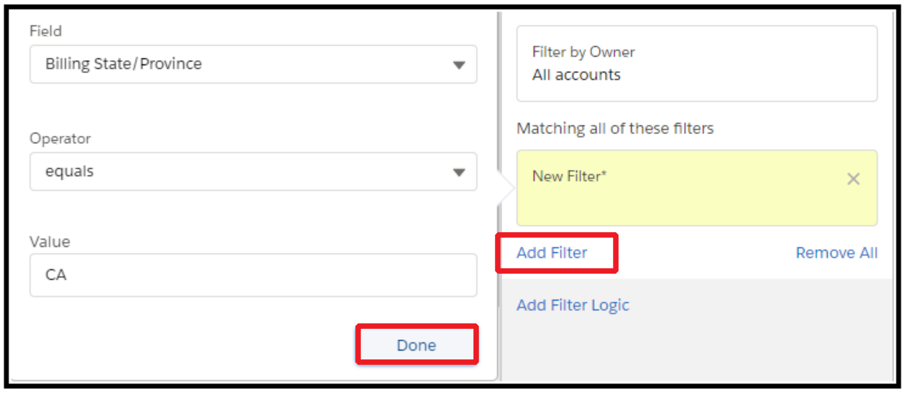
50+ items • Sorted by Account Name • Filtered by all accounts • Updated 15 minutes ago

	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.



Field: Billing State/Province

Operator: equals

Value: CA

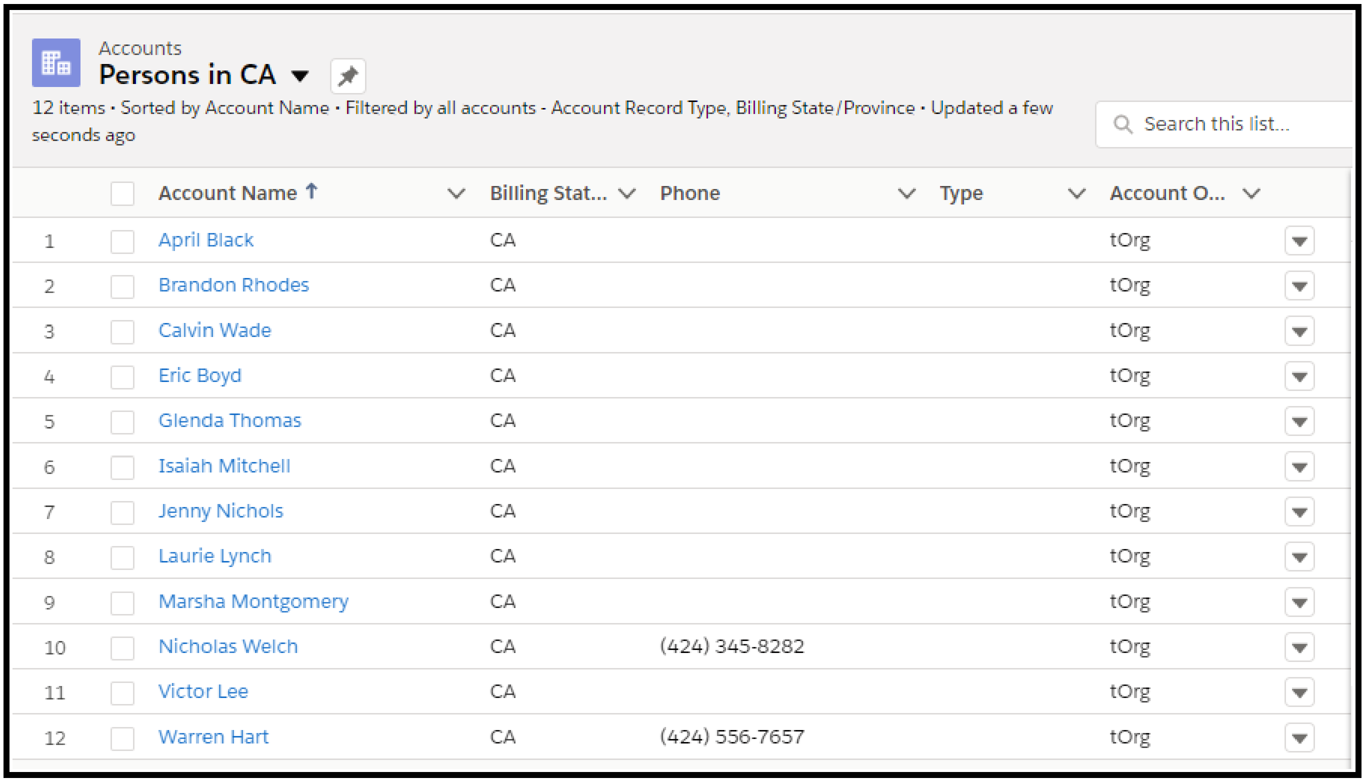
Filter by Owner: All accounts

Matching all of these filters

New Filter*

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.



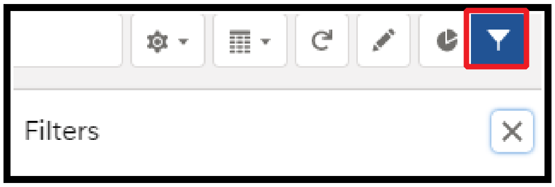
Accounts

Persons in CA

12 items • Sorted by Account Name • Filtered by all accounts - Account Record Type, Billing State/Province • Updated a few seconds ago

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

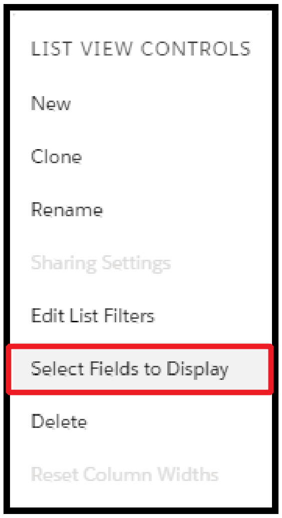
14. Click in the **Filters** icon in the upper right to **minimize** the section for better results visibility.



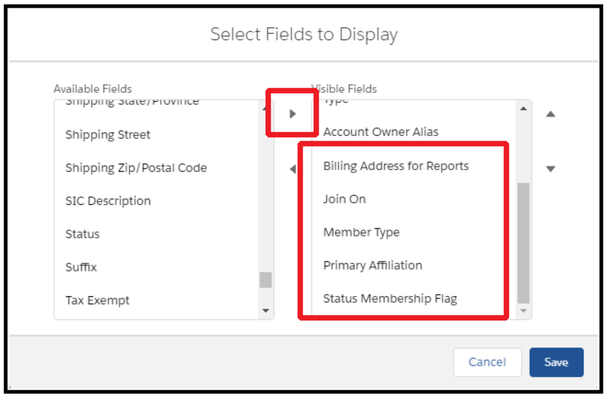
ADDING FIELDS

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

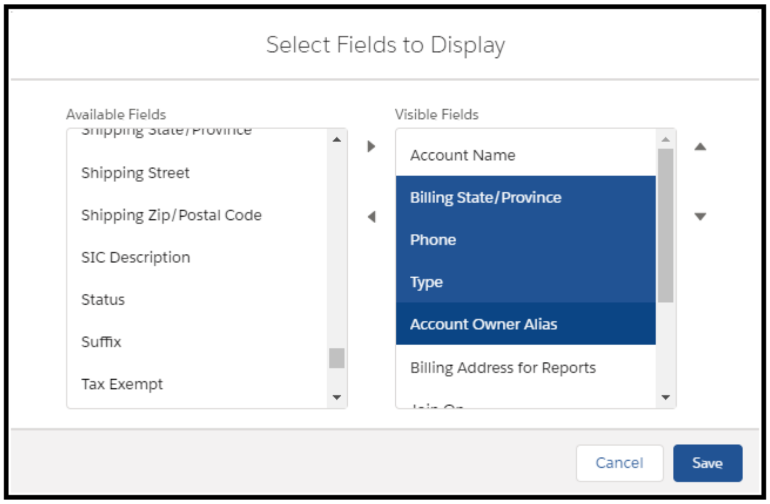
1. From the **View Setting** section, click on the **List View Controls** icon.
2. Select the **Select Fields to Display** option.


LIST VIEW CONTROLS
New
Clone
Rename
Sharing Settings
Edit List Filters
Select Fields to Display
Delete
Reset Column Widths

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.


Select Fields to Display
Available Fields
Shipping Street
Shipping Zip/Postal Code
SIC Description
Status
Suffix
Tax Exempt
Visible Fields
Account Owner Alias
Billing Address for Reports
Join On
Member Type
Primary Affiliation
Status Membership Flag
Cancel
Save

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

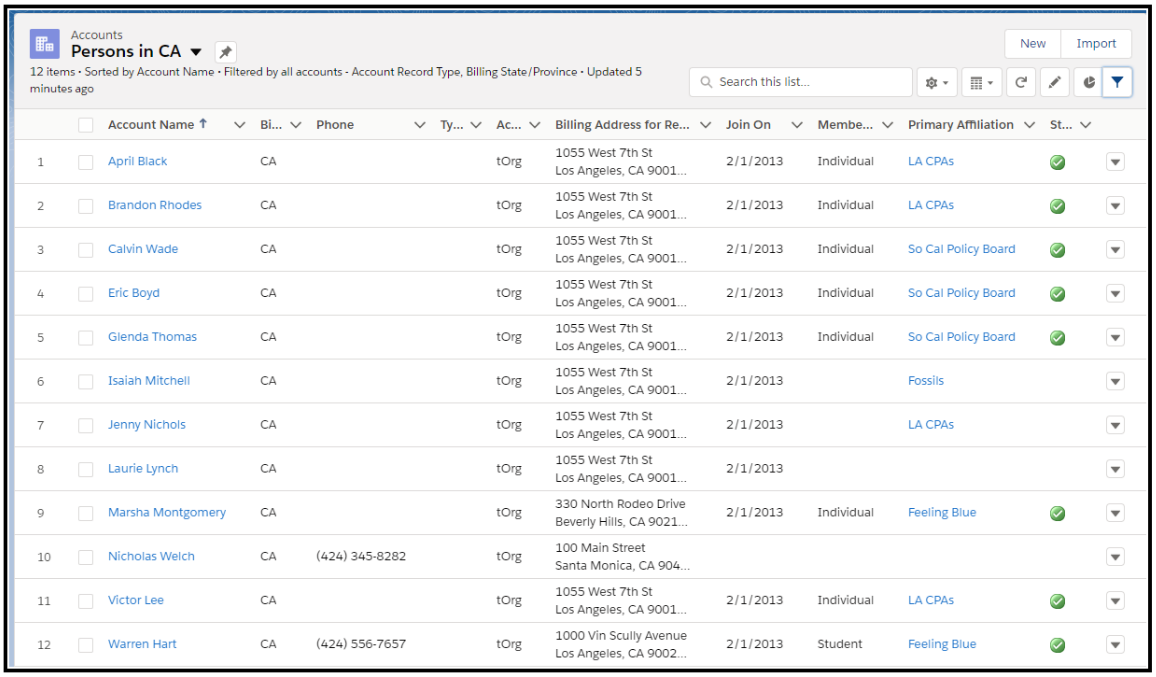

Select Fields to Display
Available Fields
Shipping State/Province
Shipping Street
Shipping Zip/Postal Code
SIC Description
Status
Suffix
Tax Exempt
Visible Fields
Account Name
Billing State/Province
Phone
Type
Account Owner Alias
Billing Address for Reports
Cancel
Save

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.

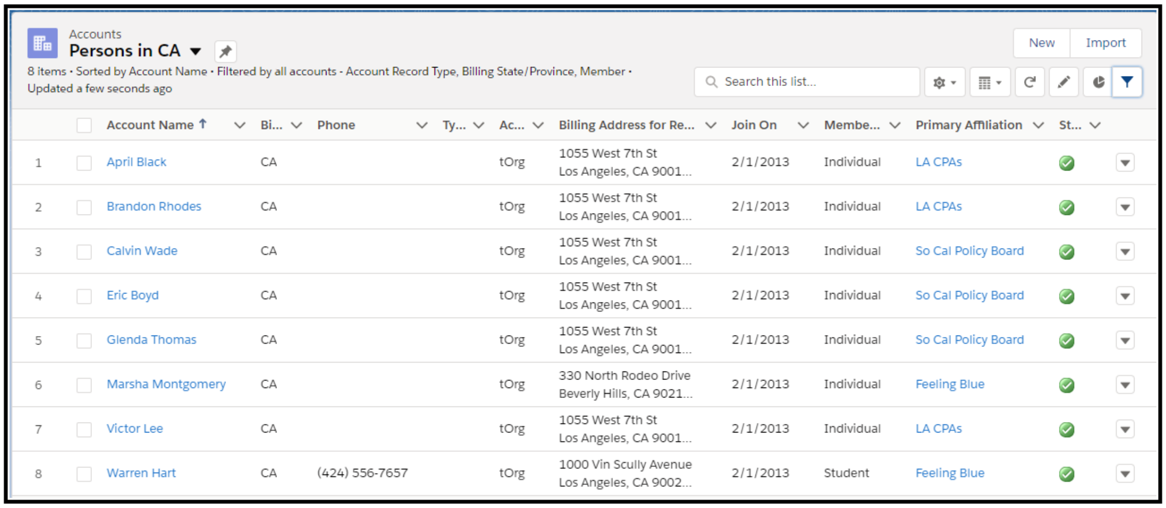


12 items • Sorted by Account Name • Filtered by all accounts - Account Record Type, Billing State/Province • Updated 5 minutes ago

	☐	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.



Accounts

Persons in CA

8 items • Sorted by Account Name • Filtered by all accounts - Account Record Type, Billing State/Province, Member • Updated a few seconds ago

	☐	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	☐	Marsha Montgomery	CA			tOrg	330 North Rodeo Drive Beverly Hills, CA 9021...	2/1/2013	Individual	Feeling Blue	✓
7	☐	Victor Lee	CA			tOrg	1055 West 7th St Los Angeles, CA 9001...	2/1/2013	Individual	LA CPAs	✓
8	☐	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.

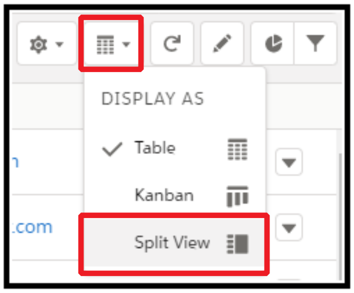
11. From the **List View Controls**, select **Rename**.
12. Enter **Members in CA**.
13. Click the **Save** button.

SPLIT VIEW

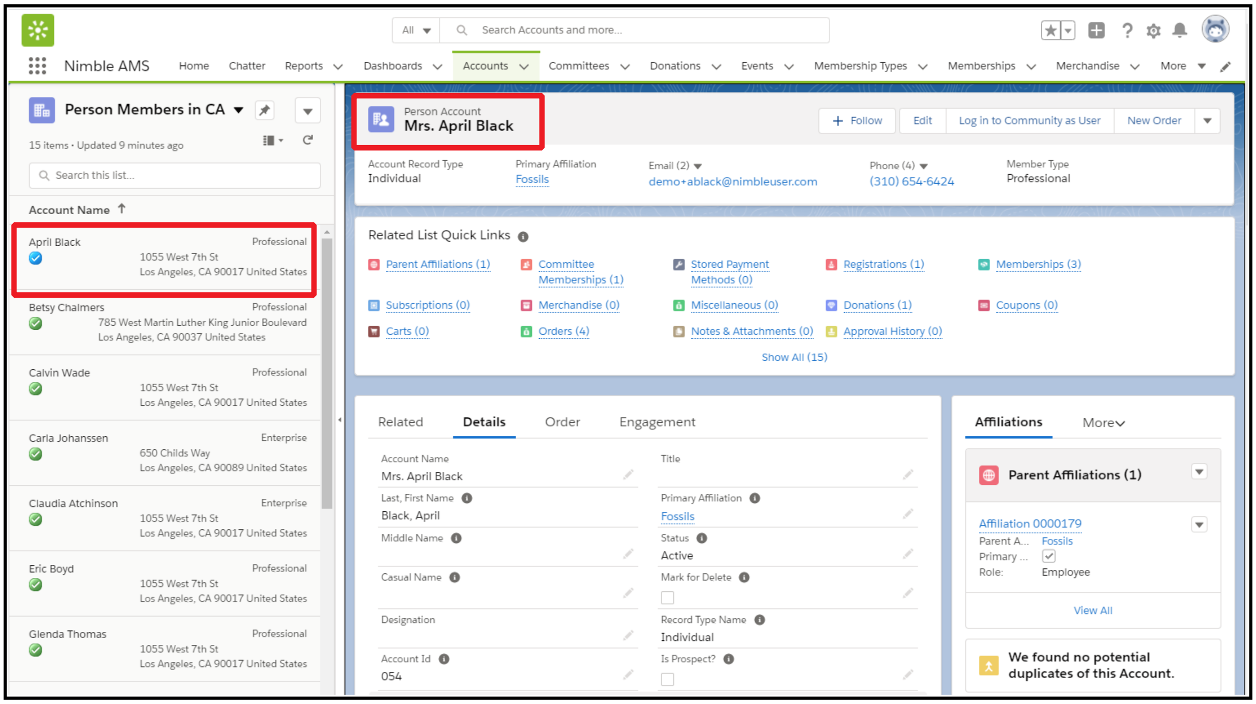
Split View is a very effective method for displaying full info about a selected record from a list view while retaining the ability to switch from one record to another quickly.

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**.


DISPLAY AS
✓ Table
Kanban
Split View
.com

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.


All
Search Accounts and more...
Nimble AMS
Home
Chatter
Reports
Dashboards
Accounts
Committees
Donations
Events
Membership Types
Memberships
Merchandise
More
Follow
Edit
Log in to Community as User
New Order
Related List Quick Links
Parent Affiliations (1)
Committee Memberships (1)
Stored Payment Methods (0)
Registrations (1)
Memberships (3)
Subscriptions (0)
Merchandise (0)
Miscellaneous (0)
Donations (1)
Coupons (0)
Carts (0)
Orders (4)
Notes & Attachments (0)
Approval History (0)
Show All (15)
Related
Details
Order
Engagement
Affiliations
More
Parent Affiliations (1)
View All
We found no potential duplicates of this Account.

Person Members in CA

15 items • Updated 9 minutes ago

Search this list...

Account Name ↑

April Black — Professional — 1055 West 7th St, Los Angeles, CA 90017 United States
Betsy Chalmers — Professional — 785 West Martin Luther King Junior Boulevard, Los Angeles, CA 90037 United States
Calvin Wade — Professional — 1055 West 7th St, Los Angeles, CA 90017 United States
Carla Johanssen — Enterprise — 650 Childs Way, Los Angeles, CA 90089 United States
Claudia Atchinson — Enterprise — 1055 West 7th St, Los Angeles, CA 90017 United States
Eric Boyd — Professional — 1055 West 7th St, Los Angeles, CA 90017 United States
Glenda Thomas — Professional — 1055 West 7th St, Los Angeles, CA 90017 United States

Person Account
Mrs. April Black

Account Record Type: Individual
Primary Affiliation: Fossils
Email (2): demo+ablack@nimbleuser.com
Phone (4): (310) 654-6424
Member Type: Professional

Account Name: Mrs. April Black
Last, First Name: Black, April
Middle Name:
Casual Name:
Designation:
Account Id: 054
Title:
Primary Affiliation: Fossils
Status: Active
Mark for Delete: ☐
Record Type Name: Individual
Is Prospect?: ☐

Affiliation 0000179
Parent A...: Fossils
Primary ...: ☑
Role: Employee

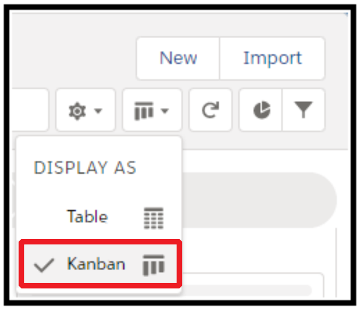
KANBAN CHARTS

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

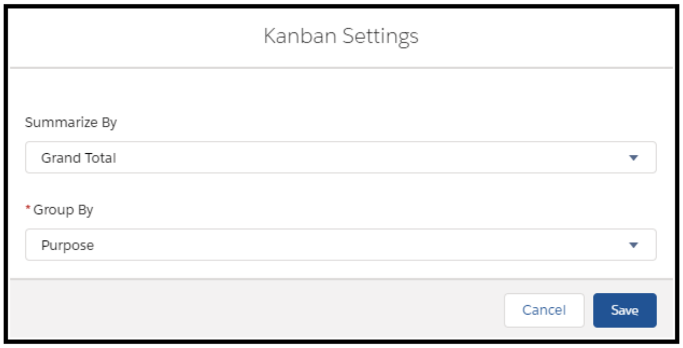
For more complex data displays, users should use **Reports** or **Dashboards**. Kanban Charts cannot provide multiple levels of data display for complex analysis.

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**.

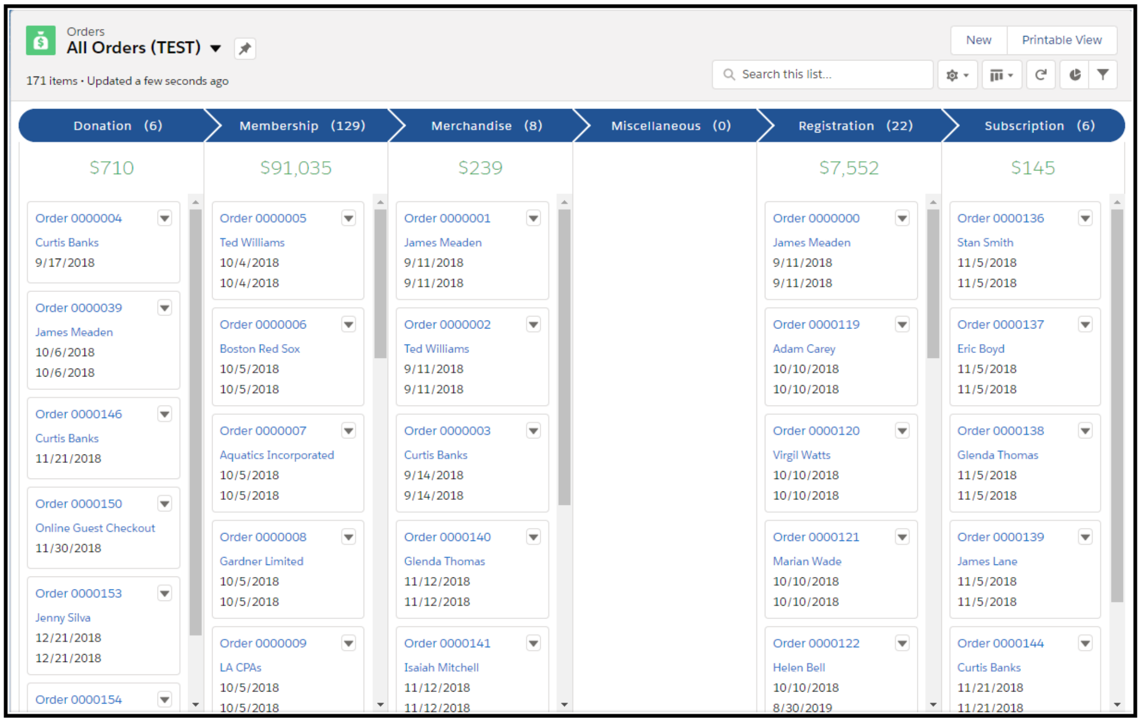

Kanban Settings

Summarize By: Grand Total

*Group By: Purpose

15. Click on **Save**.

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


Orders
All Orders (TEST)
171 items • Updated a few seconds ago
New
Printable View
Search this list...
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 0000039
James Meaden
10/6/2018
10/6/2018
Order 0000146
Curtis Banks
11/21/2018
Order 0000150
Online Guest Checkout
11/30/2018
Order 0000153
Jenny Silva
12/21/2018
12/21/2018
Order 0000154
Order 0000005
Ted Williams
10/4/2018
10/4/2018
Order 0000006
Boston Red Sox
10/5/2018
10/5/2018
Order 0000007
Aquatics Incorporated
10/5/2018
10/5/2018
Order 0000008
Gardner Limited
10/5/2018
10/5/2018
Order 0000009
LA CPAs
10/5/2018
10/5/2018
Order 0000001
James Meaden
9/11/2018
9/11/2018
Order 0000002
Ted Williams
9/11/2018
9/11/2018
Order 0000003
Curtis Banks
9/14/2018
9/14/2018
Order 0000140
Glenda Thomas
11/12/2018
11/12/2018
Order 0000141
Isaiah Mitchell
11/12/2018
11/12/2018
Order 0000000
James Meaden
9/11/2018
9/11/2018
Order 0000119
Adam Carey
10/10/2018
10/10/2018
Order 0000120
Virgil Watts
10/10/2018
10/10/2018
Order 0000121
Marian Wade
10/10/2018
10/10/2018
Order 0000122
Helen Bell
10/10/2018
8/30/2019
Order 0000136
Stan Smith
11/5/2018
11/5/2018
Order 0000137
Eric Boyd
11/5/2018
11/5/2018
Order 0000138
Glenda Thomas
11/5/2018
11/5/2018
Order 0000139
James Lane
11/5/2018
11/5/2018
Order 0000144
Curtis Banks
11/21/2018
11/21/2018

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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Existing Reports 4.5
New Reports 4.12
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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

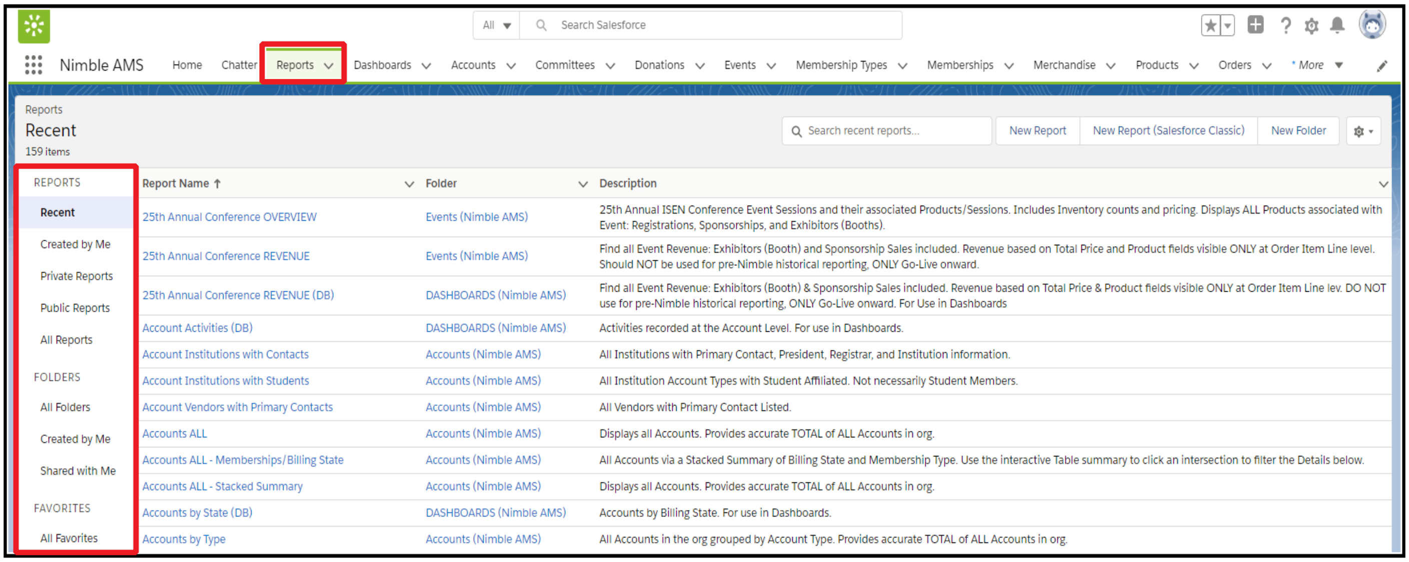
Existing Reports – Users have access to a large number of pre-existing reports that are a part of the stock Nimble AMS product. These Reports are located in Folders in the Reports Item (see next section) and organized topically.

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.



All
Search Salesforce
Nimble AMS
Home
Chatter
Reports
Dashboards
Accounts
Committees
Donations
Events
Membership Types
Memberships
Merchandise
Products
Orders
* More
Reports
Recent
159 items
Search recent reports...
New Report
New Report (Salesforce Classic)
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites

Report Name ↑	Folder	Description
25th Annual Conference OVERVIEW	Events (Nimble AMS)	25th Annual ISEN Conference Event Sessions and their associated Products/Sessions. Includes Inventory counts and pricing. Displays ALL Products associated with Event: Registrations, Sponsorships, and Exhibitors (Booths).
25th Annual Conference REVENUE	Events (Nimble AMS)	Find all Event Revenue: Exhibitors (Booth) and Sponsorship Sales included. Revenue based on Total Price and Product fields visible ONLY at Order Item Line level. Should NOT be used for pre-Nimble historical reporting, ONLY Go-Live onward.
25th Annual Conference REVENUE (DB)	DASHBOARDS (Nimble AMS)	Find all Event Revenue: Exhibitors (Booth) & Sponsorship Sales included. Revenue based on Total Price & Product fields visible ONLY at Order Item Line lev. DO NOT use for pre-Nimble historical reporting, ONLY Go-Live onward. For Use in Dashboards
Account Activities (DB)	DASHBOARDS (Nimble AMS)	Activities recorded at the Account Level. For use in Dashboards.
Account Institutions with Contacts	Accounts (Nimble AMS)	All Institutions with Primary Contact, President, Registrar, and Institution information.
Account Institutions with Students	Accounts (Nimble AMS)	All Institution Account Types with Student Affiliated. Not necessarily Student Members.
Account Vendors with Primary Contacts	Accounts (Nimble AMS)	All Vendors with Primary Contact Listed.
Accounts ALL	Accounts (Nimble AMS)	Displays all Accounts. Provides accurate TOTAL of ALL Accounts in org.
Accounts ALL - Memberships/Billing State	Accounts (Nimble AMS)	All Accounts via a Stacked Summary of Billing State and Membership Type. Use the interactive Table summary to click an intersection to filter the Details below.
Accounts ALL - Stacked Summary	Accounts (Nimble AMS)	Displays all Accounts. Provides accurate TOTAL of ALL Accounts in org.
Accounts by State (DB)	DASHBOARDS (Nimble AMS)	Accounts by Billing State. For use in Dashboards.
Accounts by Type	Accounts (Nimble AMS)	All Accounts in the org grouped by Account Type. Provides accurate TOTAL of ALL Accounts in org.

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.

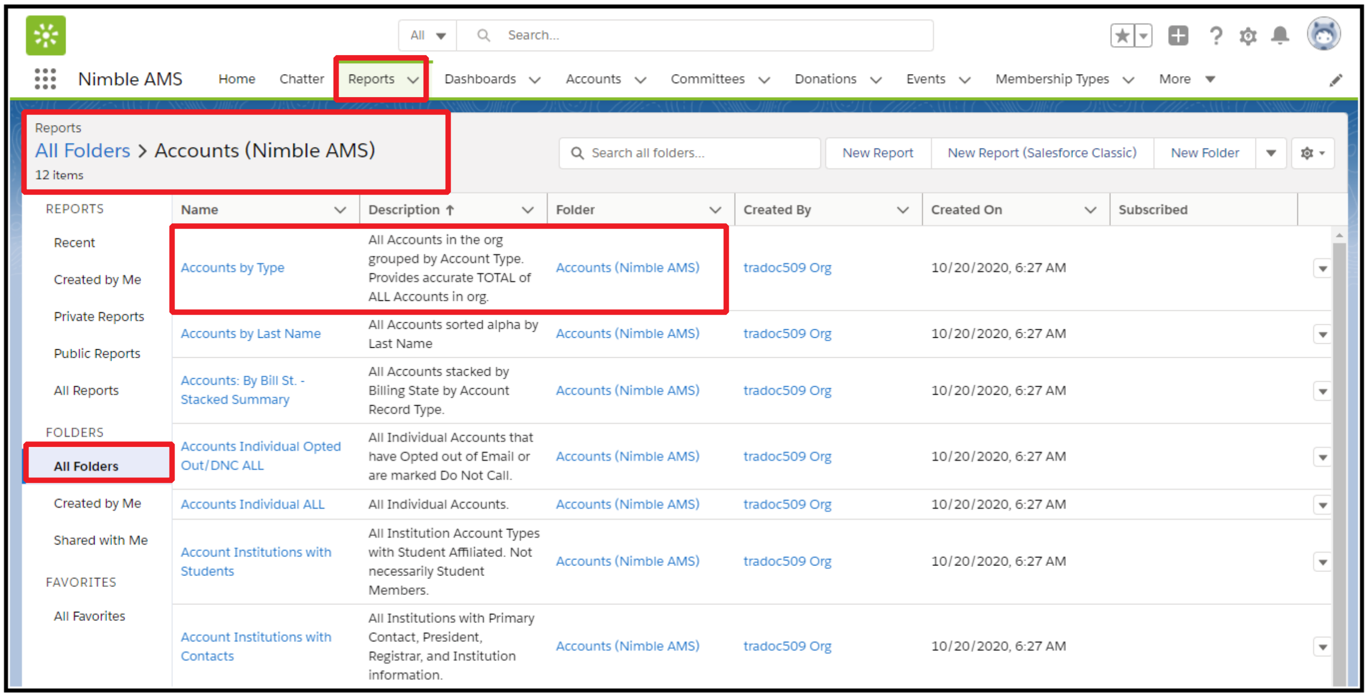
None of the changes a user applies to an unowned, existing report are permanent and will disappear once the report is exited/closed.

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.

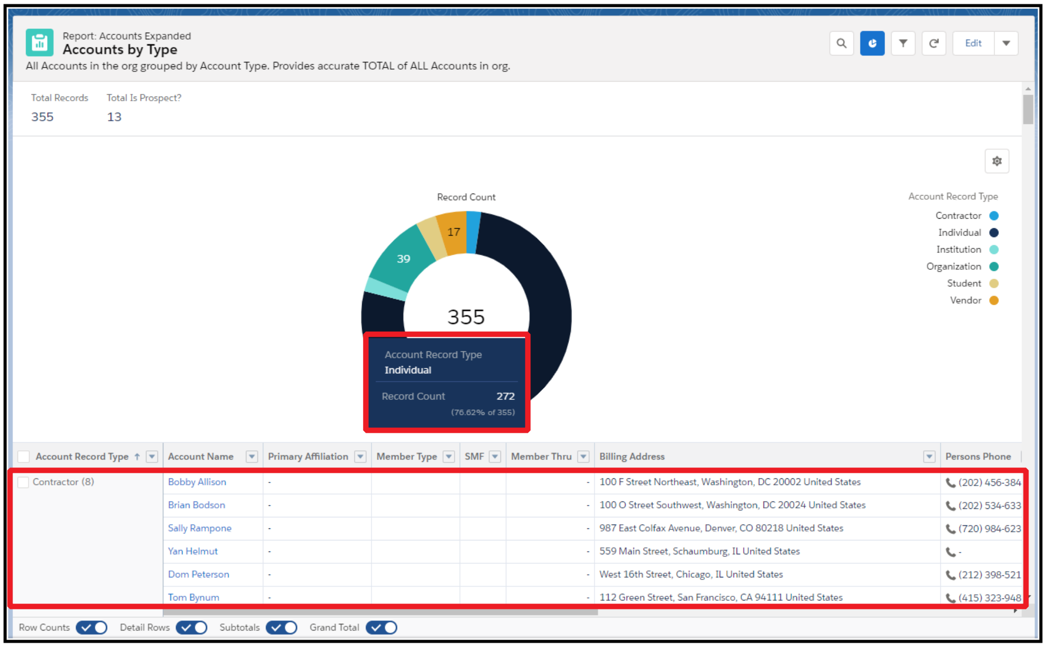

All
Search...
Nimble AMS
Home
Chatter
Reports
Dashboards
Accounts
Committees
Donations
Events
Membership Types
More
Search all folders...
New Report
New Report (Salesforce Classic)
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites

Reports
All Folders > Accounts (Nimble AMS)
12 items

Name	Description	Folder	Created By	Created On	Subscribed
Accounts by Type	All Accounts in the org grouped by Account Type. Provides accurate TOTAL of ALL Accounts in org.	Accounts (Nimble AMS)	tradoc509 Org	10/20/2020, 6:27 AM	
Accounts by Last Name	All Accounts sorted alpha by Last Name	Accounts (Nimble AMS)	tradoc509 Org	10/20/2020, 6:27 AM	
Accounts: By Bill St. - Stacked Summary	All Accounts stacked by Billing State by Account Record Type.	Accounts (Nimble AMS)	tradoc509 Org	10/20/2020, 6:27 AM	
Accounts Individual Opted Out/DNC ALL	All Individual Accounts that have Opted out of Email or are marked Do Not Call.	Accounts (Nimble AMS)	tradoc509 Org	10/20/2020, 6:27 AM	
Accounts Individual ALL	All Individual Accounts.	Accounts (Nimble AMS)	tradoc509 Org	10/20/2020, 6:27 AM	
Account Institutions with Students	All Institution Account Types with Student Affiliated. Not necessarily Student Members.	Accounts (Nimble AMS)	tradoc509 Org	10/20/2020, 6:27 AM	
Account Institutions with Contacts	All Institutions with Primary Contact, President, Registrar, and Institution information.	Accounts (Nimble AMS)	tradoc509 Org	10/20/2020, 6:27 AM	

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

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



Report: Accounts Expanded
Accounts by Type
All Accounts in the org grouped by Account Type. Provides accurate TOTAL of ALL Accounts in org.

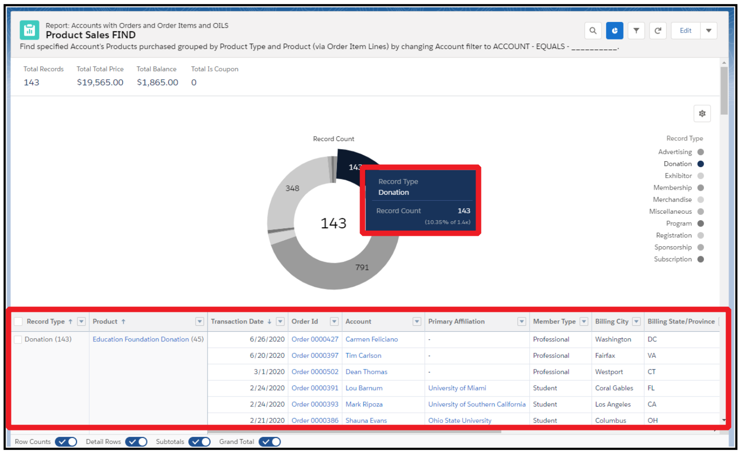
Total Records	Total Is Prospect?
355	13

Edit
Record Count
17
39
355
Account Record Type
Individual
Record Count 272
(76.62% of 355)
Account Record Type
Contractor
Individual
Institution
Organization
Student
Vendor

Account Record Type	Account Name	Primary Affiliation	Member Type	SMF	Member Thru	Billing Address	Persons Phone
Contractor (8)	Bobby Allison	-			-	100 F Street Northeast, Washington, DC 20002 United States	(202) 456-384
	Brian Bodson	-			-	100 O Street Southwest, Washington, DC 20024 United States	(202) 534-633
	Sally Rampone	-			-	987 East Colfax Avenue, Denver, CO 80218 United States	(720) 984-623
	Yan Helmut	-			-	559 Main Street, Schaumburg, IL United States	-
	Dom Peterson	-			-	West 16th Street, Chicago, IL United States	(212) 398-521
	Tom Bynum	-			-	112 Green Street, San Francisco, CA 94111 United States	(415) 323-948

Row Counts
Detail Rows
Subtotals
Grand Total

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.



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
143	$19,565.00	$1,865.00	0

Edit
Record Count
143
348
143
791
Record Type
Donation
Record Count 143
(10.35% of 1.4K)
Record Type
Advertising
Donation
Exhibitor
Membership
Merchandise
Miscellaneous
Program
Registration
Sponsorship
Subscription

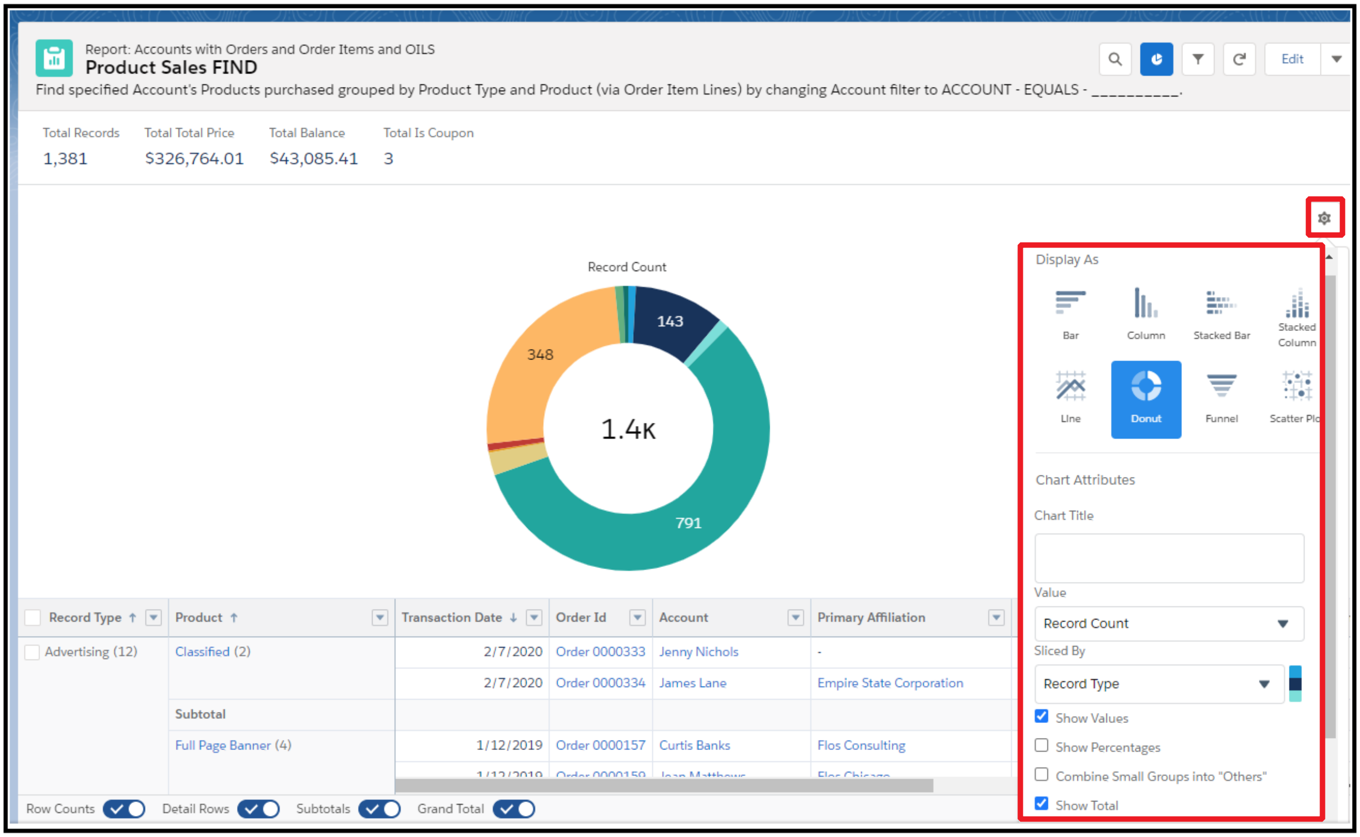
Record Type	Product	Transaction Date	Order Id	Account	Primary Affiliation	Member Type	Billing City	Billing State/Province
Donation (143)	Education Foundation Donation (45)	6/26/2020	Order 0000427	Carmen Feliciano	-	Professional	Washington	DC
		6/20/2020	Order 0000397	Tim Carlson	-	Professional	Fairfax	VA
		3/1/2020	Order 0000502	Dean Thomas	-	Professional	Westport	CT
		2/24/2020	Order 0000391	Lou Barnum	University of Miami	Student	Coral Gables	FL
		2/24/2020	Order 0000393	Mark Ripoza	University of Southern California	Student	Los Angeles	CA
		2/21/2020	Order 0000386	Shauna Evans	Ohio State University	Student	Columbus	OH

Row Counts
Detail Rows
Subtotals
Grand Total

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

Chart Attributes
Chart Title
Value: Record Count
Sliced By: Record Type
☑ Show Values
☐ Show Percentages
☐ Combine Small Groups into "Others"
☑ Show Total

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

Row Counts ✓ Detail Rows ✓ Subtotals ✓ Grand 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

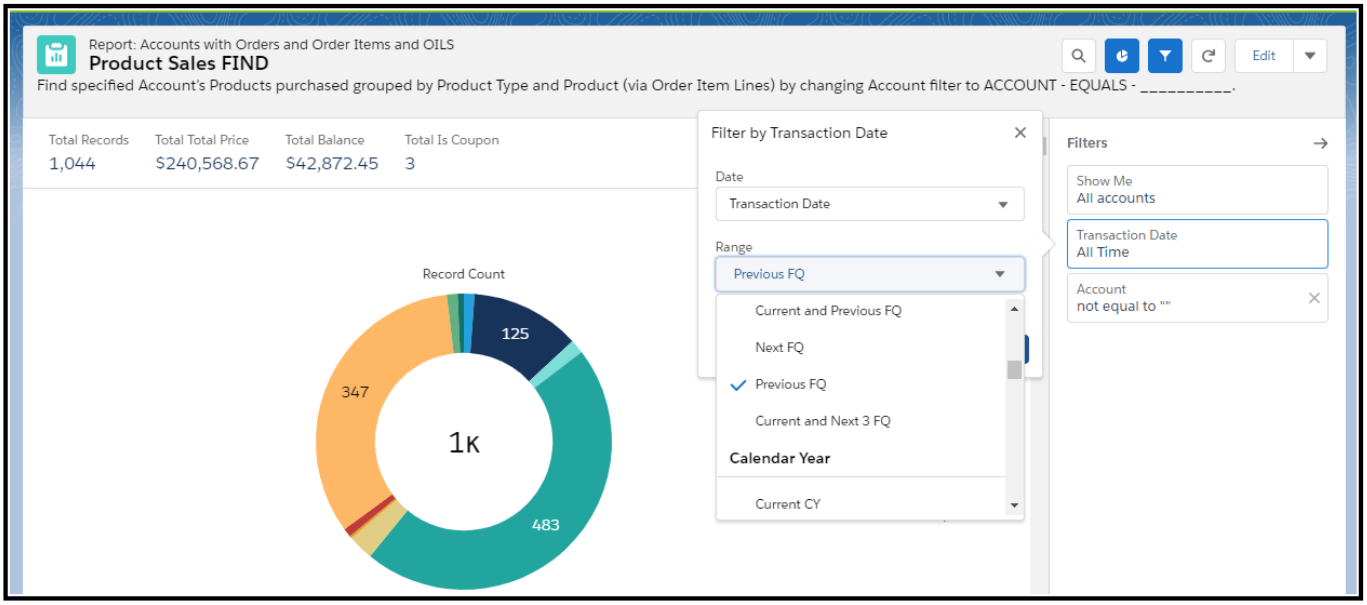
Any time a user opens an existing report, they can adjust the interactive filters to fit their desired criteria, without permanently changing them. Interactive filters enable multiple persons to use the same report across different areas of business; each user can run the report using adjusted filters 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 PERMANANTLY 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**).



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
1,044	$240,568.67	$42,872.45	3

Filter by Transaction Date
Date: Transaction Date
Range: Previous FQ

Filters
Show Me: All accounts
Transaction Date: All Time
Account: not equal to ""

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:

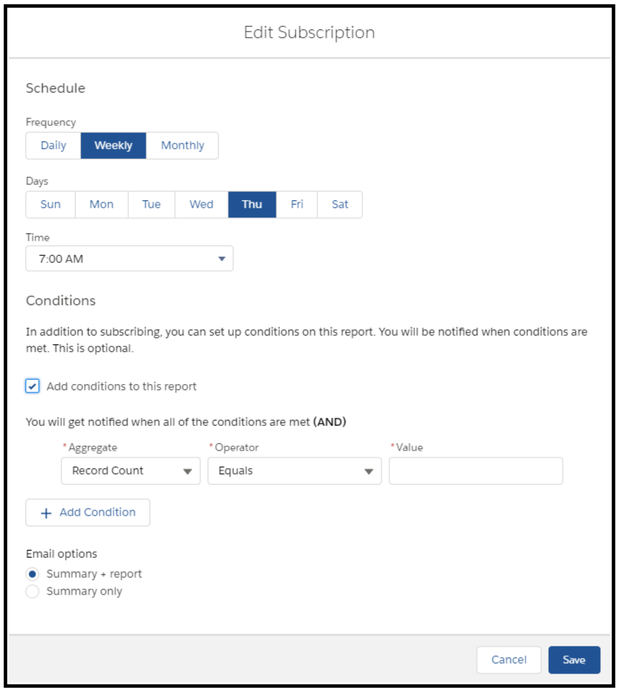
- Sort Ascending
- Sort Descending
- Group Rows by This Field
- Group Columns by This Field
- Remove Column

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.



Frequency: Weekly

Days: Thu

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	*Operator	*Value
Record Count	Equals	

Email options

● Summary + report

○ Summary only

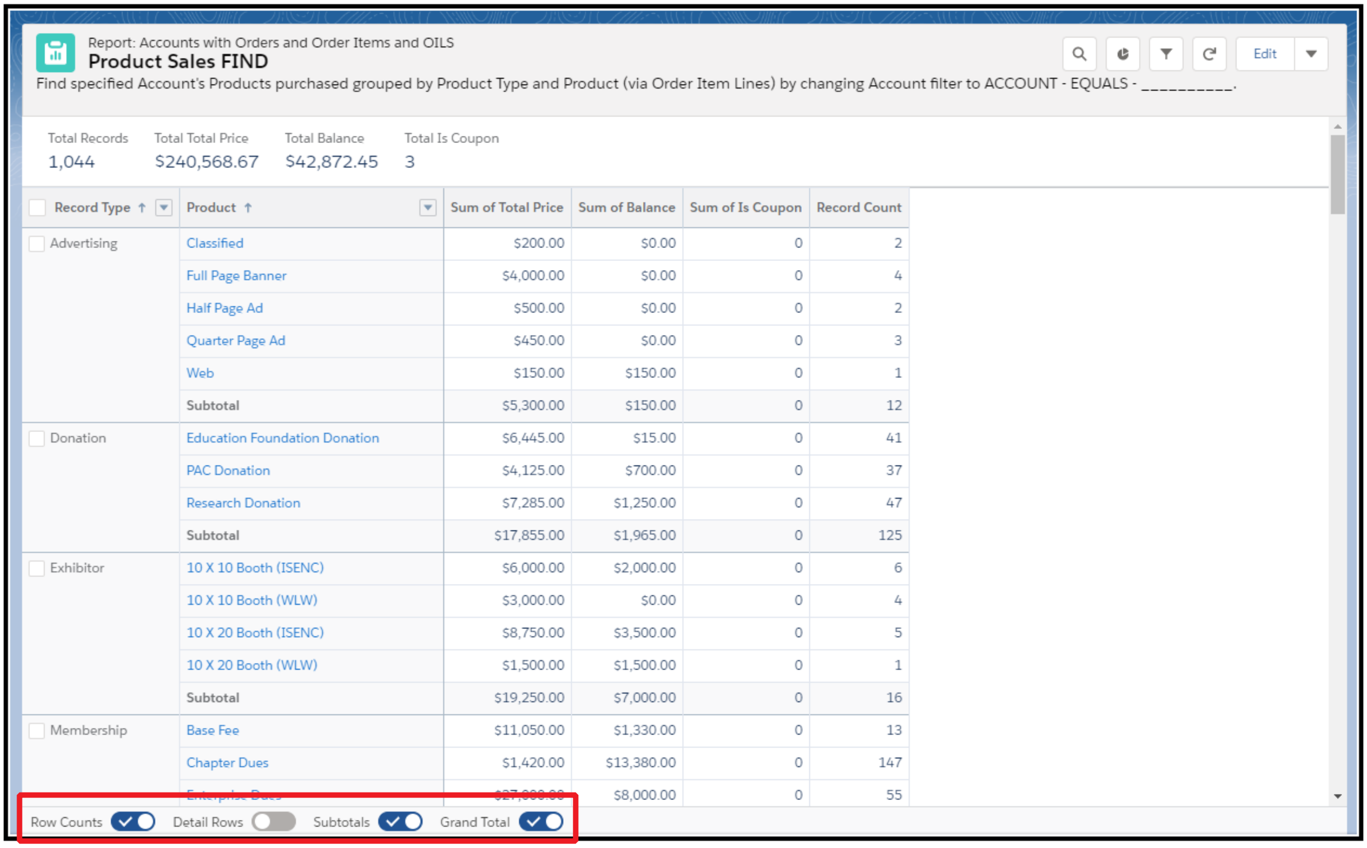
- **Export** – Enables users to export to Excel – additional Report types can be configured: Comma Delimited, PDF, Word, etc.
- **Add to Dashboard** – Enables user to add to existing or new dashboard.

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 - __________.

Total Records	Total Total Price	Total Balance	Total Is Coupon
1,044	$240,568.67	$42,872.45	3

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	[illegible]	$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:

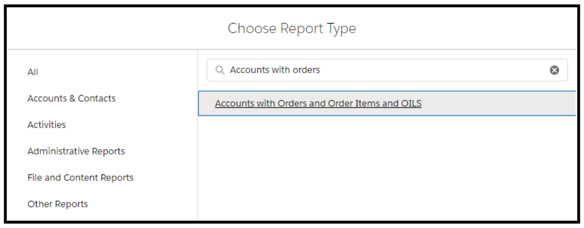
- Navigate to the **Reports** item and open the **All Reports** section on left.
- **Find** and **Open** the desired item/topic **Folder**.
- **Find** and **Run** a **Report** from folder most closely related to their desired result.
- Use the **Save As** button under **Edit** to create a copy of the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


Choose Report Type
All
Accounts & Contacts
Activities
Administrative Reports
File and Content Reports
Other Reports
Accounts with orders
Accounts with Orders and Order Items and OILS

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.

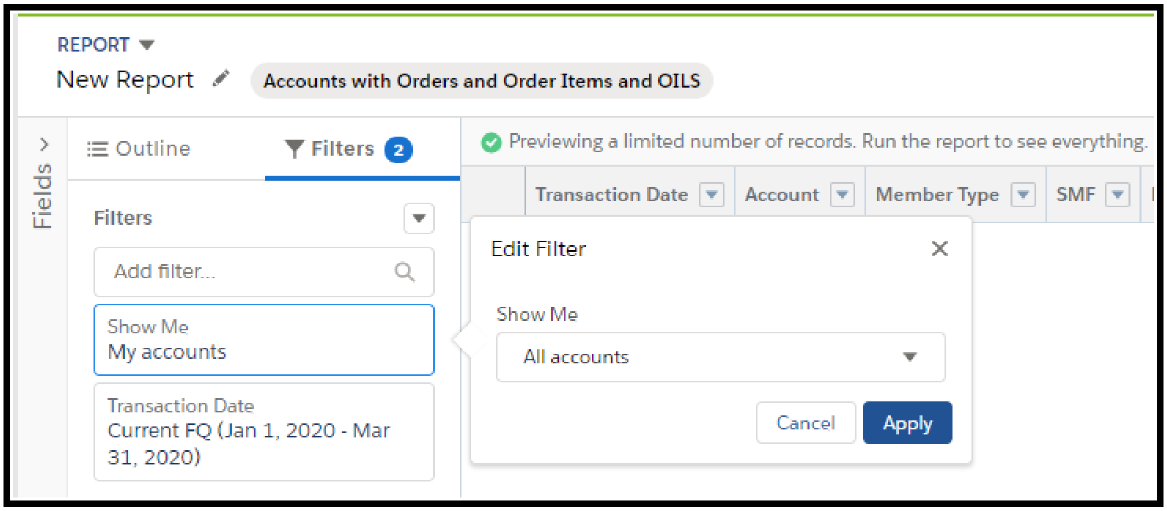
FILTERS

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**.


REPORT
New Report
Accounts with Orders and Order Items and OILS
Fields
Outline
Filters 2
Transaction Date
Account
Member Type
SMF
Filters
Add filter...
Edit Filter
Cancel
Apply

Previewing a limited number of records. Run the report to see everything.

Show Me
My accounts

Transaction Date
Current FQ (Jan 1, 2020 - Mar 31, 2020)

Show Me
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**.

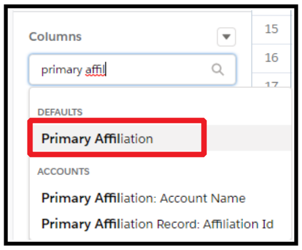
FIELDS

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

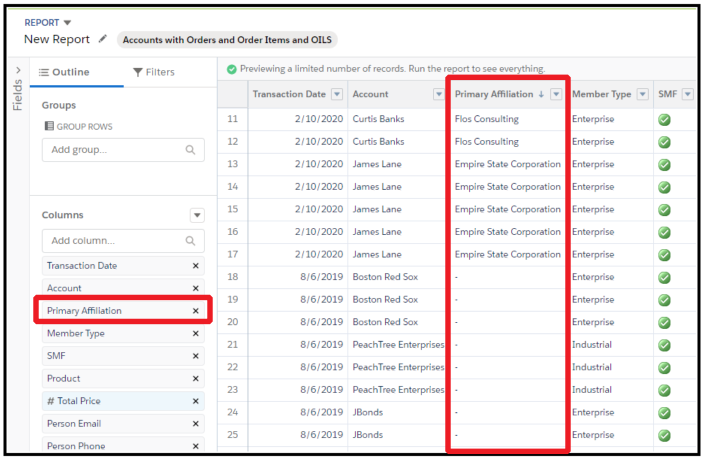
If configured properly by an Administrator, users will see a number of “default” fields display when a Report Type is first selected and initially run. Users may then want to select additional or edit existing fields (columns) to meet their requirements.

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.


Columns
primary affil
DEFAULTS
Primary Affiliation
ACCOUNTS
Primary Affiliation: Account Name
Primary Affiliation Record: Affiliation Id
15
16

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.


REPORT
New Report
Accounts with Orders and Order Items and OILS
Fields
Outline
Filters
Groups
GROUP ROWS
Add group...
Columns
Add column...
Transaction Date
Account
Primary Affiliation
Member Type
SMF
Product
# Total Price
Person Email
Person Phone

Previewing a limited number of records. Run the report to see everything.

	Transaction Date	Account	Primary Affiliation	Member Type	SMF
11	2/10/2020	Curtis Banks	Flos Consulting	Enterprise	✓
12	2/10/2020	Curtis Banks	Flos Consulting	Enterprise	✓
13	2/10/2020	James Lane	Empire State Corporation	Enterprise	✓
14	2/10/2020	James Lane	Empire State Corporation	Enterprise	✓
15	2/10/2020	James Lane	Empire State Corporation	Enterprise	✓
16	2/10/2020	James Lane	Empire State Corporation	Enterprise	✓
17	2/10/2020	James Lane	Empire State Corporation	Enterprise	✓
18	8/6/2019	Boston Red Sox	-	Enterprise	✓
19	8/6/2019	Boston Red Sox	-	Enterprise	✓
20	8/6/2019	Boston Red Sox	-	Enterprise	✓
21	8/6/2019	PeachTree Enterprises	-	Industrial	✓
22	8/6/2019	PeachTree Enterprises	-	Industrial	✓
23	8/6/2019	PeachTree Enterprises	-	Industrial	✓
24	8/6/2019	JBonds	-	Enterprise	✓
25	8/6/2019	JBonds	-	Enterprise	✓

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
- A - Text
- 📅 - Calendar
- ✓ - Checkbox
- ▭ - Picklist

REPORT NAMING & RESULTS

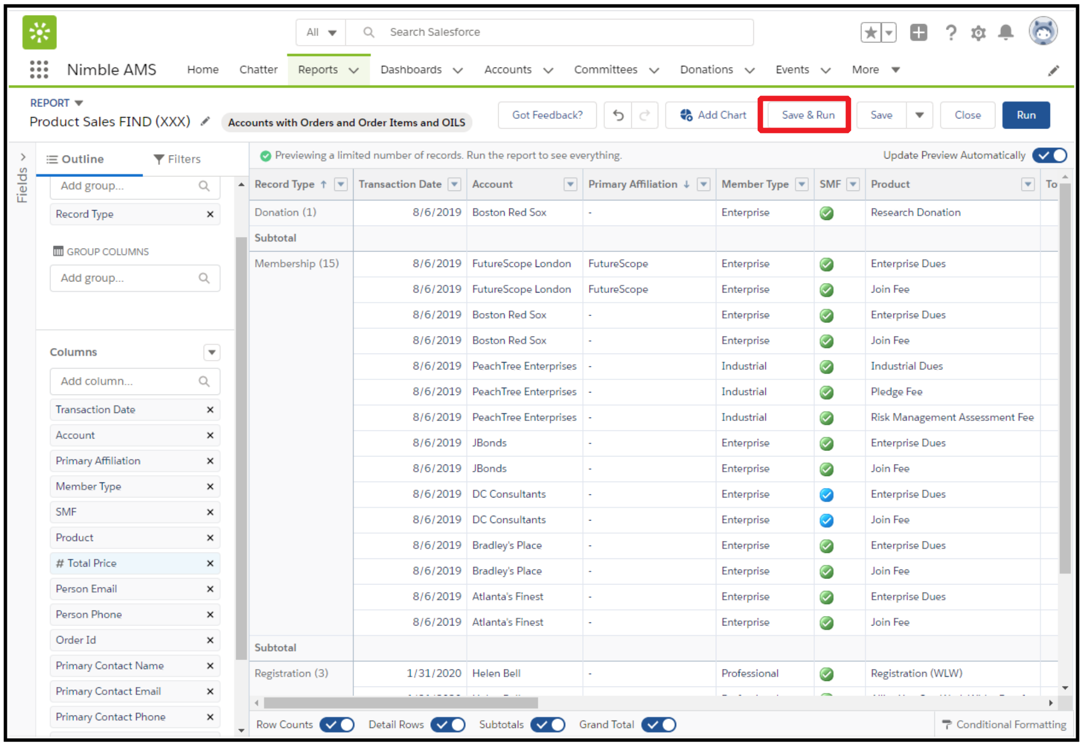
In this **exercise**, users will name and view the results of their new report.

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).


All
Search Salesforce
Nimble AMS
Home
Chatter
Reports
Dashboards
Accounts
Committees
Donations
Events
More
REPORT
Product Sales FIND (XXX)
Accounts with Orders and Order Items and OILS
Got Feedback?
Add Chart
Save & Run
Save
Close
Run
Fields
Outline
Filters
Add group...
Record Type
GROUP COLUMNS
Add group...
Columns
Add column...
Transaction Date
Account
Primary Affiliation
Member Type
SMF
Product
# Total Price
Person Email
Person Phone
Order Id
Primary Contact Name
Primary Contact Email
Primary Contact Phone
Update Preview Automatically
Row Counts
Detail Rows
Subtotals
Grand Total
Conditional Formatting

Previewing a limited number of records. Run the report to see everything.

Record Type ↑	Transaction Date	Account	Primary Affiliation ↓	Member Type	SMF	Product
Donation (1)	8/6/2019	Boston Red Sox	-	Enterprise	✓	Research Donation
Subtotal						
Membership (15)	8/6/2019	FutureScope London	FutureScope	Enterprise	✓	Enterprise Dues
	8/6/2019	FutureScope London	FutureScope	Enterprise	✓	Join Fee
	8/6/2019	Boston Red Sox	-	Enterprise	✓	Enterprise Dues
	8/6/2019	Boston Red Sox	-	Enterprise	✓	Join Fee
	8/6/2019	PeachTree Enterprises	-	Industrial	✓	Industrial Dues
	8/6/2019	PeachTree Enterprises	-	Industrial	✓	Pledge Fee
	8/6/2019	PeachTree Enterprises	-	Industrial	✓	Risk Management Assessment Fee
	8/6/2019	JBonds	-	Enterprise	✓	Enterprise Dues
	8/6/2019	JBonds	-	Enterprise	✓	Join Fee
	8/6/2019	DC Consultants	-	Enterprise	✓	Enterprise Dues
	8/6/2019	DC Consultants	-	Enterprise	✓	Join Fee
	8/6/2019	Bradley's Place	-	Enterprise	✓	Enterprise Dues
	8/6/2019	Bradley's Place	-	Enterprise	✓	Join Fee
	8/6/2019	Atlanta's Finest	-	Enterprise	✓	Enterprise Dues
	8/6/2019	Atlanta's Finest	-	Enterprise	✓	Join Fee
Subtotal						
Registration (3)	1/31/2020	Helen Bell	-	Professional	✓	Registration (WLW)

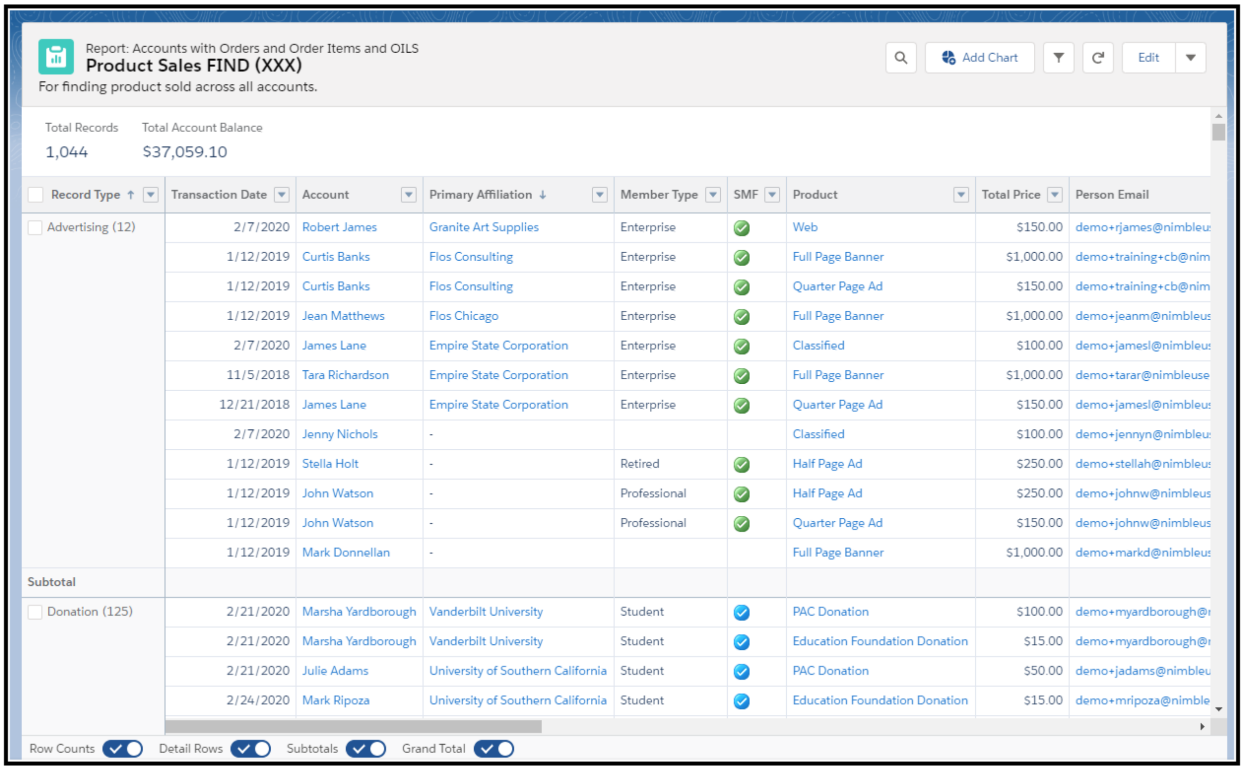
3. In the **Report Name** field, enter **Product Sales FIND (XXX)**.
   - (XXX) ='s Users Initials.
4. In **Report Description** field, enter **For finding product sold across all accounts**.

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.

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	Total Account Balance
1,044	$37,059.10

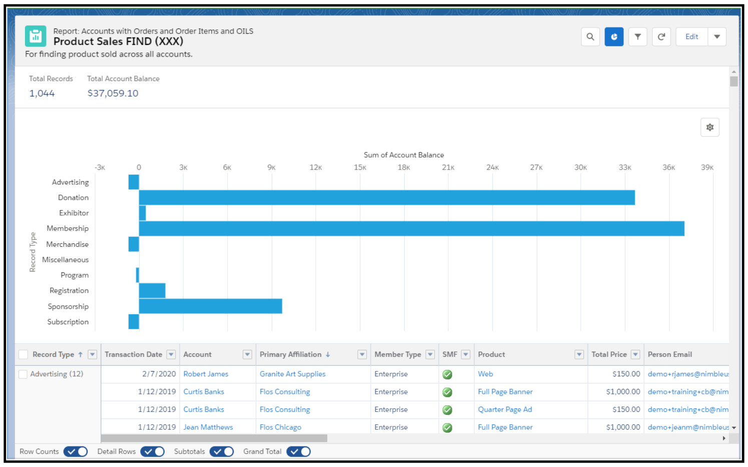
☐ Record Type ↑	Transaction Date	Account	Primary Affiliation ↓	Member Type	SMF	Product	Total Price	Person Email
☐ Advertising (12)	2/7/2020	Robert James	Granite Art Supplies	Enterprise	✓	Web	$150.00	demo+rjames@nimbleu
	1/12/2019	Curtis Banks	Flos Consulting	Enterprise	✓	Full Page Banner	$1,000.00	demo+training+cb@nim
	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@nimbleuse
	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@nimbleus
	1/12/2019	John Watson	-	Professional	✓	Quarter Page Ad	$150.00	demo+johnw@nimbleus
	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@
	2/21/2020	Marsha Yardborough	Vanderbilt University	Student	✓	Education Foundation Donation	$15.00	demo+myardborough@
	2/21/2020	Julie Adams	University of Southern California	Student	✓	PAC Donation	$50.00	demo+jadams@nimbleu
	2/24/2020	Mark Ripoza	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).


Edit
Sum of Account Balance
-3K
0
3K
6K
9K
12K
15K
18K
21K
24K
27K
30K
33K
36K
39K
Record Type
Advertising
Donation
Exhibitor
Membership
Merchandise
Miscellaneous
Program
Registration
Sponsorship
Subscription
Row Counts
Detail Rows
Subtotals
Grand Total

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. A **Horizontal Bar** chart displays by default.

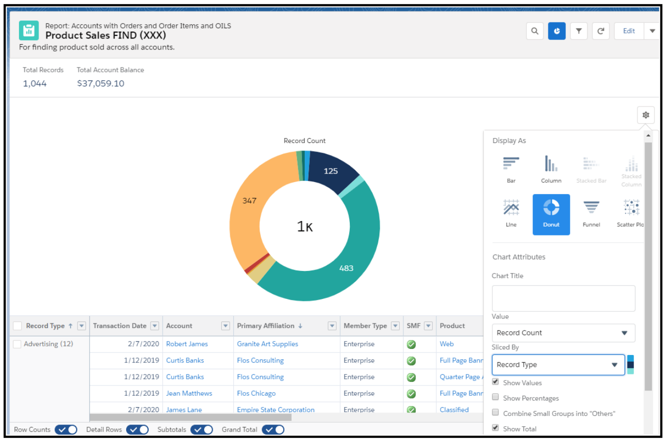
3. Click on the **Gear** icon (above the key to right side).

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.


Edit
Record Count
125
347
1K
483
Display As
Bar
Column
Stacked Bar
Stacked Column
Line
Donut
Funnel
Scatter Plo
Chart Attributes
Row Counts
Detail Rows
Subtotals
Grand Total

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

Chart Title
Value: Record Count
Sliced By: Record Type
☑ Show Values
☐ Show Percentages
☐ Combine Small Groups into "Others"
☑ Show Total

Record Type ↑	Transaction Date	Account	Primary Affiliation ↓	Member Type	SMF	Product
Advertising (12)	2/7/2020	Robert James	Granite Art Supplies	Enterprise	✓	Web
	1/12/2019	Curtis Banks	Flos Consulting	Enterprise	✓	Full Page Bann
	1/12/2019	Curtis Banks	Flos Consulting	Enterprise	✓	Quarter Page
	1/12/2019	Jean Matthews	Flos Chicago	Enterprise	✓	Full Page Bann
	2/7/2020	James Lane	Empire State Corporation	Enterprise	✓	Classified

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

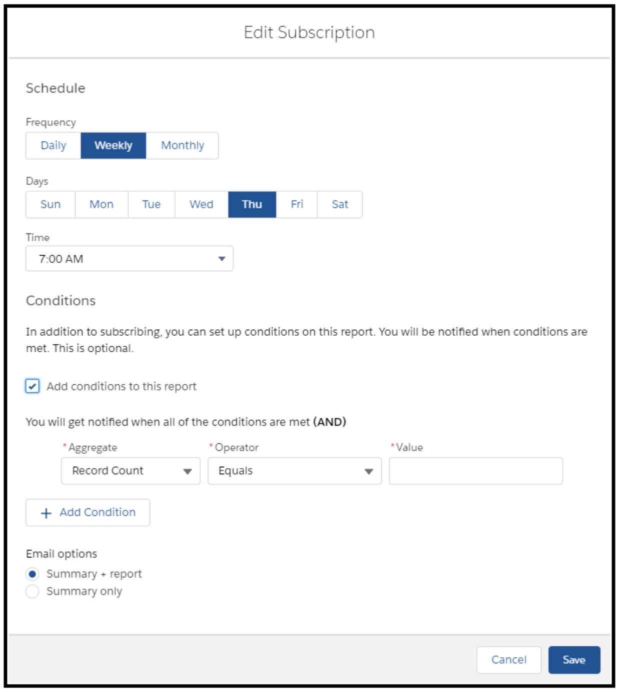
IMPORTANT NOTE For Chart functions to be available a Report must have one field Grouped, otherwise the chart icon will appear greyed out.

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	*Operator	*Value
Record Count	Equals	

Email options

● Summary + report

○ Summary only

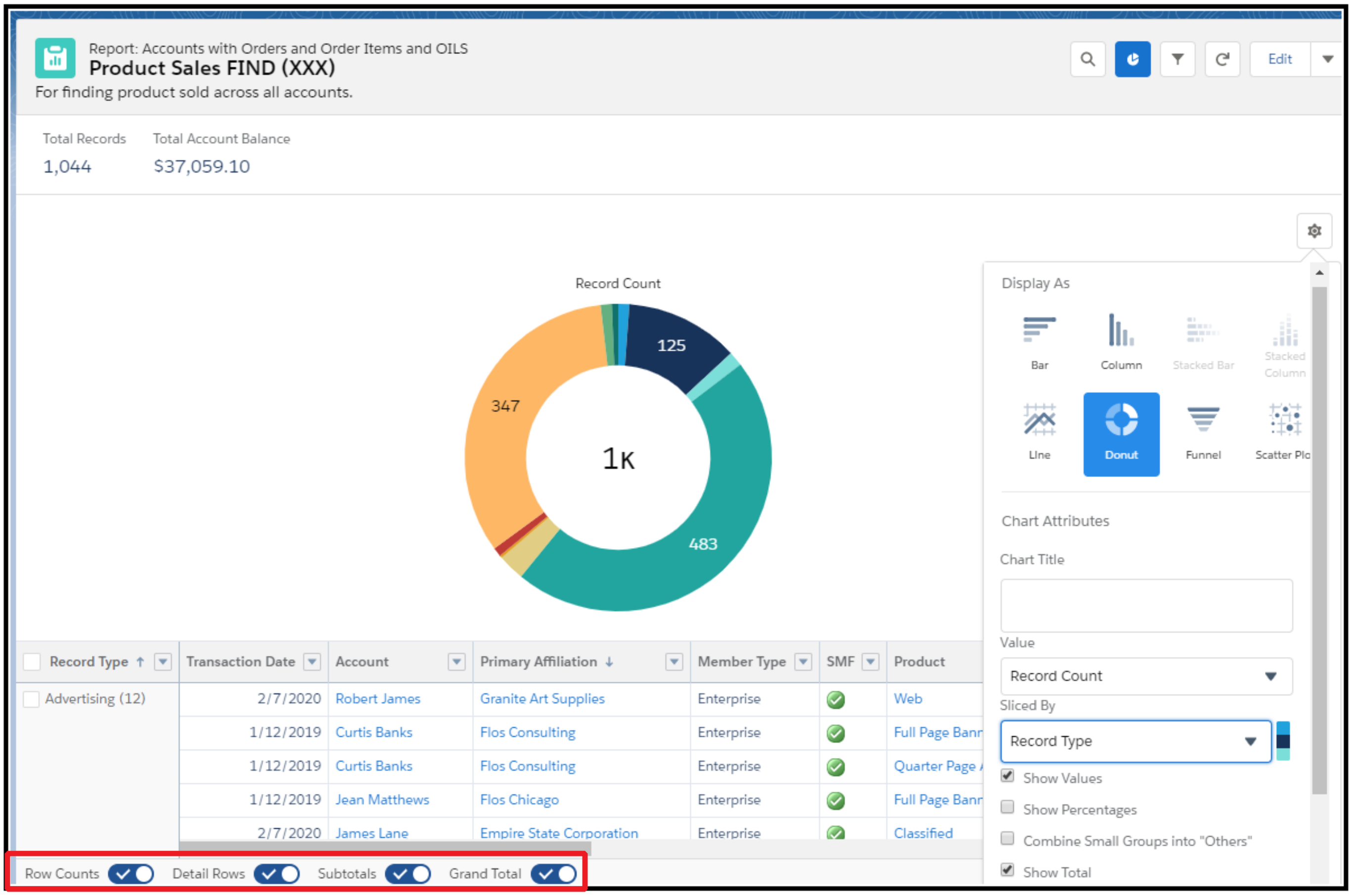
- **Export** – Enables users to export to Excel – additional Report types are configurable: Comma Delimited, PDF, Word, etc.
- **Delete** – Deletes Report.
- **Add to Dashboard** – Enables user to add to existing or new dashboard.

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.



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

Chart Attributes

Chart Title

Value: Record Count

Sliced By: Record Type

☑ Show Values

☐ Show Percentages

☐ Combine Small Groups into "Others"

☑ Show Total

Record Type ↑	Transaction Date	Account	Primary Affiliation ↓	Member Type	SMF	Product
Advertising (12)	2/7/2020	Robert James	Granite Art Supplies	Enterprise	✓	Web
	1/12/2019	Curtis Banks	Flos Consulting	Enterprise	✓	Full Page Banr
	1/12/2019	Curtis Banks	Flos Consulting	Enterprise	✓	Quarter Page
	1/12/2019	Jean Matthews	Flos Chicago	Enterprise	✓	Full Page Banr
	2/7/2020	James Lane	Empire State Corporation	Enterprise	✓	Classified

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.

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

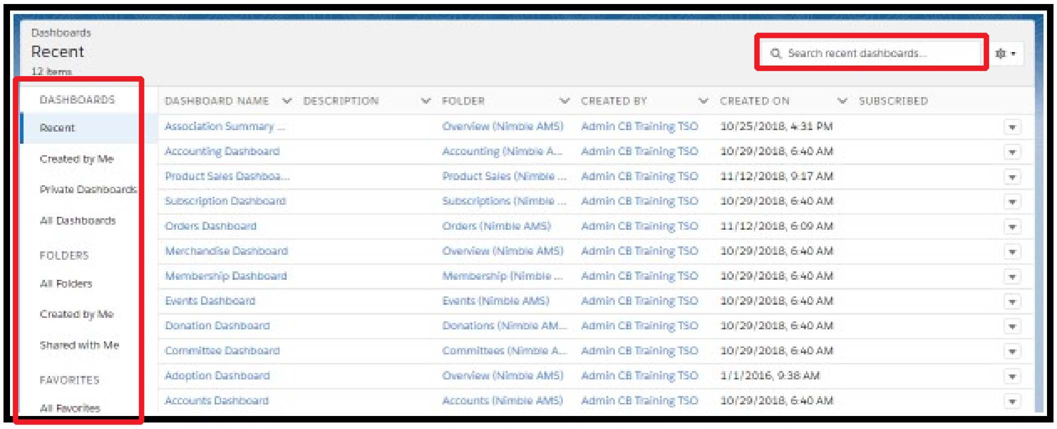
Objectives

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.



DASHBOARD NAME	DESCRIPTION	FOLDER	CREATED BY	CREATED ON	SUBSCRIBED
Association Summary ...		Overview (Nimble AMS)	Admin CB Training TSO	10/25/2018, 4:31 PM	
Accounting Dashboard		Accounting (Nimble A...	Admin CB Training TSO	10/29/2018, 6:40 AM	
Product Sales Dashboa...		Product Sales (Nimble ...	Admin CB Training TSO	11/12/2018, 9:17 AM	
Subscription Dashboard		Subscriptions (Nimble ...	Admin CB Training TSO	10/29/2018, 6:40 AM	
Orders Dashboard		Orders (Nimble AMS)	Admin CB Training TSO	11/12/2018, 6:09 AM	
Merchandise Dashboard		Overview (Nimble AMS)	Admin CB Training TSO	10/29/2018, 6:40 AM	
Membership Dashboard		Membership (Nimble ...	Admin CB Training TSO	10/29/2018, 6:40 AM	
Events Dashboard		Events (Nimble AMS)	Admin CB Training TSO	10/29/2018, 6:40 AM	
Donation Dashboard		Donations (Nimble AM...	Admin CB Training TSO	10/29/2018, 6:40 AM	
Committee Dashboard		Committees (Nimble A...	Admin CB Training TSO	10/29/2018, 6:40 AM	
Adoption Dashboard		Overview (Nimble AMS)	Admin CB Training TSO	1/1/2016, 9:38 AM	
Accounts Dashboard		Accounts (Nimble AMS)	Admin CB Training TSO	10/29/2018, 6:40 AM	

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.

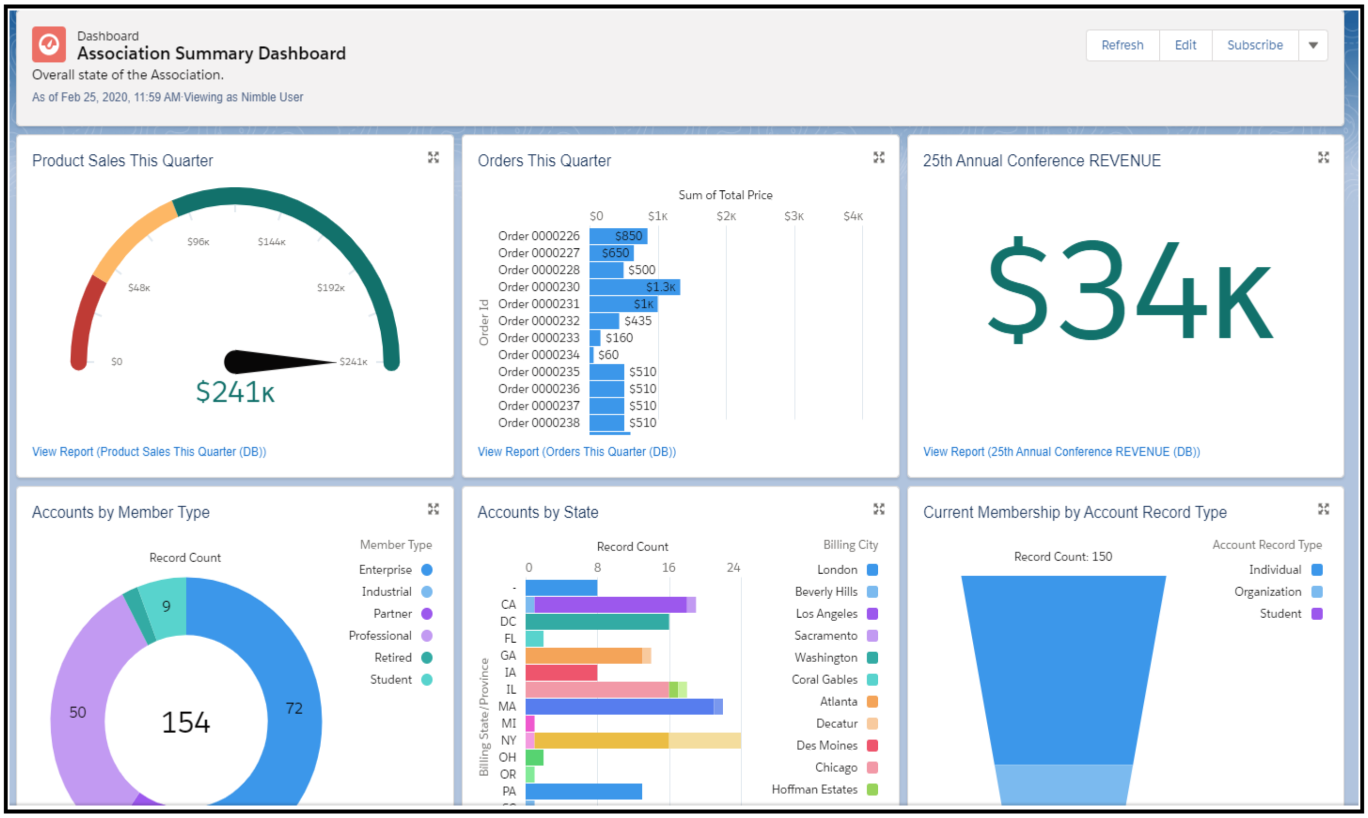
Understanding Dashboards

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.


Dashboard

Association Summary Dashboard

Overall state of the Association.

As of Feb 25, 2020, 11:59 AM·Viewing as Nimble User

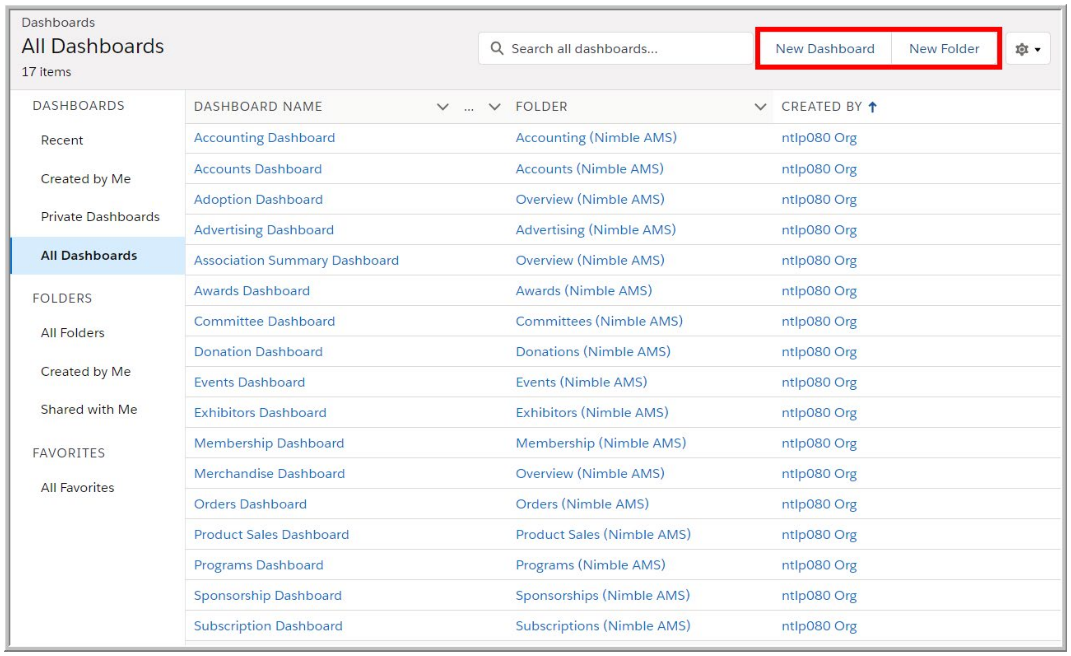
Refresh
Edit
Subscribe
Product Sales This Quarter
$0
$48K
$96K
$144K
$192K
$241K
$241K
View Report (Product Sales This Quarter (DB))
Orders This Quarter
Sum of Total Price
$0
$1K
$2K
$3K
$4K
Order Id
Order 0000226
$850
Order 0000227
$650
Order 0000228
$500
Order 0000230
$1.3K
Order 0000231
$1K
Order 0000232
$435
Order 0000233
$160
Order 0000234
$60
Order 0000235
$510
Order 0000236
$510
Order 0000237
$510
Order 0000238
$510
View Report (Orders This Quarter (DB))
25th Annual Conference REVENUE
$34K
View Report (25th Annual Conference REVENUE (DB))
Accounts by Member Type
Record Count
9
50
72
154
Member Type
Enterprise
Industrial
Partner
Professional
Retired
Student
Accounts by State
Record Count
0
8
16
24
Billing State/Province
-
CA
DC
FL
GA
IA
IL
MA
MI
NY
OH
OR
PA
Billing City
London
Beverly Hills
Los Angeles
Sacramento
Washington
Coral Gables
Atlanta
Decatur
Des Moines
Chicago
Hoffman Estates
Current Membership by Account Record Type
Record Count: 150
Account Record Type
Individual
Organization
Student

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:

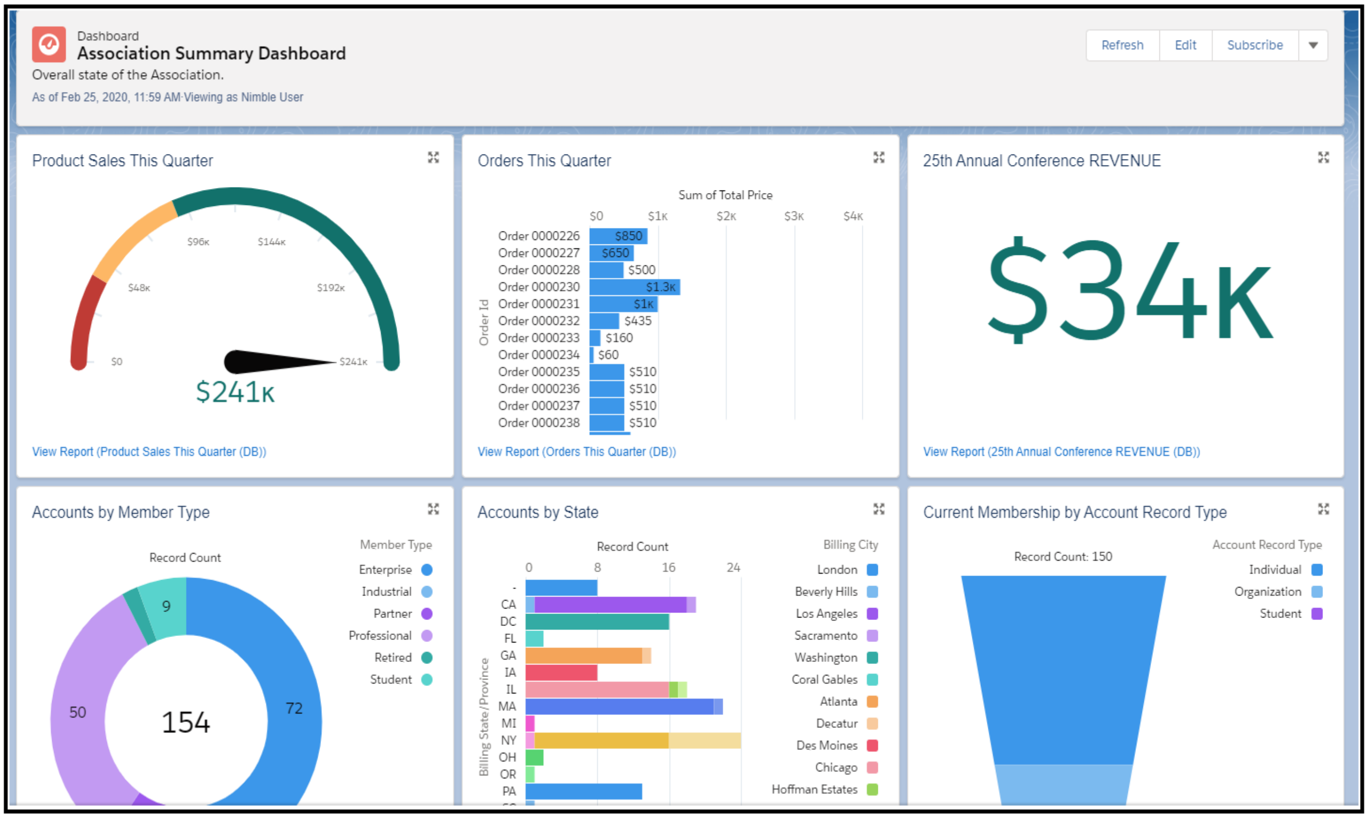
1. From the **Navigation** bar, click the **Dashboards** Item.
2. Click on the **All Dashboards** list view from the left-hand column.


Dashboards
All Dashboards
17 items
Search all dashboards...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites

DASHBOARD NAME	FOLDER	CREATED BY
Accounting Dashboard	Accounting (Nimble AMS)	ntlp080 Org
Accounts Dashboard	Accounts (Nimble AMS)	ntlp080 Org
Adoption Dashboard	Overview (Nimble AMS)	ntlp080 Org
Advertising Dashboard	Advertising (Nimble AMS)	ntlp080 Org
Association Summary Dashboard	Overview (Nimble AMS)	ntlp080 Org
Awards Dashboard	Awards (Nimble AMS)	ntlp080 Org
Committee Dashboard	Committees (Nimble AMS)	ntlp080 Org
Donation Dashboard	Donations (Nimble AMS)	ntlp080 Org
Events Dashboard	Events (Nimble AMS)	ntlp080 Org
Exhibitors Dashboard	Exhibitors (Nimble AMS)	ntlp080 Org
Membership Dashboard	Membership (Nimble AMS)	ntlp080 Org
Merchandise Dashboard	Overview (Nimble AMS)	ntlp080 Org
Orders Dashboard	Orders (Nimble AMS)	ntlp080 Org
Product Sales Dashboard	Product Sales (Nimble AMS)	ntlp080 Org
Programs Dashboard	Programs (Nimble AMS)	ntlp080 Org
Sponsorship Dashboard	Sponsorships (Nimble AMS)	ntlp080 Org
Subscription Dashboard	Subscriptions (Nimble AMS)	ntlp080 Org

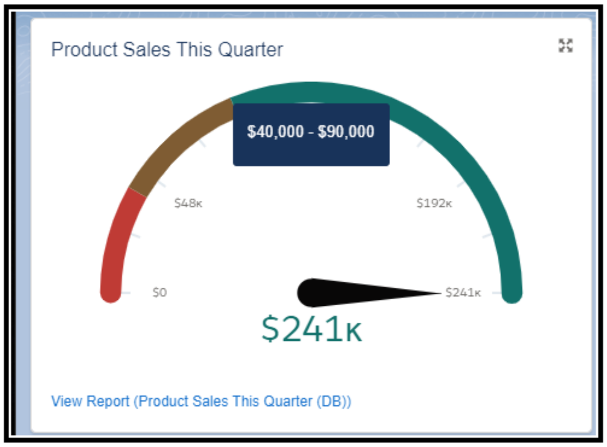
3. On the right side of the screen, observe the **Dashboard Options** area.
   - **New** - Enables creation of a new Dashboard record.
   - **New Folder -** Enables the creation of a New Dashboard Folder.

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


Dashboard
Association Summary Dashboard
Overall state of the Association.
As of Feb 25, 2020, 11:59 AM·Viewing as Nimble User
Refresh
Edit
Subscribe
Product Sales This Quarter
$0
$48K
$96K
$144K
$192K
$241K
$241K
View Report (Product Sales This Quarter (DB))
Orders This Quarter
Sum of Total Price
$0
$1K
$2K
$3K
$4K
Order Id
Order 0000226 $850
Order 0000227 $650
Order 0000228 $500
Order 0000230 $1.3K
Order 0000231 $1K
Order 0000232 $435
Order 0000233 $160
Order 0000234 $60
Order 0000235 $510
Order 0000236 $510
Order 0000237 $510
Order 0000238 $510
View Report (Orders This Quarter (DB))
25th Annual Conference REVENUE
$34K
View Report (25th Annual Conference REVENUE (DB))
Accounts by Member Type
Record Count
Member Type
Enterprise
Industrial
Partner
Professional
Retired
Student
9
50
154
72
Accounts by State
Record Count
0
8
16
24
Billing State/Province
-
CA
DC
FL
GA
IA
IL
MA
MI
NY
OH
OR
PA
Billing City
London
Beverly Hills
Los Angeles
Sacramento
Washington
Coral Gables
Atlanta
Decatur
Des Moines
Chicago
Hoffman Estates
Current Membership by Account Record Type
Record Count: 150
Account Record Type
Individual
Organization
Student

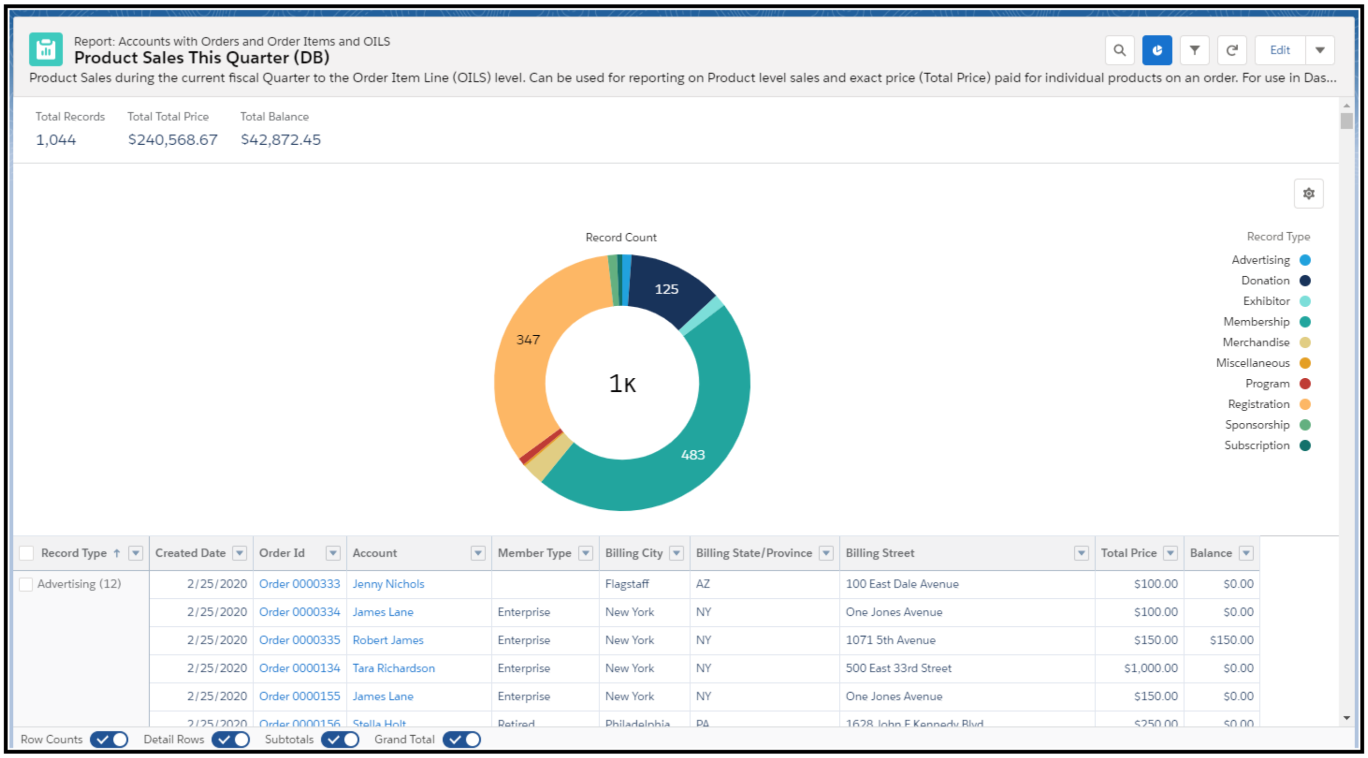
5. Observe the six displayed sections of the **Association Summary Dashboard**.

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


Product Sales This Quarter
$40,000 - $90,000
$0
$48K
$192K
$241K
$241K
View Report (Product Sales This Quarter (DB))

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

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


Edit
Record Count
125
347
483
1K
Record Type
Advertising ●
Donation ●
Exhibitor ●
Membership ●
Merchandise ●
Miscellaneous ●
Program ●
Registration ●
Sponsorship ●
Subscription ●
Row Counts
Detail Rows
Subtotals
Grand Total

Report: Accounts with Orders and Order Items and OILS

Product Sales This Quarter (DB)

Product Sales during the current fiscal Quarter to the Order Item Line (OILS) level. Can be used for reporting on Product level sales and exact price (Total Price) paid for individual products on an order. For use in Das...

Total Records 1,044

Total Total Price $240,568.67

Total Balance $42,872.45

Record Type ↑	Created Date	Order Id	Account	Member Type	Billing City	Billing State/Province	Billing Street	Total Price	Balance
Advertising (12)	2/25/2020	Order 0000333	Jenny Nichols		Flagstaff	AZ	100 East Dale Avenue	$100.00	$0.00
	2/25/2020	Order 0000334	James Lane	Enterprise	New York	NY	One Jones Avenue	$100.00	$0.00
	2/25/2020	Order 0000335	Robert James	Enterprise	New York	NY	1071 5th Avenue	$150.00	$150.00
	2/25/2020	Order 0000134	Tara Richardson	Enterprise	New York	NY	500 East 33rd Street	$1,000.00	$0.00
	2/25/2020	Order 0000155	James Lane	Enterprise	New York	NY	One Jones Avenue	$150.00	$0.00
	2/25/2020	Order 0000156	Stella Holt	Retired	Philadelphia	PA	1628 John F Kennedy Blvd	$250.00	$0.00

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.

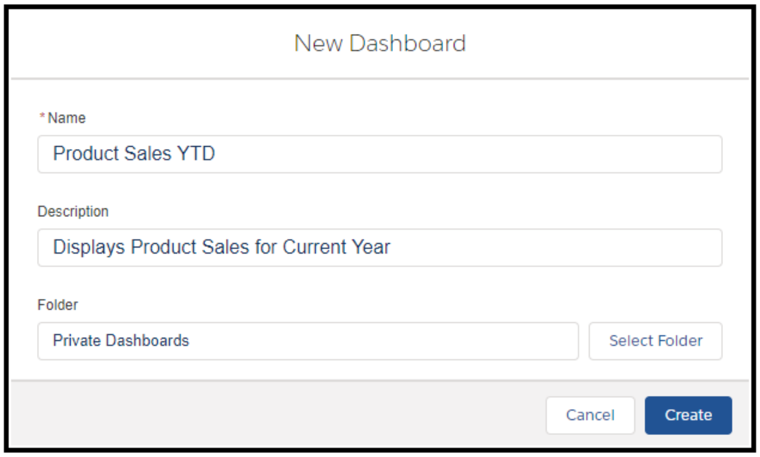
New Dashboards

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.


New Dashboard

*Name
Product Sales YTD

Description
Displays Product Sales for Current Year

Folder
Private Dashboards

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.

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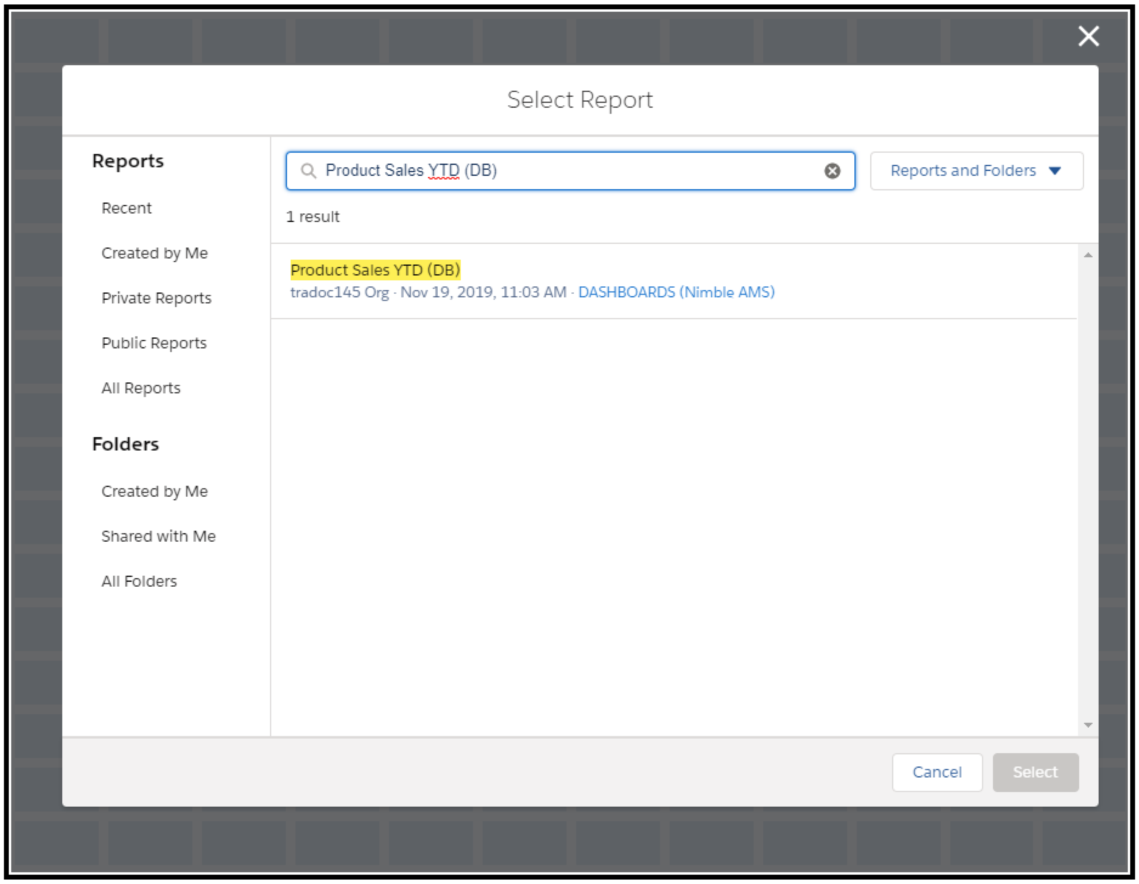
14. Click on the **Select** Button.


Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Created by Me
Shared with Me
All Folders
Reports and Folders
Cancel
Select

Product Sales YTD (DB)

1 result

Product Sales YTD (DB)
tradoc145 Org · Nov 19, 2019, 11:03 AM · DASHBOARDS (Nimble AMS)

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.

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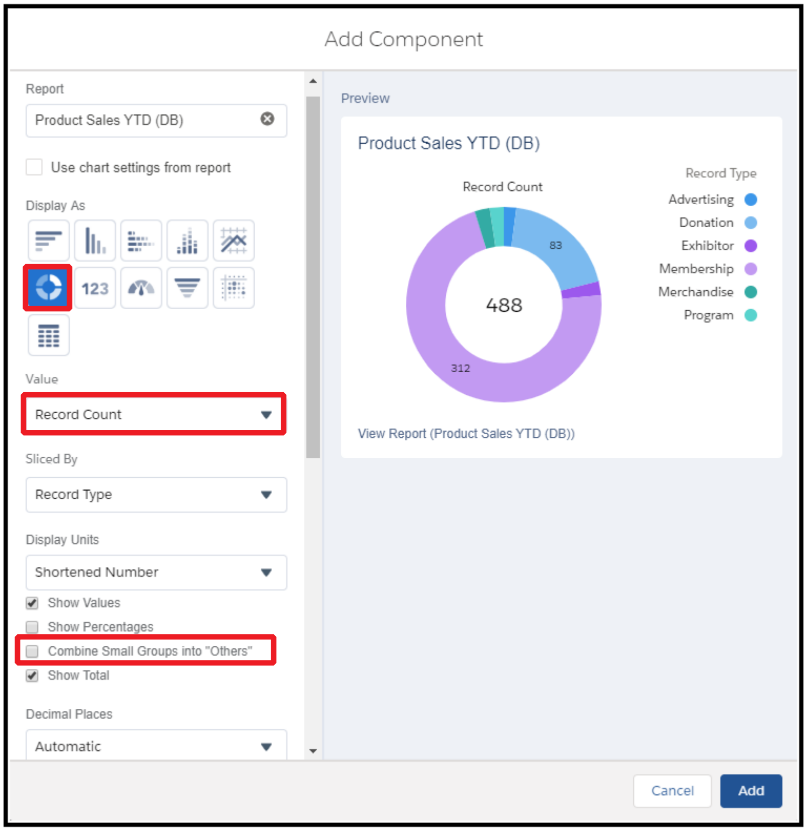
16. From the **Display As** section, select a **Donut Chart**.
17. Change the **Value** dropdown to **Record Count**.
    - Users can select a value based on any **Sub-totaled** column in the Report.
18. Uncheck the **Combine Small Groups into "Others"** checkbox.
    - This limits up to six Record Types 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.



Add Component

Report: Product Sales YTD (DB)

☐ Use chart settings from report

Display As

Value: Record Count

Sliced By: Record Type

Display Units: Shortened Number

☑ Show Values

☐ Show Percentages

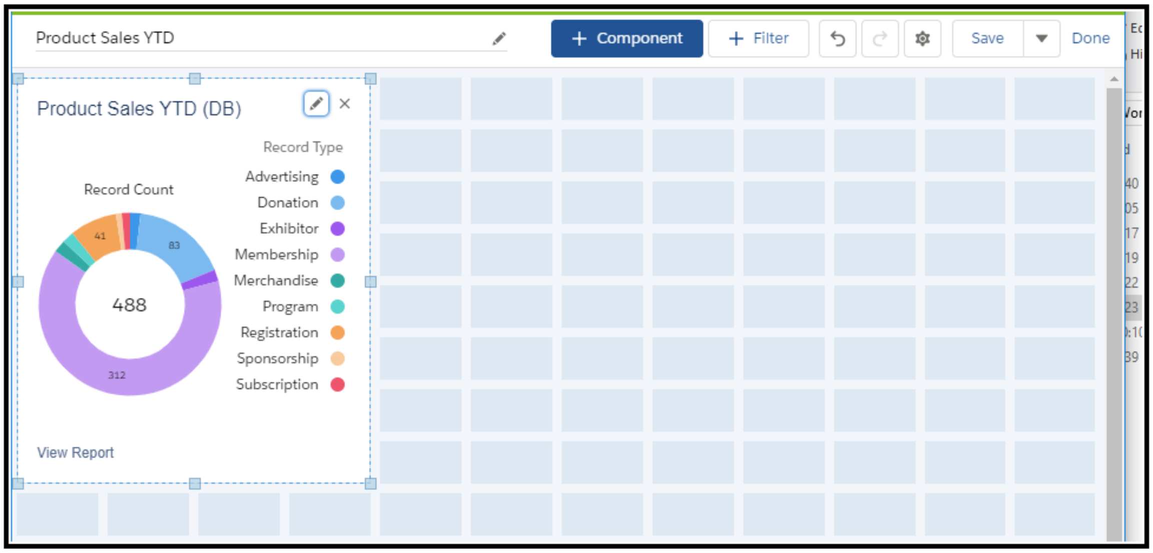
☐ Combine Small Groups into "Others"

☑ Show Total

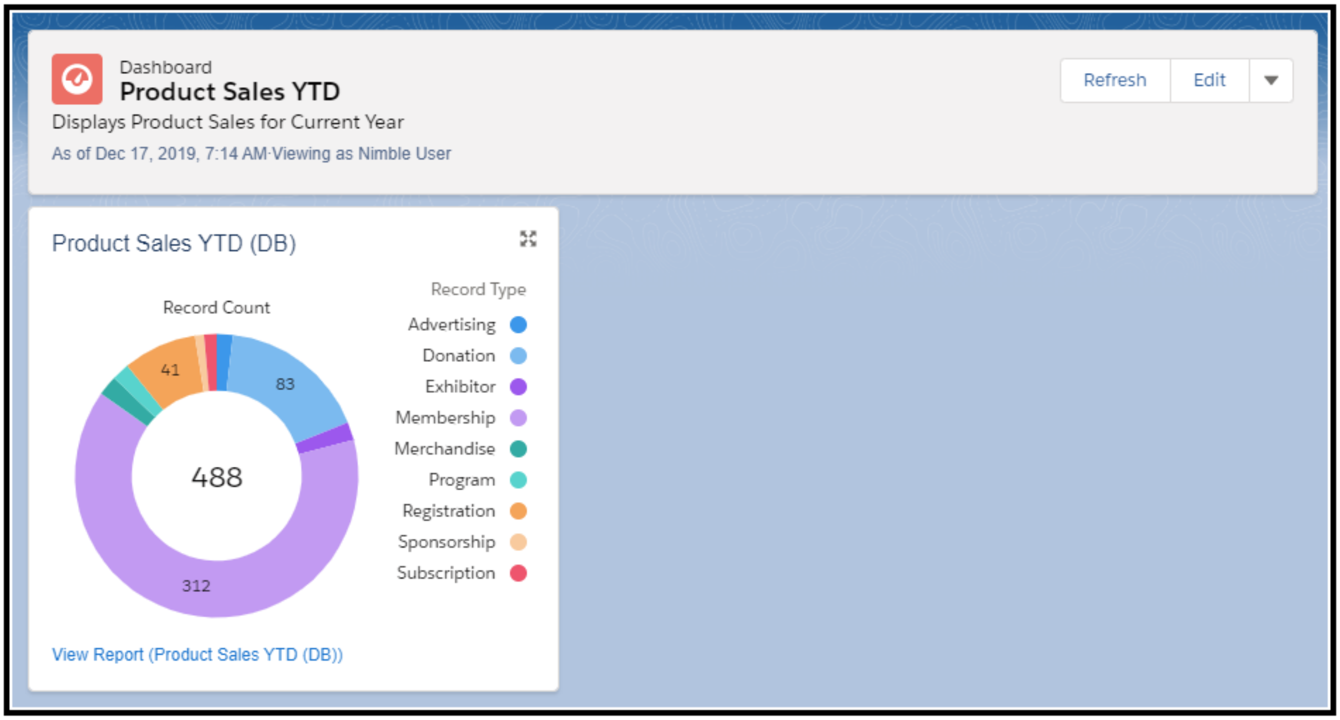
Decimal Places: Automatic

Preview
Product Sales YTD (DB)
Record Count
83
488
312
Record Type
Advertising
Donation
Exhibitor
Membership
Merchandise
Program
View Report (Product Sales YTD (DB))
Cancel
Add

20. Click on the **Add** button;
    - Report added to the **Dashboard Edit Grid**.


Product Sales YTD
+ Component
+ Filter
Save
Done
Product Sales YTD (DB)
Record Type
Record Count
Advertising
Donation
Exhibitor
Membership
Merchandise
Program
Registration
Sponsorship
Subscription
41
83
488
312
View Report

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.


Dashboard
Product Sales YTD
Refresh
Edit
Product Sales YTD (DB)
Record Type
Record Count
Advertising
Donation
Exhibitor
Membership
Merchandise
Program
Registration
Sponsorship
Subscription
41
83
488
312
View Report (Product Sales YTD (DB))

Displays Product Sales for Current Year

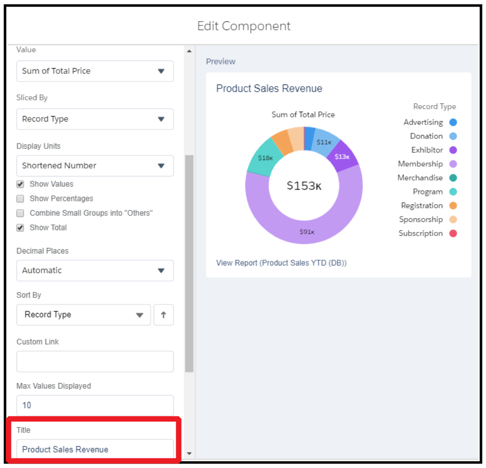
As of Dec 17, 2019, 7:14 AM·Viewing as Nimble User

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**.



Edit Component

Value: Sum of Total Price

Sliced By: Record Type

Display Units: Shortened Number

☑ Show Values
☐ Show Percentages
☐ Combine Small Groups into "Others"
☑ Show Total

Decimal Places: Automatic

Sort By: Record Type

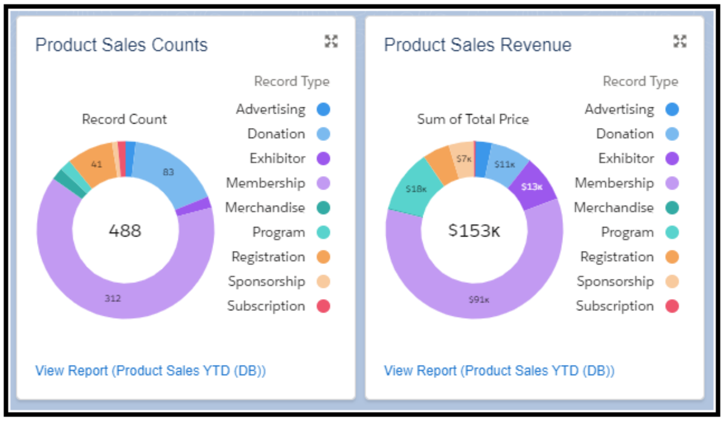
Custom Link:

Max Values Displayed: 10

Title: Product Sales Revenue

Preview
Product Sales Revenue
Sum of Total Price
$153K
$11K
$13K
$18K
$91K
Record Type
Advertising
Donation
Exhibitor
Membership
Merchandise
Program
Registration
Sponsorship
Subscription
View Report (Product Sales YTD (DB))

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**.



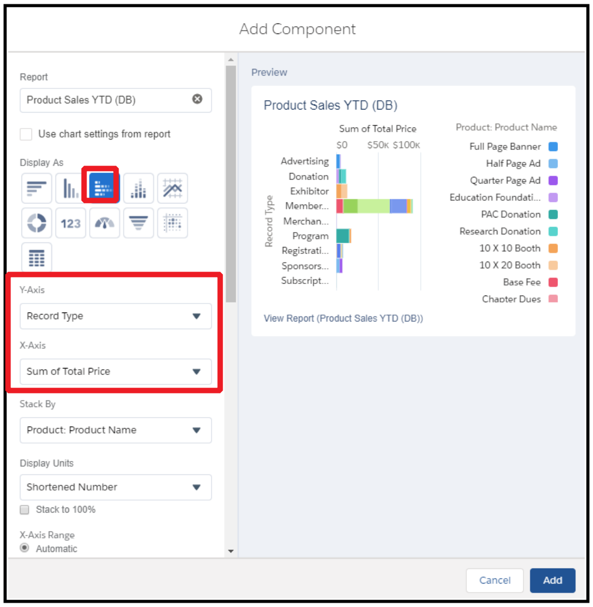
Product Sales Counts
Record Count
488
41
83
312
Record Type
Advertising
Donation
Exhibitor
Membership
Merchandise
Program
Registration
Sponsorship
Subscription
View Report (Product Sales YTD (DB))
Product Sales Revenue
Sum of Total Price
$153K
$7K
$11K
$13K
$18K
$91K
Record Type
Advertising
Donation
Exhibitor
Membership
Merchandise
Program
Registration
Sponsorship
Subscription
View Report (Product Sales YTD (DB))

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.


Add Component
Display As
123
Preview
Product Sales YTD (DB)
Sum of Total Price
$0
$50K
$100K
Record Type
Advertising
Donation
Exhibitor
Member...
Merchan...
Program
Registrati...
Sponsors...
Subscript...
Product: Product Name
Full Page Banner
Half Page Ad
Quarter Page Ad
Education Foundati...
PAC Donation
Research Donation
10 X 10 Booth
10 X 20 Booth
Base Fee
Chapter Dues
View Report (Product Sales YTD (DB))
Cancel
Add

Report: Product Sales YTD (DB)

☐ Use chart settings from report

Y-Axis: Record Type

X-Axis: Sum of Total Price

Stack By: Product: Product Name

Display Units: Shortened Number

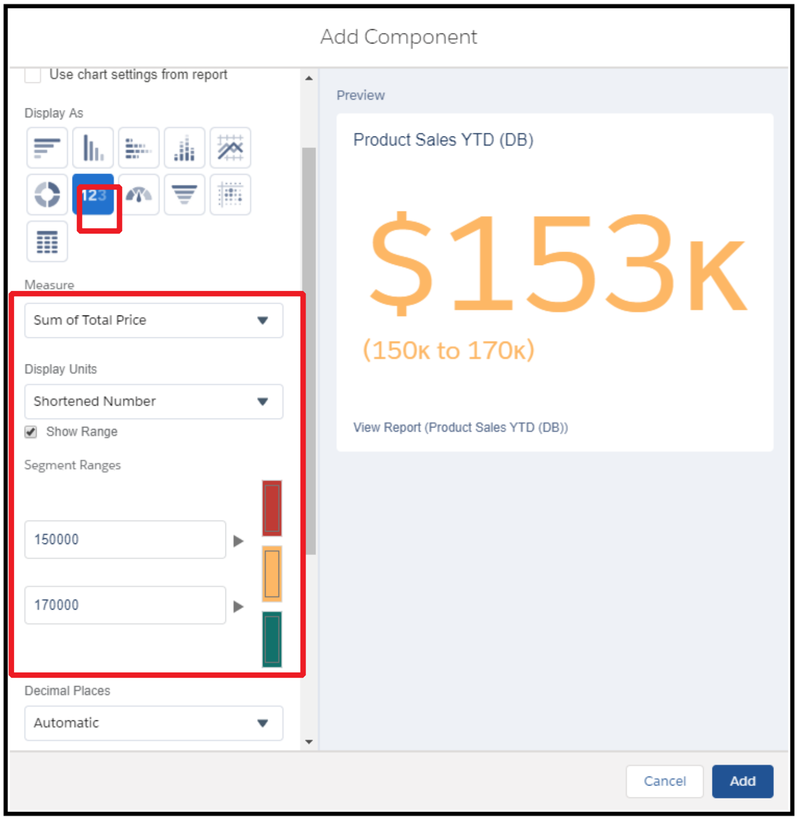
☐ Stack to 100%

X-Axis Range: ● Automatic

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.


Add Component

☐ Use chart settings from report

Display As

Measure: Sum of Total Price

Display Units: Shortened Number

☑ Show Range

Segment Ranges: 150000, 170000

Decimal Places: Automatic

Preview

Product Sales YTD (DB)

$153K

(150K to 170K)

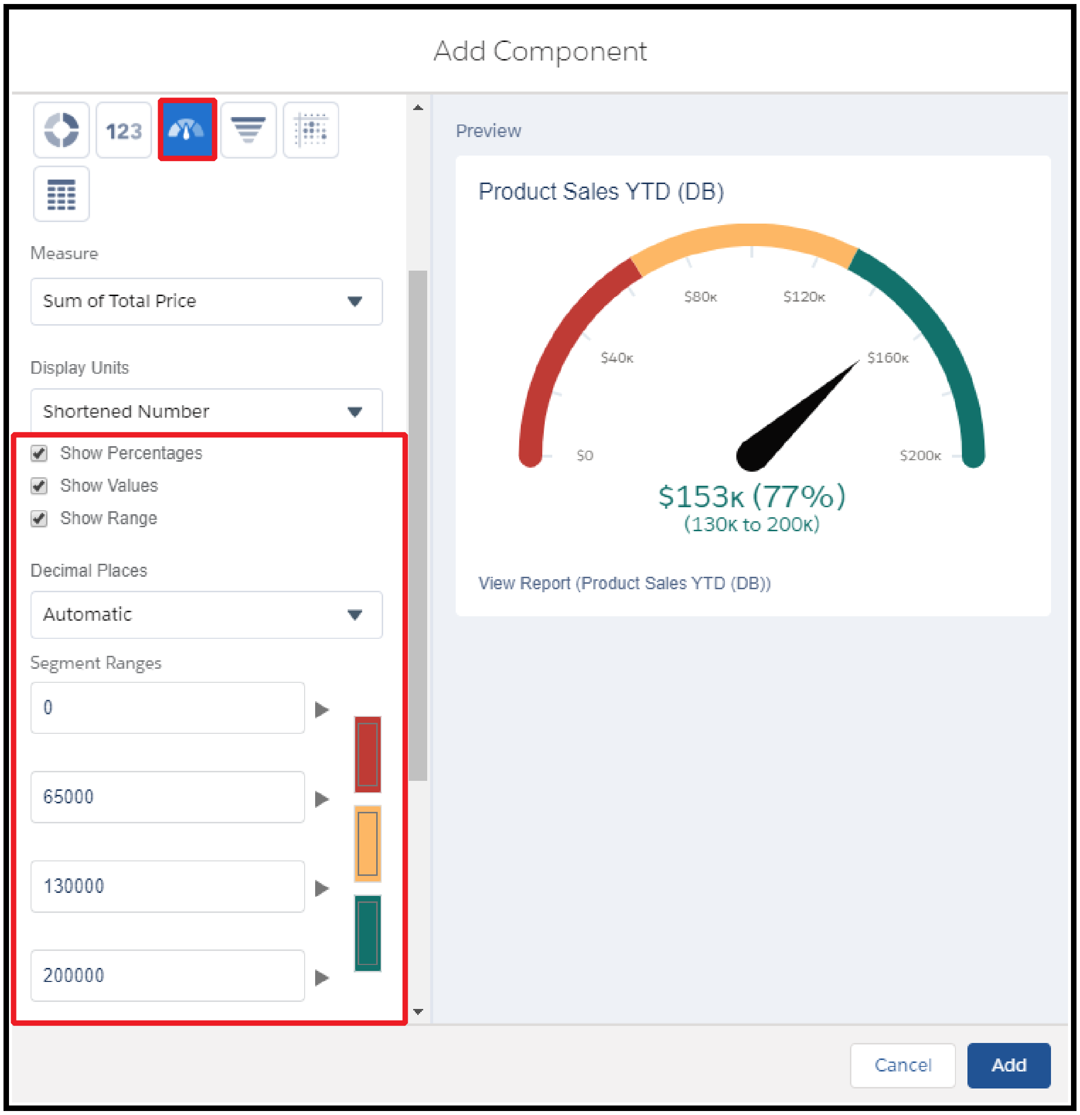
View Report (Product Sales YTD (DB))

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**.



Add Component

Measure: Sum of Total Price

Display Units: Shortened Number

☑ Show Percentages

☑ Show Values

☑ Show Range

Decimal Places: Automatic

Segment Ranges: 0, 65000, 130000, 200000

Preview

Product Sales YTD (DB)

$153K (77%)

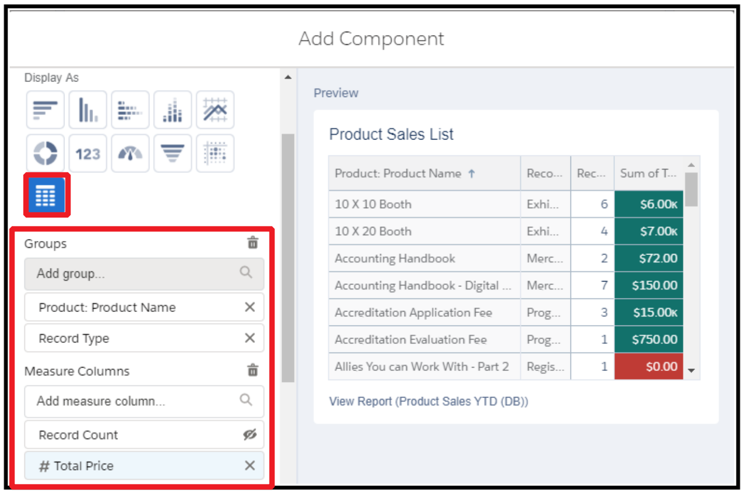
(130K to 200K)

View Report (Product Sales YTD (DB))

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**.

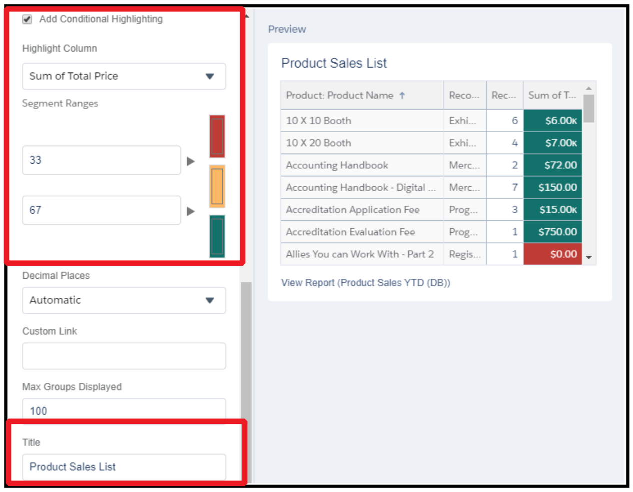


Product: Product Name
Record Type
Record Count
Total Price

Product Sales List

Product: Product Name ↑	Reco...	Rec...	Sum of T...
10 X 10 Booth	Exhi...	6	$6.00K
10 X 20 Booth	Exhi...	4	$7.00K
Accounting Handbook	Merc...	2	$72.00
Accounting Handbook - Digital ...	Merc...	7	$150.00
Accreditation Application Fee	Prog...	3	$15.00K
Accreditation Evaluation Fee	Prog...	1	$750.00
Allies You can Work With - Part 2	Regis...	1	$0.00

View Report (Product Sales YTD (DB))



☑ Add Conditional Highlighting

Highlight Column: Sum of Total Price

Segment Ranges: 33, 67

Decimal Places: Automatic

Custom Link:

Max Groups Displayed: 100

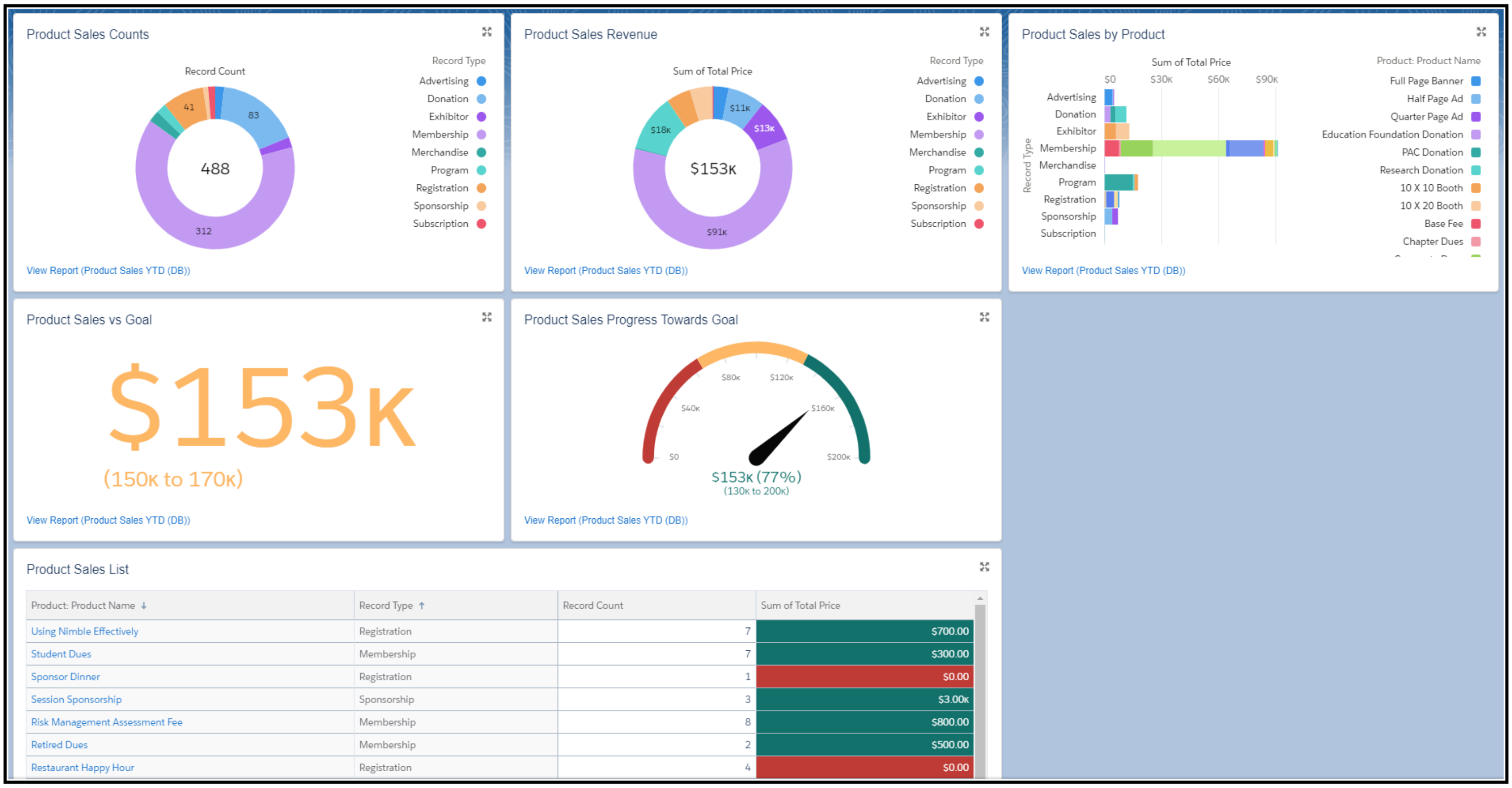
Title: Product Sales List

Product Sales List

Product: Product Name ↑	Reco...	Rec...	Sum of T...
10 X 10 Booth	Exhi...	6	$6.00K
10 X 20 Booth	Exhi...	4	$7.00K
Accounting Handbook	Merc...	2	$72.00
Accounting Handbook - Digital ...	Merc...	7	$150.00
Accreditation Application Fee	Prog...	3	$15.00K
Accreditation Evaluation Fee	Prog...	1	$750.00
Allies You can Work With - Part 2	Regis...	1	$0.00

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.


Product Sales Counts
Record Count
Record Type
Advertising
Donation
Exhibitor
Membership
Merchandise
Program
Registration
Sponsorship
Subscription
41
83
488
312
View Report (Product Sales YTD (DB))
Product Sales Revenue
Sum of Total Price
Record Type
Advertising
Donation
Exhibitor
Membership
Merchandise
Program
Registration
Sponsorship
Subscription
$11к
$13к
$18к
$153к
$91к
View Report (Product Sales YTD (DB))
Product Sales by Product
Sum of Total Price
$0
$30к
$60к
$90к
Record Type
Advertising
Donation
Exhibitor
Membership
Merchandise
Program
Registration
Sponsorship
Subscription
Product: Product Name
Full Page Banner
Half Page Ad
Quarter Page Ad
Education Foundation Donation
PAC Donation
Research Donation
10 X 10 Booth
10 X 20 Booth
Base Fee
Chapter Dues
View Report (Product Sales YTD (DB))
Product Sales vs Goal
$153к
(150к to 170к)
View Report (Product Sales YTD (DB))
Product Sales Progress Towards Goal
$0
$40к
$80к
$120к
$160к
$200к
$153к (77%)
(130к to 200к)
View Report (Product Sales YTD (DB))
Product Sales List

Product: Product Name ↓	Record Type ↑	Record Count	Sum of Total Price
Using Nimble Effectively	Registration	7	$700.00
Student Dues	Membership	7	$300.00
Sponsor Dinner	Registration	1	$0.00
Session Sponsorship	Sponsorship	3	$3.00к
Risk Management Assessment Fee	Membership	8	$800.00
Retired Dues	Membership	2	$500.00
Restaurant Happy Hour	Registration	4	$0.00

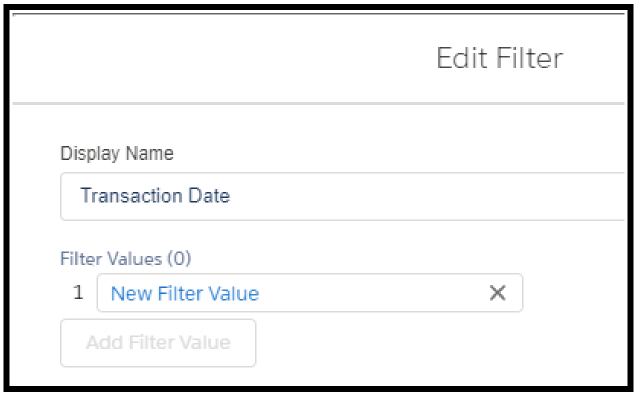
Dashboard Filter

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.



Display Name: Transaction Date

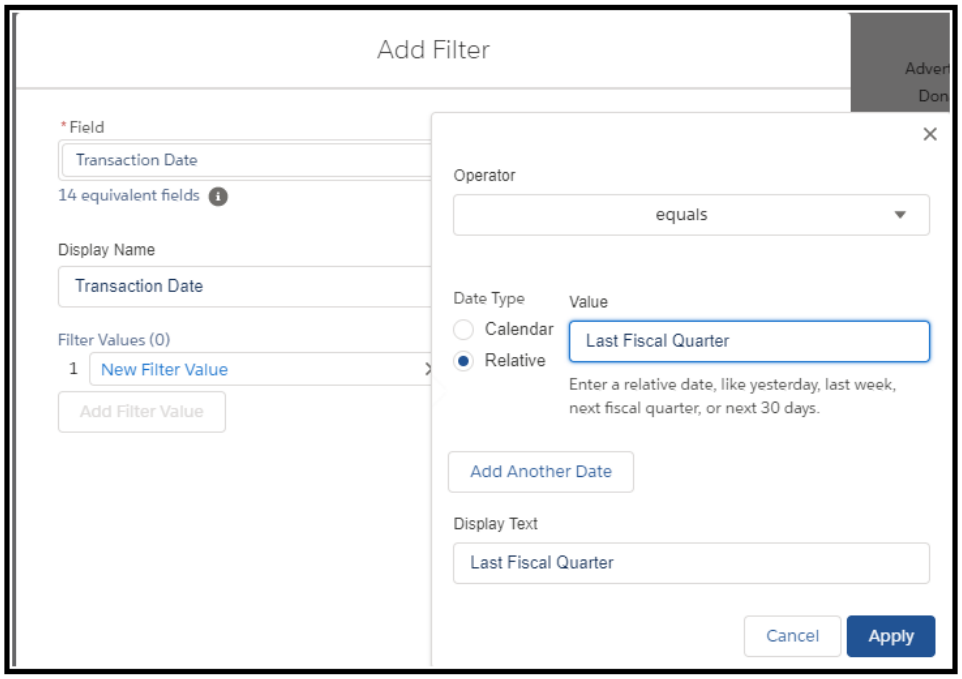
10. In the **Filter Values** field, click the **New Filter Value** linked text.

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.


Add Filter
Adver
Don
*Field
14 equivalent fields
Filter Values (0)
1
New Filter Value
Add Filter Value
Operator
Date Type
○ Calendar
● Relative
Value
Add Another Date
Display Text
Cancel
Apply

Transaction Date

Display Name: Transaction Date

Operator: equals

Value: Last Fiscal Quarter

Enter a relative date, like yesterday, last week, next fiscal quarter, or next 30 days.

Display Text: Last Fiscal Quarter

14. Click on the **Apply** button.

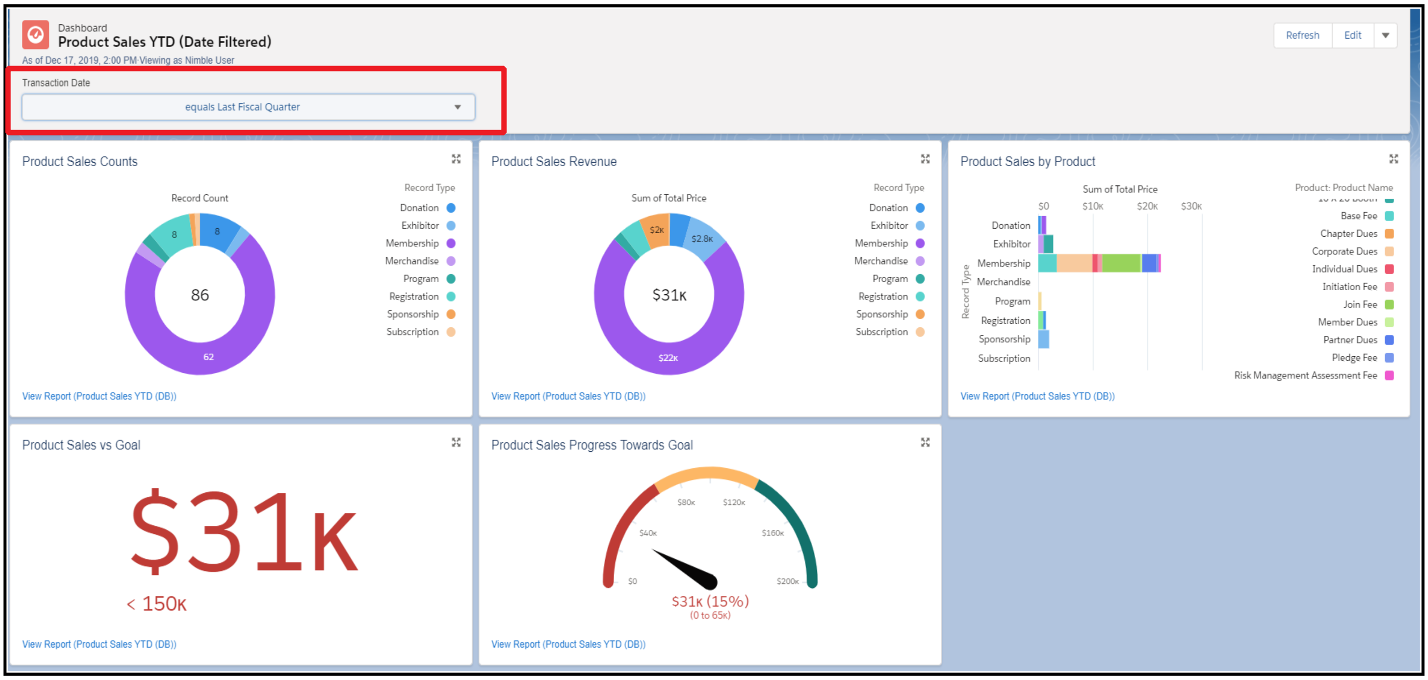
15. Click on the **Add** button.

    - **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.



Dashboard
Product Sales YTD (Date Filtered)
As of Dec 17, 2019, 2:00 PM Viewing as Nimble User

Transaction Date: equals Last Fiscal Quarter

Refresh
Edit
Product Sales Counts
Record Count
Record Type
Donation
Exhibitor
Membership
Merchandise
Program
Registration
Sponsorship
Subscription
86
8
8
62
View Report (Product Sales YTD (DB))
Product Sales Revenue
Sum of Total Price
$31K
$2K
$2.8K
$22K
View Report (Product Sales YTD (DB))
Product Sales by Product
Sum of Total Price
$0
$10K
$20K
$30K
Record Type
Product: Product Name
Base Fee
Chapter Dues
Corporate Dues
Individual Dues
Initiation Fee
Join Fee
Member Dues
Partner Dues
Pledge Fee
Risk Management Assessment Fee
View Report (Product Sales YTD (DB))
Product Sales vs Goal
$31K
< 150K
View Report (Product Sales YTD (DB))
Product Sales Progress Towards Goal
$0
$40K
$80K
$120K
$160K
$200K
$31K (15%)
(0 to 65K)
View Report (Product Sales YTD (DB))

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.

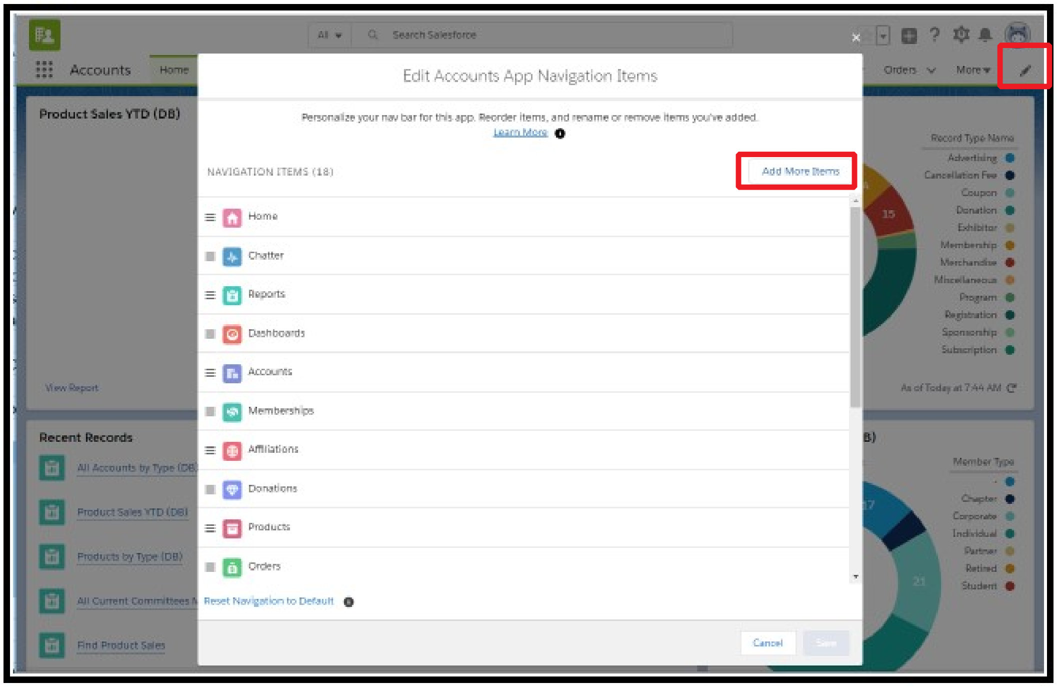
For instance, since ALL the Product Sales YTD Dashboard's Components filter via the same Product Sales YTD (DB) report for the current year to date, any Report Filter that goes outside of that range would be ineffective. Best Practice would be to set Report Filters for all Reports used in Components 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**.

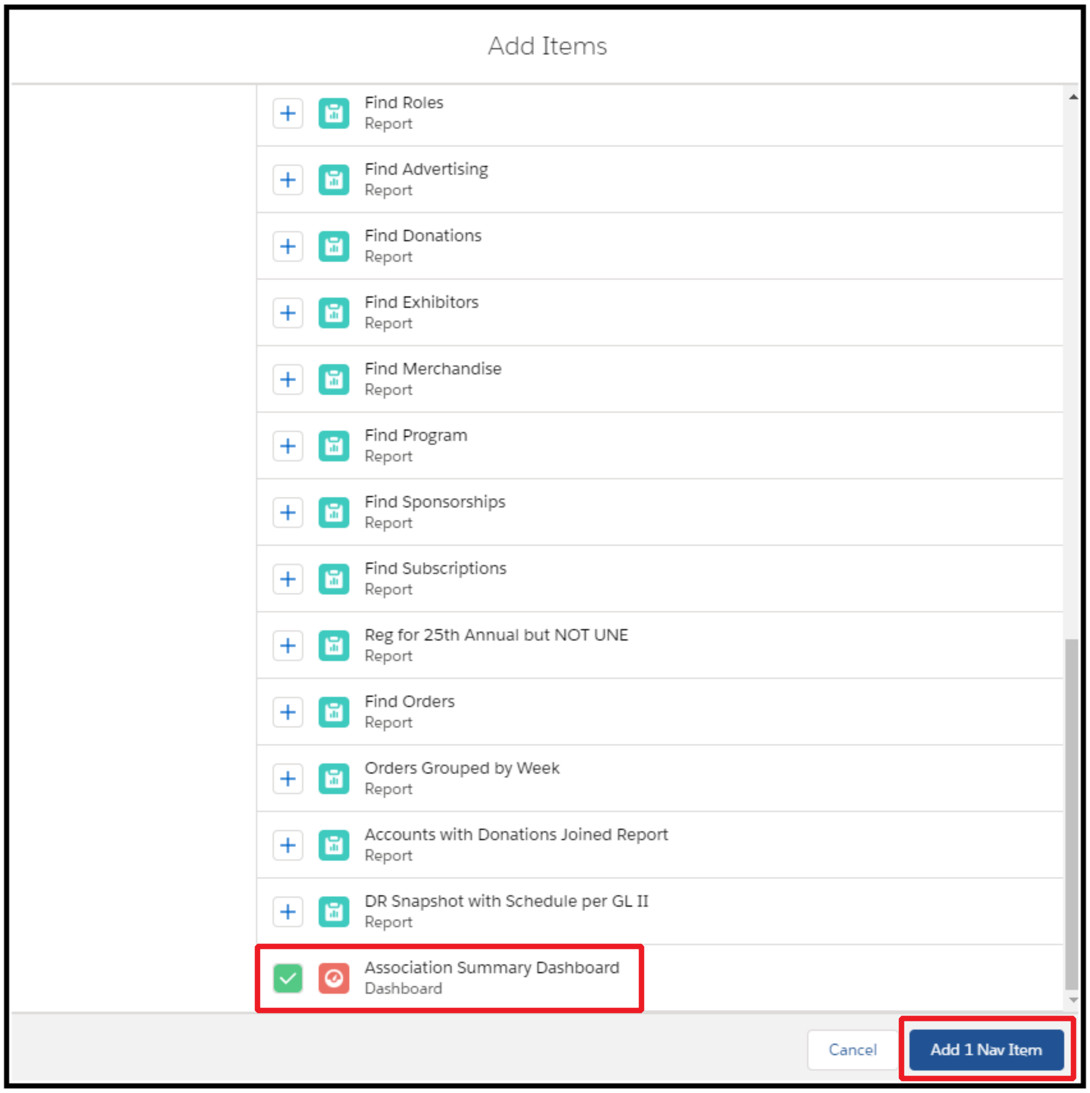


Edit Accounts App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added. Learn More

Search Salesforce
Accounts
Home
Orders
More
Product Sales YTD (DB)
View Report
Recent Records
All Accounts by Type (DB)
Product Sales YTD (DB)
Products by Type (DB)
All Current Committees
Find Product Sales
NAVIGATION ITEMS (18)
Add More Items
Home
Chatter
Reports
Dashboards
Accounts
Memberships
Affiliations
Donations
Products
Orders
Reset Navigation to Default
Cancel
Save
Record Type Name
Advertising
Cancellation Fee
Coupon
Donation
Exhibitor
Membership
Merchandise
Miscellaneous
Program
Registration
Sponsorship
Subscription
As of Today at 7:44 AM
Member Type
Chapter
Corporate
Individual
Partner
Retired
Student

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.



Add Items

Find Roles
Report

Find Advertising
Report

Find Donations
Report

Find Exhibitors
Report

Find Merchandise
Report

Find Program
Report

Find Sponsorships
Report

Find Subscriptions
Report

Reg for 25th Annual but NOT UNE
Report

Find Orders
Report

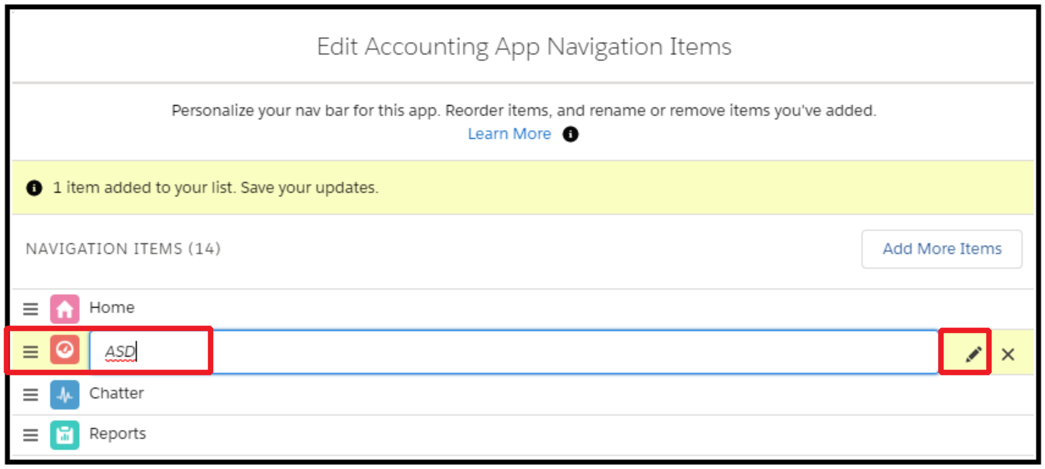
Orders Grouped by Week
Report

Accounts with Donations Joined Report
Report

DR Snapshot with Schedule per GL II
Report

Association Summary Dashboard
Dashboard

6. 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.



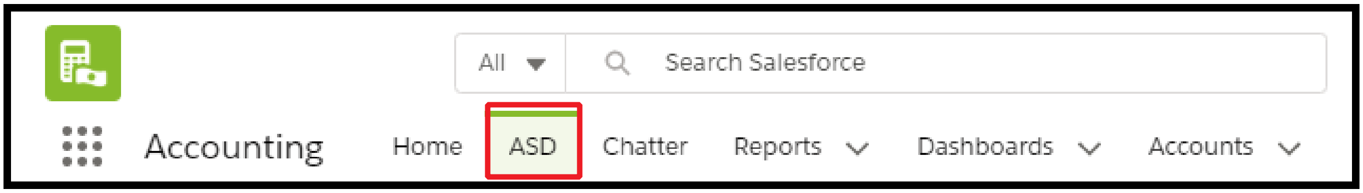
Edit Accounting App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.
Learn More

1 item added to your list. Save your updates.

NAVIGATION ITEMS (14)
Add More Items
Home
ASD
Chatter
Reports

7. Click on the **Pencil** icon to the far right of the **Association Summary Dashboard**.
8. 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.
9. Click on the **Save** button.
10. **Observe** the results of the configuration to the **Nav Bar**.



All
Search Salesforce
Accounting
Home
ASD
Chatter
Reports
Dashboards
Accounts

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

Objective 6.1
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

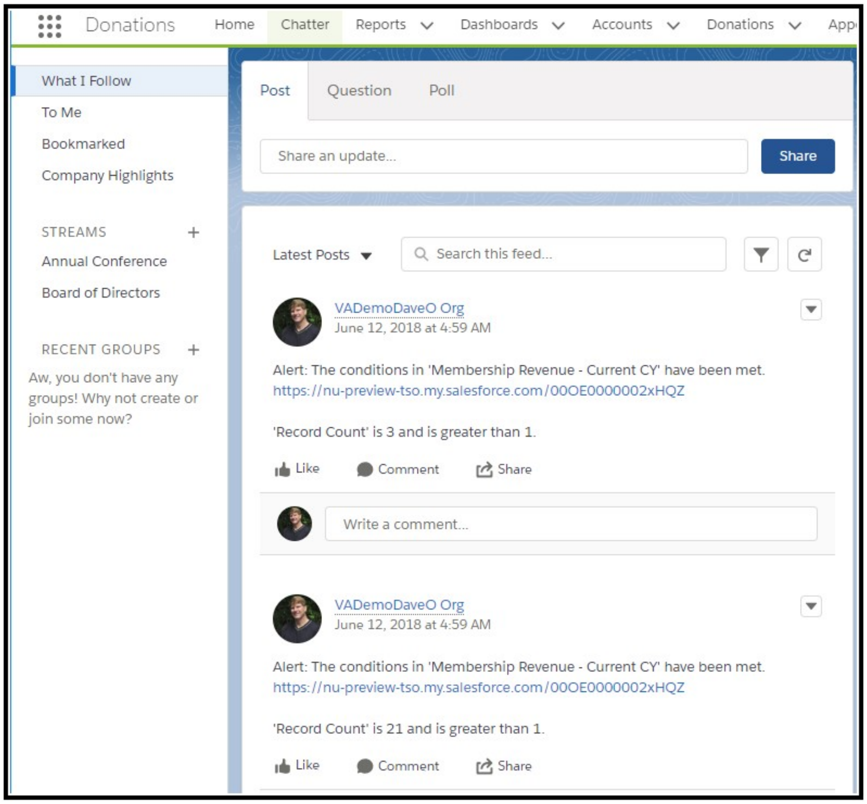
Understanding Chatter

The Chatter Item is the user’s collaboration home base and gives them instant access to the all the interactive social and tracking features of Nimble AMS. Chatter is base 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 Saleforce 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.


Donations
Home
Chatter
Reports
Dashboards
Accounts
Donations
App
What I Follow
To Me
Bookmarked
Company Highlights
STREAMS
Annual Conference
Board of Directors
RECENT GROUPS
Aw, you don't have any groups! Why not create or join some now?
Post
Question
Poll
Share an update...
Share
Latest Posts
Search this feed...
Like
Comment
Share
Write a comment...

VADemoDaveO Org
June 12, 2018 at 4:59 AM

Alert: The conditions in 'Membership Revenue - Current CY' have been met.
https://nu-preview-tso.my.salesforce.com/00OE0000002xHQZ

'Record Count' is 3 and is greater than 1.

VADemoDaveO Org
June 12, 2018 at 4:59 AM

Alert: The conditions in 'Membership Revenue - Current CY' have been met.
https://nu-preview-tso.my.salesforce.com/00OE0000002xHQZ

'Record Count' is 21 and is greater than 1.

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

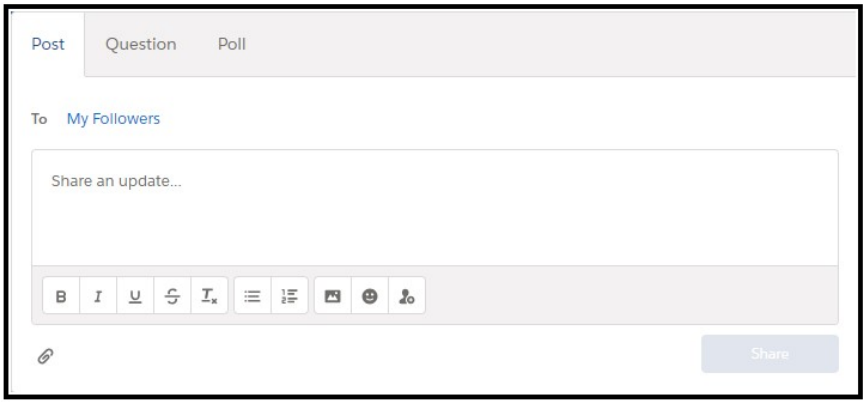
The actions of the Chatter item are executed by using the publishing area of Chatter**,** which displays in the top center of the Chatter Tab screen.

- 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.

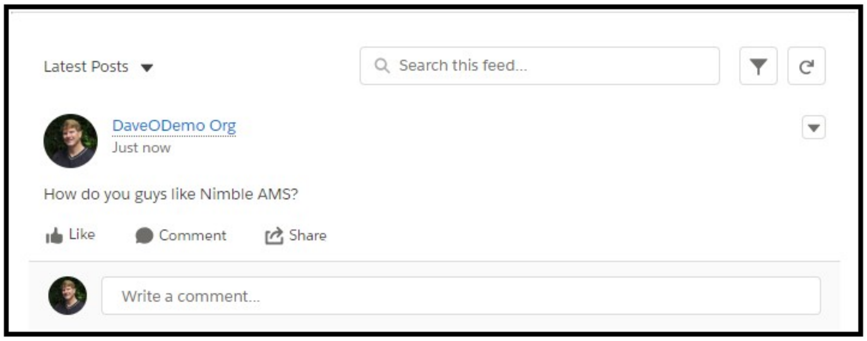
Using Chatter Posts

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.

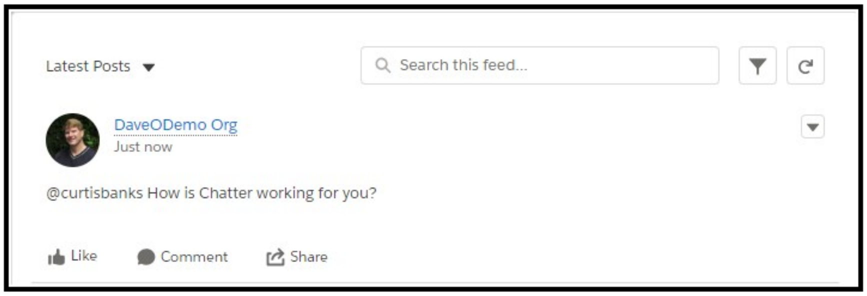

Post
Question
Poll
To
My Followers
Share an update...
Share

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.


Latest Posts
Search this feed...
DaveODemo Org
Just now
Like
Comment
Share
Write a comment...

How do you guys like Nimble AMS?

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.



@curtisbanks How is Chatter working for you?

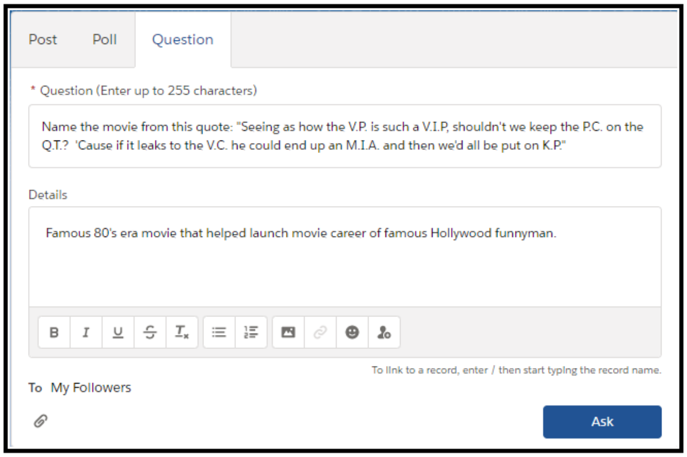
General Posting Notes:

- 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.



* Question (Enter up to 255 characters)

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."

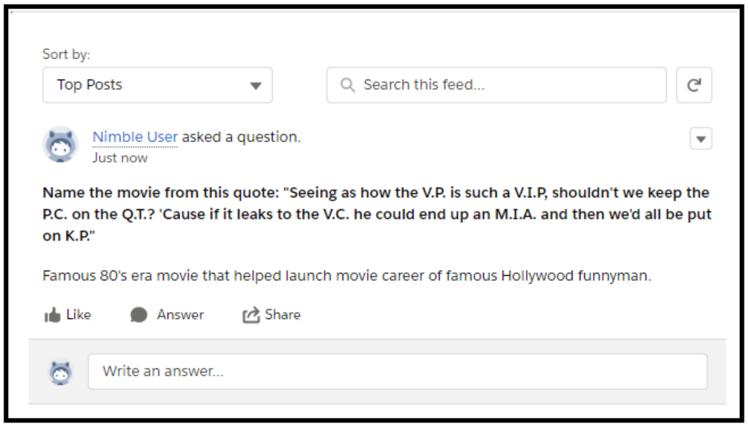
Details

Famous 80's era movie that helped launch movie career of famous Hollywood funnyman.

To link to a record, enter / then start typing the record name.

To My Followers

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

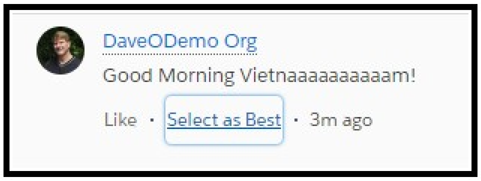


Nimble User asked a question.
Just now

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."

Famous 80's era movie that helped launch movie career of famous Hollywood funnyman.

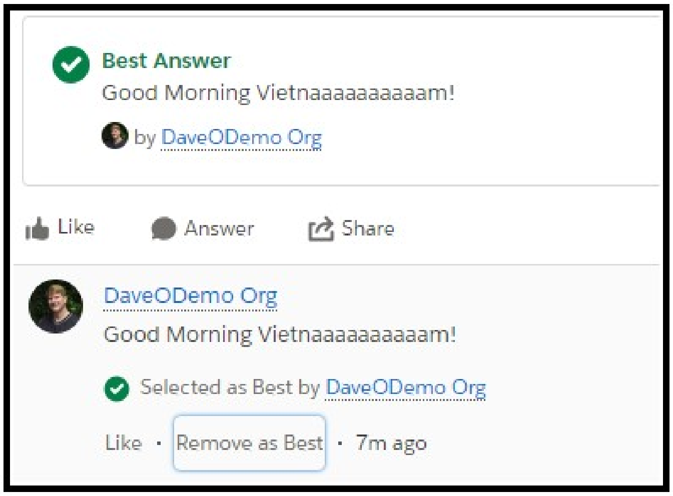
7. Post a reply to the question and click the **Select as Best** button.



DaveODemo Org

Good Morning Vietnaaaaaaaaaam!

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



Best Answer

Good Morning Vietnaaaaaaaaaam!

by DaveODemo Org

DaveODemo Org

Good Morning Vietnaaaaaaaaaam!

Selected as Best by DaveODemo Org

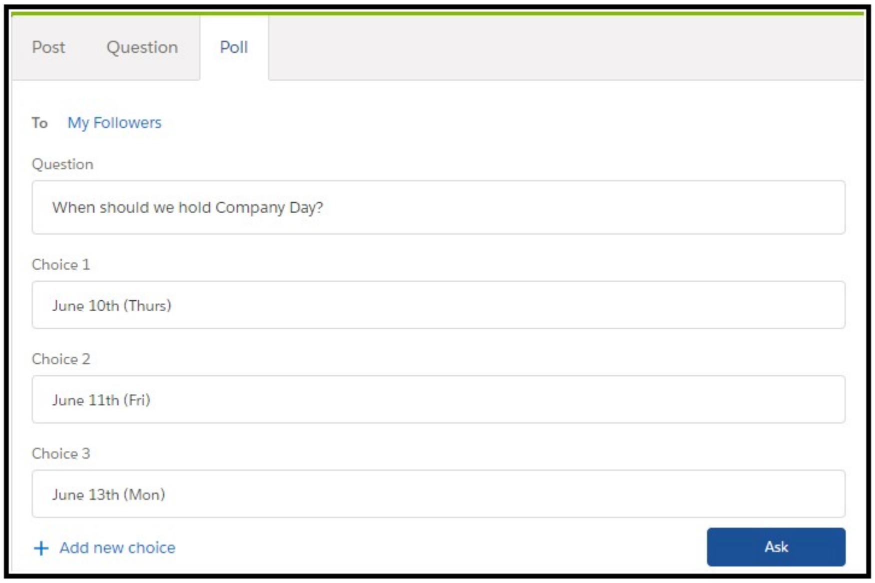
General Question Notes:

- 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.



Question: When should we hold Company Day?

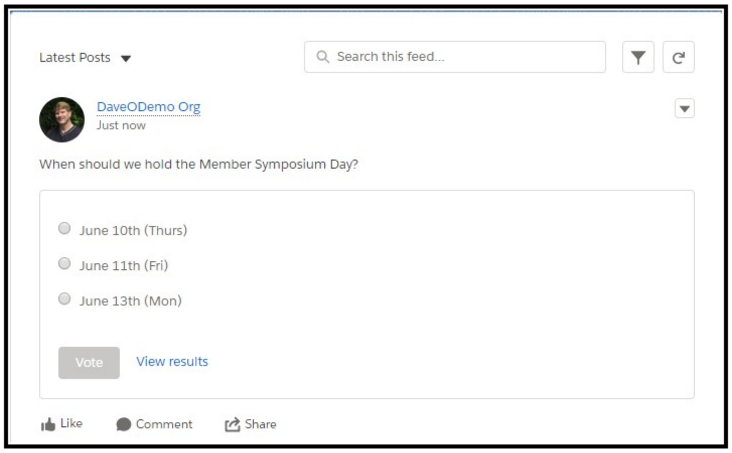
Choice 1: June 10th (Thurs)

Choice 2: June 11th (Fri)

Choice 3: June 13th (Mon)

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.



When should we hold the Member Symposium Day?

○ June 10th (Thurs)
○ June 11th (Fri)
○ June 13th (Mon)

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

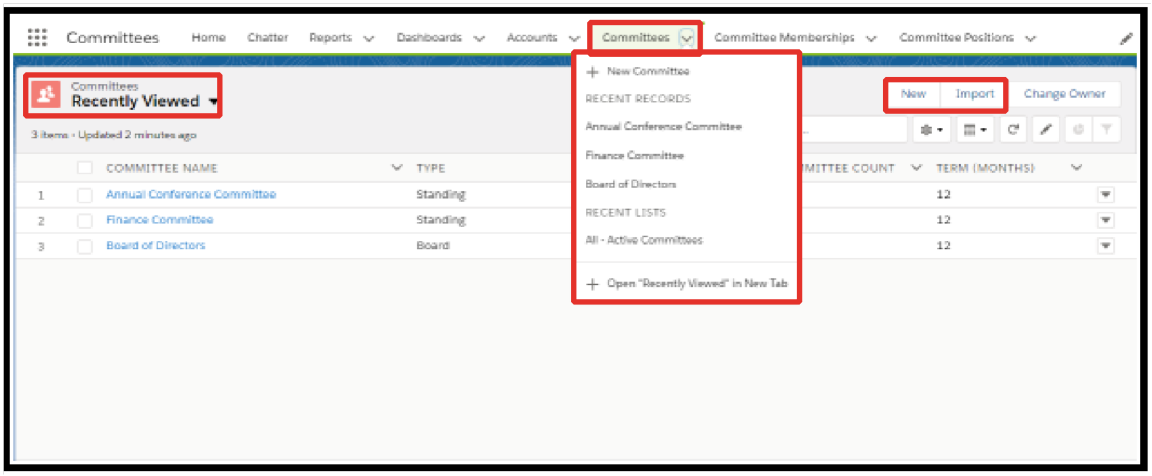
Tracks the individual Committee Member Names, Status, Position, Start, and End Dates. It is the Item where maintenance of committee participation occurs – adding /detracting members, status changes, changing start/end dates, and position changes.

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.


Committees
Home
Chatter
Reports
Dashboards
Accounts
Committees
Committee Memberships
Committee Positions
Committees
Recently Viewed
3 items • Updated 2 minutes ago
New Committee
RECENT RECORDS
Annual Conference Committee
Finance Committee
Board of Directors
RECENT LISTS
All - Active Committees
Open "Recently Viewed" in New Tab
New
Import
Change Owner

	COMMITTEE NAME	TYPE	MITTEE COUNT	TERM (MONTHS)
1	Annual Conference Committee	Standing		12
2	Finance Committee	Standing		12
3	Board of Directors	Board		12

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.

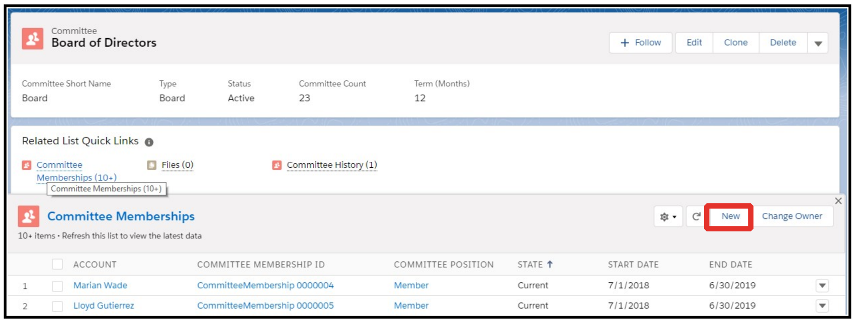
Adding a Committee Member

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).

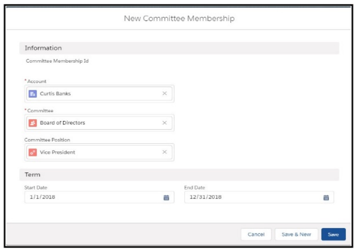

Committee
Board of Directors
+ Follow
Edit
Clone
Delete
Related List Quick Links
Committee Memberships (10+)
Files (0)
Committee History (1)
Committee Memberships (10+)
Committee Memberships
New
Change Owner

Committee Short Name	Type	Status	Committee Count	Term (Months)
Board	Board	Active	23	12

10+ items • Refresh this list to view the latest data

	ACCOUNT	COMMITTEE MEMBERSHIP ID	COMMITTEE POSITION	STATE ↑	START DATE	END DATE
1	Marian Wade	CommitteeMembership 0000004	Member	Current	7/1/2018	6/30/2019
2	Lloyd Gutierrez	CommitteeMembership 0000005	Member	Current	7/1/2018	6/30/2019

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**.


New Committee Membership
Information
Term
Cancel
Save & New
Save

Committee Membership Id

*Account: Curtis Banks

*Committee: Board of Directors

Committee Position: Vice President

Start Date: 1/1/2018

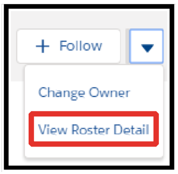
End Date: 12/31/2018

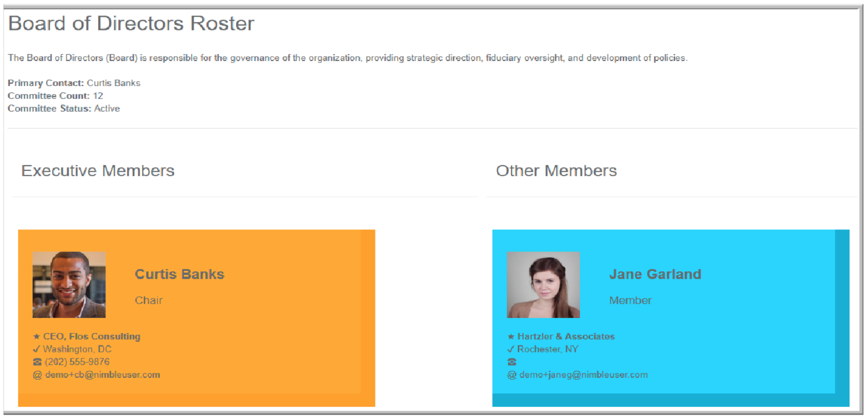
Viewing a Committee Roster

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.





Board of Directors Roster

The Board of Directors (Board) is responsible for the governance of the organization, providing strategic direction, fiduciary oversight, and development of policies.

Primary Contact: Curtis Banks
Committee Count: 12
Committee Status: Active

Executive Members

Curtis Banks
Chair
★ **CEO, Flos Consulting**
✓ Washington, DC
☎ (202) 555-9876
@ demo+cb@nimbleuser.com

Other Members

Jane Garland
Member
★ **Hartzler & Associates**
✓ Rochester, NY
☎
@ demo+janeg@nimbleuser.com

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

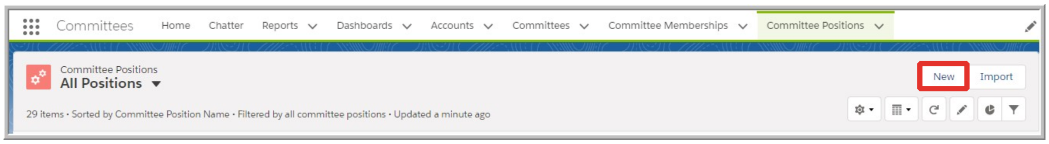
Nimble AMS allows Users to use Committee Positions to define committee roles like President, Vice President, Chair, etc. Users can define how positions will appear on roster using sort order.

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.

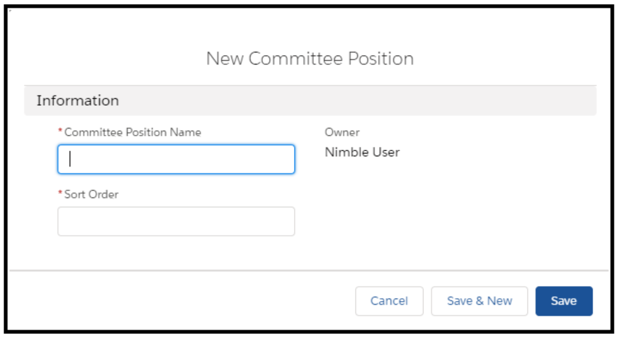
In this **exercise**, users will add a new Committee Position:

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


Committees
Home
Chatter
Reports
Dashboards
Accounts
Committees
Committee Memberships
Committee Positions
Committee Positions
All Positions
New
Import

29 items • Sorted by Committee Position Name • Filtered by all committee positions • Updated a minute ago

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


New Committee Position
Information
*Committee Position Name
*Sort Order
Cancel
Save & New
Save

Owner
Nimble User

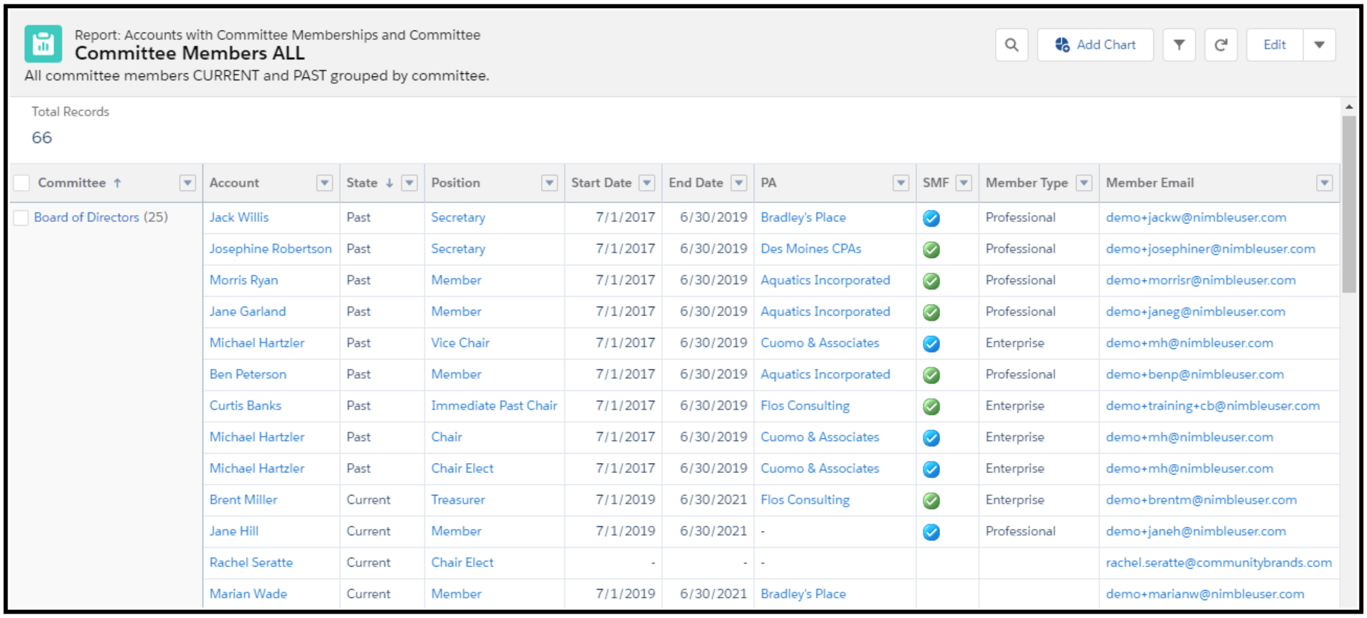
5. Enter **30** in **Sort Order**. The lower the number, the higher the name shown on the roster.
   - Consider spacing out numbers to accommodate for future changes in positions. In other words, instead of using: President: 1, Vice President: 2, Treasurer: 3 - You may want to use: President: 10, Vice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

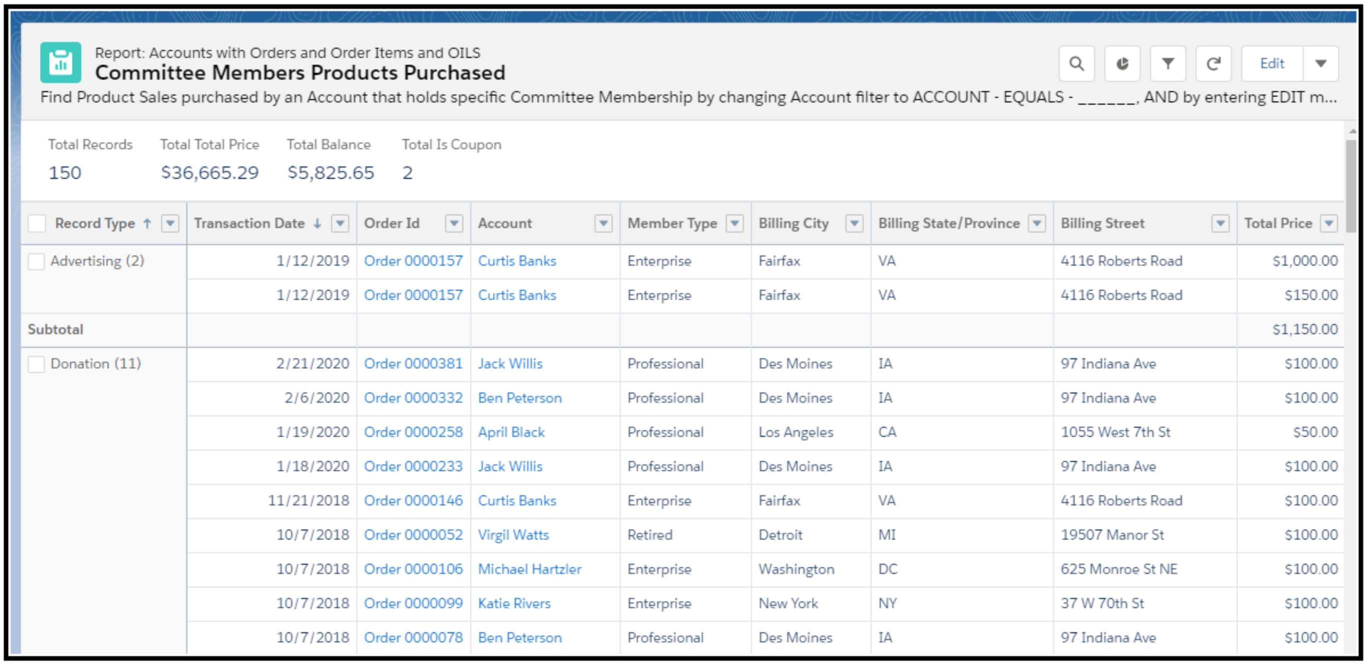
All committee members CURRENT and PAST grouped by committee.

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	Flos 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	Flos 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	Total Total Price	Total Balance	Total Is Coupon
150	$36,665.29	$5,825.65	2

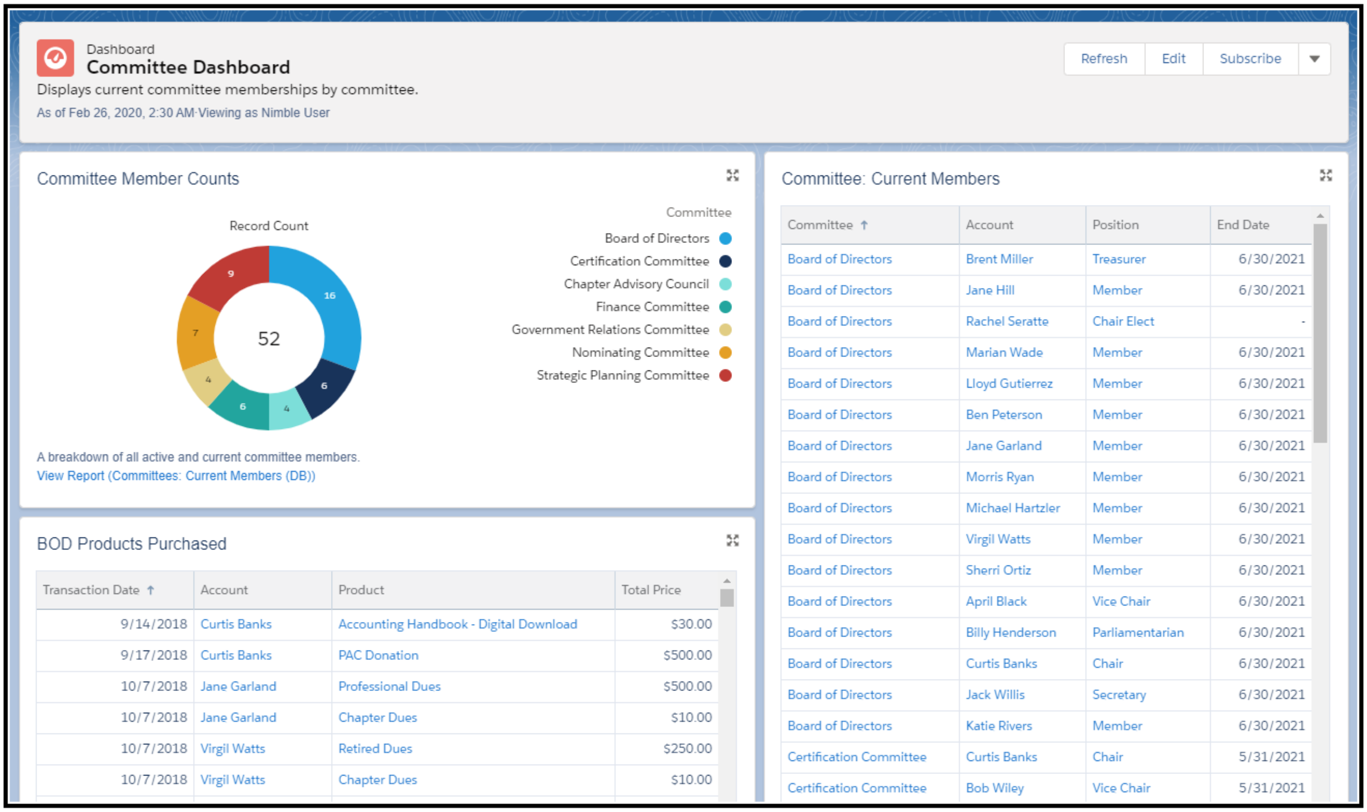
Record Type ↑	Transaction Date ↓	Order Id	Account	Member Type	Billing City	Billing State/Province	Billing Street	Total Price
☐ Advertising (2)	1/12/2019	Order 0000157	Curtis Banks	Enterprise	Fairfax	VA	4116 Roberts Road	$1,000.00
	1/12/2019	Order 0000157	Curtis Banks	Enterprise	Fairfax	VA	4116 Roberts 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.


Refresh
Edit
Subscribe
Record Count
16
6
4
6
4
7
9
52
Committee
Board of Directors ●
Certification Committee ●
Chapter Advisory Council ●
Finance Committee ●
Government Relations Committee ●
Nominating Committee ●
Strategic Planning Committee ●

Dashboard

Committee Dashboard

Displays current committee memberships by committee.

As of Feb 26, 2020, 2:30 AM·Viewing as Nimble User

Committee Member Counts

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

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

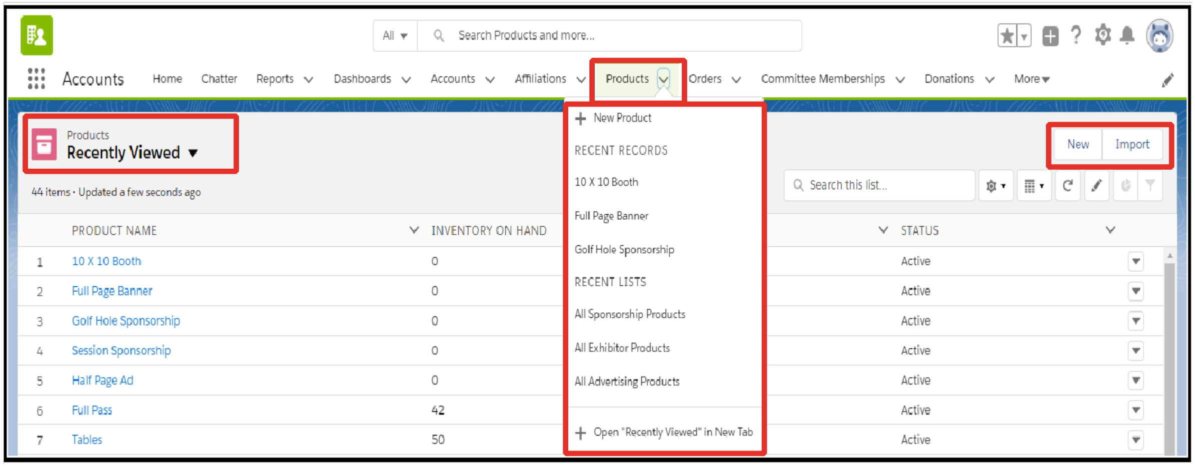
In this section, Users will understand Products in Nimble AMS.

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.


All
Search Products and more...
Accounts
Home
Chatter
Reports
Dashboards
Accounts
Affiliations
Products
Orders
Committee Memberships
Donations
More
Products
Recently Viewed
New
Import
Search this list...
New Product
RECENT RECORDS
10 X 10 Booth
Full Page Banner
Golf Hole Sponsorship
RECENT LISTS
All Sponsorship Products
All Exhibitor Products
All Advertising Products
Open "Recently Viewed" in New Tab

44 items • Updated a few seconds ago

	PRODUCT NAME	INVENTORY ON HAND	STATUS
1	10 X 10 Booth	0	Active
2	Full Page Banner	0	Active
3	Golf Hole Sponsorship	0	Active
4	Session Sponsorship	0	Active
5	Half Page Ad	0	Active
6	Full Pass	42	Active
7	Tables	50	Active

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:

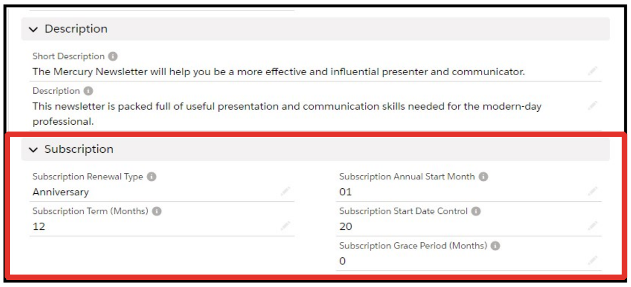
- **Nimble AMS Consultants** – during the Implementation/pre Go-Live cycle
- Members of the **Accounting/Finance** Team
- Members of the **Events/Meetings** Team – if large numbers of events held
- Members of teams that require **frequent edits to Products** – unusual, but can occur in certain situations.

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

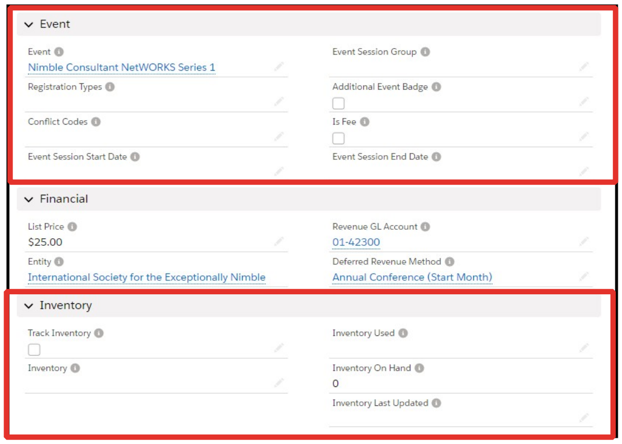
Subscription Renewal Type: Anniversary

Subscription Term (Months): 12

Subscription Annual Start Month: 01

Subscription Start Date Control: 20

Subscription Grace Period (Months): 0



Event

Event: Nimble Consultant NetWORKS Series 1

Registration Types:

Conflict Codes:

Event Session Start Date:

Event Session Group:

Additional Event Badge: ☐

Is Fee: ☐

Event Session End Date:

Financial

List Price: $25.00

Entity: International Society for the Exceptionally Nimble

Revenue GL Account: 01-42300

Deferred Revenue Method: Annual Conference (Start Month)

Inventory

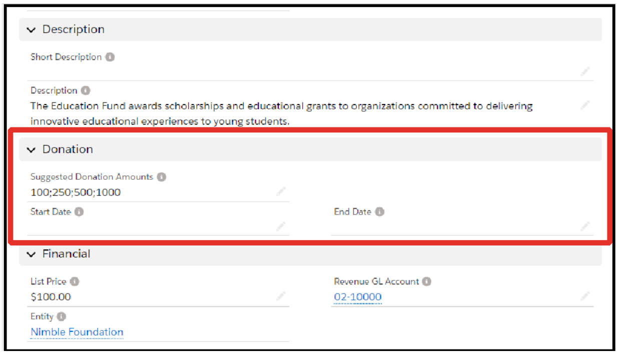
Track Inventory: ☐

Inventory:

Inventory Used:

Inventory On Hand: 0

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

Start Date:

End Date:

Financial

List Price: $100.00

Entity: Nimble Foundation

Revenue GL Account: 02-10000

Product Form Sections and Fields

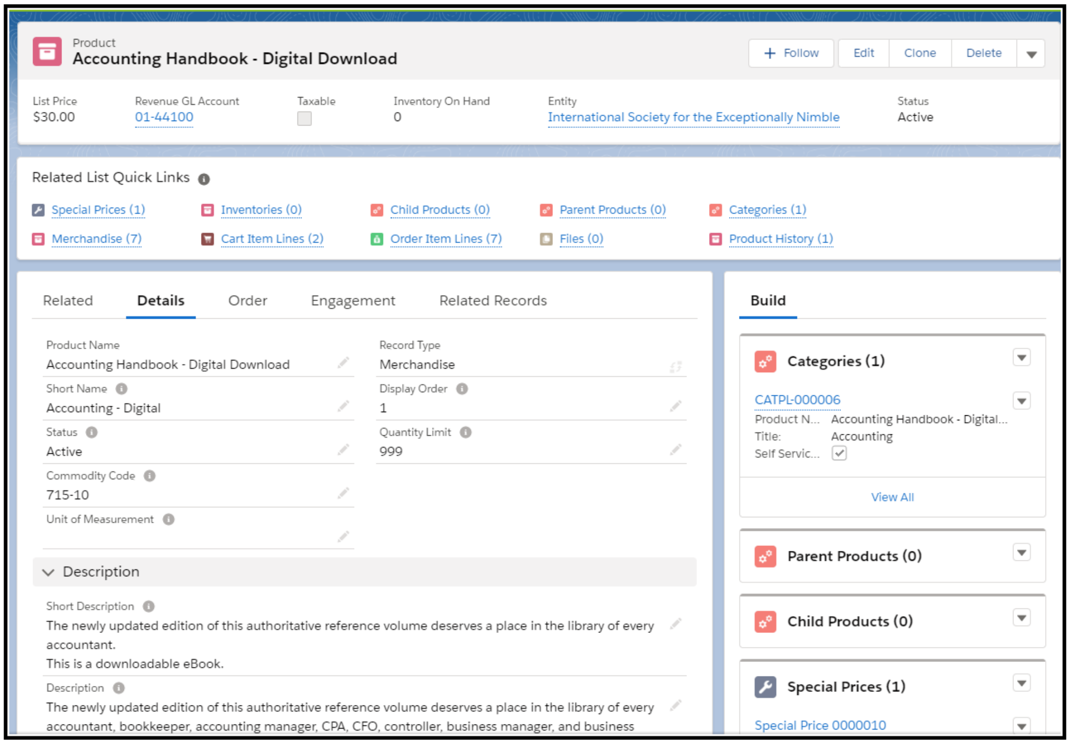
In this review of Product sections, users will open and explore a basic product (Merchandise) form to understand how it performs in the system. Other product types such as Membership, Registrations, Donations, Subscriptions, etc. are covered in this manual in subsequent chapters.

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.


Product
Follow
Edit
Clone
Delete
Related List Quick Links
Special Prices (1)
Inventories (0)
Child Products (0)
Parent Products (0)
Categories (1)
Merchandise (7)
Cart Item Lines (2)
Order Item Lines (7)
Files (0)
Product History (1)
Related
Details
Order
Engagement
Related Records
Build
View All

Accounting Handbook - Digital Download

List Price	Revenue GL Account	Taxable	Inventory On Hand	Entity	Status
$30.00	01-44100	☐	0	International Society for the Exceptionally Nimble	Active

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

Short Description: The newly updated edition of this authoritative reference volume deserves a place in the library of every accountant.
This is a downloadable eBook.

Description: The newly updated edition of this authoritative reference volume deserves a place in the library of every accountant, bookkeeper, accounting manager, CPA, CFO, controller, business manager, and business

Categories (1)
CATPL-000006
Product N... Accounting Handbook - Digital...
Title: Accounting
Self Servic... ☑

Parent Products (0)

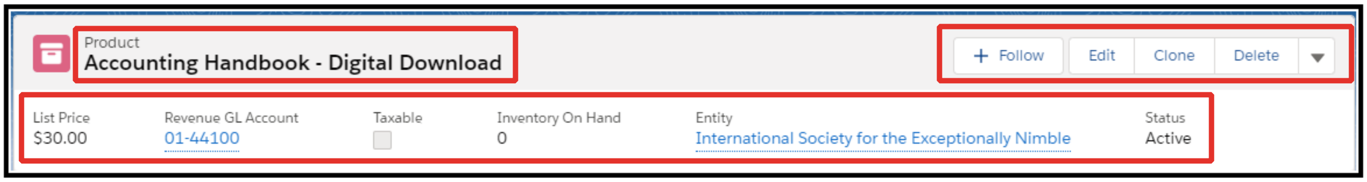
Child Products (0)

Special Prices (1)
Special Price 0000010

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**.



Product

Accounting Handbook - Digital Download

List Price	Revenue GL Account	Taxable	Inventory On Hand	Entity	Status
$30.00	01-44100	☐	0	International Society for the Exceptionally Nimble	Active

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.

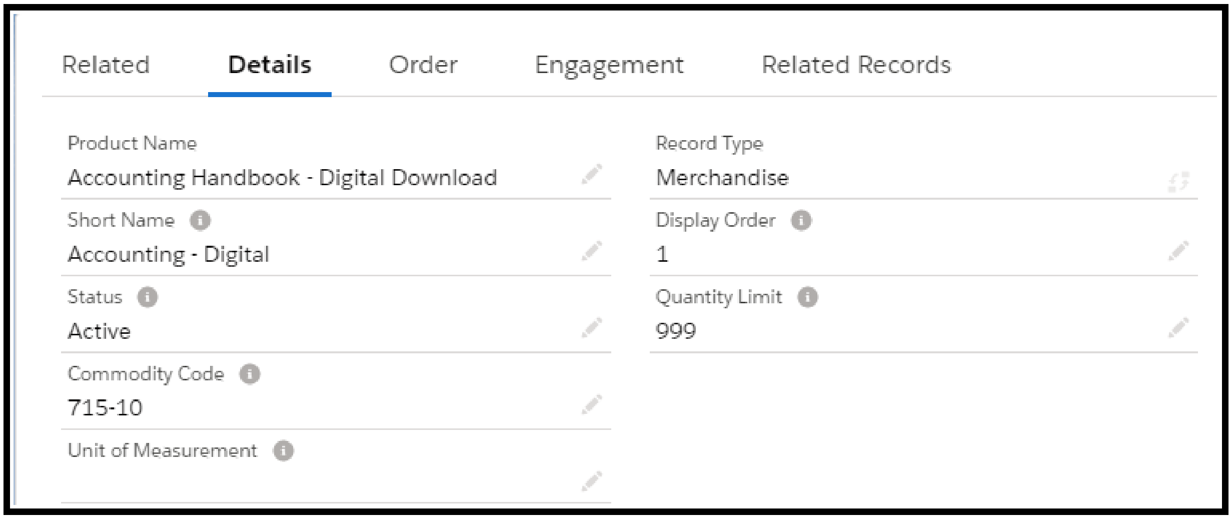
Commodity Code: Five-digit code denoting the Category to which a Product belongs.

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.



Product Name: Accounting Handbook - Digital Download

Short Name: Accounting - Digital

Status: Active

Commodity Code: 715-10

Unit of Measurement:

Record Type: Merchandise

Display Order: 1

Quantity Limit: 999

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.

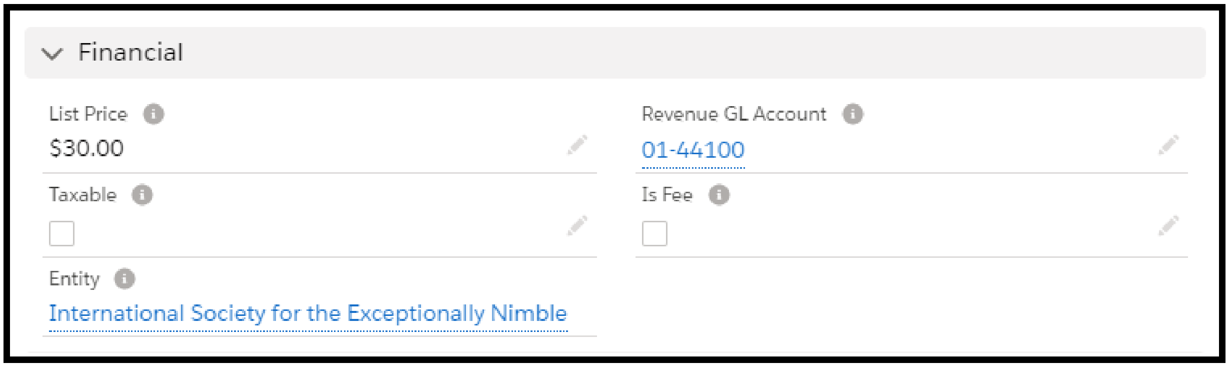
List Price: The default price paid for this product by all purchasers unless Special Pricing enabled – see area below.

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.



Financial

List Price: $30.00

Revenue GL Account: 01-44100

Taxable: ☐

Is Fee: ☐

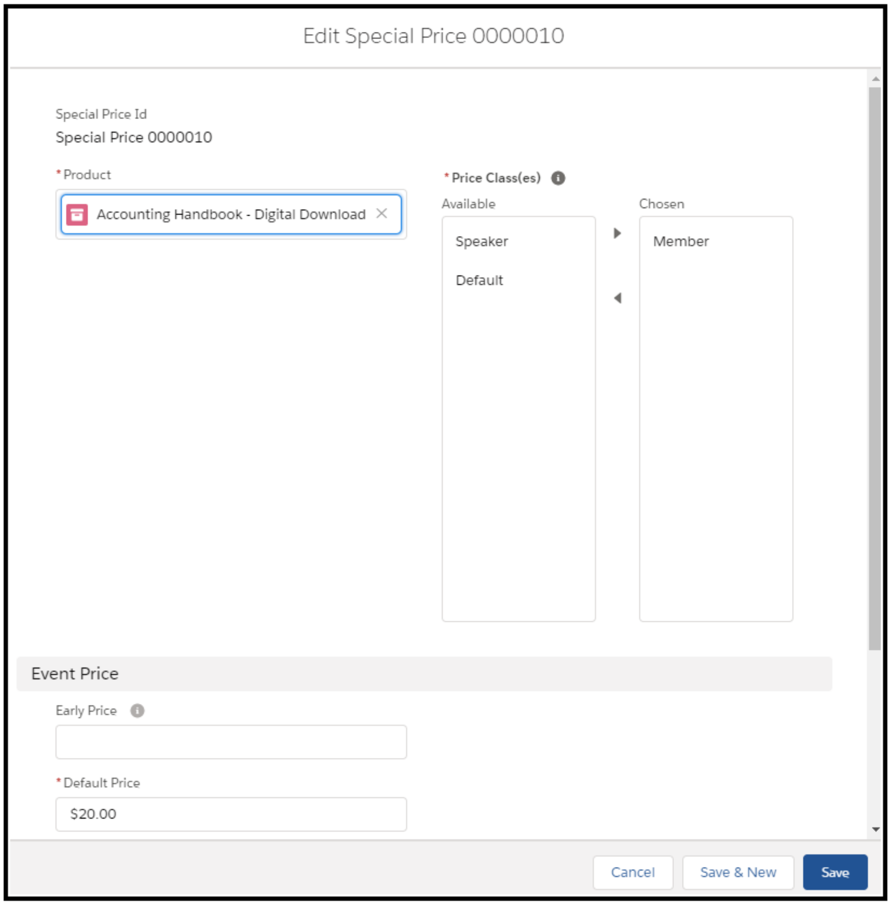
Entity: International Society for the Exceptionally Nimble

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.



Edit Special Price 0000010

Special Price Id
Special Price 0000010

*Product
Accounting Handbook - Digital Download

*Price Class(es)
Available: Speaker, Default
Chosen: Member

Event Price

Early Price

*Default Price
$20.00

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

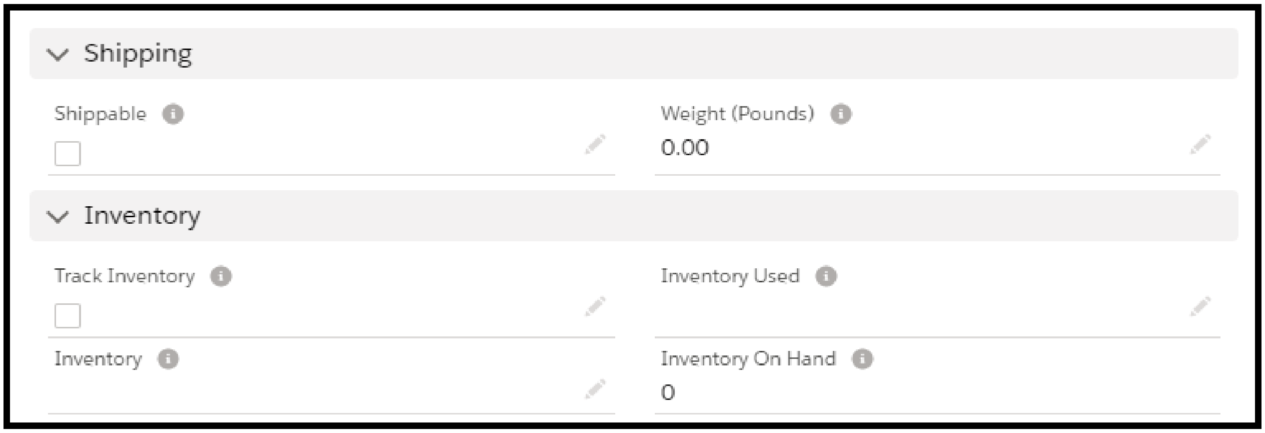
Tracking Inventory supported via Nimble AMS. The specific options available for setting up and configuring inventory discussed later in this chapter.

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.



Shipping

Shippable ☐

Weight (Pounds) 0.00

Inventory

Track Inventory ☐

Inventory Used

Inventory

Inventory On Hand 0

Community Hub

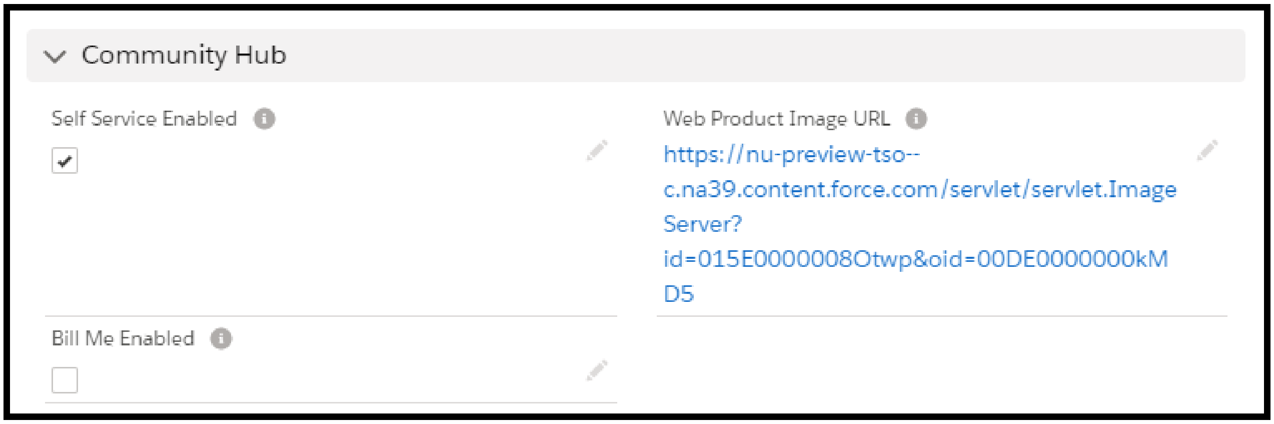
Fields listed control how Community Hub interacts with the product.

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.



Community Hub

Self Service Enabled
☑

Web Product Image URL
https://nu-preview-tso--c.na39.content.force.com/servlet/servlet.ImageServer?id=015E0000008Otwp&oid=00DE0000000kMD5

Bill Me Enabled
☐

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.

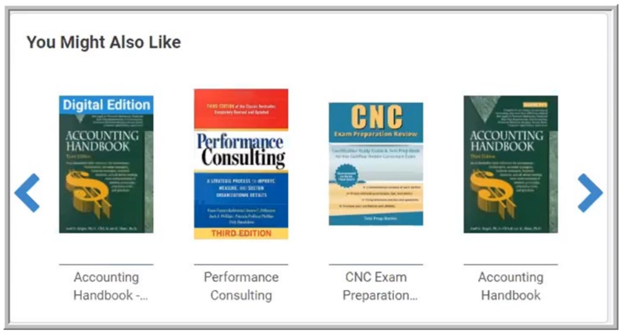
Cross-Selling vs. Upselling

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.**

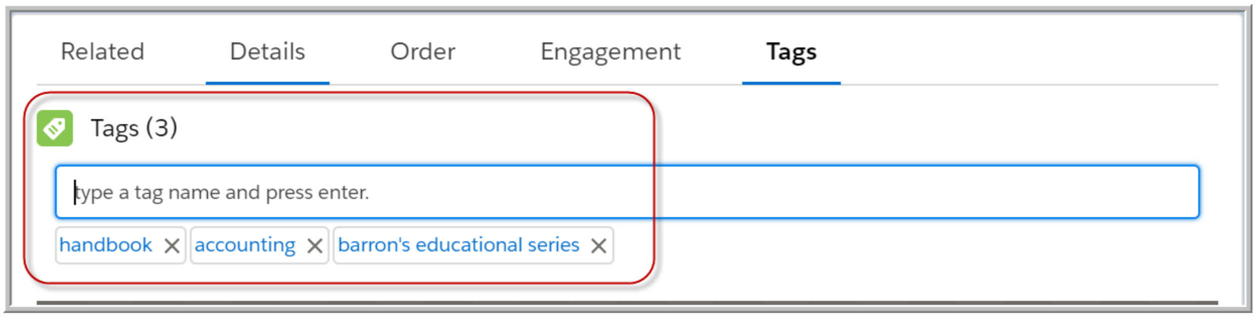


Cross-Selling on the Product Item

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

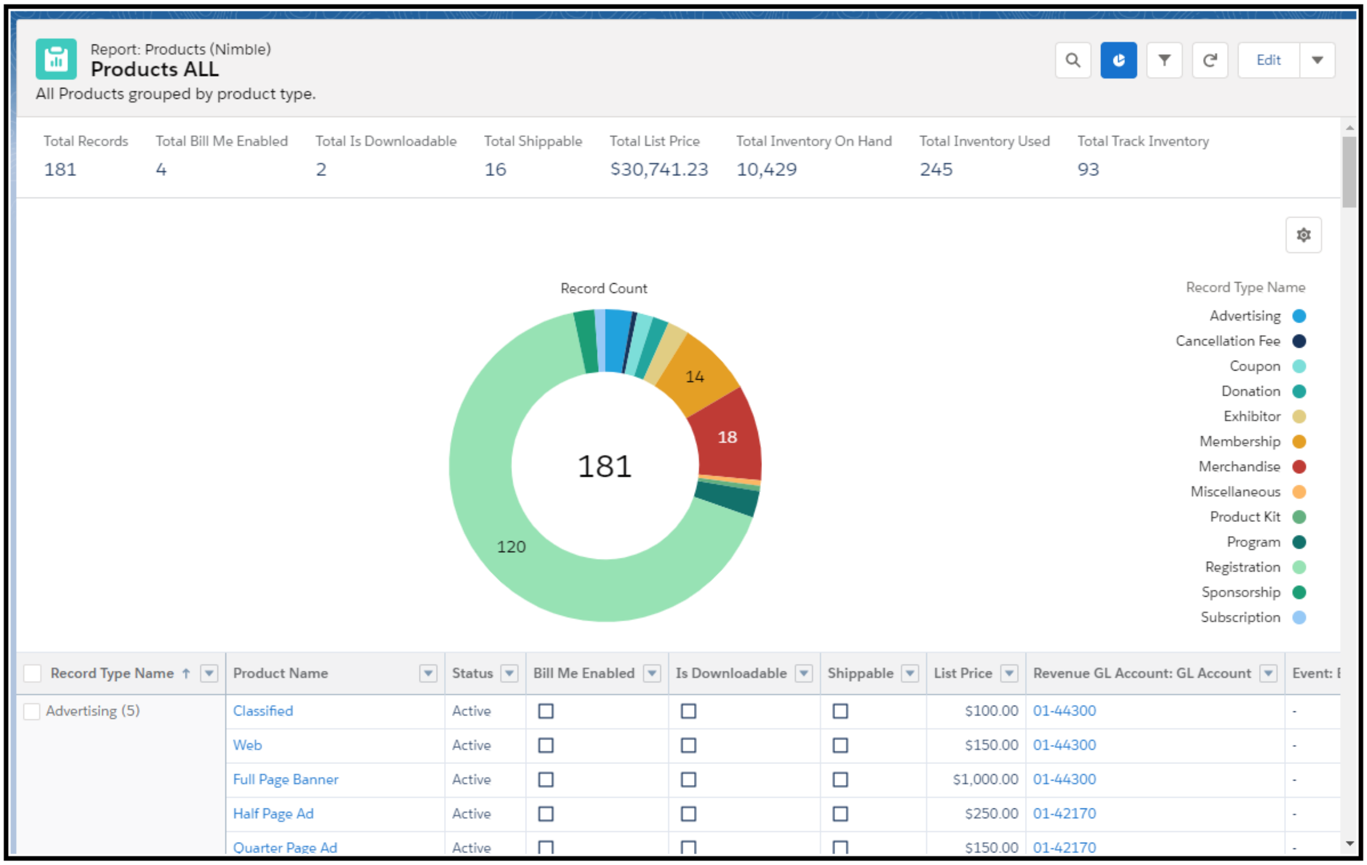
For additional information about cross-selling in Nimble AMS – reference Chapter 14.10– Cross Selling Carousel in Community Hub.

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


Edit
Record Count
181
14
18
120
Record Type Name
Advertising
Cancellation Fee
Coupon
Donation
Exhibitor
Membership
Merchandise
Miscellaneous
Product Kit
Program
Registration
Sponsorship
Subscription

Report: Products (Nimble)
Products ALL
All Products grouped by product type.

Total Records	Total Bill Me Enabled	Total Is Downloadable	Total Shippable	Total List Price	Total Inventory On Hand	Total Inventory Used	Total Track Inventory
181	4	2	16	$30,741.23	10,429	245	93

Record Type Name ↑	Product Name	Status	Bill Me Enabled	Is Downloadable	Shippable	List Price	Revenue GL Account: GL Account	Event:
Advertising (5)	Classified	Active	☐	☐	☐	$100.00	01-44300	-
	Web	Active	☐	☐	☐	$150.00	01-44300	-
	Full Page Banner	Active	☐	☐	☐	$1,000.00	01-44300	-
	Half Page Ad	Active	☐	☐	☐	$250.00	01-42170	-
	Quarter Page Ad	Active	☐	☐	☐	$150.00	01-42170	-

IMPORTANT NOTE: Products tracking in dashboards usually handled by Orders and Sales Dashboards.

CHAPTER

9 Orders and Payments

Objective 9.2
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The Order Process 9.5
Placing an Order 9.6
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Managing Carts 9.24
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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.

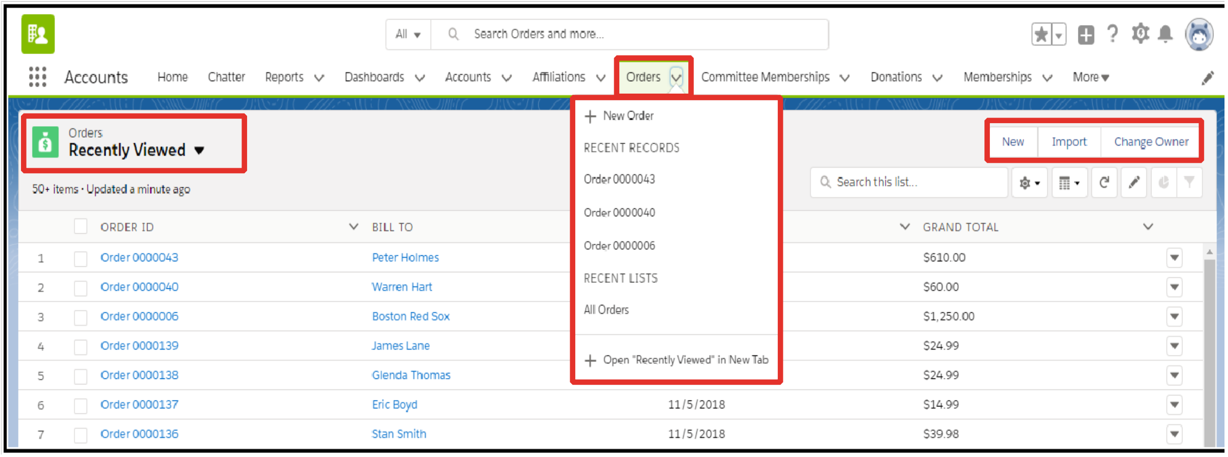
Nimble AMS provides a similar order experience for self-service Constituents and Users. Both Users and Constituents can place orders, make payments, and obtain confirmation of an order, all in one place.

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.


All
Search Orders and more...
Accounts
Home
Chatter
Reports
Dashboards
Accounts
Affiliations
Orders
Committee Memberships
Donations
Memberships
More
New Order
RECENT RECORDS
Order 0000043
Order 0000040
Order 0000006
RECENT LISTS
All Orders
Open "Recently Viewed" in New Tab
New
Import
Change Owner
Search this list...

Orders
Recently Viewed

50+ items • Updated a minute ago

	ORDER ID	BILL TO		GRAND TOTAL
1	Order 0000043	Peter Holmes		$610.00
2	Order 0000040	Warren Hart		$60.00
3	Order 0000006	Boston Red Sox		$1,250.00
4	Order 0000139	James Lane		$24.99
5	Order 0000138	Glenda Thomas		$24.99
6	Order 0000137	Eric Boyd	11/5/2018	$14.99
7	Order 0000136	Stan Smith	11/5/2018	$39.98

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.

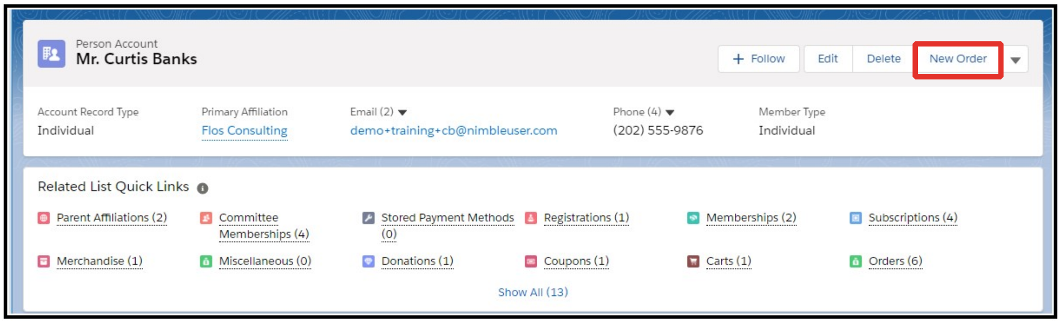
Creating a New Order

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**.



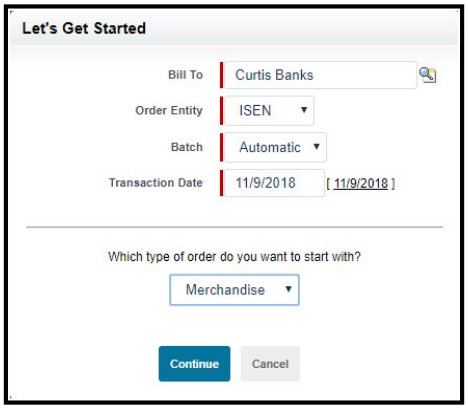
Person Account
Mr. Curtis Banks

Account Record Type: Individual
Primary Affiliation: Flos Consulting
Email (2): demo+training+cb@nimbleuser.com
Phone (4): (202) 555-9876
Member Type: Individual

+ Follow
Edit
Delete
New Order
Related List Quick Links
Parent Affiliations (2)
Committee Memberships (4)
Stored Payment Methods (0)
Registrations (1)
Memberships (2)
Subscriptions (4)
Merchandise (1)
Miscellaneous (0)
Donations (1)
Coupons (1)
Carts (1)
Orders (6)
Show All (13)

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**.



Let's Get Started

Bill To: Curtis Banks

Order Entity: ISEN

Batch: Automatic

Transaction Date: 11/9/2018 [11/9/2018]

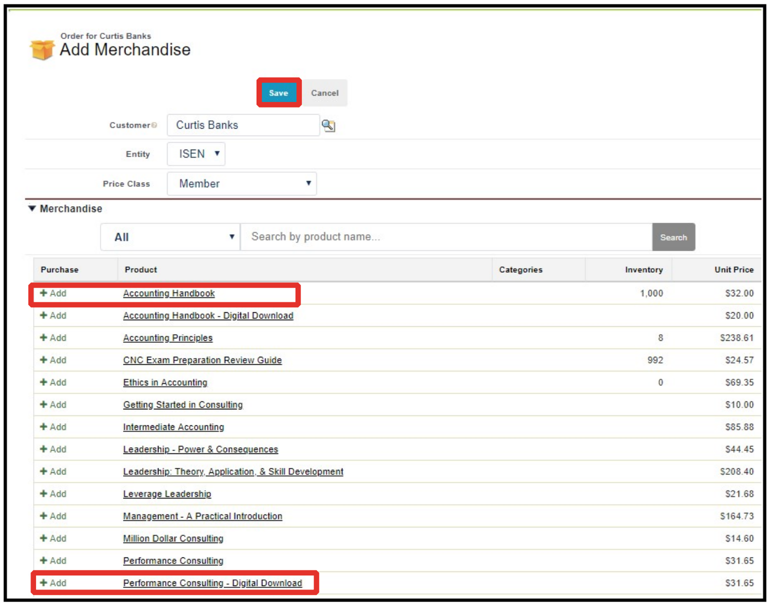
Which type of order do you want to start with? Merchandise

6. Click **Continue**.

Add Merchandise

The **Add Merchandise** step of the order process is where products are added to the cart.

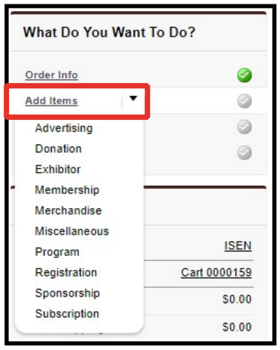
1. Click **+Add** next to the **Performance Consulting - Digital Download** Product.
2. Click **+Add** next to the **Accounting Handbook** Product.


Order for Curtis Banks
Add Merchandise
Save
Cancel
Merchandise
All
Search by product name...
Search

Customer: Curtis Banks
Entity: ISEN
Price Class: Member

Purchase	Product	Categories	Inventory	Unit Price
+ Add	Accounting Handbook		1,000	$32.00
+ Add	Accounting Handbook - Digital Download			$20.00
+ Add	Accounting Principles		8	$238.61
+ Add	CNC Exam Preparation Review Guide		992	$24.57
+ Add	Ethics in Accounting		0	$69.35
+ Add	Getting Started in Consulting			$10.00
+ Add	Intermediate Accounting			$85.88
+ Add	Leadership - Power & Consequences			$44.45
+ Add	Leadership: Theory, Application, & Skill Development			$208.40
+ Add	Leverage Leadership			$21.68
+ Add	Management - A Practical Introduction			$164.73
+ Add	Million Dollar Consulting			$14.60
+ Add	Performance Consulting			$31.65
+ Add	Performance Consulting - Digital Download			$31.65

IMPORTANT NOTE: The Add Items drop down menu (upper right) available to add additional products to an order.


What Do You Want To Do?
Order Info
Add Items
Advertising
Donation
Exhibitor
Membership
Merchandise
Miscellaneous
Program
Registration
Sponsorship
Subscription
ISEN
Cart 0000159
$0.00
$0.00

3. Click the **Save** button from either the top, or bottom of the page.

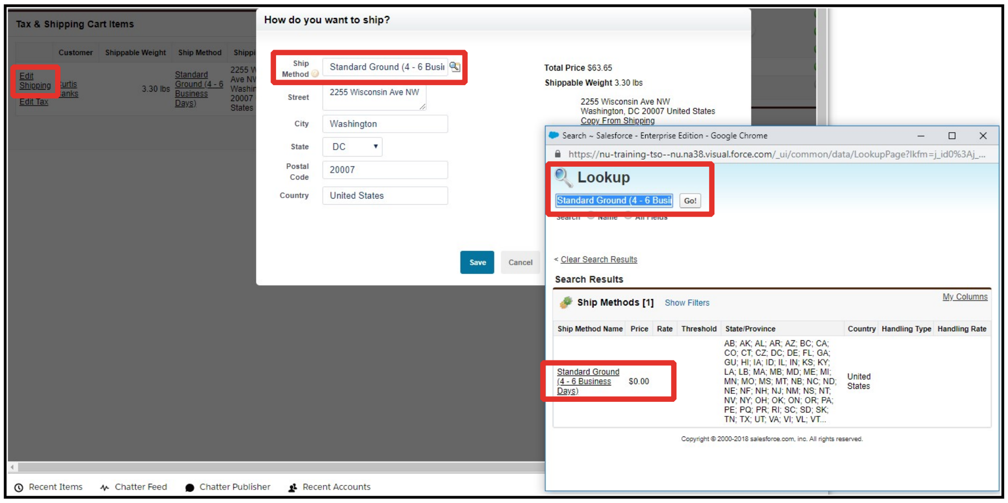
Tax and Shipping Step

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.


Tax & Shipping Cart Items
Customer
Shippable Weight
Ship Method
Edit Shipping
Edit Tax
3.30 lbs
Save
Cancel
Search ~ Salesforce - Enterprise Edition - Google Chrome
Go!
< Clear Search Results
Show Filters
My Columns
Recent Items
Chatter Feed
Chatter Publisher
Recent Accounts

How do you want to ship?

Ship Method: Standard Ground (4 - 6 Busi
Street: 2255 Wisconsin Ave NW
City: Washington
State: DC
Postal Code: 20007
Country: United States

Total Price $63.65
Shippable Weight 3.30 lbs

2255 Wisconsin Ave NW
Washington, DC 20007 United States
Copy From Shipping

https://nu-training-tso--nu.na38.visual.force.com/_ui/common/data/LookupPage?lkfm=j_id0%3Aj_...

Lookup

Standard Ground (4 - 6 Busi

Search Results

Ship Methods [1]

Ship Method Name	Price	Rate	Threshold	State/Province	Country	Handling Type	Handling Rate
Standard Ground (4 - 6 Business Days)	$0.00			AB; AK; AL; AR; AZ; BC; CA; CO; CT; CZ; DC; DE; FL; GA; GU; HI; IA; ID; IL; IN; KS; KY; LA; LB; MA; MB; MD; ME; MI; MN; MO; MS; MT; NB; NC; ND; NE; NF; NH; NJ; NM; NS; NT; NV; NY; OH; OK; ON; OR; PA; PE; PQ; PR; RI; SC; SD; SK; TN; TX; UT; VA; VI; VL; VT...	United States		

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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

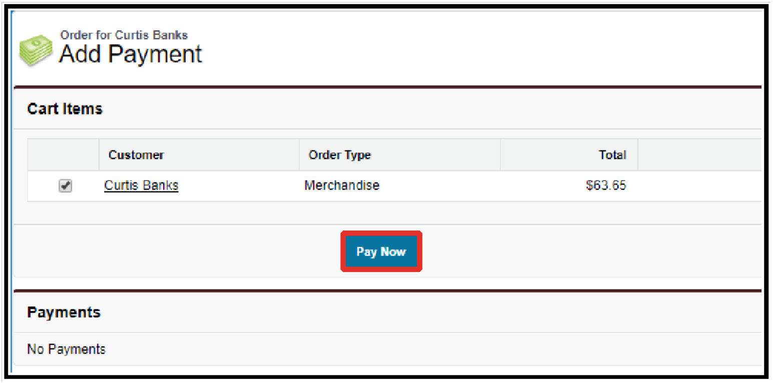
The Payment step of the order process is where Users enter purchase order and invoice information, select the products in the cart to pay for, choose a payment method, modify any payments, and submit the cart.

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

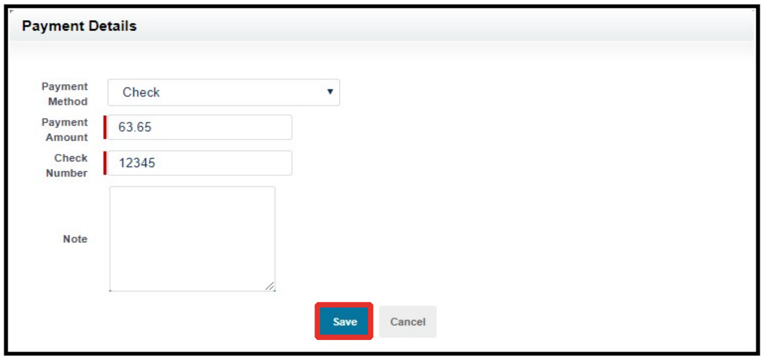
Cart Items

	Customer	Order Type	Total
☑	Curtis Banks	Merchandise	$63.65

Payments

No Payments

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	

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**.

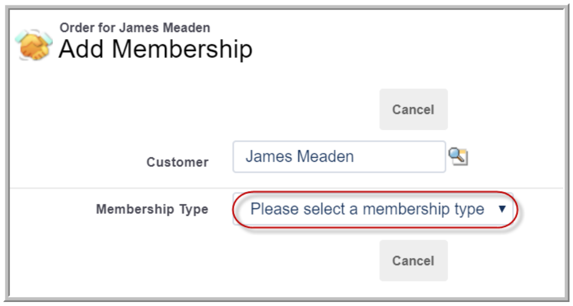
Scheduling Payments

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:

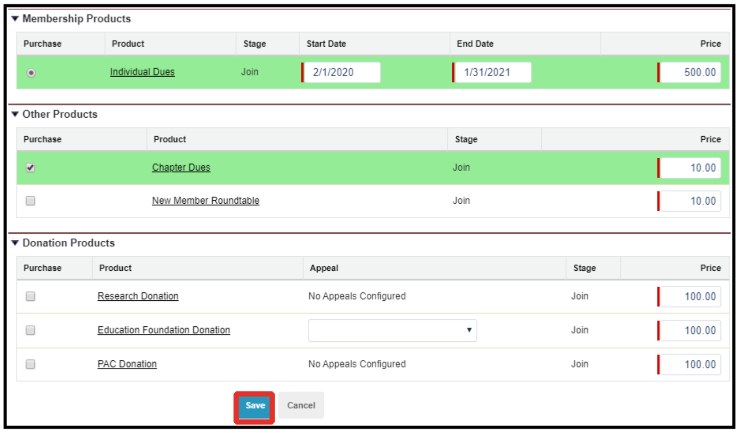
1. Using **Search**, find and select the **Account** for **James Meaden**.
2. Click **New Order**.
3. Select **Membership** from the list of entity order items for the selected entity.
4. From the **Membership Type** dropdown, select **Individual**.



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
●	Individual Dues	Join	2/1/2020	1/31/2021	500.00

▼ Other Products

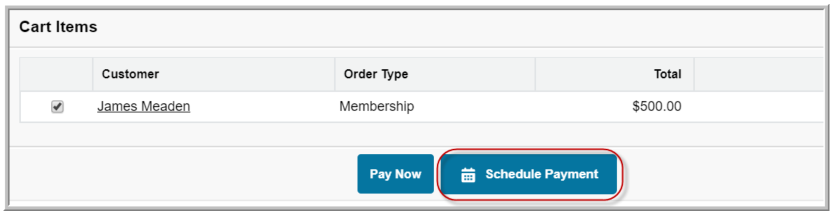
Purchase	Product	Stage	Price
☑	Chapter Dues	Join	10.00
☐	New Member Roundtable	Join	10.00

▼ Donation Products

Purchase	Product	Appeal	Stage	Price
☐	Research Donation	No Appeals Configured	Join	100.00
☐	Education Foundation Donation	▼	Join	100.00
☐	PAC Donation	No Appeals Configured	Join	100.00

6. Click the **Save** Button.

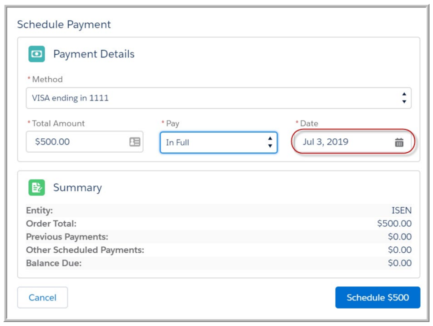
7. Click **Go to Payment** button.
8. Click the **Schedule Payment** button.
    - Users will schedule a **One Time Scheduled Payment** for this exercise.



Cart Items

	Customer	Order Type	Total
☑	James Meaden	Membership	$500.00

10. Change the **Date field** to **one month in the future**.



Schedule Payment

Payment Details

* Method: VISA ending in 1111

* Total Amount: $500.00

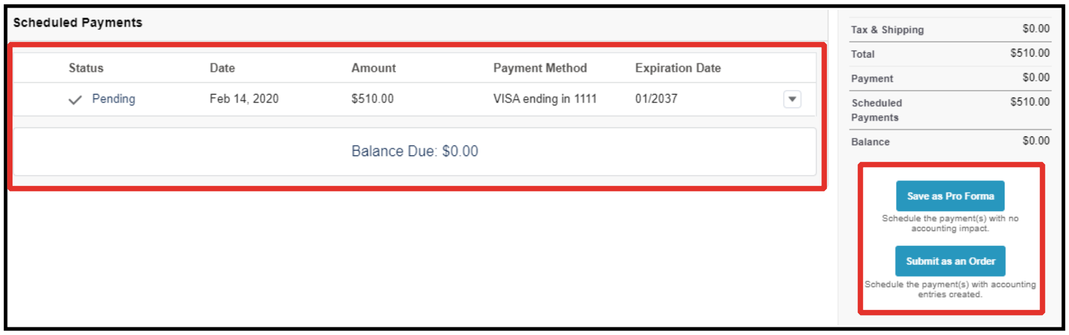
* Pay: In Full

* Date: Jul 3, 2019

Summary

Entity:	ISEN
Order Total:	$500.00
Previous Payments:	$0.00
Other Scheduled Payments:	$0.00
Balance Due:	$0.00

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.



Scheduled Payments

Status	Date	Amount	Payment Method	Expiration Date
✓ Pending	Feb 14, 2020	$510.00	VISA ending in 1111	01/2037

Balance Due: $0.00

Tax & Shipping	$0.00
Total	$510.00
Payment	$0.00
Scheduled Payments	$510.00
Balance	$0.00

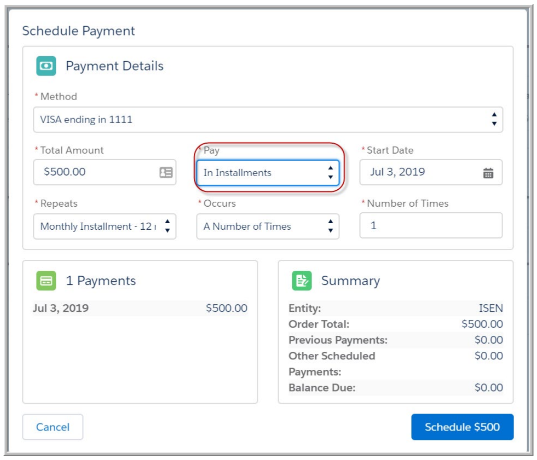
Schedule the payment(s) with no accounting impact.

Schedule the payment(s) with 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**.

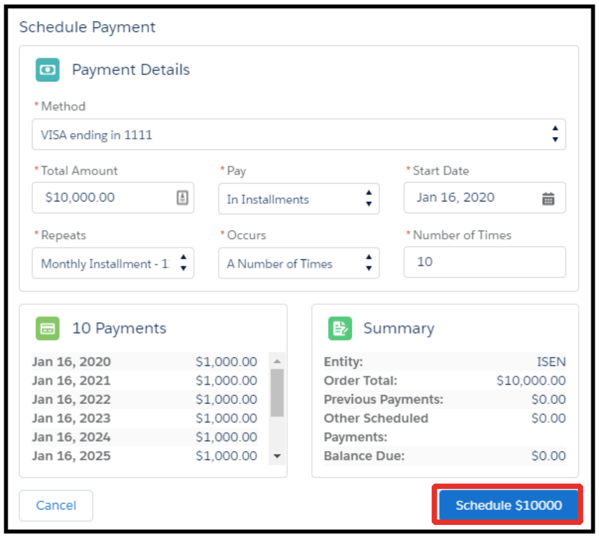

Schedule Payment
Payment Details
1 Payments
Summary
Cancel
Schedule $500

*Method: VISA ending in 1111
*Total Amount: $500.00
*Pay: In Installments
*Start Date: Jul 3, 2019
*Repeats: Monthly Installment - 12 i
*Occurs: A Number of Times
*Number of Times: 1

Jul 3, 2019	$500.00

Entity:	ISEN
Order Total:	$500.00
Previous Payments:	$0.00
Other Scheduled Payments:	$0.00
Balance Due:	$0.00

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.


Schedule Payment
Payment Details
10 Payments
Summary
Cancel
Schedule $10000

*Method: VISA ending in 1111
*Total Amount: $10,000.00
*Pay: In Installments
*Start Date: Jan 16, 2020
*Repeats: Monthly Installment - 1
*Occurs: A Number of Times
*Number of Times: 10

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

Entity:	ISEN
Order Total:	$10,000.00
Previous Payments:	$0.00
Other Scheduled Payments:	$0.00
Balance Due:	$0.00

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 the 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

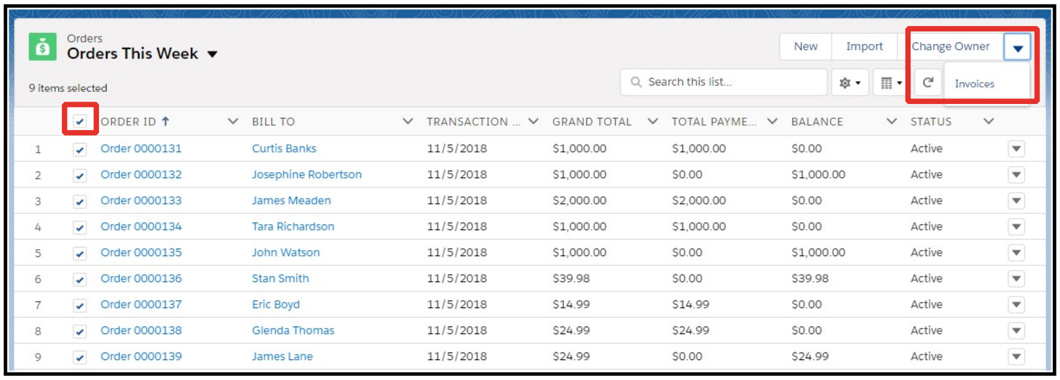
The following reports used during Training should be built in the Client production version of Nimble AMS:

> **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**.



9 items selected

	☑	ORDER ID	BILL TO	TRANSACTION ...	GRAND TOTAL	TOTAL PAYME...	BALANCE	STATUS
1	☑	Order 0000131	Curtis Banks	11/5/2018	$1,000.00	$1,000.00	$0.00	Active
2	☑	Order 0000132	Josephine Robertson	11/5/2018	$1,000.00	$0.00	$1,000.00	Active
3	☑	Order 0000133	James Meaden	11/5/2018	$2,000.00	$2,000.00	$0.00	Active
4	☑	Order 0000134	Tara Richardson	11/5/2018	$1,000.00	$1,000.00	$0.00	Active
5	☑	Order 0000135	John Watson	11/5/2018	$1,000.00	$0.00	$1,000.00	Active
6	☑	Order 0000136	Stan Smith	11/5/2018	$39.98	$0.00	$39.98	Active
7	☑	Order 0000137	Eric Boyd	11/5/2018	$14.99	$14.99	$0.00	Active
8	☑	Order 0000138	Glenda Thomas	11/5/2018	$24.99	$24.99	$0.00	Active
9	☑	Order 0000139	James Lane	11/5/2018	$24.99	$0.00	$24.99	Active

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**.

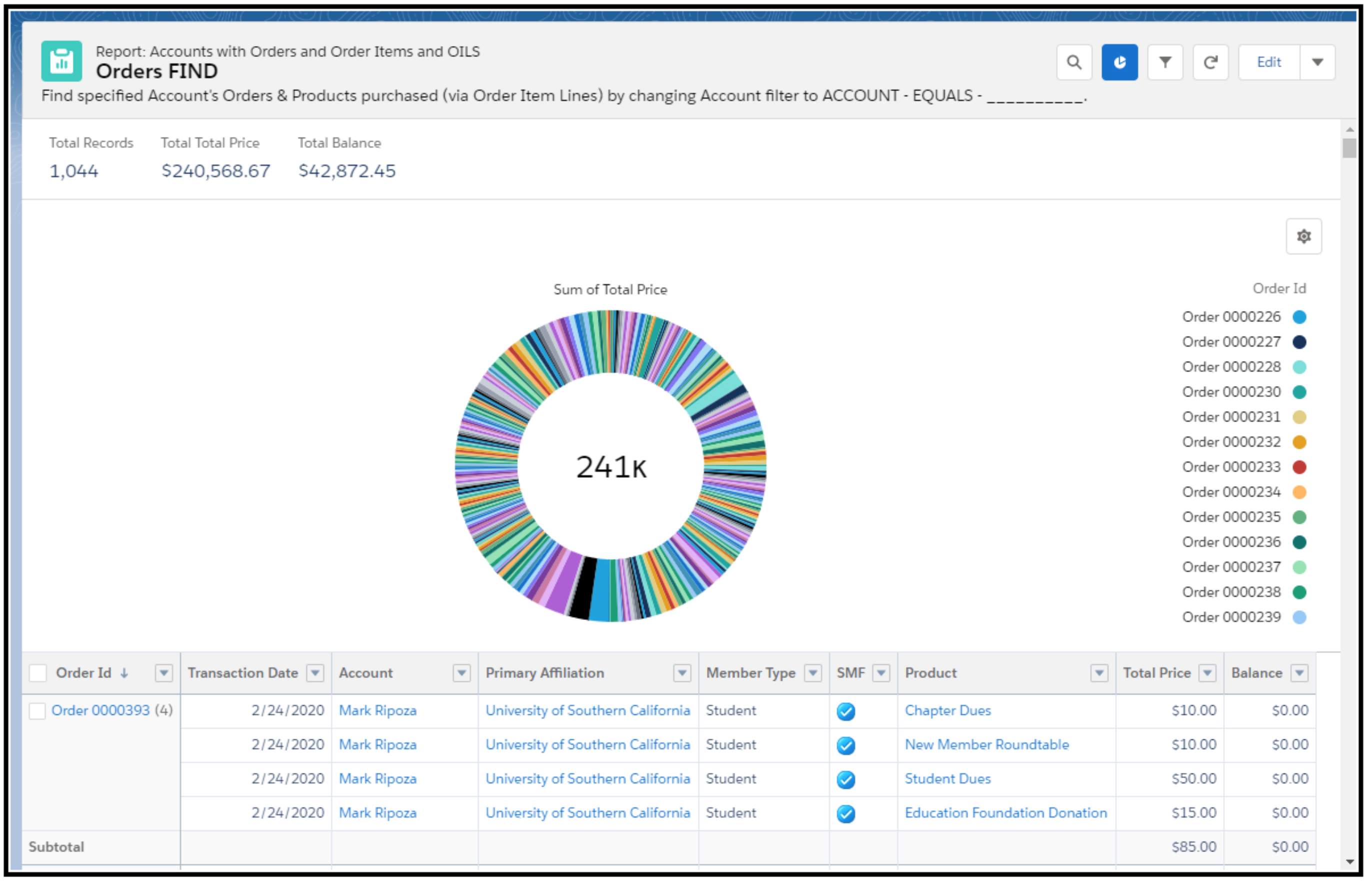
IMPORTANT NOTE: Carts with Payments CANNOT be deleted. The Cart would have to be processed as an Order OR the Payment would have to be voided before the Cart can be removed.

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


Edit

Report: Accounts with Orders and Order Items and OILS

Orders FIND

Find specified Account's Orders & Products purchased (via Order Item Lines) by changing Account filter to ACCOUNT - EQUALS - __________.

Total Records	Total Total Price	Total Balance
1,044	$240,568.67	$42,872.45

Sum of Total Price
241K
Order Id
Order 0000226
Order 0000227
Order 0000228
Order 0000230
Order 0000231
Order 0000232
Order 0000233
Order 0000234
Order 0000235
Order 0000236
Order 0000237
Order 0000238
Order 0000239

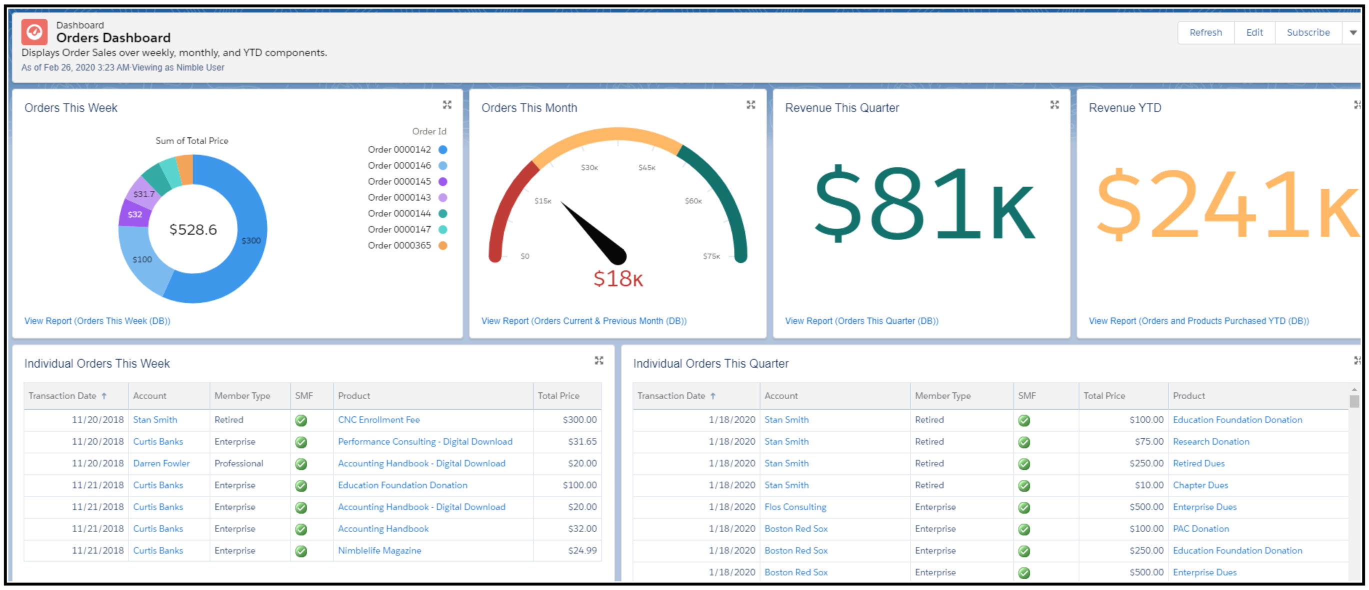
Order Id ↓	Transaction Date	Account	Primary Affiliation	Member Type	SMF	Product	Total Price	Balance
☐ Order 0000393 (4)	2/24/2020	Mark Ripoza	University of Southern California	Student	✓	Chapter Dues	$10.00	$0.00
	2/24/2020	Mark Ripoza	University of Southern California	Student	✓	New Member Roundtable	$10.00	$0.00
	2/24/2020	Mark Ripoza	University of Southern California	Student	✓	Student Dues	$50.00	$0.00
	2/24/2020	Mark Ripoza	University of Southern California	Student	✓	Education Foundation Donation	$15.00	$0.00
Subtotal							$85.00	$0.00

- 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.


Refresh
Edit
Subscribe
Orders This Week
Sum of Total Price
$528.6
$300
$100
$32
$31.7
Order Id
Order 0000142
Order 0000146
Order 0000145
Order 0000143
Order 0000144
Order 0000147
Order 0000365
Orders This Month
$0
$15K
$30K
$45K
$60K
$75K
$18K
Revenue This Quarter
$81K
Revenue YTD
$241K

Dashboard
Orders Dashboard
Displays Order Sales over weekly, monthly, and YTD components.
As of Feb 26, 2020 3:23 AM·Viewing as Nimble User

View Report (Orders This Week (DB))

View Report (Orders Current & Previous Month (DB))

View Report (Orders This Quarter (DB))

View Report (Orders and Products Purchased YTD (DB))

Individual Orders This Week

Transaction Date ↑	Account	Member Type	SMF	Product	Total Price
11/20/2018	Stan Smith	Retired	✓	CNC Enrollment Fee	$300.00
11/20/2018	Curtis Banks	Enterprise	✓	Performance Consulting - Digital Download	$31.65
11/20/2018	Darren Fowler	Professional	✓	Accounting Handbook - Digital Download	$20.00
11/21/2018	Curtis Banks	Enterprise	✓	Education Foundation Donation	$100.00
11/21/2018	Curtis Banks	Enterprise	✓	Accounting Handbook - Digital Download	$20.00
11/21/2018	Curtis Banks	Enterprise	✓	Accounting Handbook	$32.00
11/21/2018	Curtis Banks	Enterprise	✓	Nimblelife Magazine	$24.99

Individual Orders This Quarter

Transaction Date ↑	Account	Member Type	SMF	Total Price	Product
1/18/2020	Stan Smith	Retired	✓	$100.00	Education Foundation Donation
1/18/2020	Stan Smith	Retired	✓	$75.00	Research Donation
1/18/2020	Stan Smith	Retired	✓	$250.00	Retired Dues
1/18/2020	Stan Smith	Retired	✓	$10.00	Chapter Dues
1/18/2020	Flos Consulting	Enterprise	✓	$500.00	Enterprise Dues
1/18/2020	Boston Red Sox	Enterprise	✓	$100.00	PAC Donation
1/18/2020	Boston Red Sox	Enterprise	✓	$250.00	Education Foundation Donation
1/18/2020	Boston Red Sox	Enterprise	✓	$500.00	Enterprise Dues

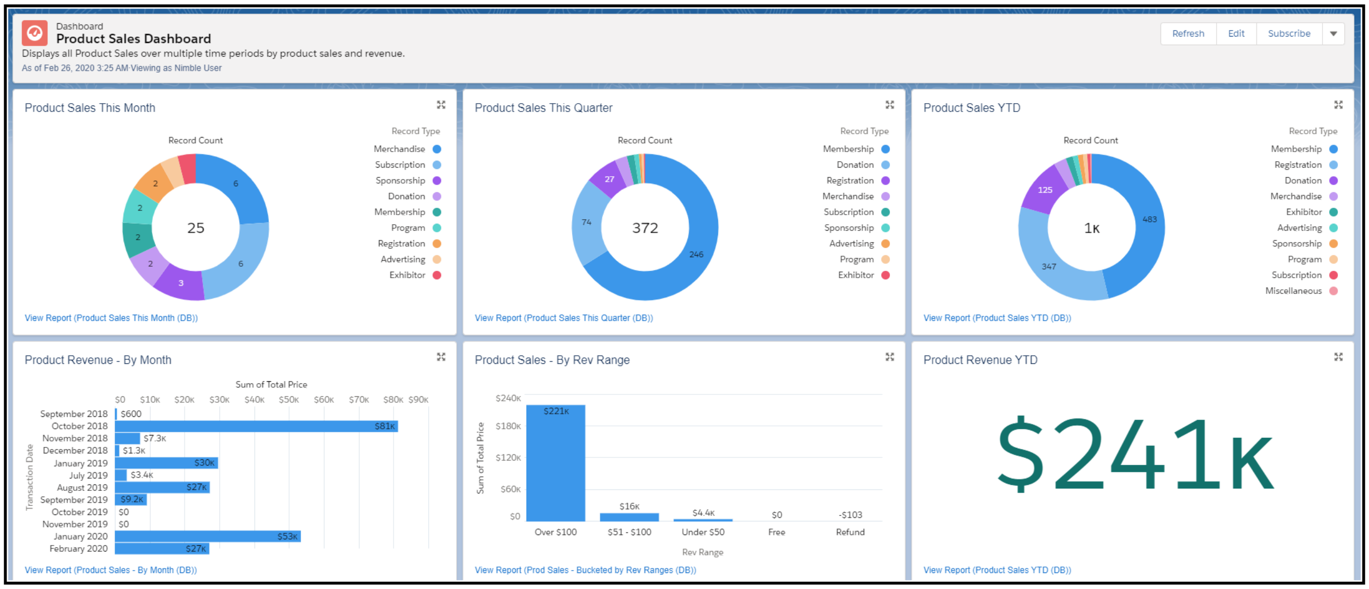
Notes:

- 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.



Dashboard
Product Sales Dashboard
Displays all Product Sales over multiple time periods by product sales and revenue.
As of Feb 26, 2020 3:25 AM Viewing as Nimble User

Refresh
Edit
Subscribe
Product Sales This Month
Record Count
Record Type
Merchandise
Subscription
Sponsorship
Donation
Membership
Program
Registration
Advertising
Exhibitor
25
View Report (Product Sales This Month (DB))
Product Sales This Quarter
Record Count
372
Membership
Donation
Registration
Merchandise
Subscription
Sponsorship
Advertising
Program
Exhibitor
View Report (Product Sales This Quarter (DB))
Product Sales YTD
Record Count
1K
Membership
Registration
Donation
Merchandise
Exhibitor
Advertising
Sponsorship
Program
Subscription
Miscellaneous
View Report (Product Sales YTD (DB))
Product Revenue - By Month
Sum of Total Price
Transaction Date
September 2018 $600
October 2018 $81K
November 2018 $7.3K
December 2018 $1.3K
January 2019 $30K
July 2019 $3.4K
August 2019 $27K
September 2019 $9.2K
October 2019 $0
November 2019 $0
January 2020 $53K
February 2020 $27K
View Report (Product Sales - By Month (DB))
Product Sales - By Rev Range
Sum of Total Price
Rev Range
Over $100 $221K
$51 - $100 $16K
Under $50 $4.4K
Free $0
Refund -$103
View Report (Prod Sales - Bucketed by Rev Ranges (DB))
Product Revenue YTD
$241K
View Report (Product Sales YTD (DB))

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.

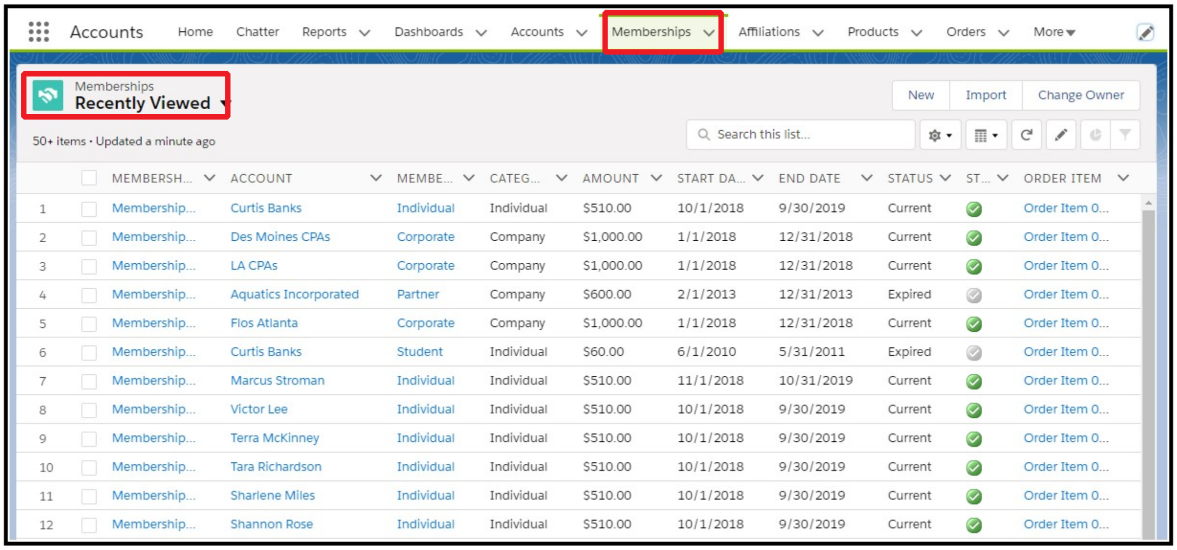
For INDIVIDUAL Membership analysis, users should use reports that focus on **Professional** membership. For ORGANIZATIONAL Membership analysis, users should use reports that focus on **Enterprise** membership. Both these memberships contain the most Account records

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.



Memberships
Recently Viewed

50+ items • Updated a minute ago

	MEMBERSH...	ACCOUNT	MEMBE...	CATEG...	AMOUNT	START DA...	END DATE	STATUS	ST...	ORDER ITEM
1	Membership...	Curtis Banks	Individual	Individual	$510.00	10/1/2018	9/30/2019	Current	✓	Order Item 0...
2	Membership...	Des Moines CPAs	Corporate	Company	$1,000.00	1/1/2018	12/31/2018	Current	✓	Order Item 0...
3	Membership...	LA CPAs	Corporate	Company	$1,000.00	1/1/2018	12/31/2018	Current	✓	Order Item 0...
4	Membership...	Aquatics Incorporated	Partner	Company	$600.00	2/1/2013	12/31/2013	Expired	✓	Order Item 0...
5	Membership...	Flos Atlanta	Corporate	Company	$1,000.00	1/1/2018	12/31/2018	Current	✓	Order Item 0...
6	Membership...	Curtis Banks	Student	Individual	$60.00	6/1/2010	5/31/2011	Expired	✓	Order Item 0...
7	Membership...	Marcus Stroman	Individual	Individual	$510.00	11/1/2018	10/31/2019	Current	✓	Order Item 0...
8	Membership...	Victor Lee	Individual	Individual	$510.00	10/1/2018	9/30/2019	Current	✓	Order Item 0...
9	Membership...	Terra McKinney	Individual	Individual	$510.00	10/1/2018	9/30/2019	Current	✓	Order Item 0...
10	Membership...	Tara Richardson	Individual	Individual	$510.00	10/1/2018	9/30/2019	Current	✓	Order Item 0...
11	Membership...	Sharlene Miles	Individual	Individual	$510.00	10/1/2018	9/30/2019	Current	✓	Order Item 0...
12	Membership...	Shannon Rose	Individual	Individual	$510.00	10/1/2018	9/30/2019	Current	✓	Order Item 0...

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

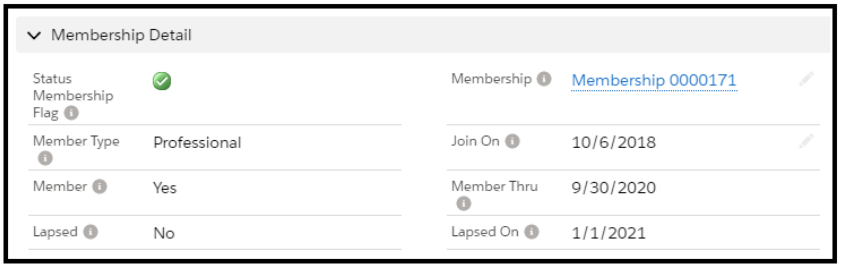
From the TOP LEFT, Memberships Recently Viewed drop down, Users can:

- 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	Join On	10/6/2018
Member	Yes	Member Thru	9/30/2020
Lapsed	No	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

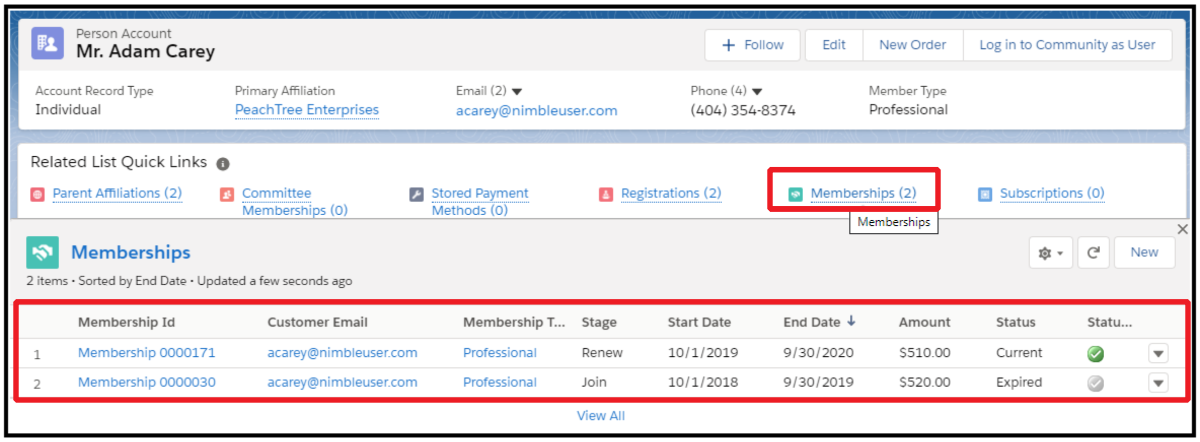
- **Lapsed On**

  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

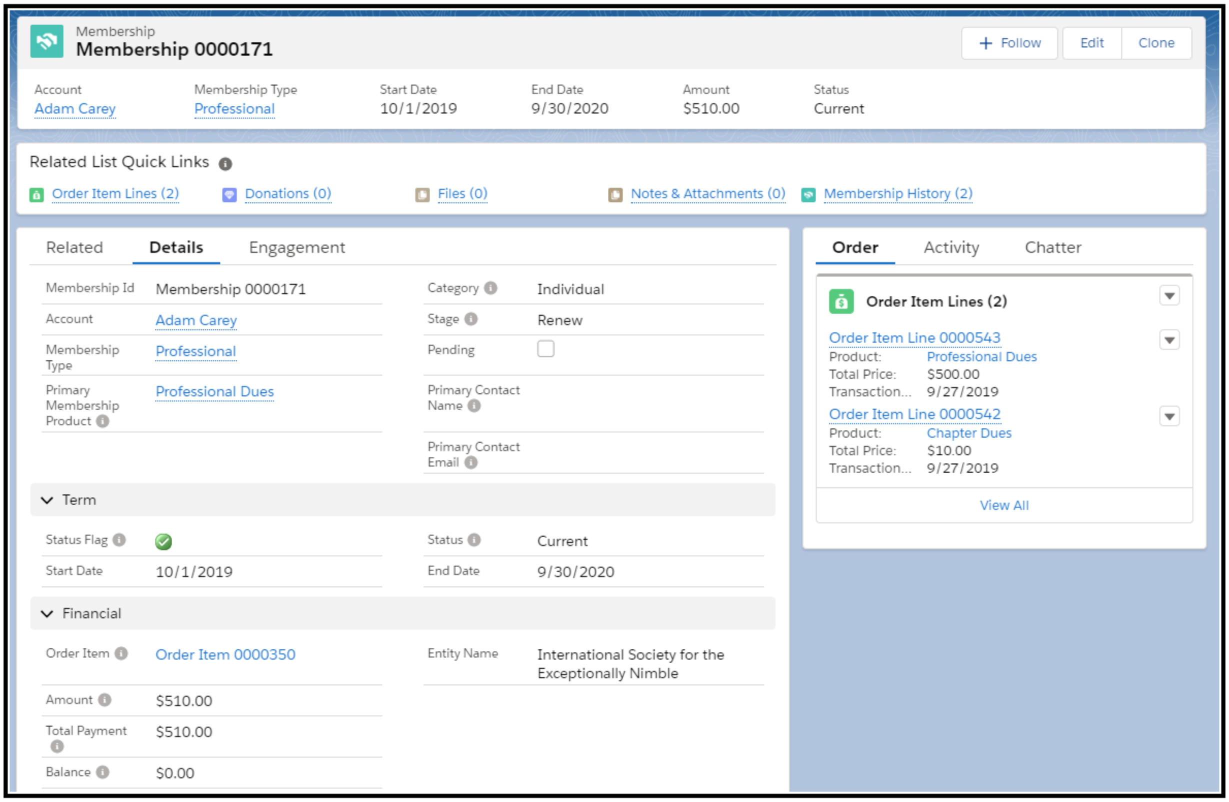
Account Record Type: Individual
Primary Affiliation: PeachTree Enterprises
Email (2): acarey@nimbleuser.com
Phone (4): (404) 354-8374
Member Type: Professional

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	✓

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)

Membership Id	Membership 0000171	Category	Individual
Account	Adam Carey	Stage	Renew
Membership Type	Professional	Pending	☐
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 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

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

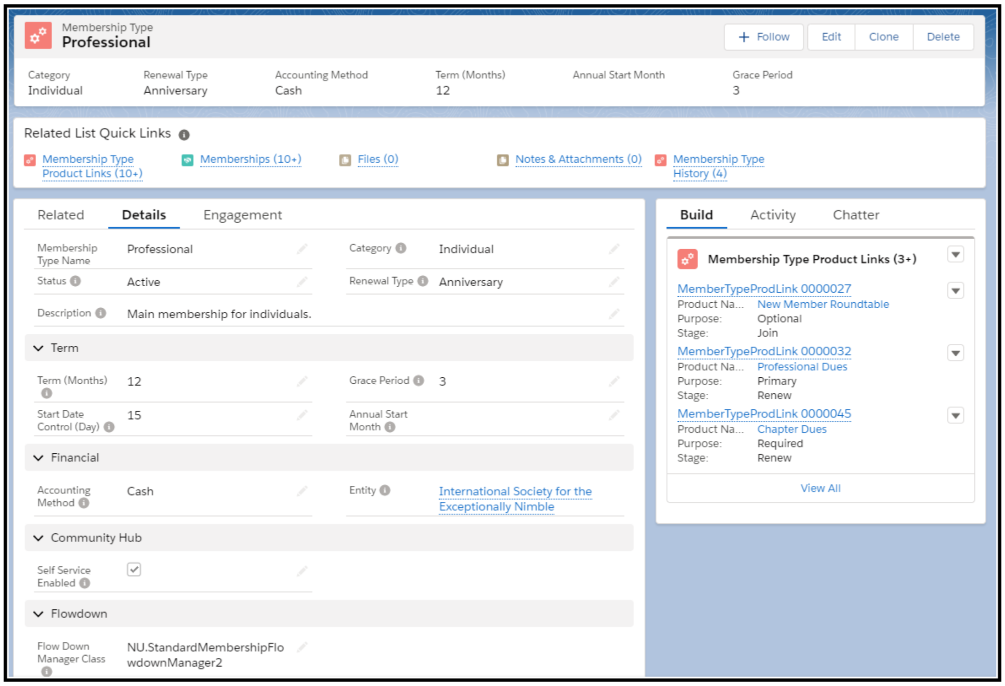
Membership types are setup either way, depending on an association's needs.

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.


+ Follow
Edit
Clone
Delete
Related List Quick Links
Membership Type Product Links (10+)
Memberships (10+)
Files (0)
Notes & Attachments (0)
Membership Type History (4)
Related
Details
Engagement
Build
Activity
Chatter
View All

Membership Type
Professional

Category: Individual
Renewal Type: Anniversary
Accounting Method: Cash
Term (Months): 12
Annual Start Month:
Grace Period: 3

Membership Type Name: Professional
Category: Individual
Status: Active
Renewal Type: Anniversary
Description: Main membership for individuals.

Term
Term (Months): 12
Grace Period: 3
Start Date Control (Day): 15
Annual Start Month:

Financial
Accounting Method: Cash
Entity: International Society for the Exceptionally Nimble

Community Hub
Self Service Enabled: ☑

Flowdown
Flow Down Manager Class: NU.StandardMembershipFlowdownManager2

Membership Type Product Links (3+)

MemberTypeProdLink 0000027
Product Na...: New Member Roundtable
Purpose: Optional
Stage: Join

MemberTypeProdLink 0000032
Product Na...: Professional Dues
Purpose: Primary
Stage: Renew

MemberTypeProdLink 0000045
Product Na...: Chapter Dues
Purpose: Required
Stage: Renew

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

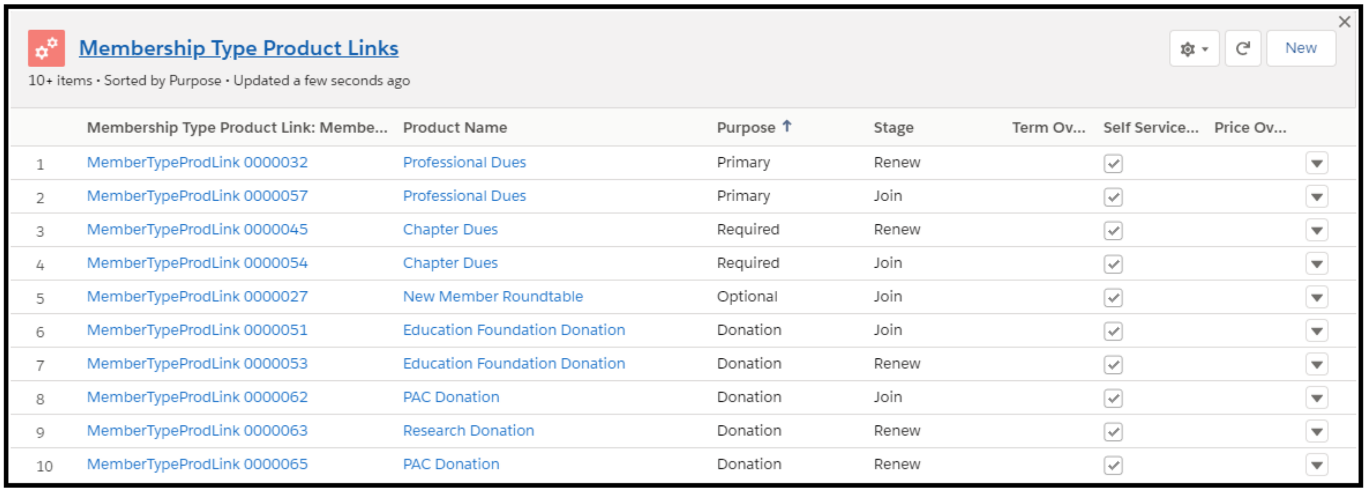
Membership Type Product Links enable users to link the following types of membership products directly to the purchase of a Membership:

- **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 Links

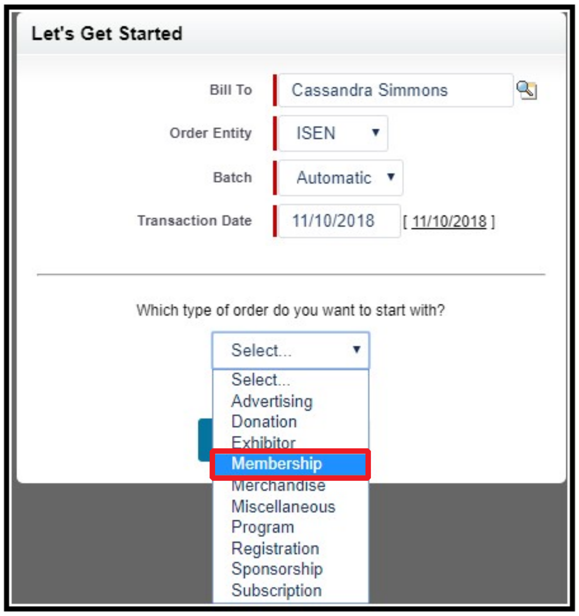
10+ items • Sorted by Purpose • Updated a few seconds ago

	Membership Type Product Link: Membe...	Product Name	Purpose ↑	Stage	Term Ov...	Self Service...	Price Ov...	
1	MemberTypeProdLink 0000032	Professional Dues	Primary	Renew		☑		▼
2	MemberTypeProdLink 0000057	Professional Dues	Primary	Join		☑		▼
3	MemberTypeProdLink 0000045	Chapter Dues	Required	Renew		☑		▼
4	MemberTypeProdLink 0000054	Chapter Dues	Required	Join		☑		▼
5	MemberTypeProdLink 0000027	New Member Roundtable	Optional	Join		☑		▼
6	MemberTypeProdLink 0000051	Education Foundation Donation	Donation	Join		☑		▼
7	MemberTypeProdLink 0000053	Education Foundation Donation	Donation	Renew		☑		▼
8	MemberTypeProdLink 0000062	PAC Donation	Donation	Join		☑		▼
9	MemberTypeProdLink 0000063	Research Donation	Donation	Renew		☑		▼
10	MemberTypeProdLink 0000065	PAC Donation	Donation	Renew		☑		▼

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.



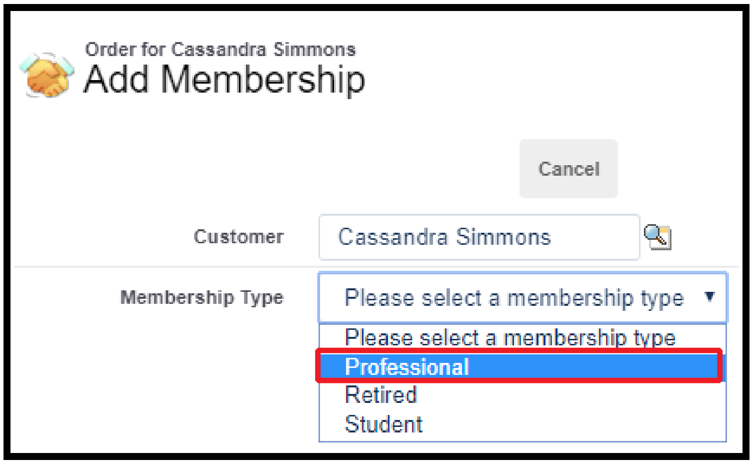
Let's Get Started

Bill To: Cassandra Simmons
Order Entity: ISEN
Batch: Automatic
Transaction Date: 11/10/2018 [11/10/2018]

Which type of order do you want to start with?

Select...
Select...
Advertising
Donation
Exhibitor
Membership
Merchandise
Miscellaneous
Program
Registration
Sponsorship
Subscription

4. Click **Continue**.
5. Click the **Membership Type** drop-down and select **Professional**.

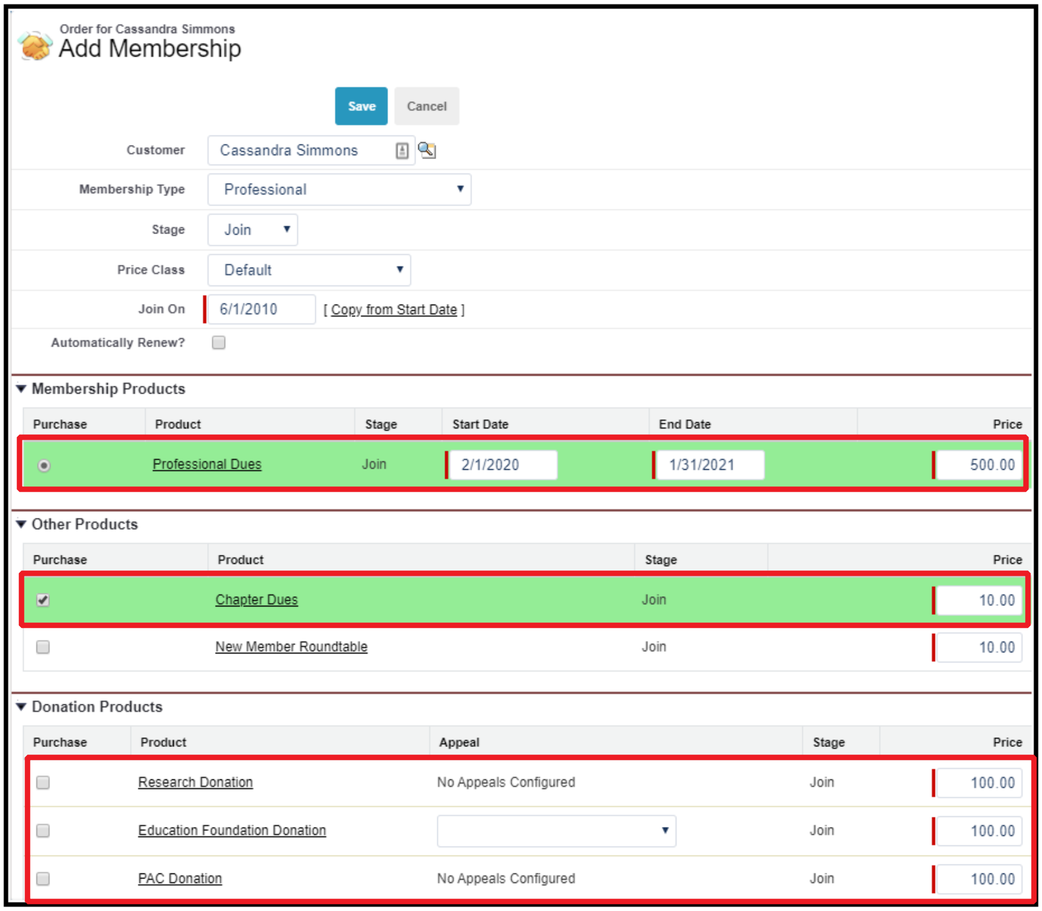


Order for Cassandra Simmons
Add Membership

Customer: Cassandra Simmons
Membership Type: Please select a membership type

Cancel
Please select a membership type
Professional
Retired
Student

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
●	Professional Dues	Join	2/1/2020	1/31/2021	500.00

Other Products

Purchase	Product	Stage	Price
☑	Chapter Dues	Join	10.00
☐	New Member Roundtable	Join	10.00

Donation Products

Purchase	Product	Appeal	Stage	Price
☐	Research Donation	No Appeals Configured	Join	100.00
☐	Education Foundation Donation		Join	100.00
☐	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, uses 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** processes 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.

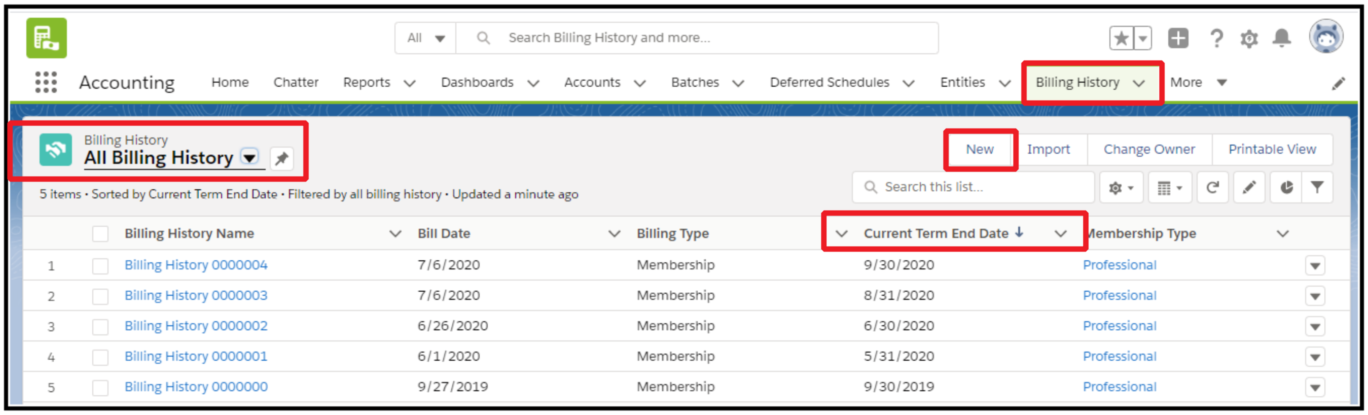
Creating Membership Renewals

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

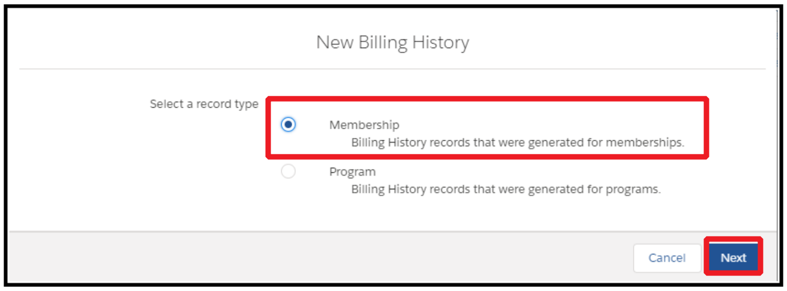
1. Click on the **App Launcher**.
2. In the **Search apps and items** box, enter **Billing History**.
3. Click on the newly added **Billing History** Item dropdown.
4. Click on the **+ Add Billing History to Nav Bar** option to permanently add the Item.
5. Click on the **Recently Viewed** dropdown (upper 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).


All
Search Billing History and more...
Accounting
Home
Chatter
Reports
Dashboards
Accounts
Batches
Deferred Schedules
Entities
Billing History
More
Billing History
All Billing History
New
Import
Change Owner
Printable View
Search this list...

5 items • Sorted by Current Term End Date • Filtered by all billing history • Updated a minute ago

	Billing History Name	Bill Date	Billing Type	Current Term End Date	Membership Type
1	Billing History 0000004	7/6/2020	Membership	9/30/2020	Professional
2	Billing History 0000003	7/6/2020	Membership	8/31/2020	Professional
3	Billing History 0000002	6/26/2020	Membership	6/30/2020	Professional
4	Billing History 0000001	6/1/2020	Membership	5/31/2020	Professional
5	Billing History 0000000	9/27/2019	Membership	9/30/2019	Professional

9. Confirm that the **Membership** radio button selected.



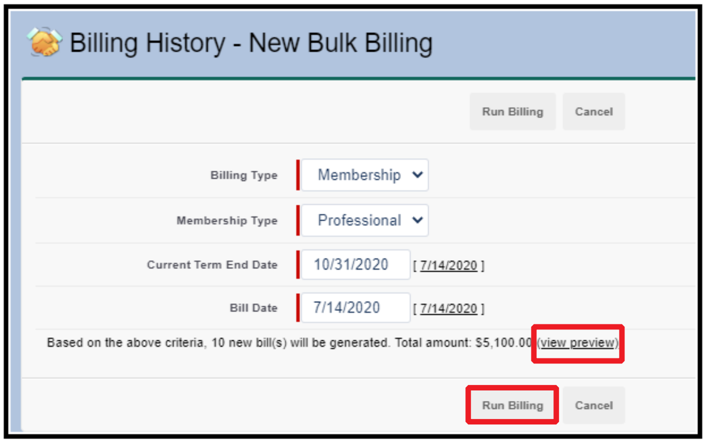
New Billing History

Select a record type

● Membership
Billing History records that were generated for memberships.

○ Program
Billing History records that were generated for programs.

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).**



Billing History - New Bulk Billing

Billing Type: Membership

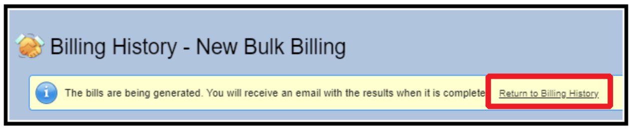
Membership Type: Professional

Current Term End Date: 10/31/2020 [7/14/2020]

Bill Date: 7/14/2020 [7/14/2020]

Based on the above criteria, 10 new bill(s) will be generated. Total amount: $5,100.00 (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**.



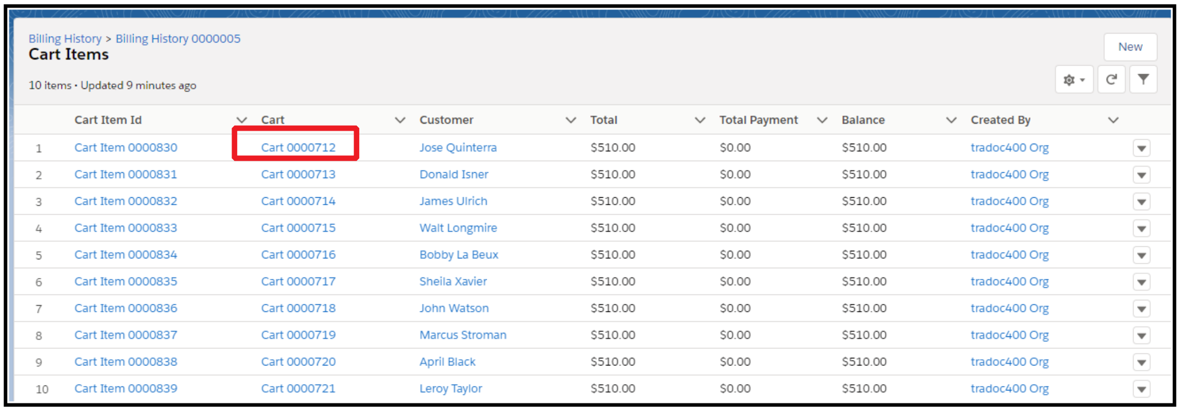
Billing History - New Bulk Billing

The bills are being generated. You will receive an email with the results when it is complete Return to Billing History

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.



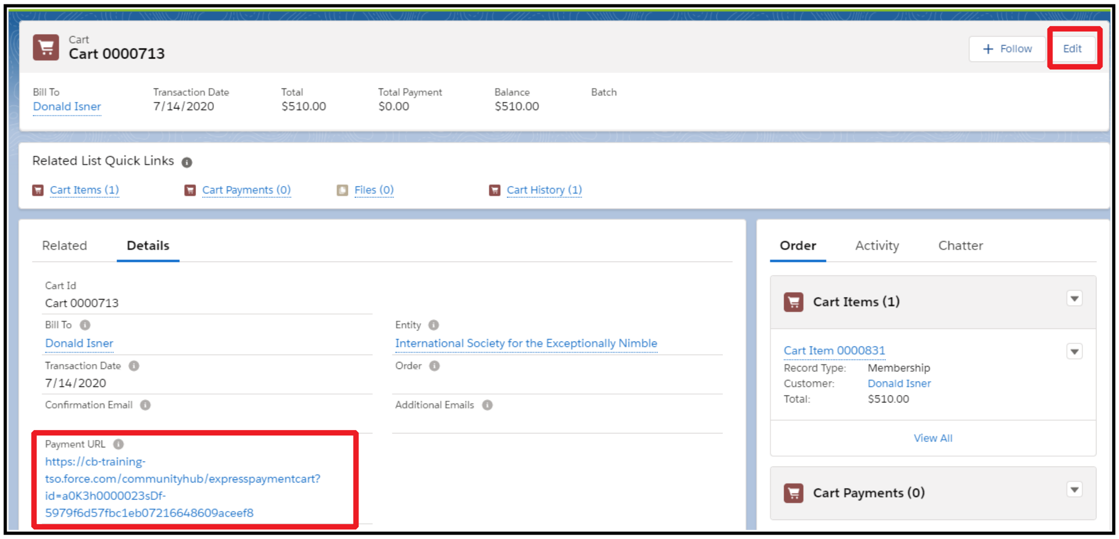
Billing History > Billing History 0000005

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	Transaction Date	Total	Total Payment	Balance	Batch
Donald Isner	7/14/2020	$510.00	$0.00	$510.00	

Related List Quick Links

Cart Items (1) Cart Payments (0) Files (0) Cart History (1)

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

Cart Items (1)

Cart Item 0000831

Record Type: Membership

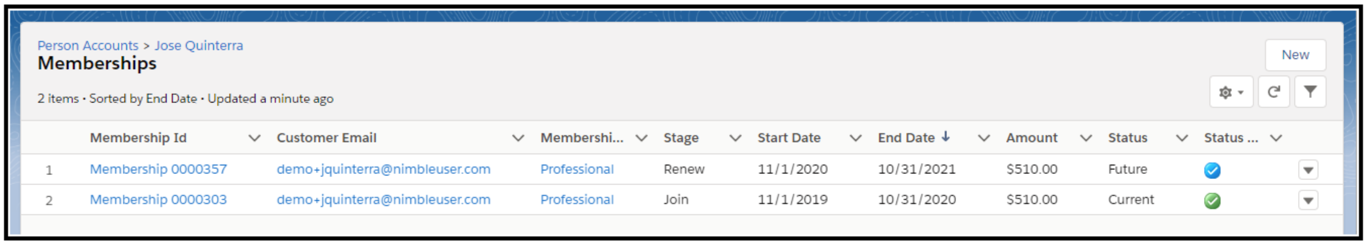
Customer: Donald Isner

Total: $510.00

Cart Payments (0)

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.



Person Accounts > Jose Quinterra

Memberships

2 items • Sorted by End Date • Updated a minute ago

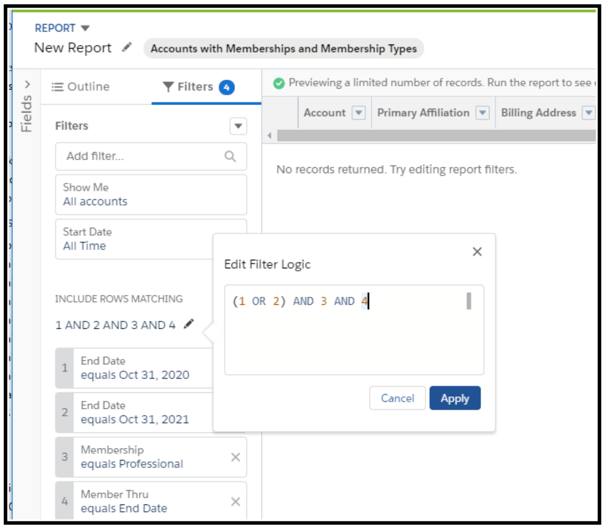
	Membership Id	Customer Email	Membershi...	Stage	Start Date	End Date ↓	Amount	Status	Status ...
1	Membership 0000357	demo+jquinterra@nimbleuser.com	Professional	Renew	11/1/2020	10/31/2021	$510.00	Future	✓
2	Membership 0000303	demo+jquinterra@nimbleuser.com	Professional	Join	11/1/2019	10/31/2020	$510.00	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** <u>PLUS ONE YEAR</u> 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**.



New Report — Accounts with Memberships and Membership Types

Previewing a limited number of records. Run the report to see

No records returned. Try editing report filters.

Show Me: All accounts

Start Date: All Time

INCLUDE ROWS MATCHING: 1 AND 2 AND 3 AND 4

1 End Date equals Oct 31, 2020

2 End Date equals Oct 31, 2021

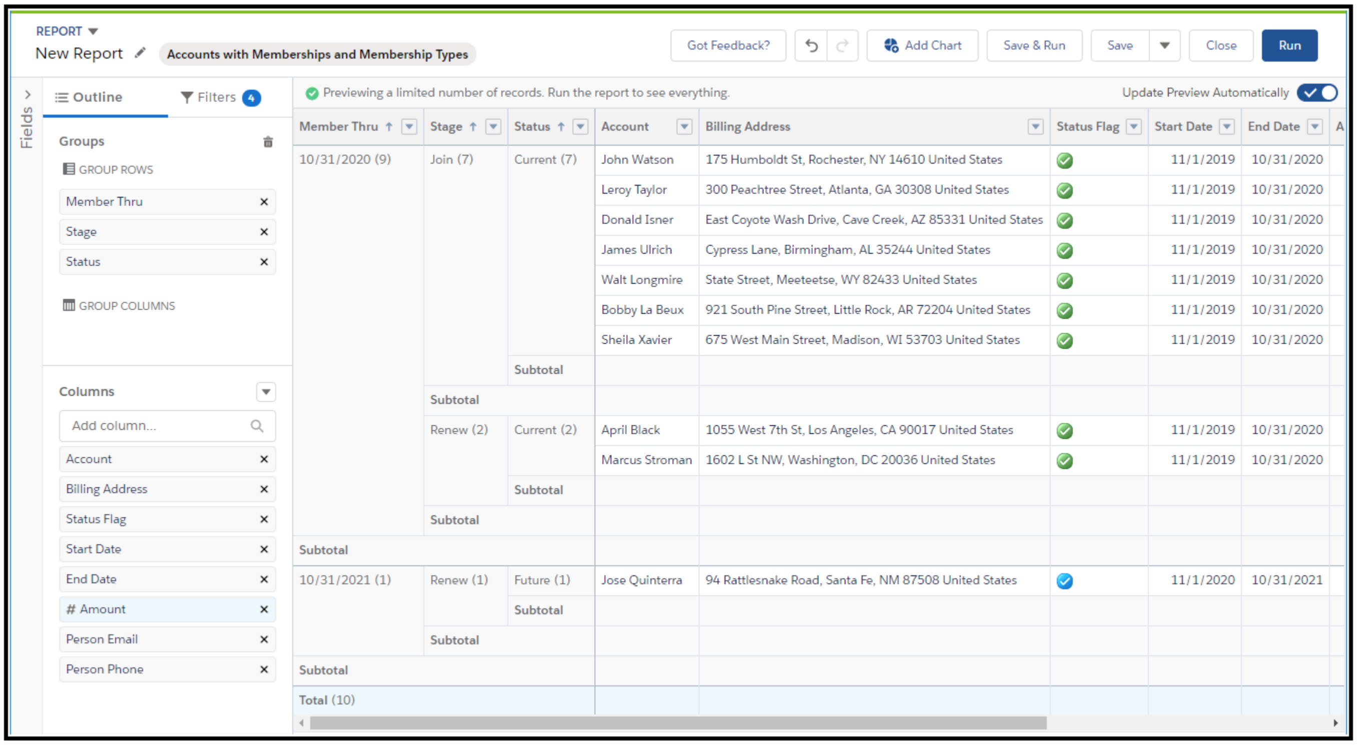
3 Membership equals Professional

4 Member Thru equals End Date

Edit Filter Logic

```
(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


REPORT
New Report
Accounts with Memberships and Membership Types
Got Feedback?
Add Chart
Save & Run
Save
Close
Run
Fields
Outline
Filters 4
Groups
GROUP ROWS
Member Thru
Stage
Status
GROUP COLUMNS
Columns
Add column...
Account
Billing Address
Status Flag
Start Date
End Date
# Amount
Person Email
Person Phone
Update Preview Automatically

Previewing a limited number of records. Run the report to see everything.

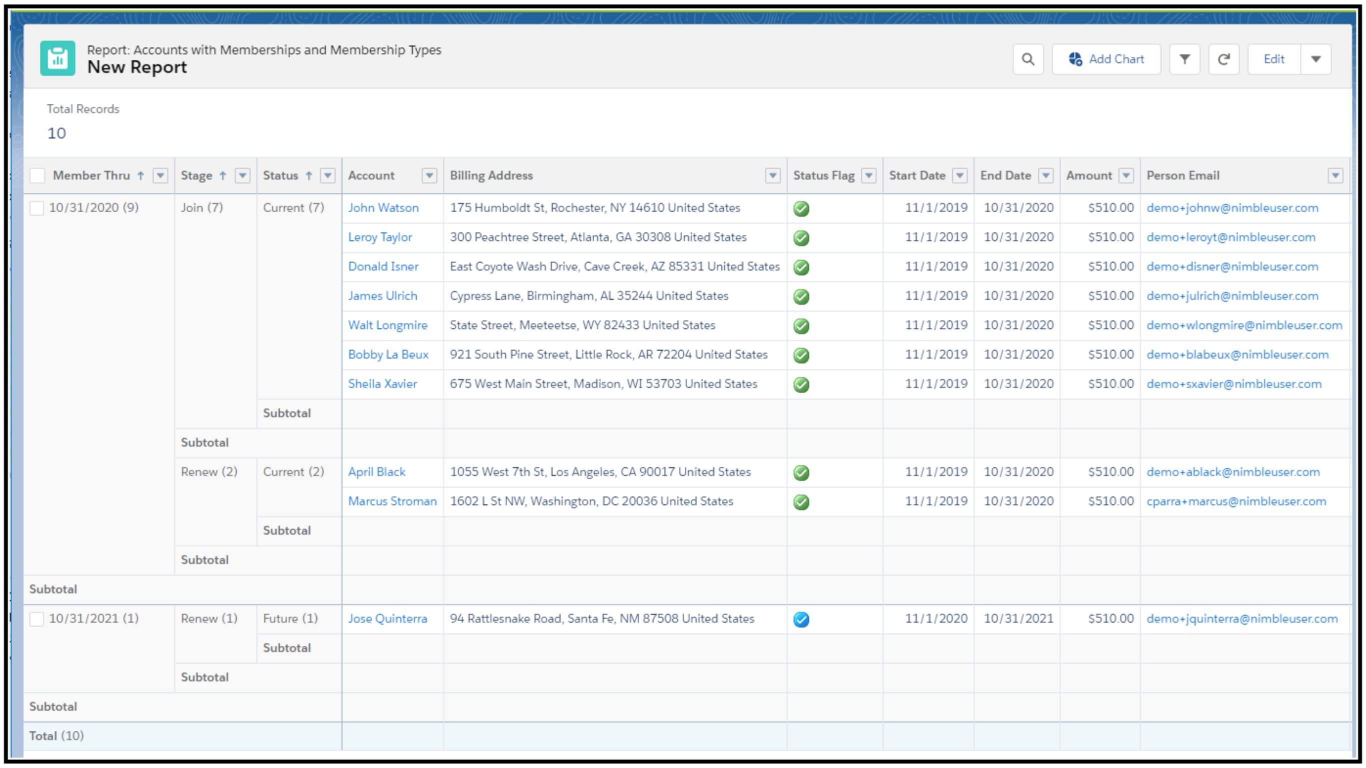
Member Thru ↑	Stage ↑	Status ↑	Account	Billing Address	Status Flag	Start Date	End Date
10/31/2020 (9)	Join (7)	Current (7)	John Watson	175 Humboldt St, Rochester, NY 14610 United States	✓	11/1/2019	10/31/2020
			Leroy Taylor	300 Peachtree Street, Atlanta, GA 30308 United States	✓	11/1/2019	10/31/2020
			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								
	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.

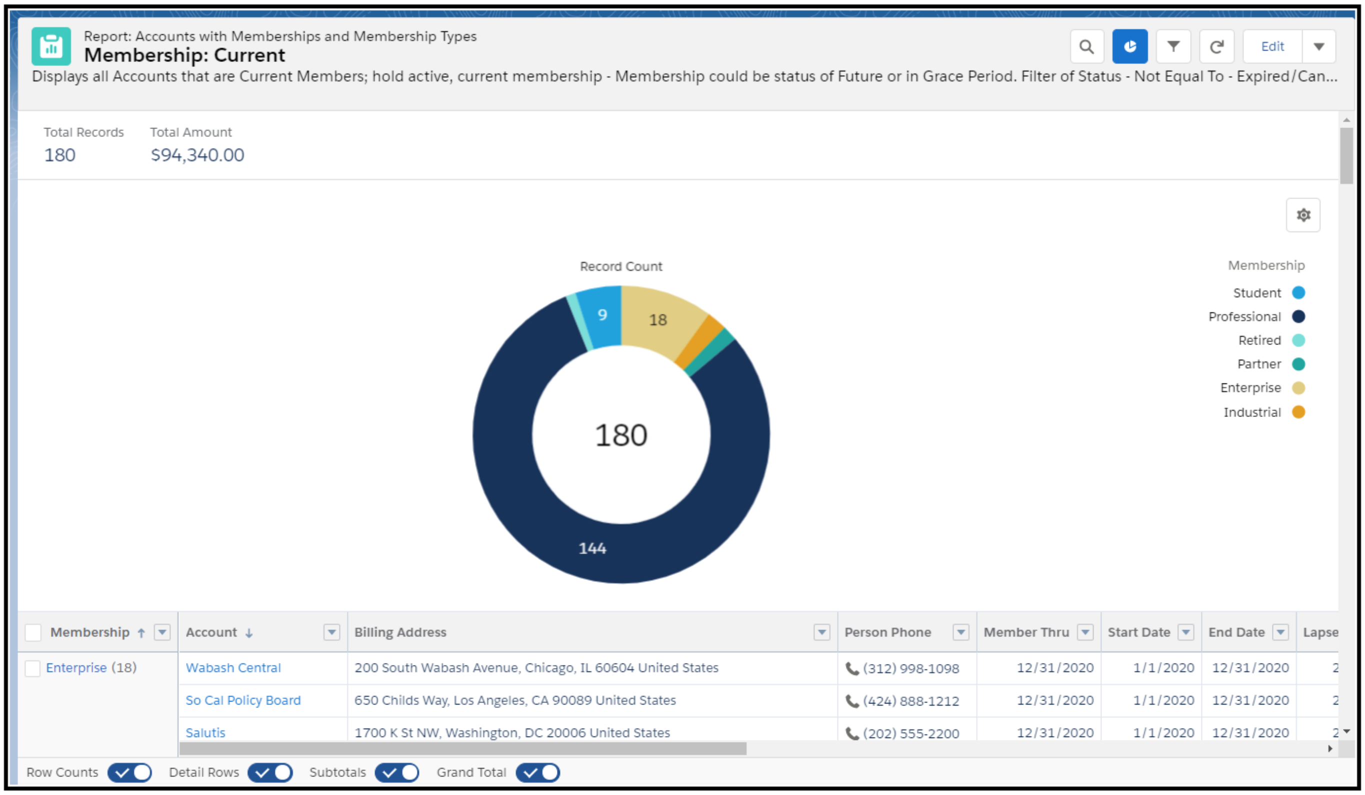
Membership Reports and Dashboard

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.



Report: Accounts with Memberships and Membership Types

Membership: Current

Displays all Accounts that are Current Members; hold active, current membership - Membership could be status of Future or in Grace Period. Filter of Status - Not Equal To - Expired/Can...

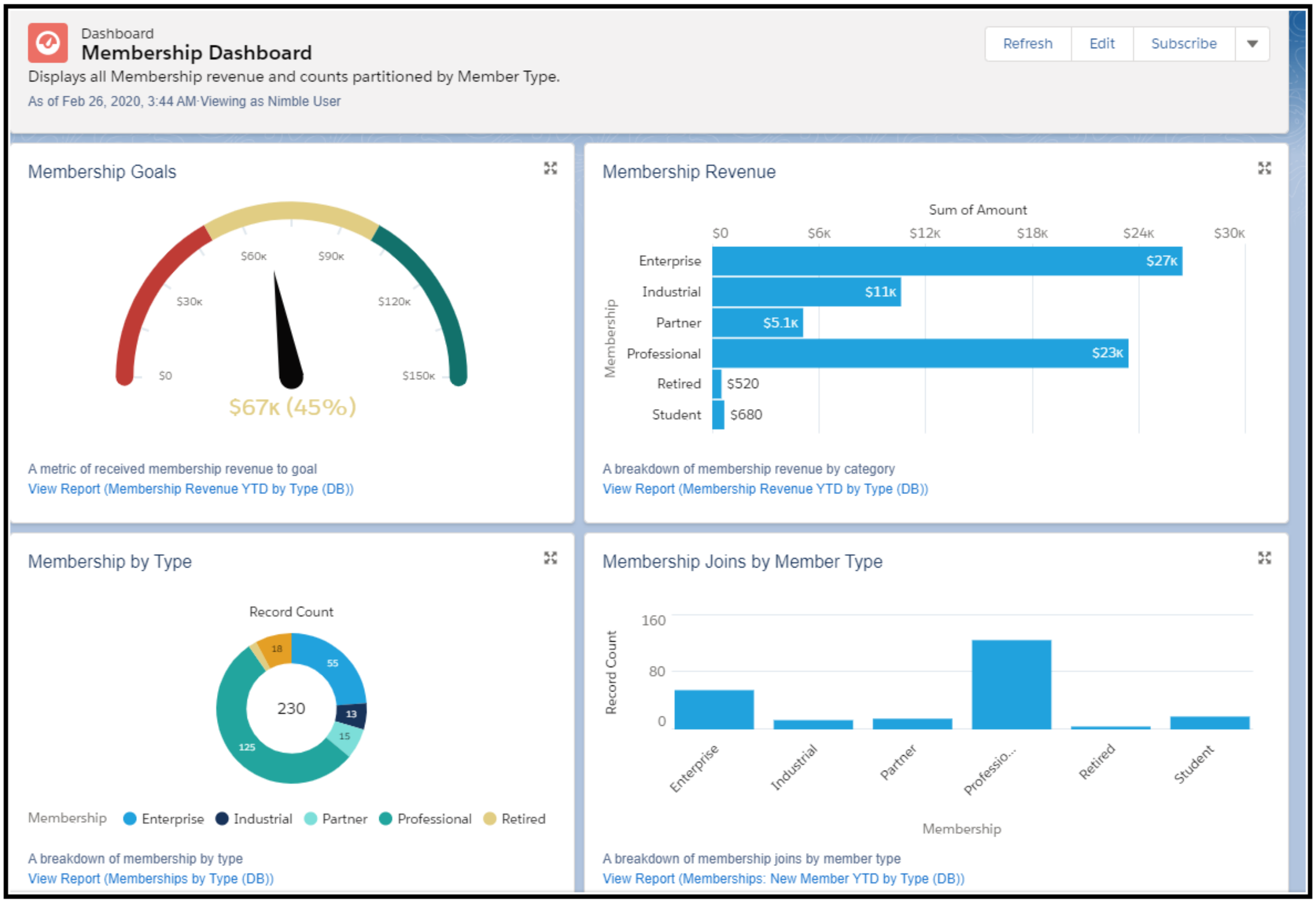
Total Records	Total Amount
180	$94,340.00

Membership ↑	Account ↓	Billing Address	Person Phone	Member Thru	Start Date	End Date	Lapse
☐ Enterprise (18)	Wabash Central	200 South Wabash Avenue, Chicago, IL 60604 United States	☎ (312) 998-1098	12/31/2020	1/1/2020	12/31/2020	2
	So Cal Policy Board	650 Childs Way, Los Angeles, CA 90089 United States	☎ (424) 888-1212	12/31/2020	1/1/2020	12/31/2020	2
	Salutis	1700 K St NW, Washington, DC 20006 United States	☎ (202) 555-2200	12/31/2020	1/1/2020	12/31/2020	2

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.



Dashboard
Membership Dashboard
Displays all Membership revenue and counts partitioned by Member Type.
As of Feb 26, 2020, 3:44 AM·Viewing as Nimble User

Refresh
Edit
Subscribe
Membership Goals
$0
$30K
$60K
$90K
$120K
$150K
$67K (45%)

A metric of received membership revenue to goal
View Report (Membership Revenue YTD by Type (DB))

Membership Revenue
Sum of Amount
$0
$6K
$12K
$18K
$24K
$30K
Membership
Enterprise
Industrial
Partner
Professional
Retired
Student
$27K
$11K
$5.1K
$23K
$520
$680

A breakdown of membership revenue by category
View Report (Membership Revenue YTD by Type (DB))

Membership by Type
Record Count
230
55
13
15
125
18
Membership
● Enterprise
● Industrial
● Partner
● Professional
● Retired

A breakdown of membership by type
View Report (Memberships by Type (DB))

Membership Joins by Member Type
Record Count
160
80
0
Enterprise
Industrial
Partner
Professio...
Retired
Student
Membership

A breakdown of membership joins by member type
View Report (Memberships: New Member YTD by Type (DB))

CHAPTER

11 Donations

Objective 11.1
Donations Item 11.2
Overview 11.3
Donations Product 11.3
Processing Donations 11.4
Updating Donation Records 11.6
Appeals 11.7
Donation Reports and Dashboards 11.9

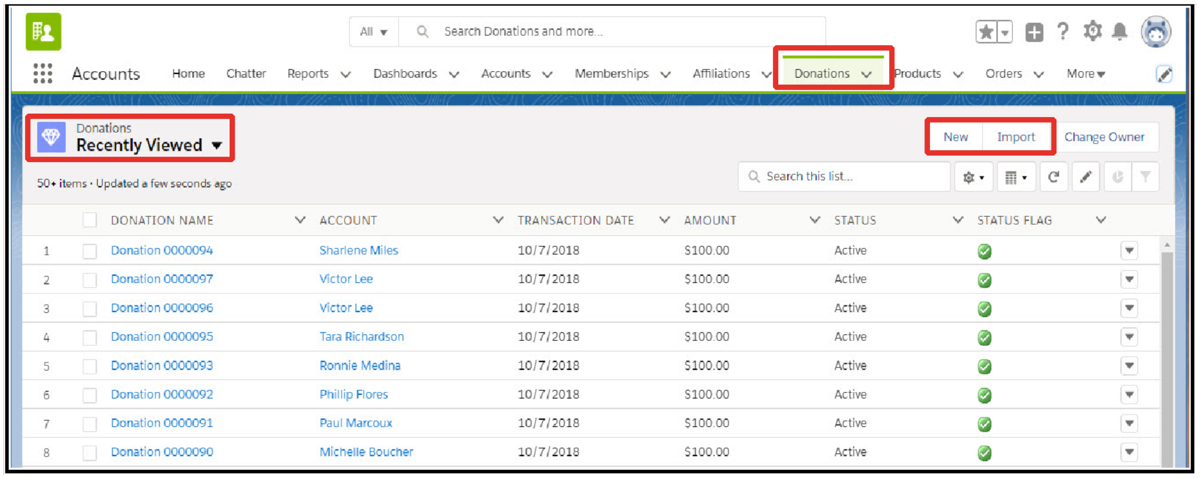
Objective

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.


All
Search Donations and more...
Accounts
Home
Chatter
Reports
Dashboards
Accounts
Memberships
Affiliations
Donations
Products
Orders
More
Donations
Recently Viewed
New
Import
Change Owner
Search this list...

50+ items • Updated a few seconds ago

		DONATION NAME	ACCOUNT	TRANSACTION DATE	AMOUNT	STATUS	STATUS FLAG
1	☐	Donation 0000094	Sharlene Miles	10/7/2018	$100.00	Active	✓
2	☐	Donation 0000097	Victor Lee	10/7/2018	$100.00	Active	✓
3	☐	Donation 0000096	Victor Lee	10/7/2018	$100.00	Active	✓
4	☐	Donation 0000095	Tara Richardson	10/7/2018	$100.00	Active	✓
5	☐	Donation 0000093	Ronnie Medina	10/7/2018	$100.00	Active	✓
6	☐	Donation 0000092	Phillip Flores	10/7/2018	$100.00	Active	✓
7	☐	Donation 0000091	Paul Marcoux	10/7/2018	$100.00	Active	✓
8	☐	Donation 0000090	Michelle Boucher	10/7/2018	$100.00	Active	✓

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.

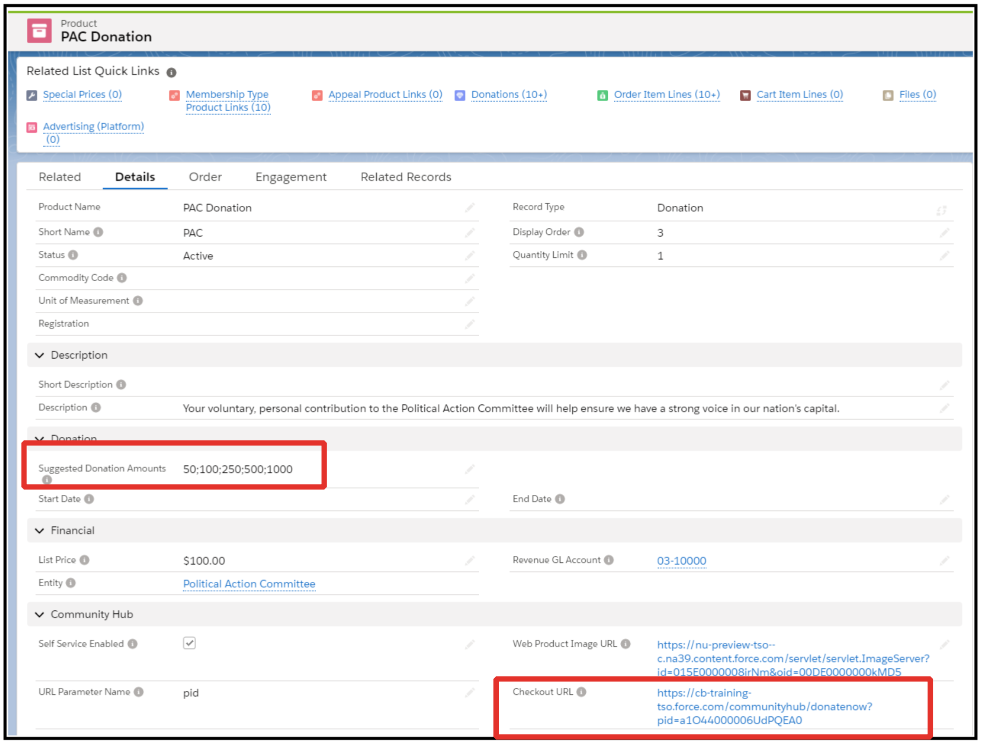
Donations are also distinct from other products by having their own, separate section of Community Hub, where constituents can be directed via email, donate anonymously, and proceed through a more rapid checkout.

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.


Product
Related List Quick Links
Special Prices (0)
Membership Type Product Links (10)
Appeal Product Links (0)
Donations (10+)
Order Item Lines (10+)
Cart Item Lines (0)
Files (0)
Advertising (Platform) (0)
Related
Details
Order
Engagement
Related Records

PAC Donation

Product Name	PAC Donation	Record Type	Donation
Short Name	PAC	Display Order	3
Status	Active	Quantity Limit	1
Commodity Code			
Unit of Measurement			
Registration			

Description

Short Description	
Description	Your voluntary, personal contribution to the Political Action Committee will help ensure we have a strong voice in our nation's capital.

Donation

Suggested Donation Amounts	50;100;250;500;1000		
Start Date		End Date	

Financial

List Price	$100.00	Revenue GL Account	03-10000
Entity	Political Action Committee		

Community Hub

Self Service Enabled	☑	Web Product Image URL	https://nu-preview-tso--c.na39.content.force.com/servlet/servlet.ImageServer?id=015E0000008irNm&oid=00DE0000000kMD5
URL Parameter Name	pid	Checkout URL	https://cb-training-tso.force.com/communityhub/donatenow?pid=a1O44000006UdPQEA0

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.

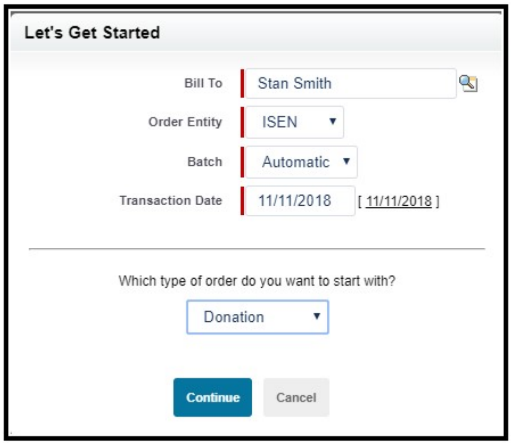
In Community Hub, logged in (or directed by email) constituent donors can click a "Donate Now" button in the global menu to browse a list of causes or use direct links shared with them by Users to browse to a Community Hub checkout page for donation product. On the donation checkout page, they can choose 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**.


Let's Get Started

Bill To: Stan Smith

Order Entity: ISEN

Batch: Automatic

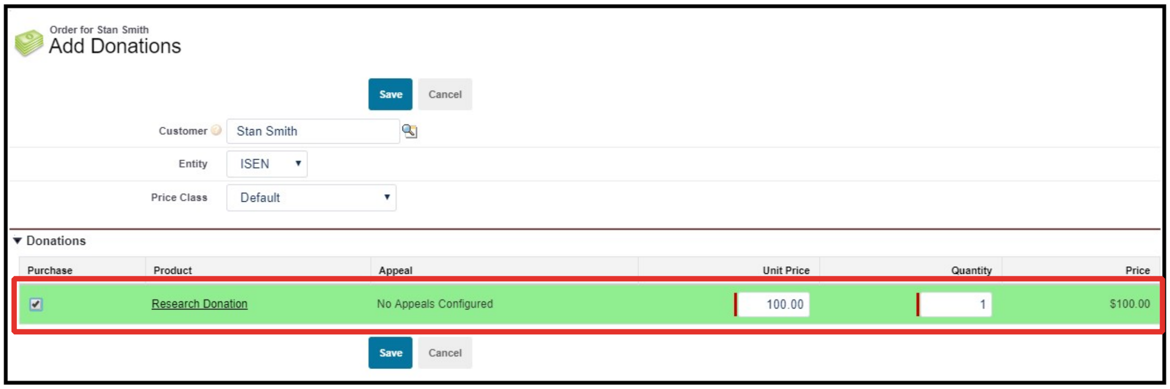
Transaction Date: 11/11/2018 [11/11/2018]

Which type of order do you want to start with?

Donation

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**.



Order for Stan Smith

Add Donations

Customer: Stan Smith

Entity: ISEN

Price Class: Default

Purchase	Product	Appeal	Unit Price	Quantity	Price
☑	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.

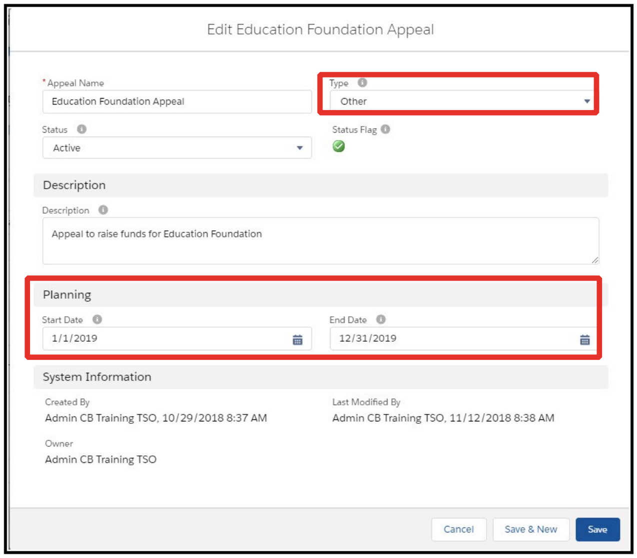
Appeals

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



Edit Education Foundation Appeal

*Appeal Name: Education Foundation Appeal

Type: Other

Status: Active

Status Flag: ✓

Description

Description: Appeal to raise funds for Education Foundation

Planning

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

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.

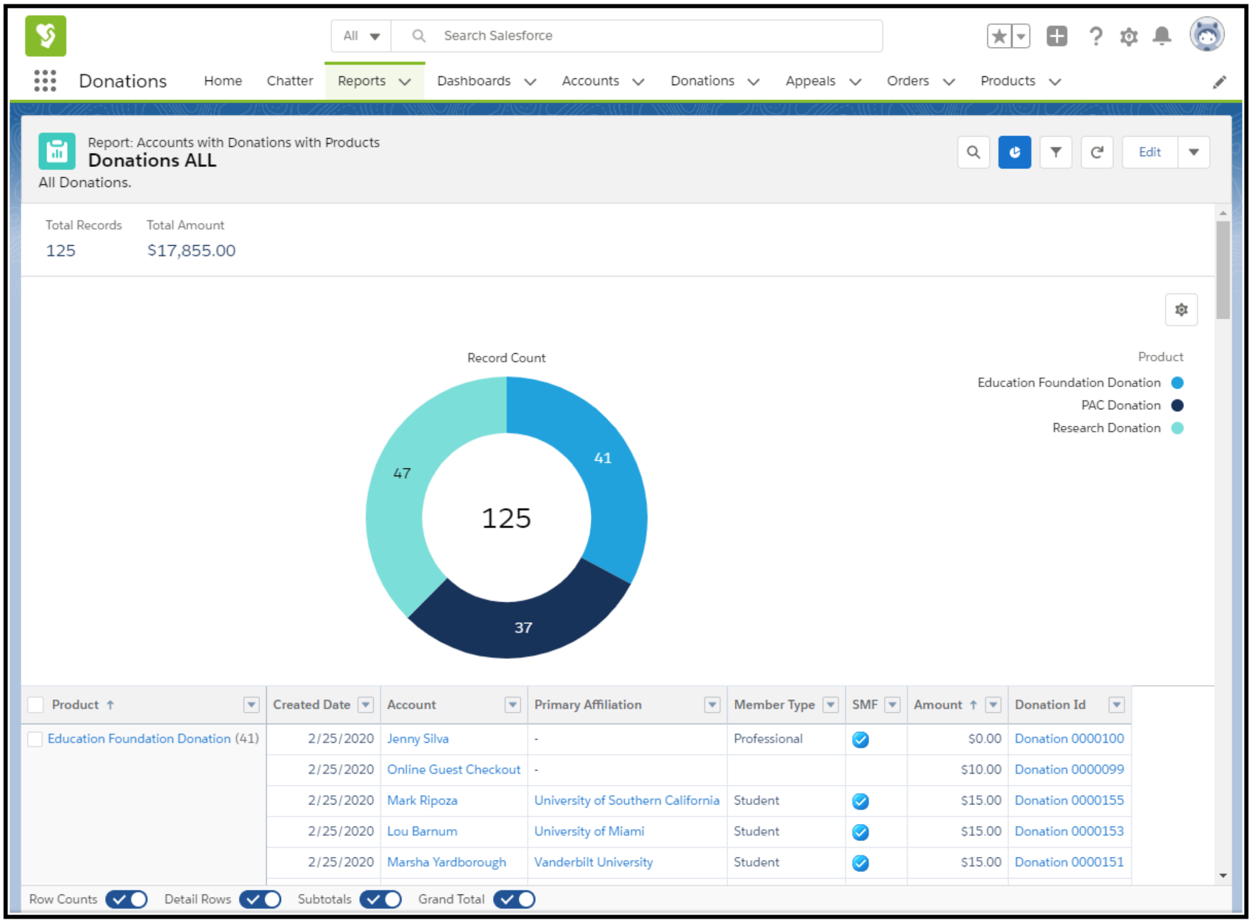
Donation Reports and Dashboards

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


All
Search Salesforce
Donations
Home
Chatter
Reports
Dashboards
Accounts
Donations
Appeals
Orders
Products
Edit
Record Count
Product
Education Foundation Donation
PAC Donation
Research Donation
47
41
37
125
Row Counts
Detail Rows
Subtotals
Grand Total

Report: Accounts with Donations with Products

Donations ALL

All Donations.

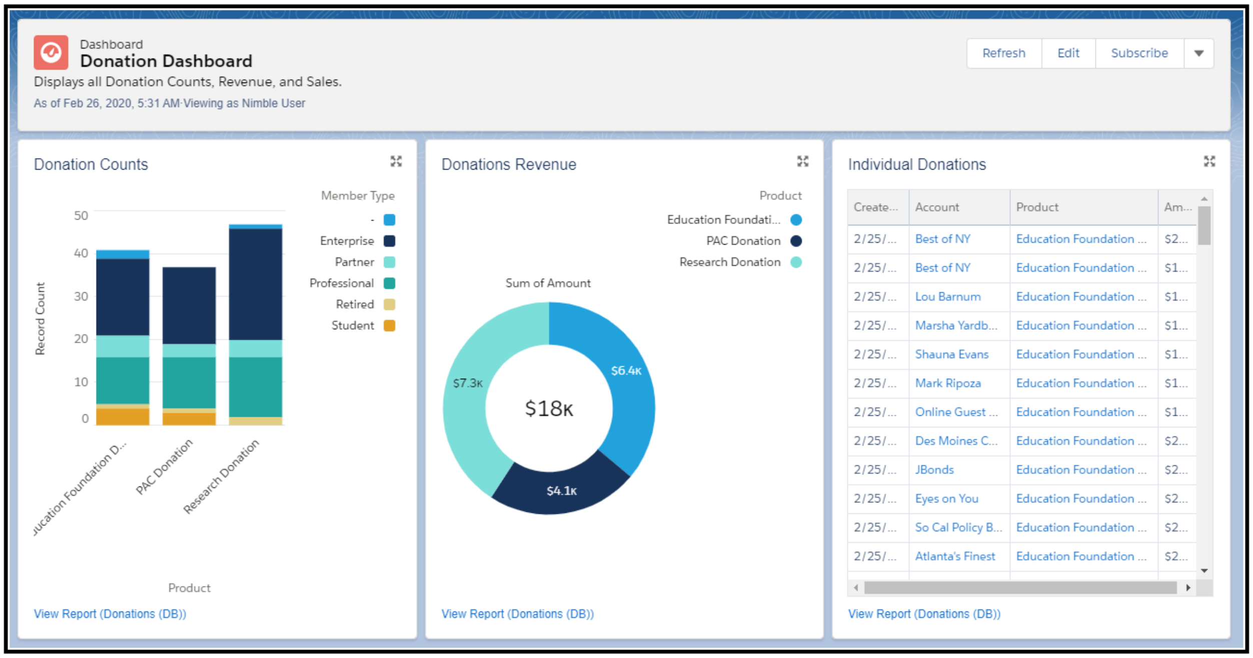
Total Records	Total Amount
125	$17,855.00

Product ↑	Created Date	Account	Primary Affiliation	Member Type	SMF	Amount ↑	Donation Id
Education Foundation Donation (41)	2/25/2020	Jenny Silva	-	Professional	✓	$0.00	Donation 0000100
	2/25/2020	Online Guest Checkout	-			$10.00	Donation 0000099
	2/25/2020	Mark Ripoza	University of Southern California	Student	✓	$15.00	Donation 0000155
	2/25/2020	Lou Barnum	University of Miami	Student	✓	$15.00	Donation 0000153
	2/25/2020	Marsha Yardborough	Vanderbilt University	Student	✓	$15.00	Donation 0000151

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.


Refresh
Edit
Subscribe
Donation Counts
Member Type
-
Enterprise
Partner
Professional
Retired
Student
Record Count
50
40
30
20
10
0
ucation Foundation D...
PAC Donation
Research Donation
Product
View Report (Donations (DB))
Donations Revenue
Product
Education Foundati...
PAC Donation
Research Donation
Sum of Amount
$7.3K
$6.4K
$18K
$4.1K
View Report (Donations (DB))
Individual Donations
View Report (Donations (DB))

Dashboard

Donation Dashboard

Displays all Donation Counts, Revenue, and Sales.

As of Feb 26, 2020, 5:31 AM·Viewing as Nimble User

Create...	Account	Product	Am...
2/25/...	Best of NY	Education Foundation ...	$2...
2/25/...	Best of NY	Education Foundation ...	$1...
2/25/...	Lou Barnum	Education Foundation ...	$1...
2/25/...	Marsha Yardb...	Education Foundation ...	$1...
2/25/...	Shauna Evans	Education Foundation ...	$1...
2/25/...	Mark Ripoza	Education Foundation ...	$1...
2/25/...	Online Guest ...	Education Foundation ...	$1...
2/25/...	Des Moines C...	Education Foundation ...	$2...
2/25/...	JBonds	Education Foundation ...	$2...
2/25/...	Eyes on You	Education Foundation ...	$2...
2/25/...	So Cal Policy B...	Education Foundation ...	$2...
2/25/...	Atlanta's Finest	Education Foundation ...	$2...

CHAPTER

12 Events

Objective 12.1
Understanding Events 12.2
Events Item 12.4
Viewing an Existing Event 12.5
Creating a New Event 12.14
Creating a New Registration Product 12.16
Creating a Registration 12.18
Transferring Event Registrations 12.20
Event Questions 12.21
Cloning Existing Events 12.23
Microsites 12.24
Events Reports and Dashboard 12.28

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.

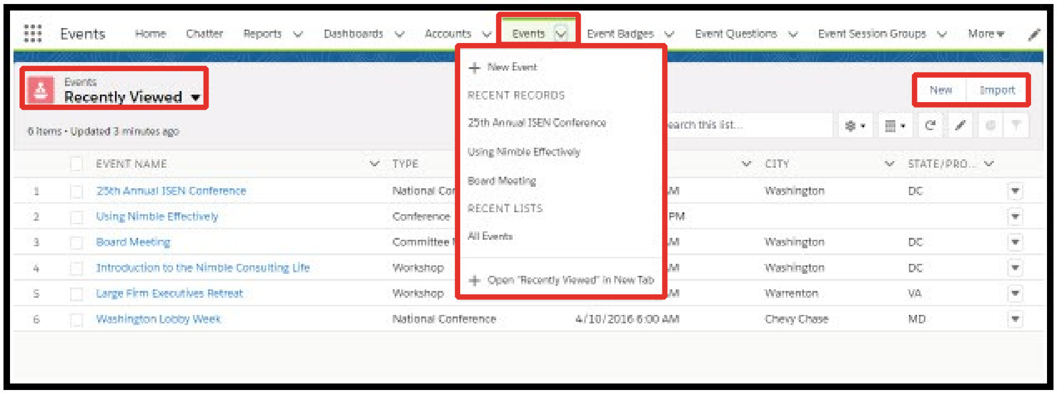
Rooms - Basic record tracking Room capacity information and contact details.

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.


Events
Home
Chatter
Reports
Dashboards
Accounts
Events
Event Badges
Event Questions
Event Session Groups
More
New Event
RECENT RECORDS
25th Annual ISEN Conference
Using Nimble Effectively
Board Meeting
RECENT LISTS
All Events
Open "Recently Viewed" in New Tab
Events
Recently Viewed
New
Import
earch this list...

6 items • Updated 3 minutes ago

	EVENT NAME	TYPE		CITY	STATE/PRO...
1	25th Annual ISEN Conference	National Cor	M	Washington	DC
2	Using Nimble Effectively	Conference	PM		
3	Board Meeting	Committee	M	Washington	DC
4	Introduction to the Nimble Consulting Life	Workshop	M	Washington	DC
5	Large Firm Executives Retreat	Workshop	M	Warrenton	VA
6	Washington Lobby Week	National Conference	4/10/2016 6:00 AM	Chevy Chase	MD

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.

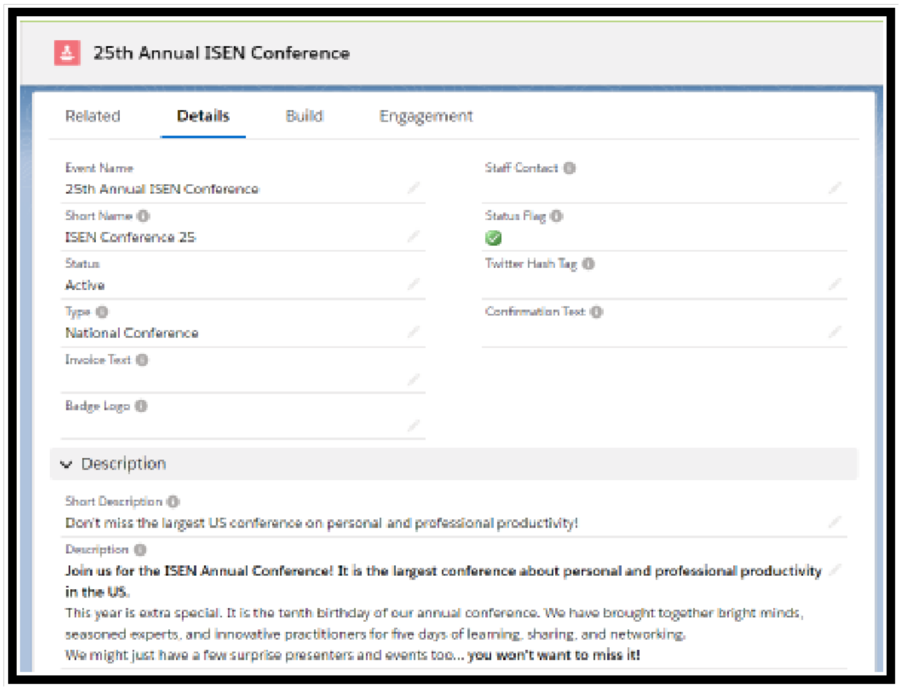
Event

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.



Event Name
25th Annual ISEN Conference

Staff Contact

Short Name
ISEN Conference 25

Status Flag
✓

Status
Active

Twitter Hash Tag

Type
National Conference

Confirmation Text

Invoice Text

Badge Logo

Short Description
Don't miss the largest US conference on personal and professional productivity!

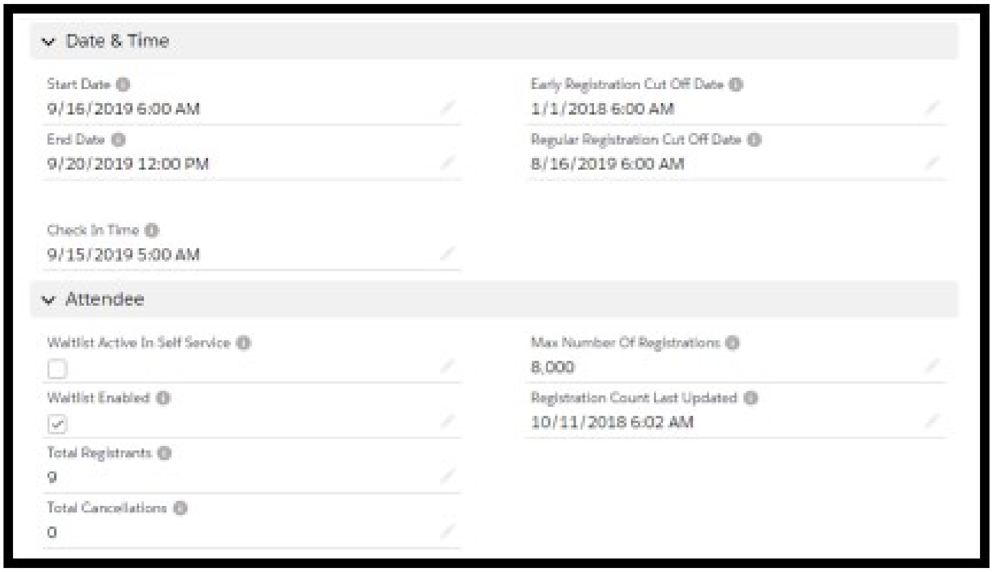
Description
Join us for the ISEN Annual Conference! It is the largest conference about personal and professional productivity in the US.
This year is extra special. It is the tenth birthday of our annual conference. We have brought together bright minds, seasoned experts, and innovative practitioners for five days of learning, sharing, and networking.
We might just have a few surprise presenters and events too... **you won't want to miss it!**

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.



Start Date: 9/16/2019 6:00 AM

Early Registration Cut Off Date: 1/1/2018 6:00 AM

End Date: 9/20/2019 12:00 PM

Regular Registration Cut Off Date: 8/16/2019 6:00 AM

Check In Time: 9/15/2019 5:00 AM

Waitlist Active In Self Service: ☐

Max Number Of Registrations: 8,000

Waitlist Enabled: ☑

Registration Count Last Updated: 10/11/2018 6:02 AM

Total Registrants: 9

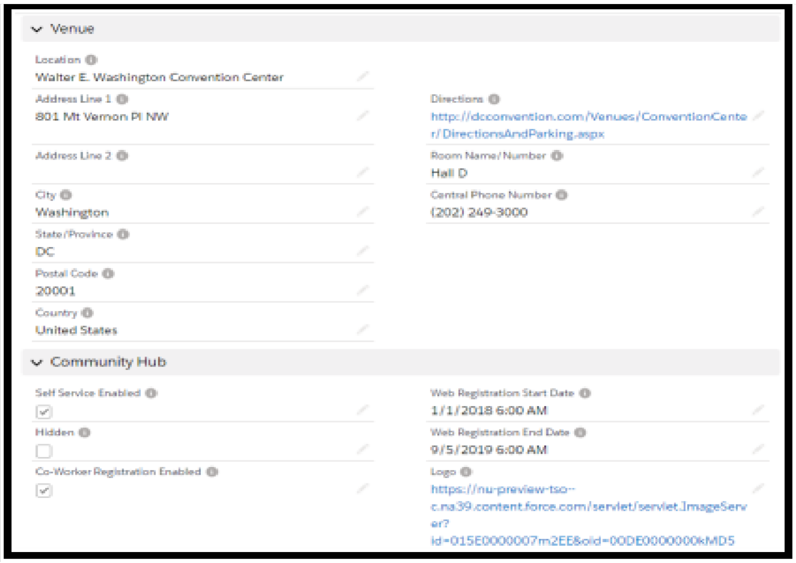
Total Cancellations: 0

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 receipients 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.



Venue

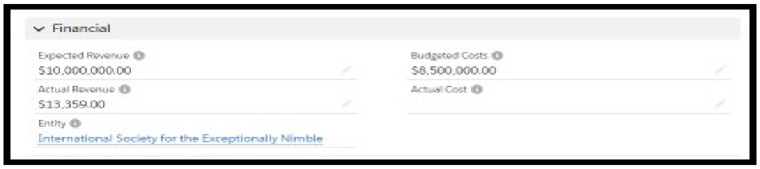
Location: Walter E. Washington Convention Center
Address Line 1: 801 Mt Vernon Pl NW
Address Line 2:
City: Washington
State/Province: DC
Postal Code: 20001
Country: United States
Directions: http://dcconvention.com/Venues/ConventionCenter/DirectionsAndParking.aspx
Room Name/Number: Hall D
Central Phone Number: (202) 249-3000

Community Hub

Self Service Enabled: ☑
Hidden: ☐
Co-Worker Registration Enabled: ☑
Web Registration Start Date: 1/1/2018 6:00 AM
Web Registration End Date: 9/5/2019 6:00 AM
Logo: https://nu-preview-tso--c.na39.content.force.com/servlet/servlet.ImageServer?id=015E0000007m2EE&oid=00DE0000000kMD5

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.



Financial

Expected Revenue: $10,000,000.00
Actual Revenue: $13,359.00
Entity: International Society for the Exceptionally Nimble
Budgeted Costs: $8,500,000.00
Actual Cost:

Registration Product

In this **exercise**, users will investigate how a **Registration** product is linked to the 25th Annual ISEN Conference.

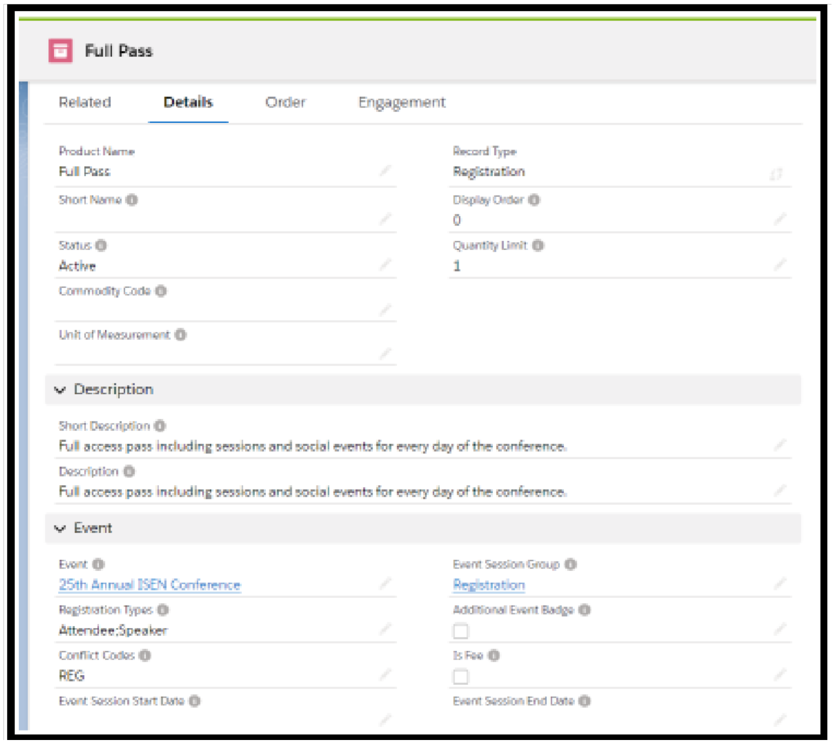
1. From the **25th Annual ISEN Conference Record**, look under **Build** tab on right side.
2. Under the **Products (3+)** area, click on the **Full Pass** link.
    - Any Product linked to the Event, whether Registration or other types will display when clicking the **View All** link at the bottom of 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.



Product Name: Full Pass
Record Type: Registration
Short Name:
Display Order: 0
Status: Active
Quantity Limit: 1
Commodity Code:
Unit of Measurement:

Description

Short Description: Full access pass including sessions and social events for every day of the conference.
Description: Full access pass including sessions and social events for every day of the conference.

Event

Event: 25th Annual ISEN Conference
Event Session Group: Registration
Registration Types: Attendee;Speaker
Additional Event Badge: ☐
Conflict Codes: REG
Is Fee: ☐
Event Session Start Date:
Event Session End Date:

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.

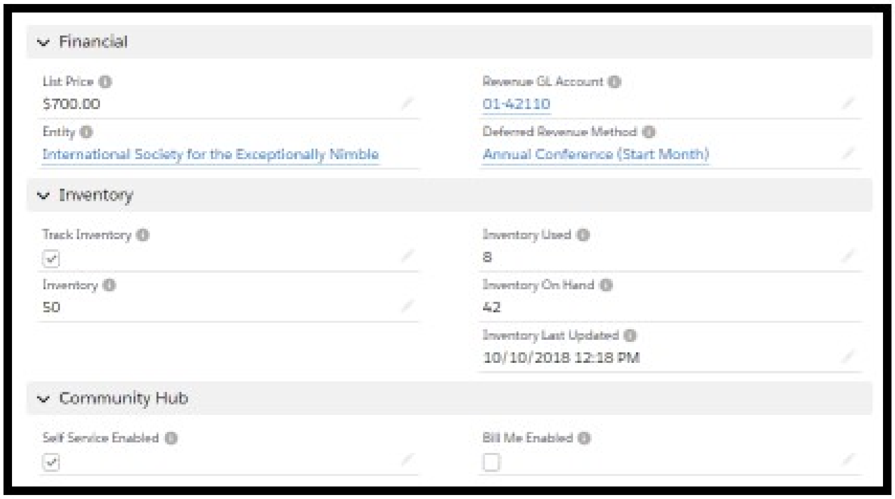
Inventory

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.



Financial

List Price: $700.00
Revenue GL Account: 01-42110
Entity: International Society for the Exceptionally Nimble
Deferred Revenue Method: Annual Conference (Start Month)

Inventory

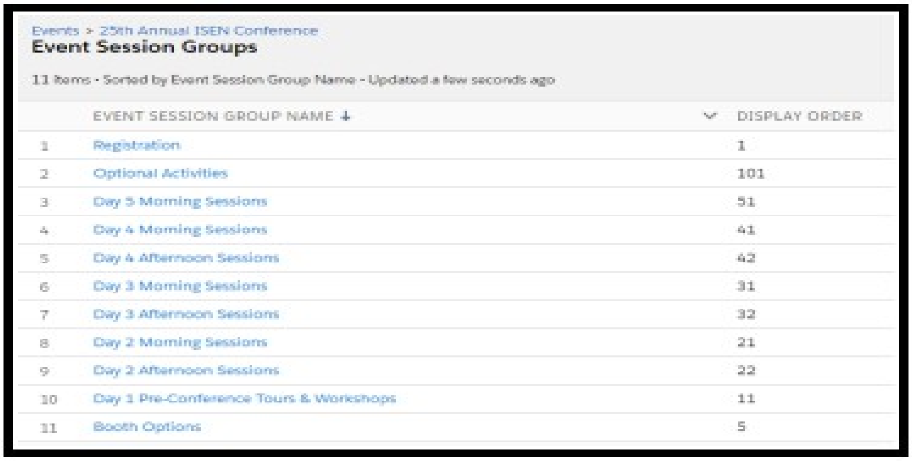
Track Inventory: ☑
Inventory Used: 8
Inventory: 50
Inventory On Hand: 42
Inventory Last Updated: 10/10/2018 12:18 PM

Community Hub

Self Service Enabled: ☑
Bill Me Enabled: ☐

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.

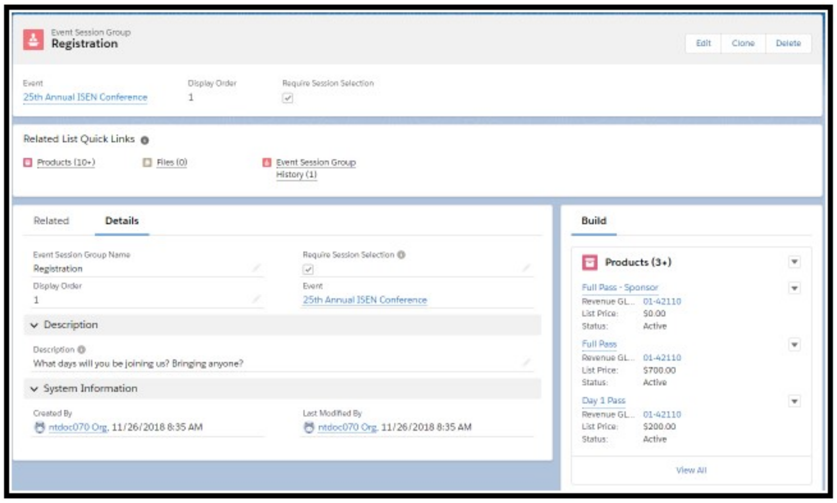


Event Session Groups

11 items • Sorted by Event Session Group Name • Updated a few seconds ago

	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.



Event Session Group
Registration

Event: 25th Annual ISEN Conference
Display Order: 1
Require Session Selection: ☑

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: ntdoc070 Org, 11/26/2018 8:35 AM
Last Modified By: ntdoc070 Org, 11/26/2018 8:35 AM

Products (3+)

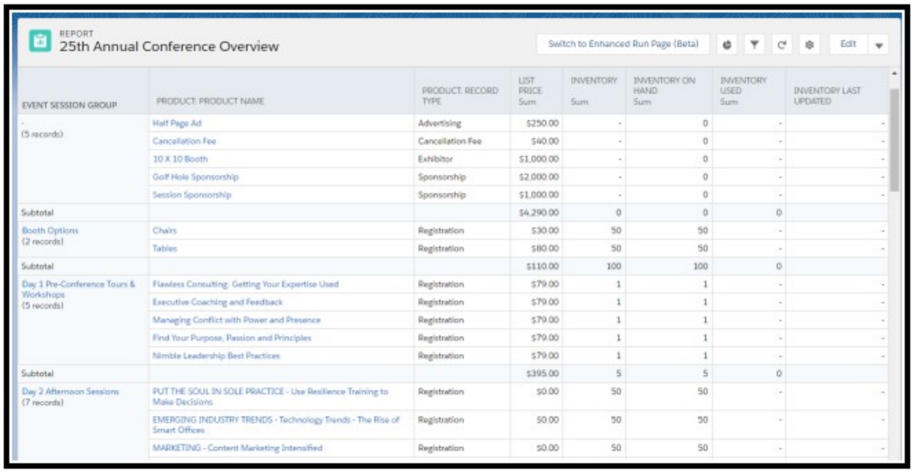
Full Pass - Sponsor
Revenue GL...: 01-42110
List Price: $0.00
Status: Active

Full Pass
Revenue GL...: 01-42110
List Price: $700.00
Status: Active

Day 1 Pass
Revenue GL...: 01-42110
List Price: $200.00
Status: Active

Viewing Sessions and Registrations

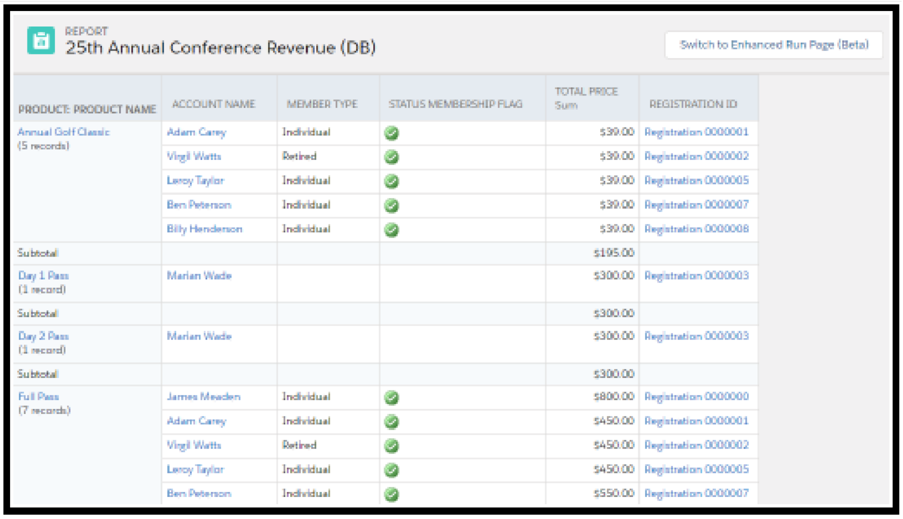
1. Click on the **25th Annual ISEN Conference Overview** report from Favorites.
    - Observe the grouping of products by **Event Session Groups**.
    - Observe the top Event Session Group is undefined - this is because these products are NOT Registration products but are still linked to the Meeting.
    - Observe the Inventory columns displaying total and remaining inventory.



REPORT
25th Annual Conference Overview

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	-	-

2. 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.



REPORT
25th Annual Conference Revenue (DB)

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 0000000
	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.

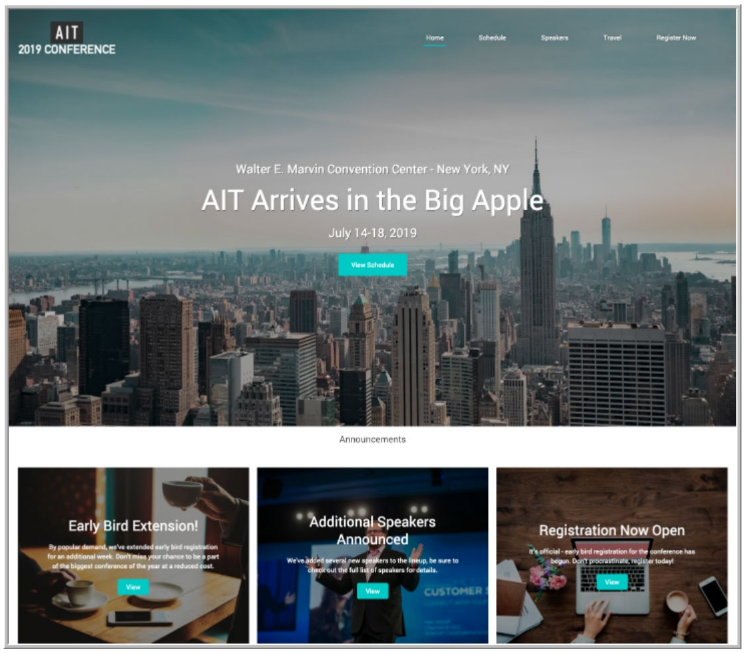
Enabling the Microsites

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.

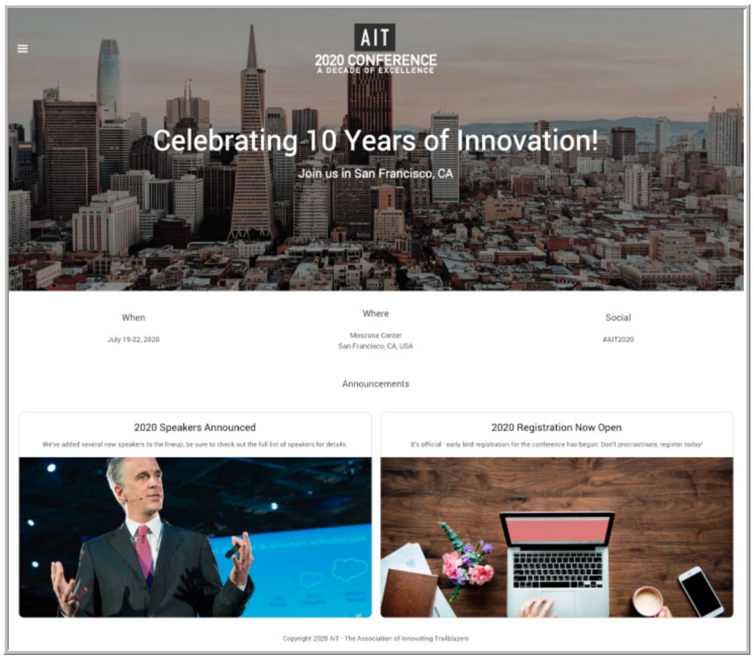

AIT
2019 CONFERENCE
Home
Schedule
Speakers
Travel
Register Now
Walter E. Marvin Convention Center - New York, NY
AIT Arrives in the Big Apple
July 14-18, 2019
View Schedule
Announcements
Early Bird Extension!
View
Additional Speakers Announced
View
Registration Now Open
View

By popular demand, we've extended early bird registration for an additional week. Don't miss your chance to be a part of the biggest conference of the year at a reduced cost.

We've added several new speakers to the lineup, be sure to check out the full list of speakers for details.

It's official - early bird registration for the conference has begun. Don't procrastinate, register today!

2020 Template


AIT
2020 CONFERENCE
A DECADE OF EXCELLENCE
Celebrating 10 Years of Innovation!
Join us in San Francisco, CA
When
July 19-22, 2020
Where
Moscone Center
San Francisco, CA, USA
Social
#AIT2020
Announcements
2020 Speakers Announced
2020 Registration Now Open
Copyright 2020 AIT - The Association of Innovating Trailblazers

We've added several new speakers to the lineup, be sure to check out the full list of speakers for details.

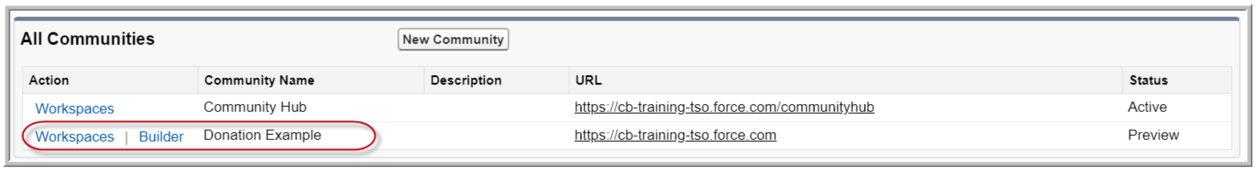
It's official - early bird registration for the conference has begun. Don't procrastinate, register today!

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**.**



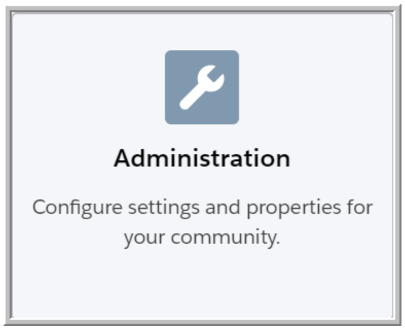
All Communities

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:

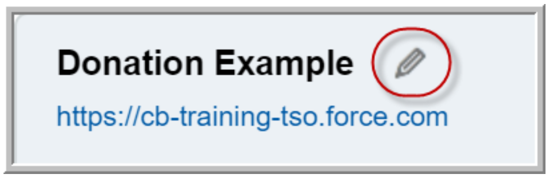
1. From Community Workspaces, click the **Administration** tile



Administration

Configure settings and properties for your community.

2. In the Settings area, click the pencil icon next to the name:



Donation Example

https://cb-training-tso.force.com

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

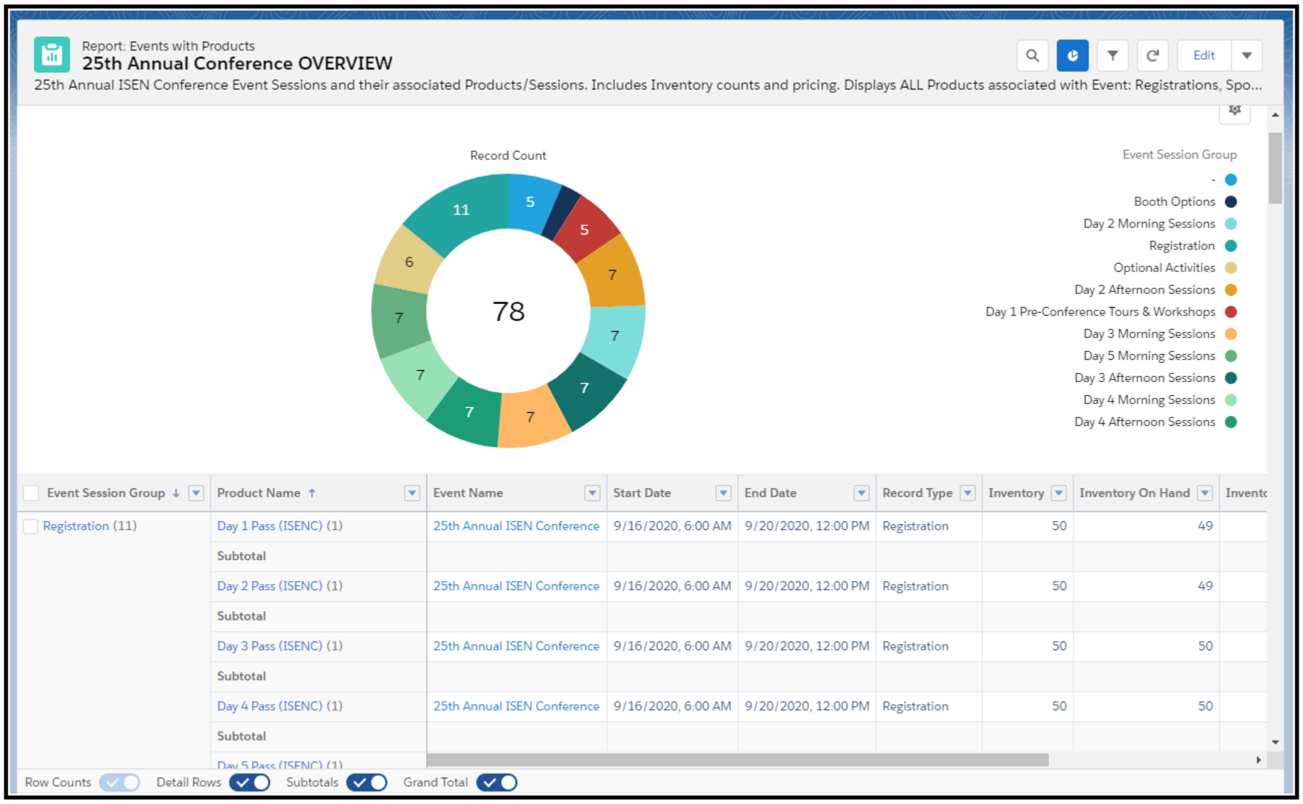
Events Reports

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


Edit
Record Count
78
11
5
5
7
7
7
7
7
7
7
6
Event Session Group
-
Booth Options
Day 2 Morning Sessions
Registration
Optional Activities
Day 2 Afternoon Sessions
Day 1 Pre-Conference Tours & Workshops
Day 3 Morning Sessions
Day 5 Morning Sessions
Day 3 Afternoon Sessions
Day 4 Morning Sessions
Day 4 Afternoon Sessions
Row Counts
Detail Rows
Subtotals
Grand Total

Report: Events with Products

25th Annual Conference OVERVIEW

25th Annual ISEN Conference Event Sessions and their associated Products/Sessions. Includes Inventory counts and pricing. Displays ALL Products associated with Event: Registrations, Spo...

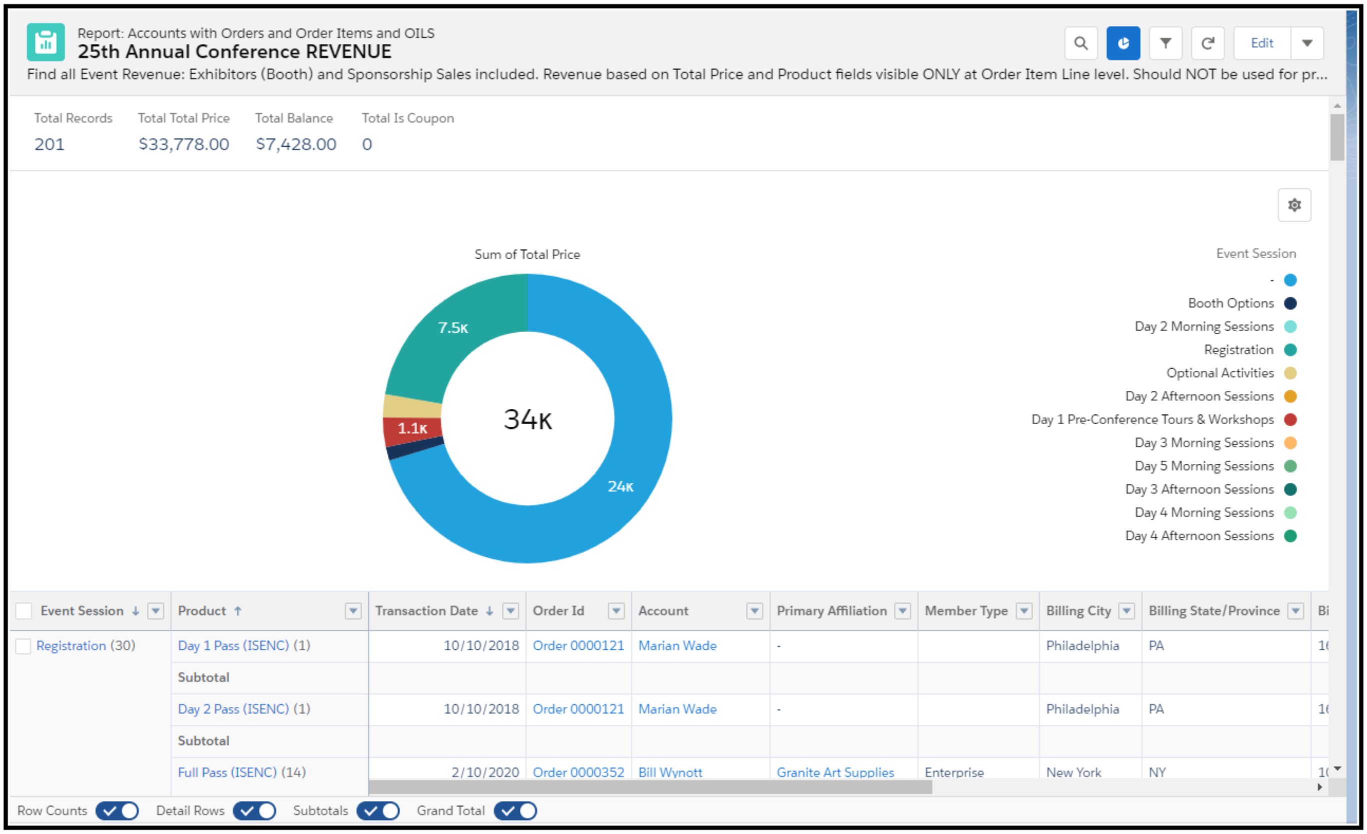
Event Session Group ↓	Product Name ↑	Event Name	Start Date	End Date	Record Type	Inventory	Inventory On Hand	Invento
Registration (11)	Day 1 Pass (ISENC) (1)	25th Annual ISEN Conference	9/16/2020, 6:00 AM	9/20/2020, 12:00 PM	Registration	50	49	
	Subtotal							
	Day 2 Pass (ISENC) (1)	25th Annual ISEN Conference	9/16/2020, 6:00 AM	9/20/2020, 12:00 PM	Registration	50	49	
	Subtotal							
	Day 3 Pass (ISENC) (1)	25th Annual ISEN Conference	9/16/2020, 6:00 AM	9/20/2020, 12:00 PM	Registration	50	50	
	Subtotal							
	Day 4 Pass (ISENC) (1)	25th Annual ISEN Conference	9/16/2020, 6:00 AM	9/20/2020, 12:00 PM	Registration	50	50	
	Subtotal							
	Day 5 Pass (ISENC) (1)							

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)


Edit
Sum of Total Price
7.5K
1.1K
34K
24K
Event Session
-
Booth Options
Day 2 Morning Sessions
Registration
Optional Activities
Day 2 Afternoon Sessions
Day 1 Pre-Conference Tours & Workshops
Day 3 Morning Sessions
Day 5 Morning Sessions
Day 3 Afternoon Sessions
Day 4 Morning Sessions
Day 4 Afternoon Sessions
Row Counts
Detail Rows
Subtotals
Grand Total

Report: Accounts with Orders and Order Items and OILS

25th Annual Conference REVENUE

Find all Event Revenue: Exhibitors (Booth) and Sponsorship Sales included. Revenue based on Total Price and Product fields visible ONLY at Order Item Line level. Should NOT be used for pr...

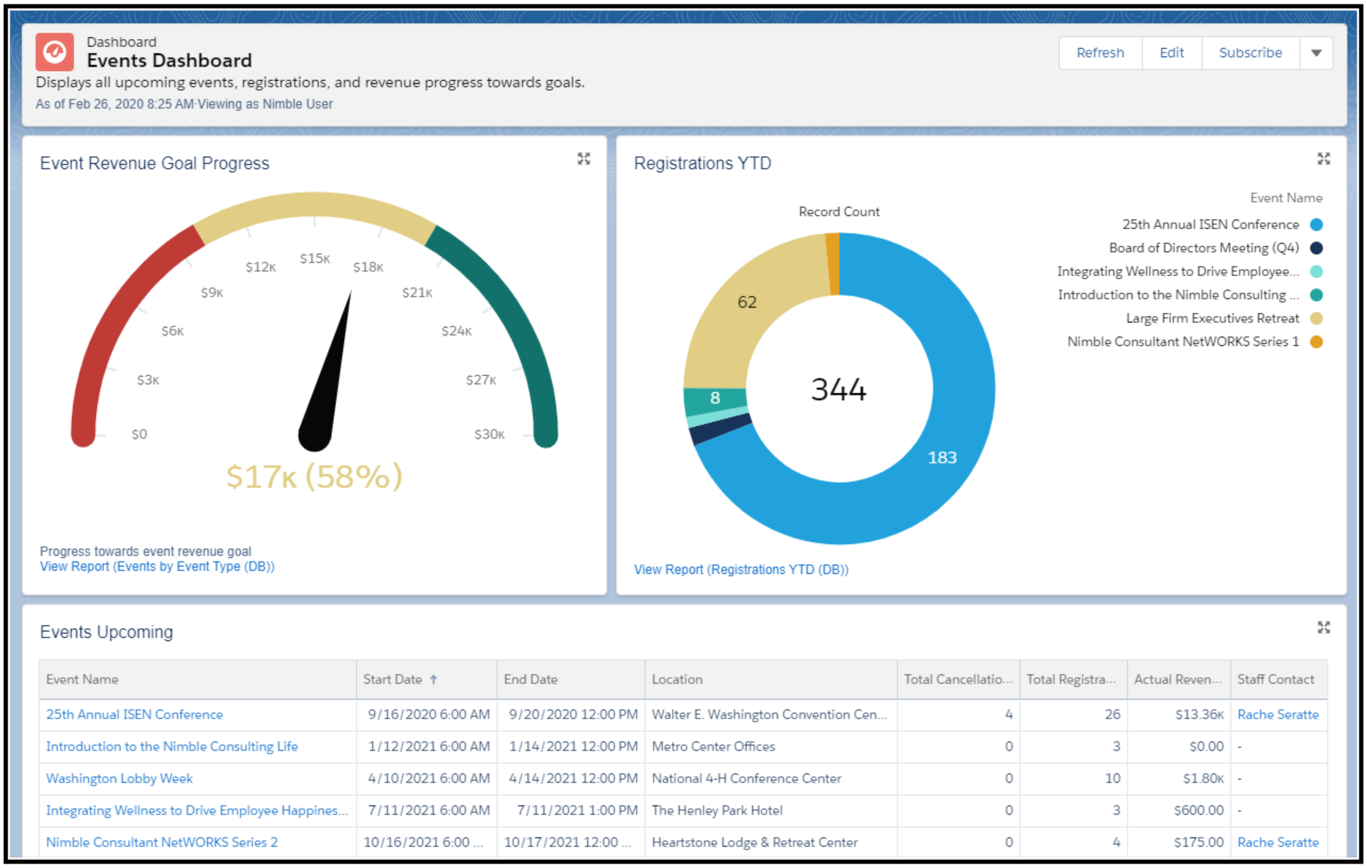
Total Records	Total Total Price	Total Balance	Total Is Coupon
201	$33,778.00	$7,428.00	0

Event Session ↓	Product ↑	Transaction Date ↓	Order Id	Account	Primary Affiliation	Member Type	Billing City	Billing State/Province	Bi
Registration (30)	Day 1 Pass (ISENC) (1)	10/10/2018	Order 0000121	Marian Wade	-		Philadelphia	PA	1
	Subtotal								
	Day 2 Pass (ISENC) (1)	10/10/2018	Order 0000121	Marian Wade	-		Philadelphia	PA	1
	Subtotal								
	Full Pass (ISENC) (14)	2/10/2020	Order 0000352	Bill Wynott	Granite Art Supplies	Enterprise	New York	NY	1

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.



Refresh
Edit
Subscribe
Event Revenue Goal Progress
$0
$3K
$6K
$9K
$12K
$15K
$18K
$21K
$24K
$27K
$30K
$17K (58%)
Registrations YTD
Record Count
62
8
344
183
Event Name
25th Annual ISEN Conference
Board of Directors Meeting (Q4)
Integrating Wellness to Drive Employee...
Introduction to the Nimble Consulting ...
Large Firm Executives Retreat
Nimble Consultant NetWORKS Series 1

Dashboard
Events Dashboard
Displays all upcoming events, registrations, and revenue progress towards goals.
As of Feb 26, 2020 8:25 AM·Viewing as Nimble User

Progress towards event revenue goal
View Report (Events by Event Type (DB))

View Report (Registrations YTD (DB))

Events Upcoming

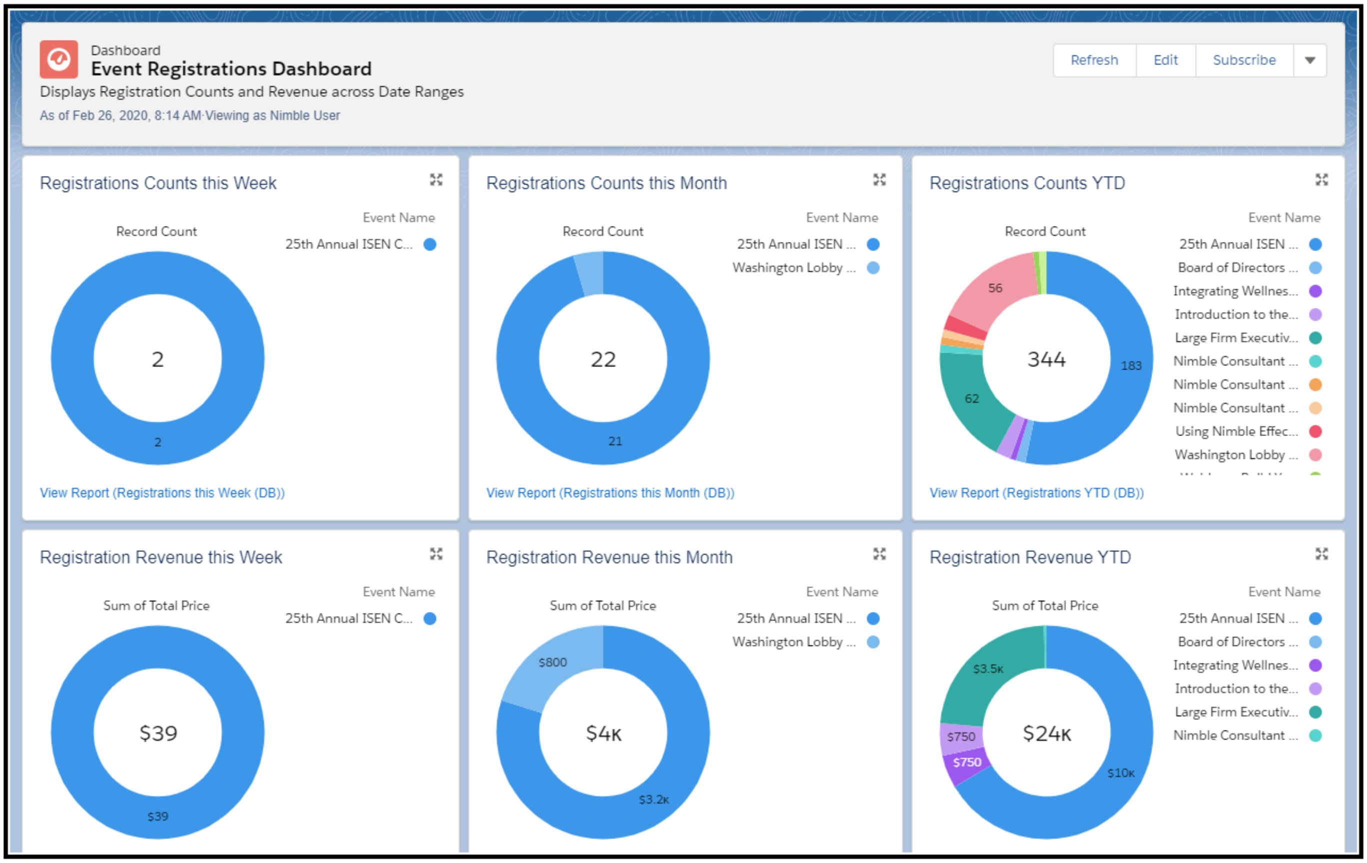
Event Name	Start Date ↑	End Date	Location	Total Cancellatio...	Total Registra...	Actual Reven...	Staff Contact
25th Annual ISEN Conference	9/16/2020 6:00 AM	9/20/2020 12:00 PM	Walter E. Washington Convention Cen...	4	26	$13.36K	Rache Seratte
Introduction to the Nimble Consulting Life	1/12/2021 6:00 AM	1/14/2021 12:00 PM	Metro Center Offices	0	3	$0.00	-
Washington Lobby Week	4/10/2021 6:00 AM	4/14/2021 12:00 PM	National 4-H Conference Center	0	10	$1.80K	-
Integrating Wellness to Drive Employee Happines...	7/11/2021 6:00 AM	7/11/2021 1:00 PM	The Henley Park Hotel	0	3	$600.00	-
Nimble Consultant NetWORKS Series 2	10/16/2021 6:00 ...	10/17/2021 12:00 ...	Heartstone Lodge & Retreat Center	0	4	$175.00	Rache Seratte

- **Displays** revenue for Events
- Overall **Registration Counts** for Events
- Lists ALL Upcoming **Events**, **Dates**, **Location**, **Reg**, **Cancellation**s, & **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.



Dashboard

Event Registrations Dashboard

Displays Registration Counts and Revenue across Date Ranges

As of Feb 26, 2020, 8:14 AM·Viewing as Nimble User

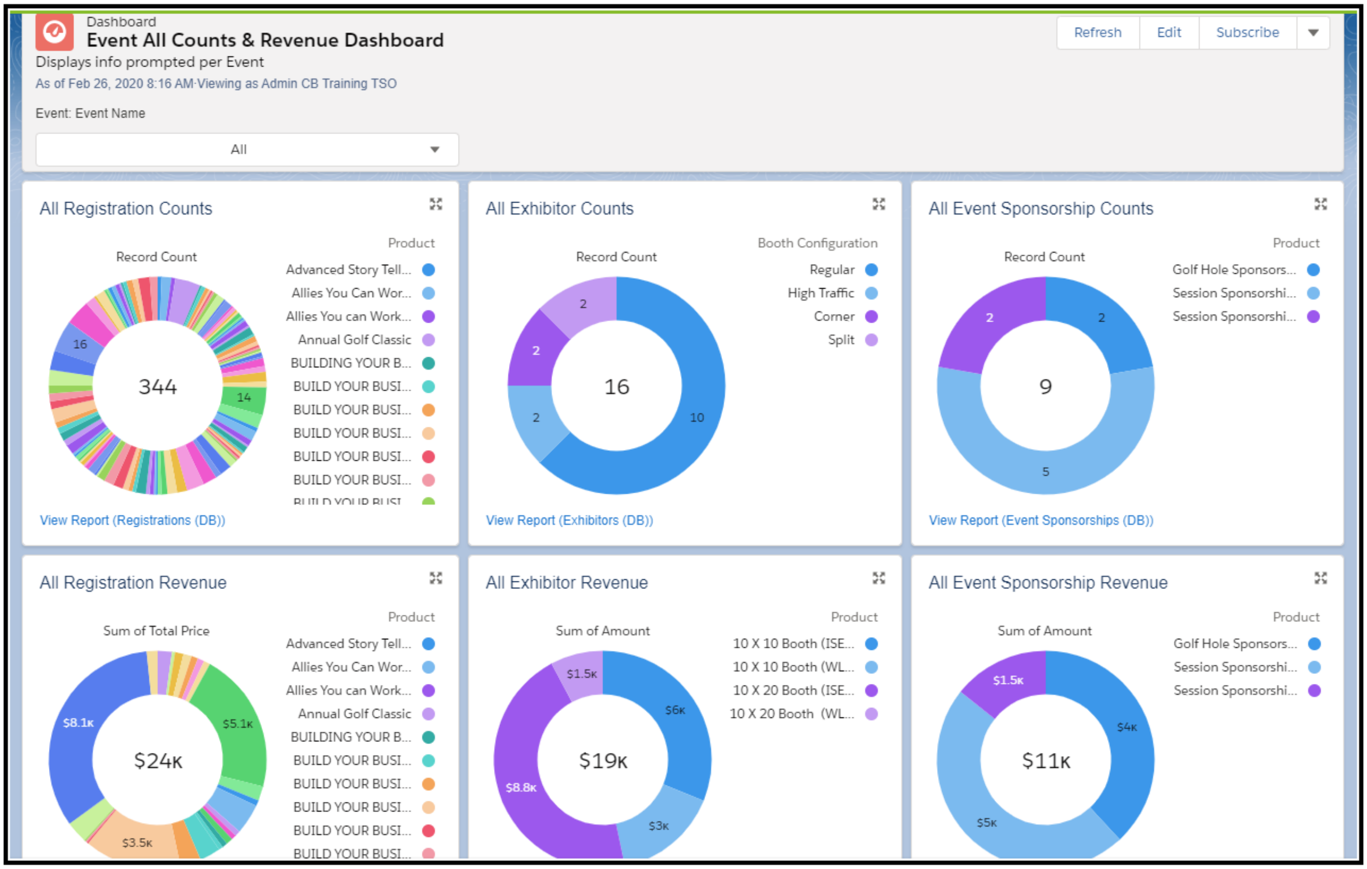
Refresh
Edit
Subscribe
Registrations Counts this Week
Record Count
Event Name
25th Annual ISEN C...
2
2
View Report (Registrations this Week (DB))
Registrations Counts this Month
Record Count
Event Name
25th Annual ISEN ...
Washington Lobby ...
22
21
View Report (Registrations this Month (DB))
Registrations Counts YTD
Record Count
Event Name
25th Annual ISEN ...
Board of Directors ...
Integrating Wellnes...
Introduction to the...
Large Firm Executiv...
Nimble Consultant ...
Nimble Consultant ...
Nimble Consultant ...
Using Nimble Effec...
Washington Lobby ...
56
344
183
62
View Report (Registrations YTD (DB))
Registration Revenue this Week
Sum of Total Price
Event Name
25th Annual ISEN C...
$39
$39
Registration Revenue this Month
Sum of Total Price
Event Name
25th Annual ISEN ...
Washington Lobby ...
$800
$4K
$3.2K
Registration Revenue YTD
Sum of Total Price
Event Name
25th Annual ISEN ...
Board of Directors ...
Integrating Wellnes...
Introduction to the...
Large Firm Executiv...
Nimble Consultant ...
$3.5K
$750
$750
$24K
$10K

- **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.


Dashboard

Event All Counts & Revenue Dashboard

Displays info prompted per Event

As of Feb 26, 2020 8:16 AM·Viewing as Admin CB Training TSO

Event: Event Name

All

Refresh
Edit
Subscribe
All Registration Counts
Record Count
Product
344
16
14
Advanced Story Tell...
Allies You Can Wor...
Allies You can Work...
Annual Golf Classic
BUILDING YOUR B...
BUILD YOUR BUSI...
View Report (Registrations (DB))
All Exhibitor Counts
Record Count
Booth Configuration
Regular
High Traffic
Corner
Split
16
2
2
2
10
View Report (Exhibitors (DB))
All Event Sponsorship Counts
Record Count
Product
Golf Hole Sponsors...
Session Sponsorshi...
Session Sponsorshi...
9
2
2
5
View Report (Event Sponsorships (DB))
All Registration Revenue
Sum of Total Price
Product
$24K
$8.1K
$5.1K
$3.5K
All Exhibitor Revenue
Sum of Amount
Product
10 X 10 Booth (ISE...
10 X 10 Booth (WL...
10 X 20 Booth (ISE...
10 X 20 Booth (WL...
$19K
$1.5K
$6K
$8.8K
$3K
All Event Sponsorship Revenue
Sum of Amount
Product
$11K
$1.5K
$4K
$5K

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.

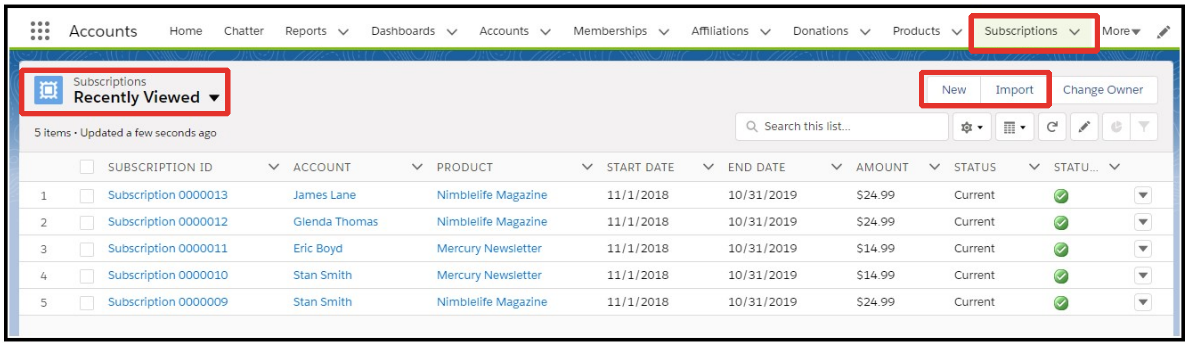
Nimble AMS makes it easy for constituents to get engaged with the association and subscribe to your organization’s subscriptions products via the self-service portal. The self-service portal makes it easy for a constituent to enable automatic renewals via credit card or bank account, choose to enroll 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.


Accounts
Home
Chatter
Reports
Dashboards
Accounts
Memberships
Affiliations
Donations
Products
Subscriptions
More
Subscriptions
Recently Viewed
New
Import
Change Owner
Search this list...

5 items • Updated a few seconds ago

	SUBSCRIPTION ID	ACCOUNT	PRODUCT	START DATE	END DATE	AMOUNT	STATUS	STATU...
1	Subscription 0000013	James Lane	Nimblelife Magazine	11/1/2018	10/31/2019	$24.99	Current	✓
2	Subscription 0000012	Glenda Thomas	Nimblelife Magazine	11/1/2018	10/31/2019	$24.99	Current	✓
3	Subscription 0000011	Eric Boyd	Mercury Newsletter	11/1/2018	10/31/2019	$14.99	Current	✓
4	Subscription 0000010	Stan Smith	Mercury Newsletter	11/1/2018	10/31/2019	$14.99	Current	✓
5	Subscription 0000009	Stan Smith	Nimblelife Magazine	11/1/2018	10/31/2019	$24.99	Current	✓

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

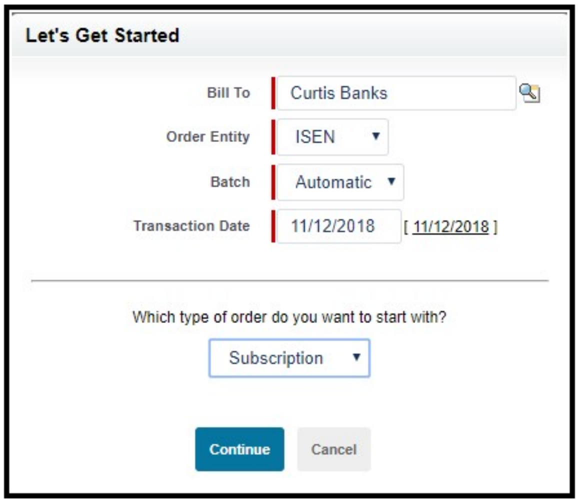
From the TOP LEFT, Subscriptions Recently Viewed drop down, Users can:

- 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**.

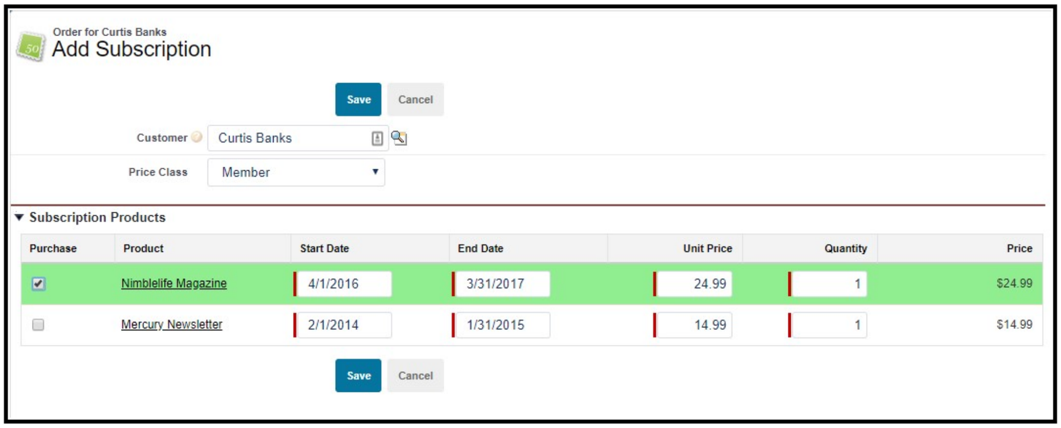


Let's Get Started

Bill To: Curtis Banks
Order Entity: ISEN
Batch: Automatic
Transaction Date: 11/12/2018 [11/12/2018]

Which type of order do you want to start with?
Subscription

4. Click in the **Nimble Magazine** checkbox.
5. Click **Save**.



Order for Curtis Banks
Add Subscription

Customer: Curtis Banks
Price Class: Member

Subscription Products

Purchase	Product	Start Date	End Date	Unit Price	Quantity	Price
☑	Nimblelife Magazine	4/1/2016	3/31/2017	24.99	1	$24.99
☐	Mercury Newsletter	2/1/2014	1/31/2015	14.99	1	$14.99

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**.

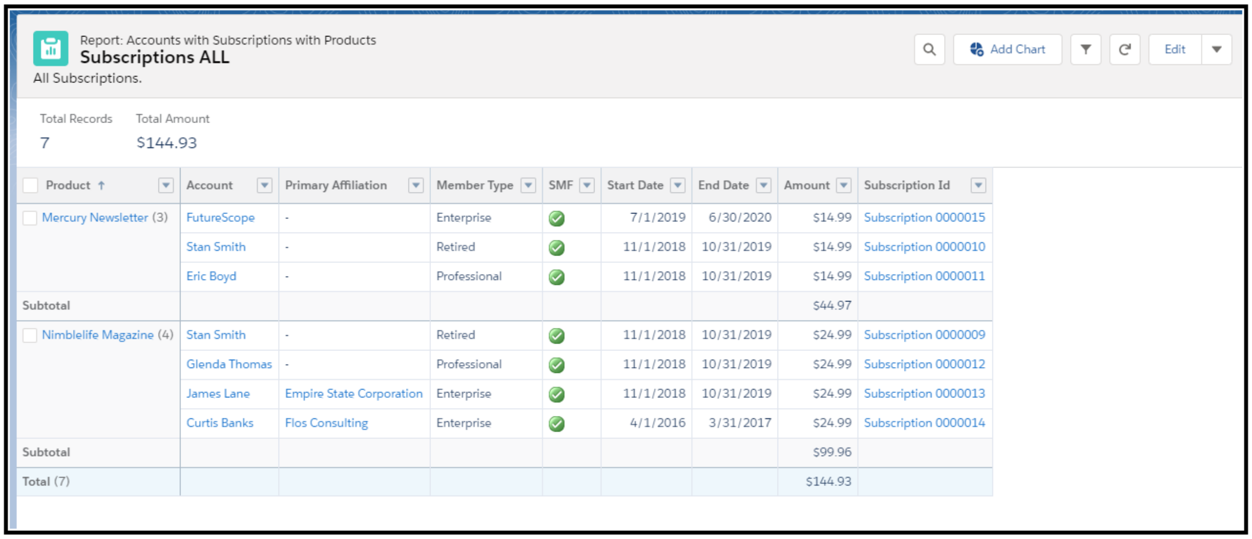
Subscription Reports and Dashboard

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.

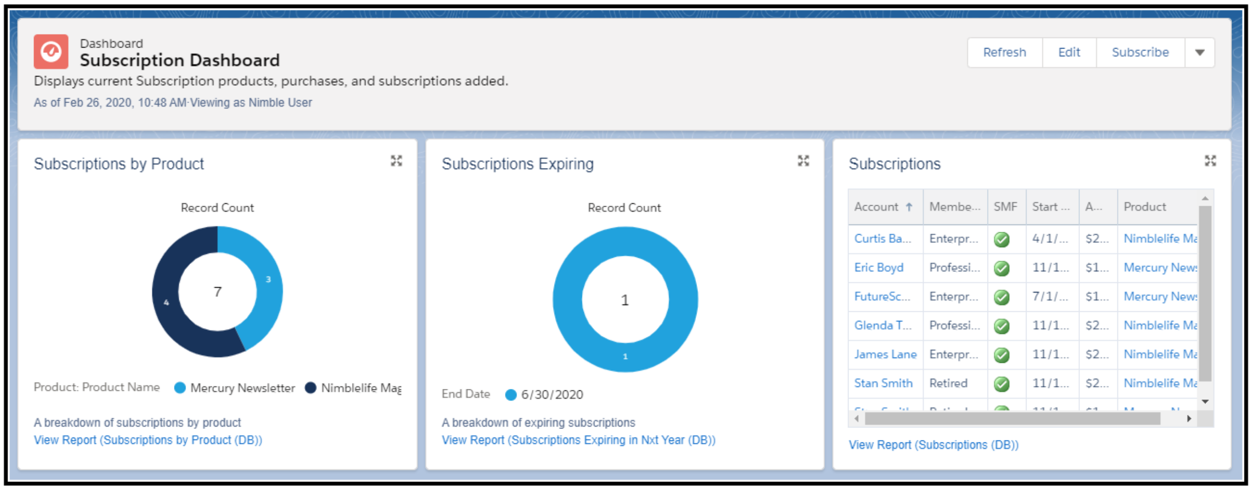
Total Records 7

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.


Dashboard
Refresh
Edit
Subscribe
Record Count
7
3
4
Product: Product Name
● Mercury Newsletter
● Nimblelife Mag
Record Count
1
1
End Date
● 6/30/2020

Subscription Dashboard

Displays current Subscription products, purchases, and subscriptions added.

As of Feb 26, 2020, 10:48 AM·Viewing as Nimble User

Subscriptions by Product

A breakdown of subscriptions by product

View Report (Subscriptions by Product (DB))

Subscriptions Expiring

A breakdown of expiring subscriptions

View Report (Subscriptions Expiring in Nxt Year (DB))

Subscriptions

Account ↑	Membe...	SMF	Start ...	A...	Product
Curtis Ba...	Enterpr...	✓	4/1/...	$2...	Nimblelife Ma
Eric Boyd	Professi...	✓	11/1...	$1...	Mercury News
FutureSc...	Enterpr...	✓	7/1/...	$1...	Mercury News
Glenda T...	Professi...	✓	11/1...	$2...	Nimblelife Ma
James Lane	Enterpr...	✓	11/1...	$2...	Nimblelife Ma
Stan Smith	Retired	✓	11/1...	$2...	Nimblelife Ma

View Report (Subscriptions (DB))

CHAPTER

14 Mobile

Objective 14.1
Logging In 14.2
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.

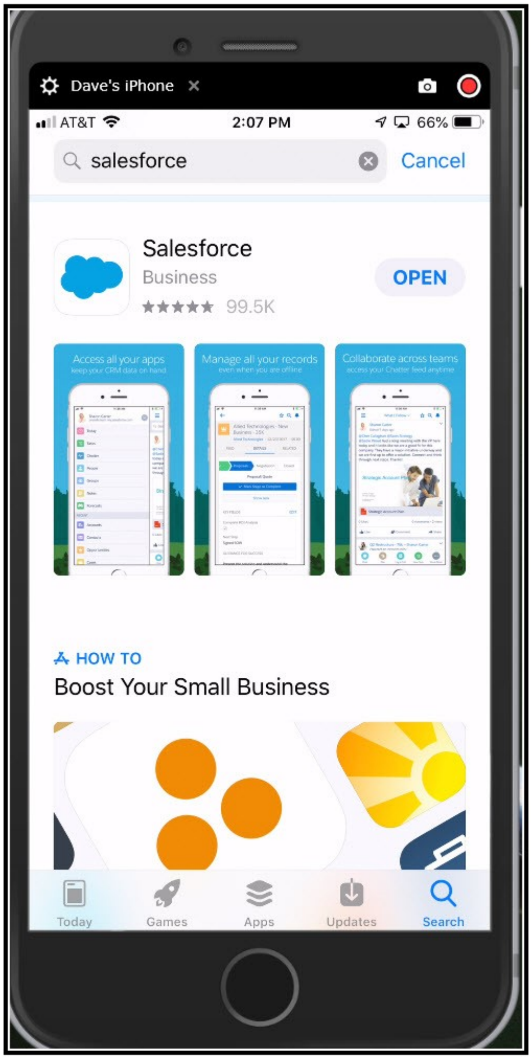
In this chapter, users will:

- Learn to Login
- Learn to Navigate
- Learn How to Use the High Impact Areas for the Mobile App
- Learn about additional Functions

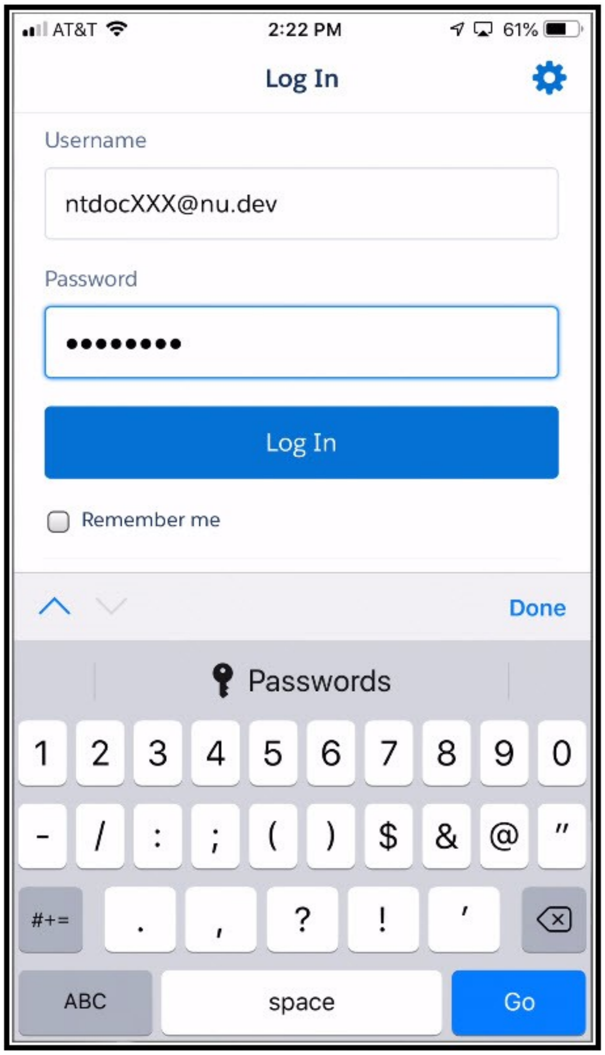
Logging In

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**).


Dave's iPhone
AT&T
2:07 PM
66%
salesforce
Cancel
Salesforce
Business
★★★★★ 99.5K
OPEN
Access all your apps
Manage all your records
Collaborate across teams
HOW TO
Boost Your Small Business
Today
Games
Apps
Updates
Search

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.



Username: ntdocXXX@nu.dev

Password: ●●●●●●●●●

AT&T
2:22 PM
61%
Log In
Log In
☐ Remember me
Done
Passwords
1 2 3 4 5 6 7 8 9 0
- / : ; ( ) $ & @ "
#+= . , ? ! '
ABC
space
Go

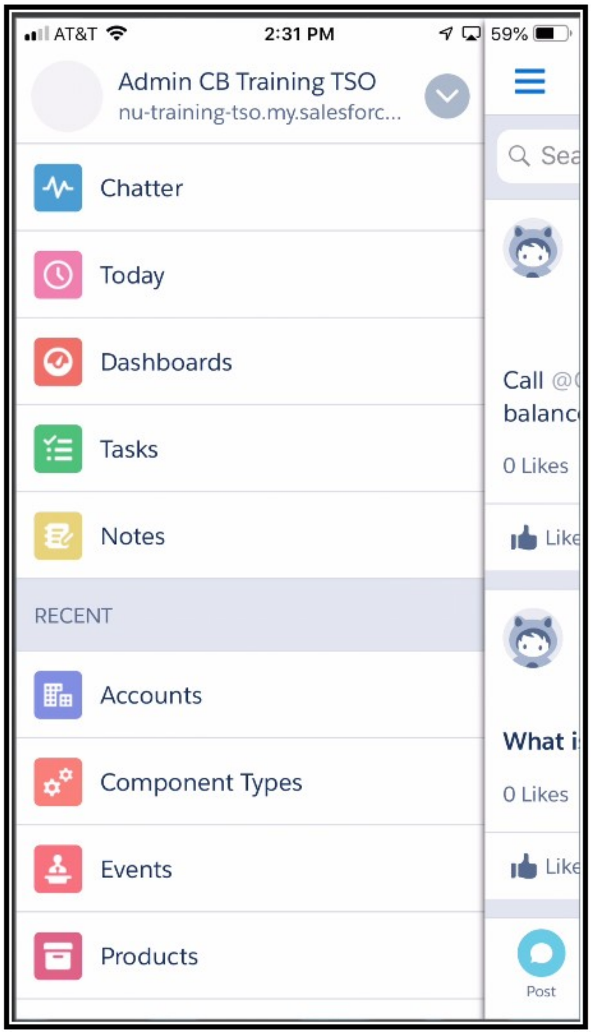
Navigation

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

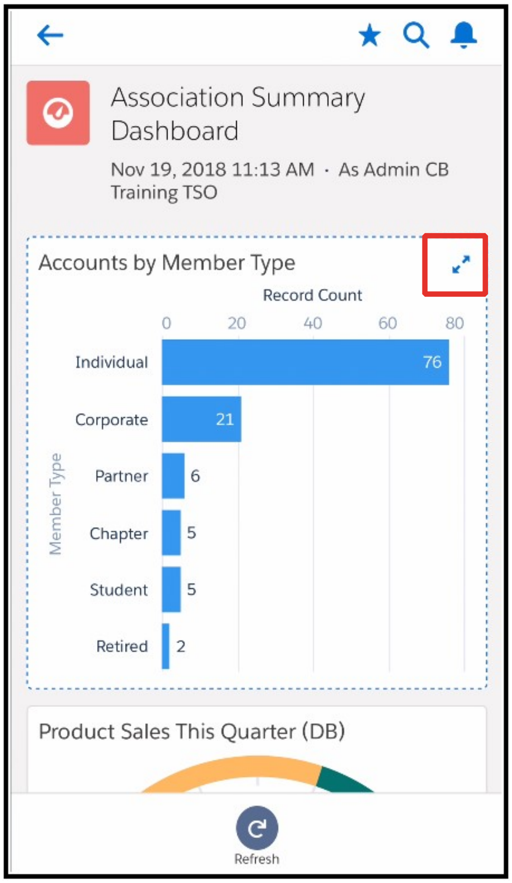

AT&T
2:31 PM
59%
Admin CB Training TSO
nu-training-tso.my.salesforc...
Chatter
Today
Dashboards
Tasks
Notes
RECENT
Accounts
Component Types
Events
Products
Sea
Call @
balanc
0 Likes
Like
What i
0 Likes
Like
Post

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.



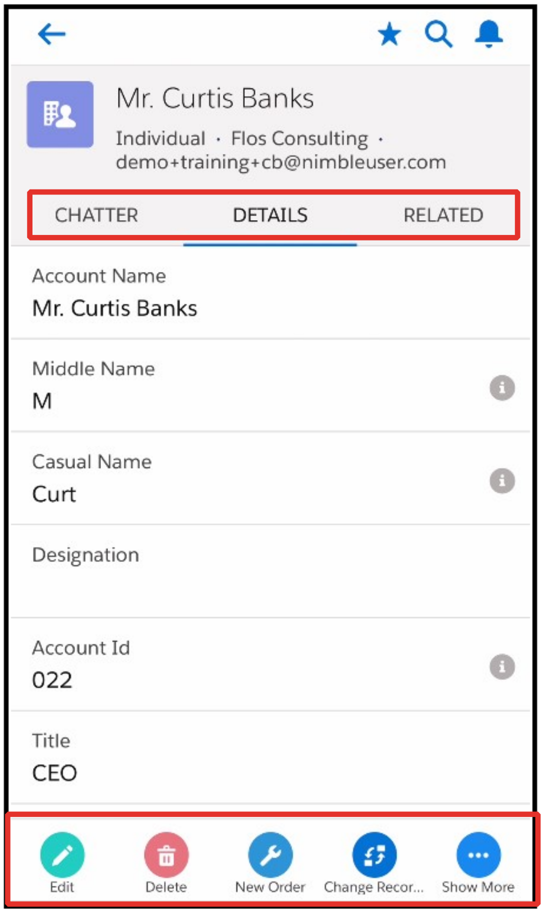
Association Summary Dashboard

Nov 19, 2018 11:13 AM · As Admin CB Training TSO

Accounts by Member Type
Record Count
0
20
40
60
80
Member Type
Individual
76
Corporate
21
Partner
6
Chapter
5
Student
5
Retired
2
Product Sales This Quarter (DB)
Refresh

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.



Mr. Curtis Banks

Individual · Flos Consulting · demo+training+cb@nimbleuser.com

Account Name
Mr. Curtis Banks

Middle Name
M

Casual Name
Curt

Designation

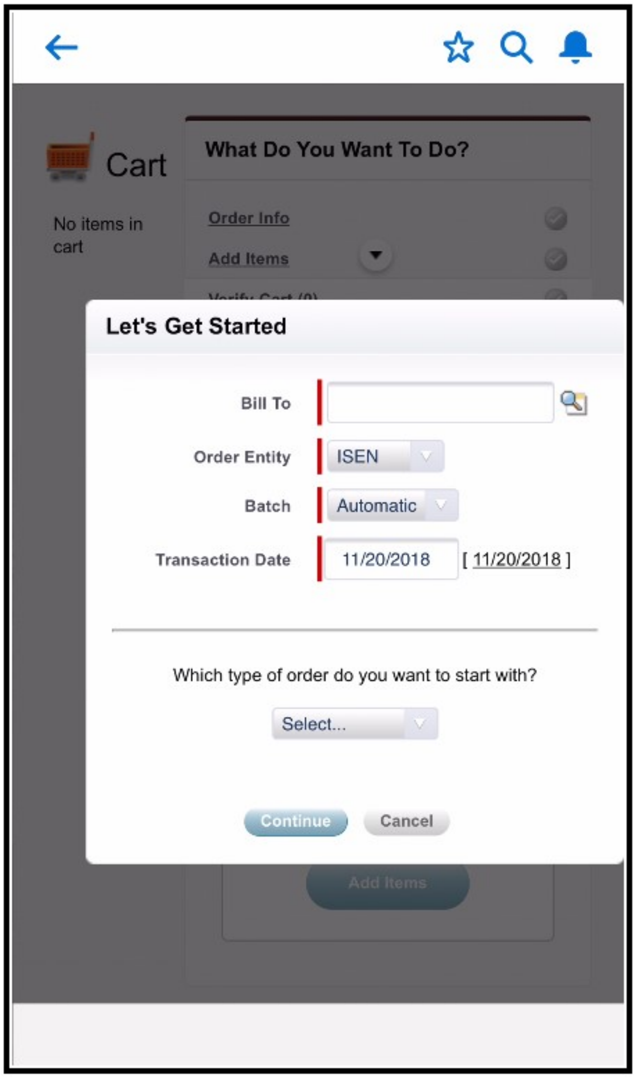
Account Id
022

Title
CEO

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.**


Cart
No items in cart
What Do You Want To Do?
Order Info
Add Items
Verify Cart (0)
Continue
Cancel
Add Items

Let's Get Started

Bill To:

Order Entity: ISEN

Batch: Automatic

Transaction Date: 11/20/2018 [11/20/2018]

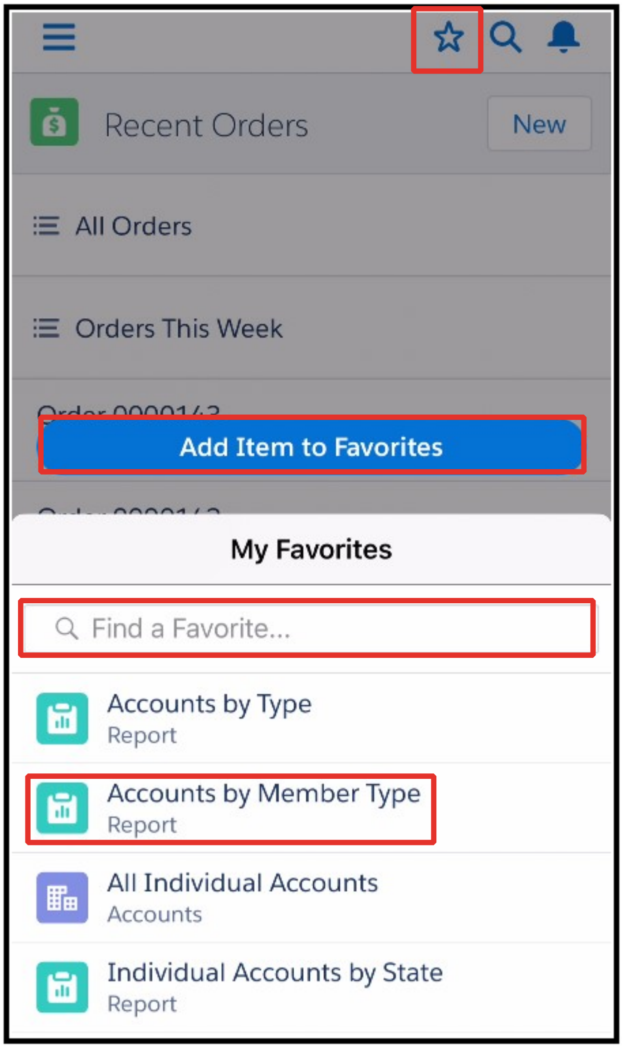
Which type of order do you want to start with? Select...

Additional Functions

Favorites

From any area users can also **Access**, **Add**, or **Manage** their **Favorites**.

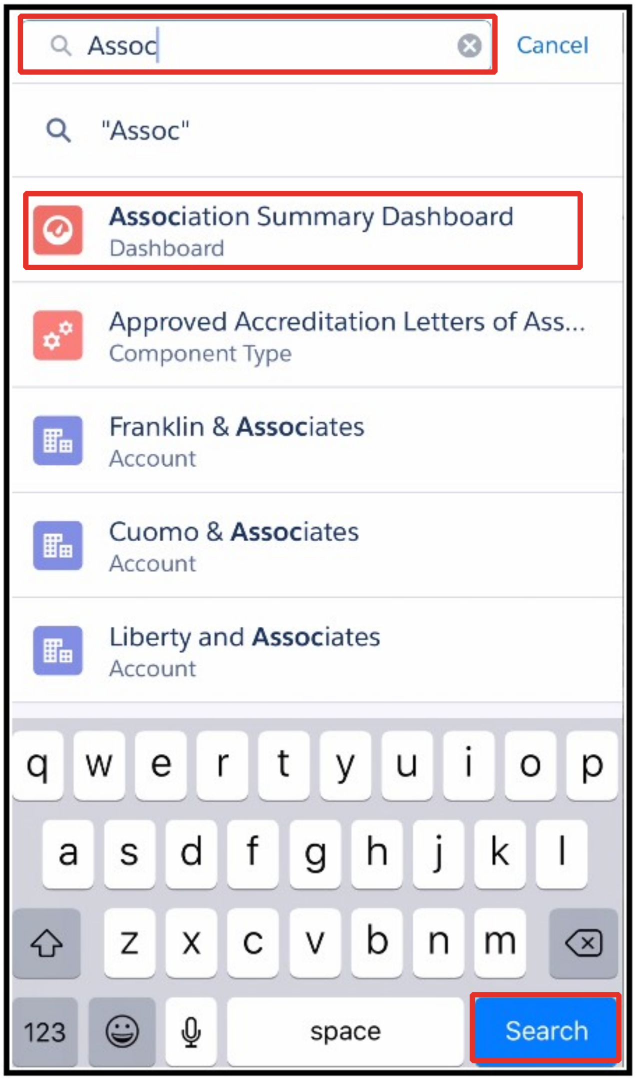
1. Tap on the **Favorites** icon (**Star**) in the upper right hand corner of the screen.
2. Observe the ability to:
3. **Add Item to Favorites** - current to what the user is located on.
4. **Find** a Favorite.


Recent Orders
New
All Orders
Orders This Week
Order 0000143
Add Item to Favorites
My Favorites
Find a Favorite...
Accounts by Type
Report
Accounts by Member Type
Report
All Individual Accounts
Accounts
Individual Accounts by State
Report

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.


Assoc

"Assoc"

Association Summary Dashboard
Dashboard

Approved Accreditation Letters of Ass...
Component Type

Franklin & Associates
Account

Cuomo & Associates
Account

Liberty and Associates
Account

CHAPTER

15 Community Hub

Objective 15.1
Logging In 15.2
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

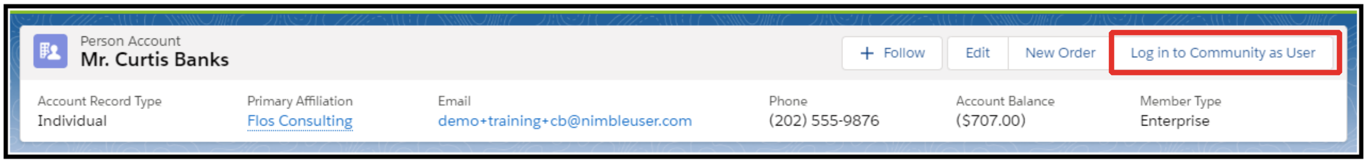
Logging In

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.



Mr. Curtis Banks

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

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.

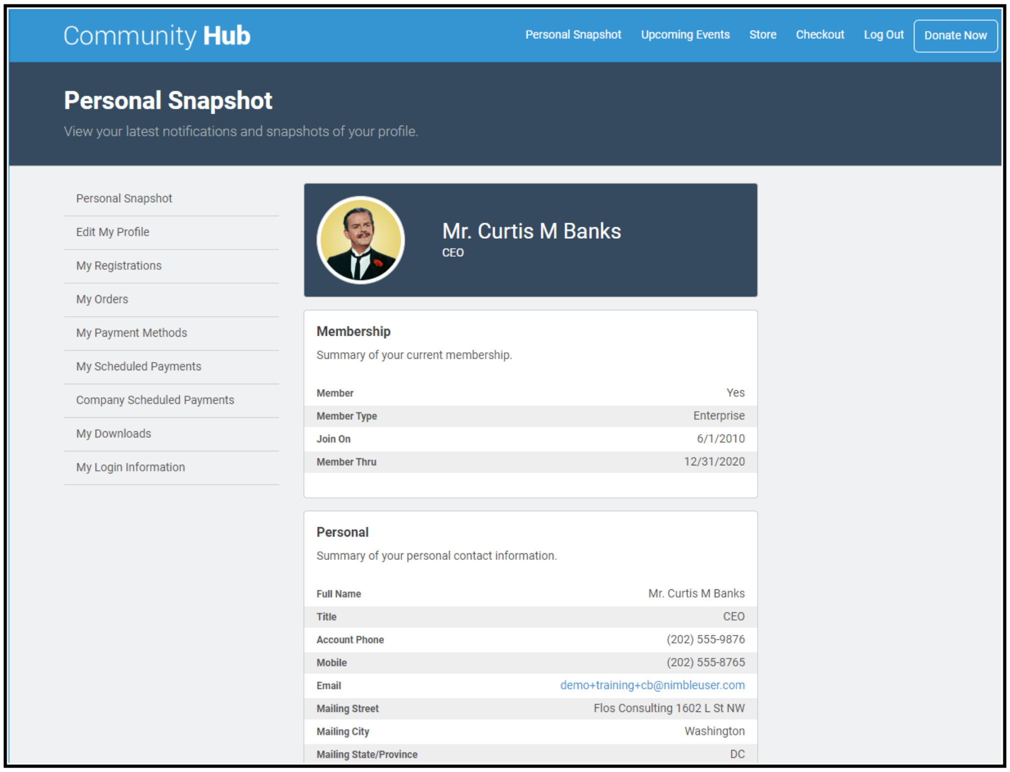
Personal Snapshot & Navigation

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.


Community Hub
Personal Snapshot
Upcoming Events
Store
Checkout
Log Out
Donate Now
Personal Snapshot
Edit My Profile
My Registrations
My Orders
My Payment Methods
My Scheduled Payments
Company Scheduled Payments
My Downloads
My Login Information

Personal Snapshot

View your latest notifications and snapshots of your profile.

Mr. Curtis M Banks
CEO

Membership

Summary of your current membership.

Member	Yes
Member Type	Enterprise
Join On	6/1/2010
Member Thru	12/31/2020

Personal

Summary of your personal contact information.

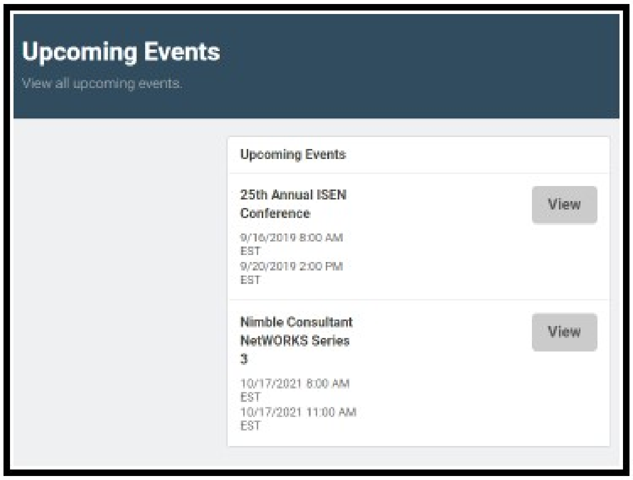
Full Name	Mr. Curtis M Banks
Title	CEO
Account Phone	(202) 555-9876
Mobile	(202) 555-8765
Email	demo+training+cb@nimbleuser.com
Mailing Street	Flos Consulting 1602 L St NW
Mailing City	Washington
Mailing State/Province	DC

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.



Upcoming Events

View all upcoming events.

Upcoming Events

25th Annual ISEN Conference

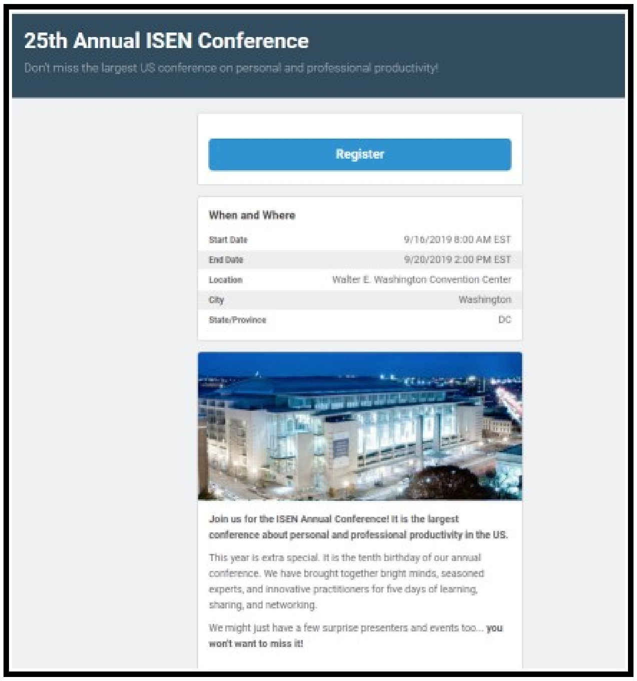
9/16/2019 8:00 AM EST
9/20/2019 2:00 PM EST

Nimble Consultant NetWORKS Series 3

10/17/2021 8:00 AM EST
10/17/2021 11:00 AM EST

- 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**.



25th Annual ISEN Conference

Don't miss the largest US conference on personal and professional productivity!

When and Where

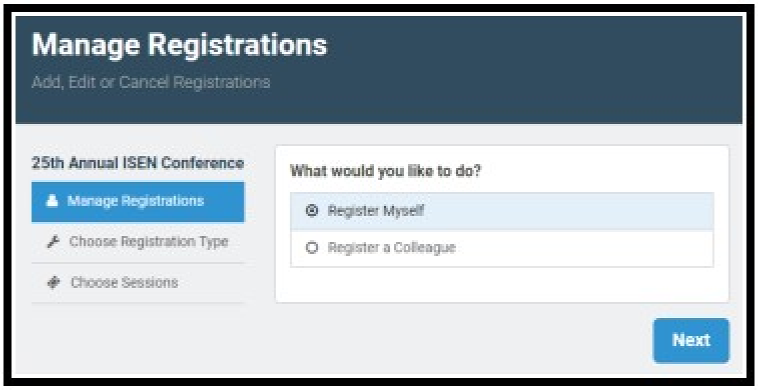
Start Date	9/16/2019 8:00 AM EST
End Date	9/20/2019 2:00 PM EST
Location	Walter E. Washington Convention Center
City	Washington
State/Province	DC

Join us for the ISEN Annual Conference! It is the largest conference about personal and professional productivity in the US.

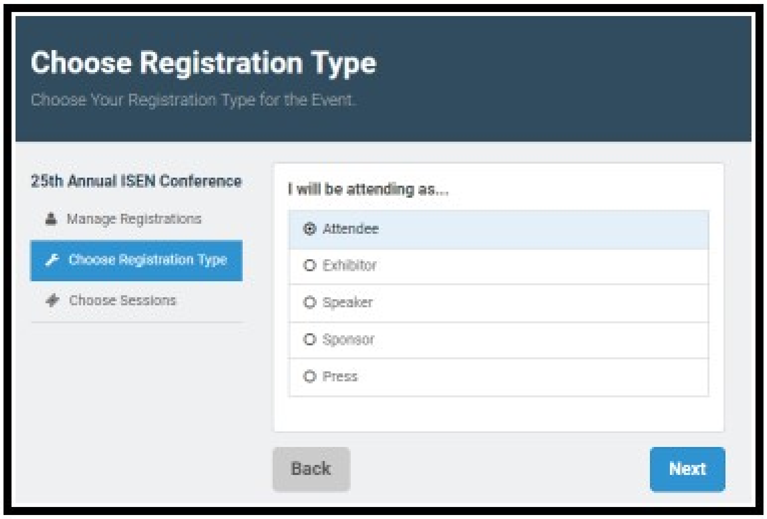
This year is extra special. It is the tenth birthday of our annual conference. We have brought together bright minds, seasoned experts, and innovative practitioners for five days of learning, sharing, and networking.

We might just have a few surprise presenters and events too... **you won't want to miss it!**

4. Users can click on the **Register** button to register themselves or a **Colleague**.

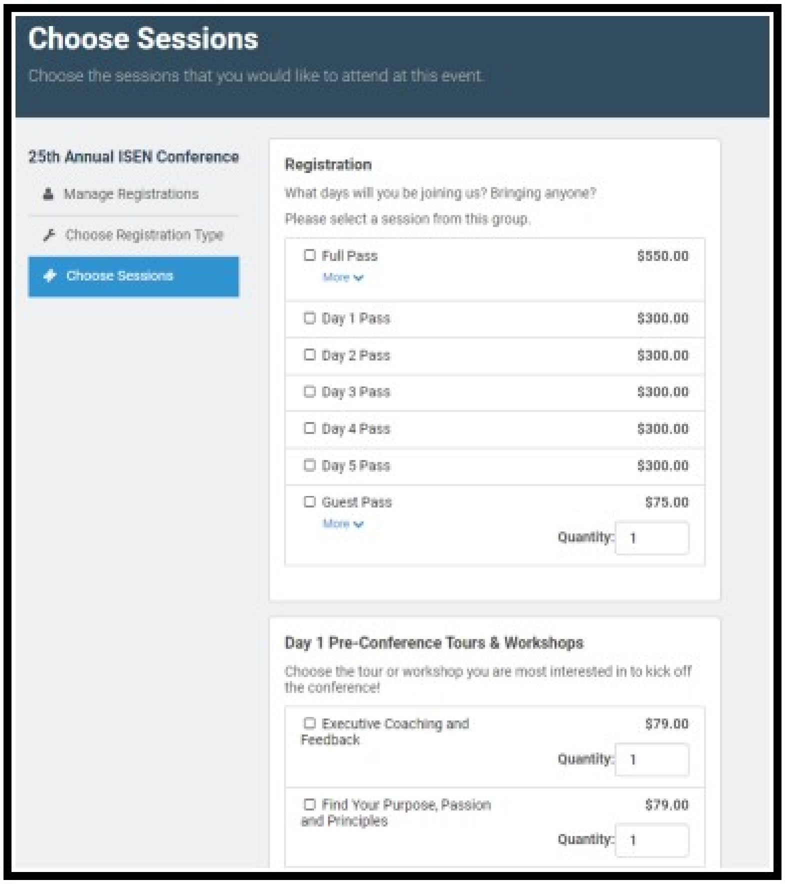

Manage Registrations
Add, Edit or Cancel Registrations
25th Annual ISEN Conference
Manage Registrations
Choose Registration Type
Choose Sessions
What would you like to do?
● Register Myself
○ Register a Colleague
Next

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**.


Choose Registration Type
Choose Your Registration Type for the Event.
25th Annual ISEN Conference
Manage Registrations
Choose Registration Type
Choose Sessions
I will be attending as...
● Attendee
○ Exhibitor
○ Speaker
○ Sponsor
○ Press
Back
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.


25th Annual ISEN Conference
Manage Registrations
Choose Registration Type
Choose Sessions
More
More

Choose Sessions

Choose the sessions that you would like to attend at this event.

Registration

What days will you be joining us? Bringing anyone?

Please select a session from this group.

☐ 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	
☐ Guest Pass	$75.00	Quantity: 1

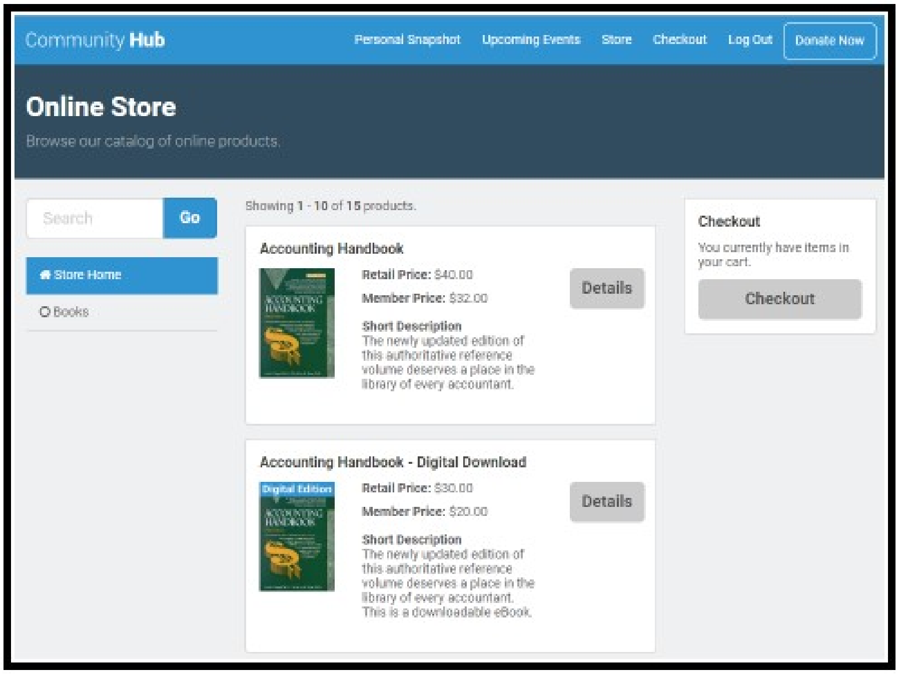
Day 1 Pre-Conference Tours & Workshops

Choose the tour or workshop you are most interested in to kick off the conference!

☐ Executive Coaching and Feedback	$79.00	Quantity: 1
☐ Find Your Purpose, Passion and Principles	$79.00	Quantity: 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**.


Community Hub
Personal Snapshot
Upcoming Events
Store
Checkout
Log Out
Donate Now
Search
Go
Store Home
○ Books
Details
Details
Checkout

Online Store

Browse our catalog of online products.

Showing 1 - 10 of 15 products.

Accounting Handbook

Retail Price: $40.00

Member Price: $32.00

Short Description
The newly updated edition of this authoritative reference volume deserves a place in the library of every accountant.

Accounting Handbook - Digital Download

Retail Price: $30.00

Member Price: $20.00

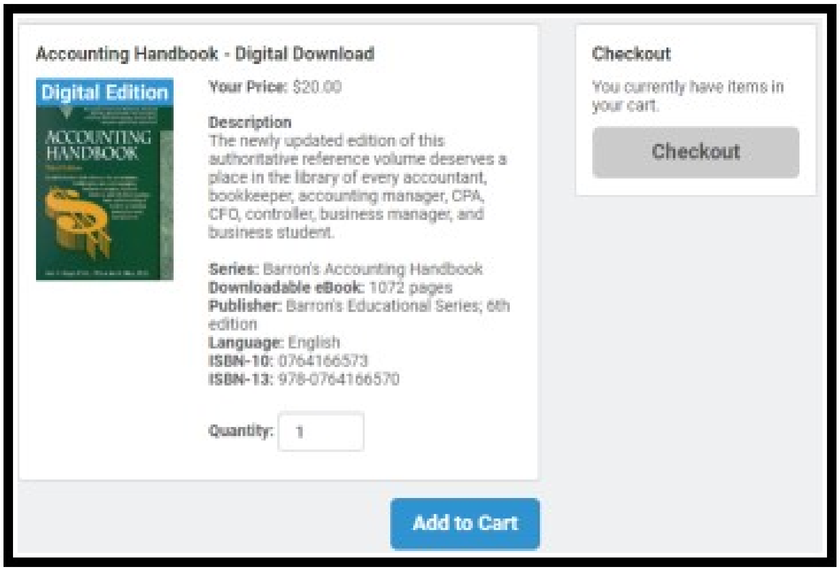
Short Description
The newly updated edition of this authoritative reference volume deserves a place in the library of every accountant.
This is a downloadable eBook.

Checkout

You currently have items in your cart.

4. The Product Details screen displays.

5. Users can read **Description**, Change Quantity, **Add to Cart** (the item), and/or **Checkout**.



Accounting Handbook - Digital Download

Your Price: $20.00

Description
The newly updated edition of this authoritative reference volume deserves a place in the library of every accountant, bookkeeper, accounting manager, CPA, CFO, controller, business manager, and business student.

Series: Barron's Accounting Handbook
Downloadable eBook: 1072 pages
Publisher: Barron's Educational Series; 6th edition
Language: English
ISBN-10: 0764166573
ISBN-13: 978-0764166570

Quantity: 1

Checkout

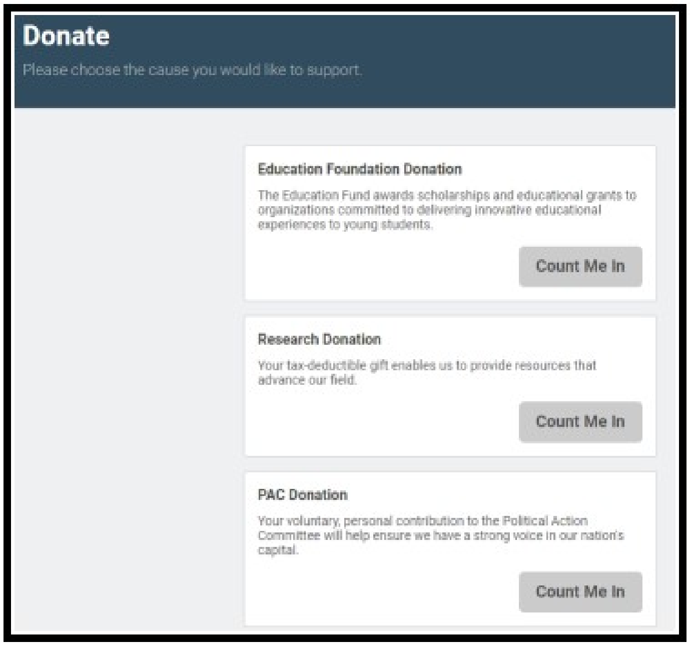
You currently have items in your cart.

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.



Donate

Please choose the cause you would like to support.

Education Foundation Donation

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

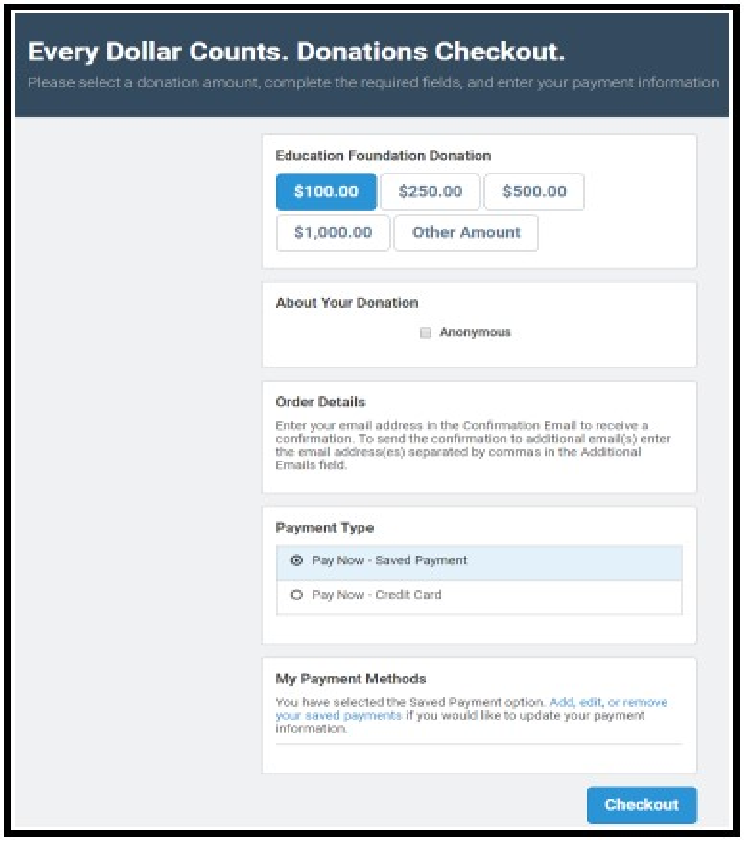
Research Donation

Your tax-deductible gift enables us to provide resources that advance our field.

PAC Donation

Your voluntary, personal contribution to the Political Action Committee will help ensure we have a strong voice in our nation's capital.

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

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

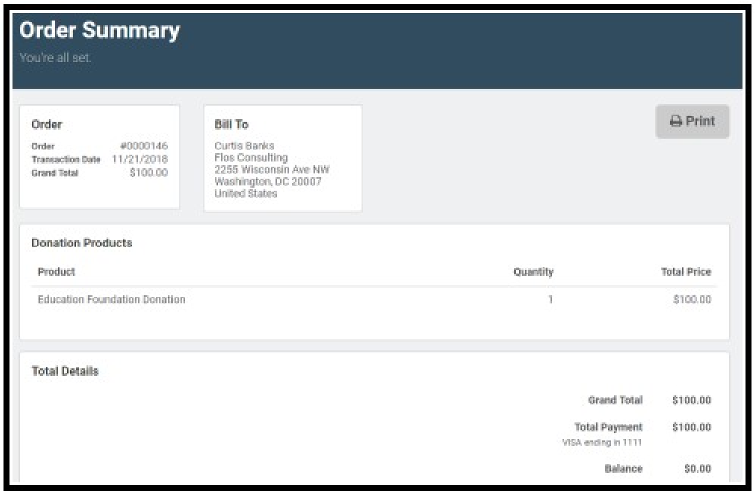
● Pay Now - Saved Payment

○ 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.

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
Flos Consulting
2255 Wisconsin Ave NW
Washington, DC 20007
United States

Donation Products

Product	Quantity	Total Price
Education Foundation Donation	1	$100.00

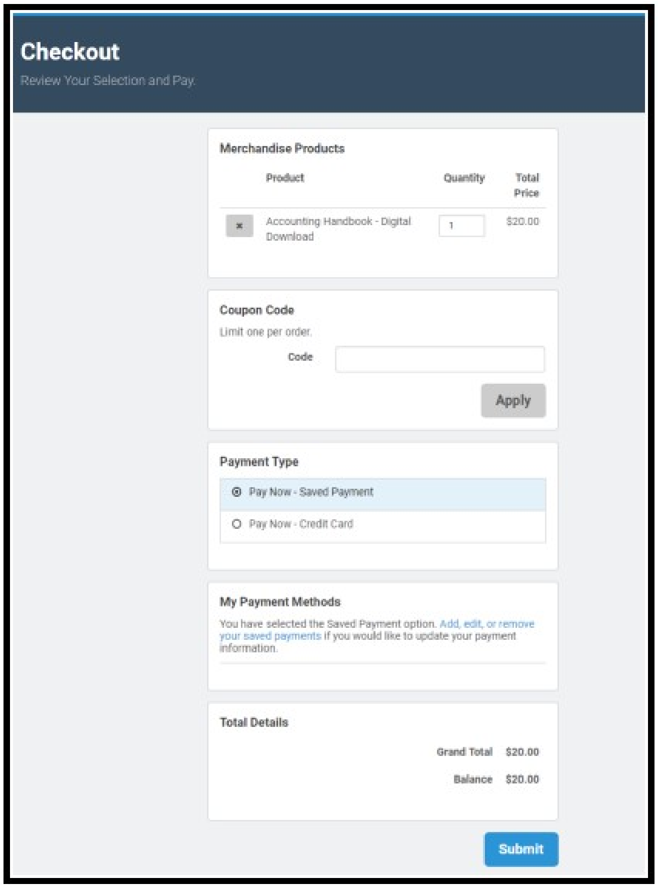
Total Details

Grand Total	$100.00
Total Payment VISA ending in 1111	$100.00
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



Checkout

Review Your Selection and Pay.

Merchandise Products

	Product	Quantity	Total Price
×	Accounting Handbook - Digital Download	1	$20.00

Coupon Code

Limit one per order.

Code

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.

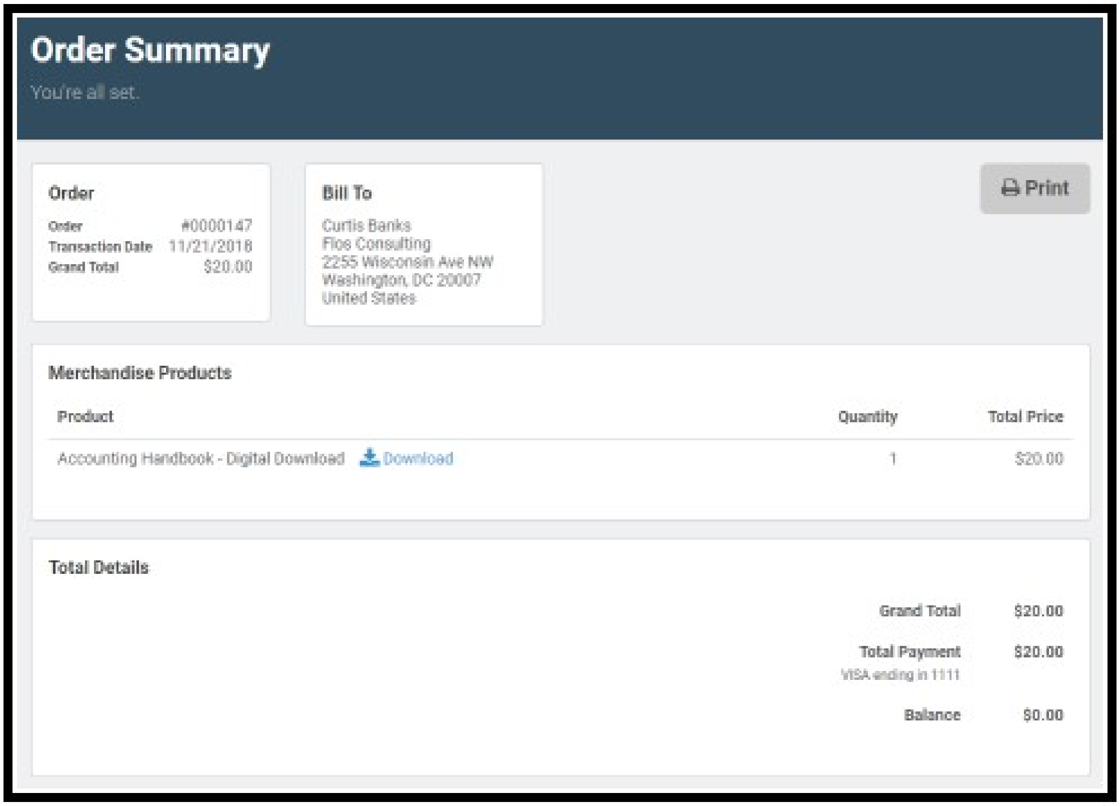
Total Details

Grand Total $20.00

Balance $20.00

3. Click on the **Submit** button.

4. The Order Summary page displays.
   - Users can print if desired.



Order Summary

You're all set.

Order

Order	#0000147
Transaction Date	11/21/2018
Grand Total	$20.00

Bill To

Curtis Banks
Flos Consulting
2255 Wisconsin Ave NW
Washington, DC 20007
United States

Merchandise Products

Product	Quantity	Total Price
Accounting Handbook - Digital Download Download	1	$20.00

Total Details

Grand Total	$20.00
Total Payment VISA ending in 1111	$20.00
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

Objective 16.1
Accounting Basics 16.2
Entities 16.3
Entity Record 16.4
GL Accounts 16.9
Transactions 16.11
Batching 16.12
Accounting Reports 16.17
Accounting Dashboards 16.23

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.

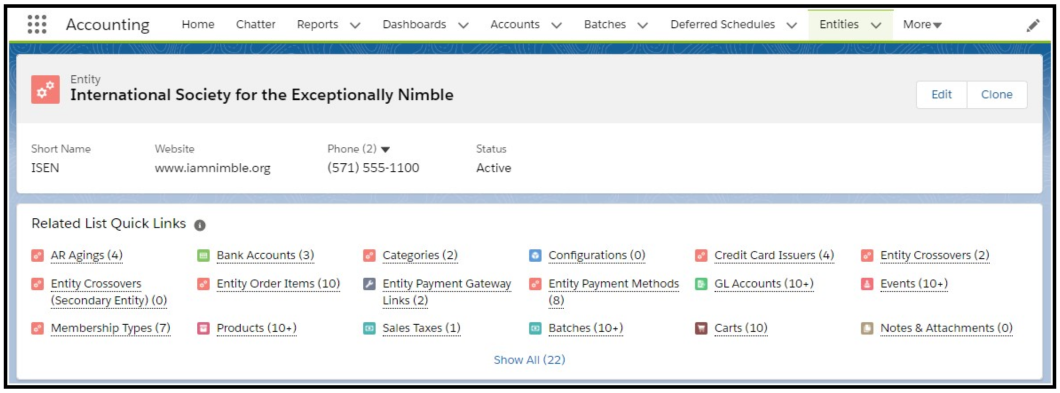
For more advanced treatment of Entity setup, settings, and configuration, users should take the more advanced Nimble AMS Accounting class.

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

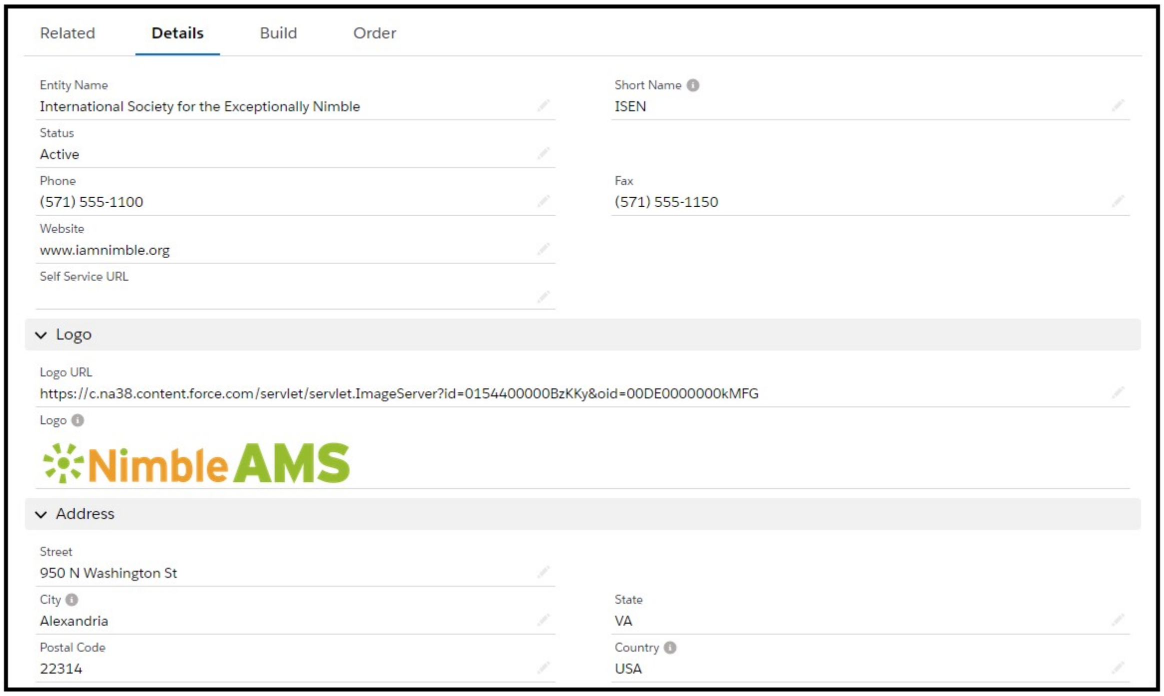

Accounting
Home
Chatter
Reports
Dashboards
Accounts
Batches
Deferred Schedules
Entities
More
Edit
Clone
Related List Quick Links
AR Agings (4)
Bank Accounts (3)
Categories (2)
Configurations (0)
Credit Card Issuers (4)
Entity Crossovers (2)
Entity Crossovers (Secondary Entity) (0)
Entity Order Items (10)
Entity Payment Gateway Links (2)
Entity Payment Methods (8)
GL Accounts (10+)
Events (10+)
Membership Types (7)
Products (10+)
Sales Taxes (1)
Batches (10+)
Carts (10)
Notes & Attachments (0)
Show All (22)

Entity
International Society for the Exceptionally Nimble

Short Name	Website	Phone (2)	Status
ISEN	www.iamnimble.org	(571) 555-1100	Active

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.



Entity Name
International Society for the Exceptionally Nimble

Short Name
ISEN

Status
Active

Phone
(571) 555-1100

Fax
(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=00DE0000000kMFG

Logo
NimbleAMS

Address

Street
950 N Washington St

City
Alexandria

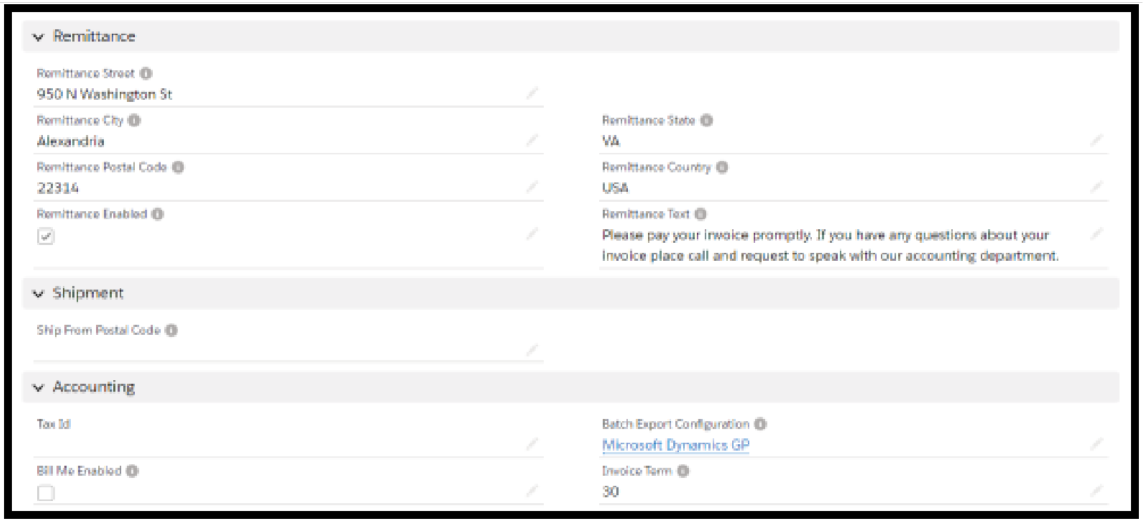
State
VA

Postal Code
22314

Country
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.



Remittance

Remittance Street
950 N Washington St

Remittance City
Alexandria

Remittance State
VA

Remittance Postal Code
22314

Remittance Country
USA

Remittance Enabled
☑

Remittance Text
Please pay your invoice promptly. If you have any questions about your invoice place call and request to speak with our accounting department.

Shipment

Ship From Postal Code

Accounting

Tax Id

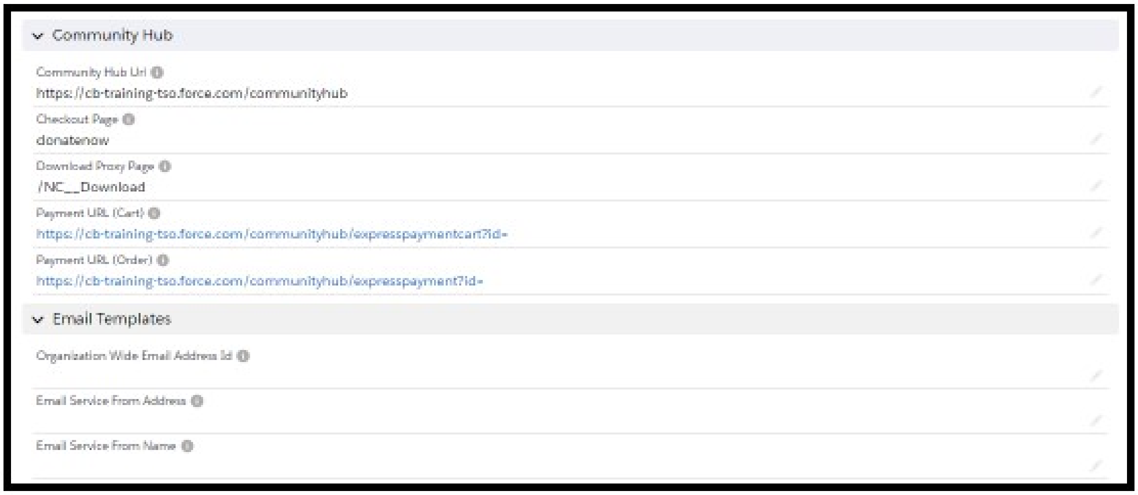
Batch Export Configuration
Microsoft Dynamics GP

Bill Me Enabled
☐

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.



Community Hub Url
https://cb-training-tso.force.com/communityhub

Checkout Page
donatenow

Download Proxy Page
/NC__Download

Payment URL (Cart)
https://cb-training-tso.force.com/communityhub/expresspaymentcart?id=

Payment URL (Order)
https://cb-training-tso.force.com/communityhub/expresspayment?id=

Organization Wide Email Address Id

Email Service From Address

Email Service From Name

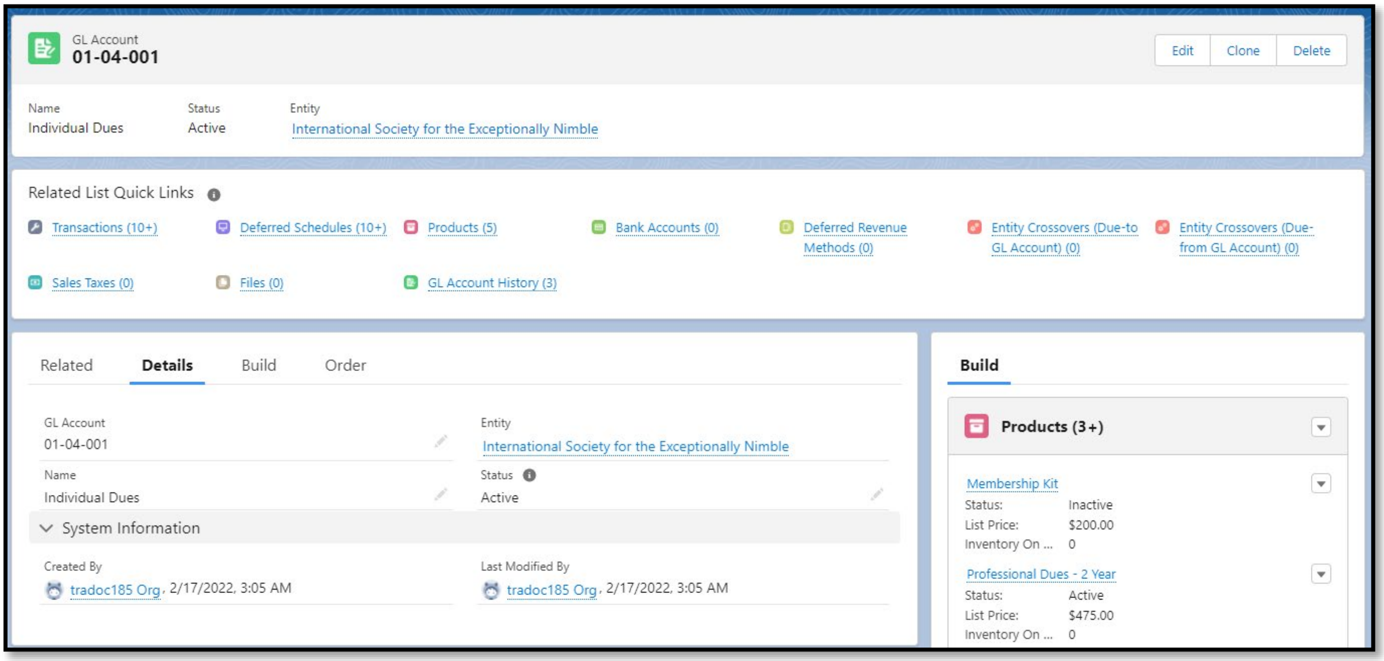
GL Accounts

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 **01-04-001** 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.


Edit
Clone
Delete
Related List Quick Links
Transactions (10+)
Deferred Schedules (10+)
Products (5)
Bank Accounts (0)
Deferred Revenue Methods (0)
Entity Crossovers (Due-to GL Account) (0)
Entity Crossovers (Due-from GL Account) (0)
Sales Taxes (0)
Files (0)
GL Account History (3)
Related
Details
Build
Order
System Information
Build
Products (3+)

GL Account
01-04-001

Name: Individual Dues
Status: Active
Entity: International Society for the Exceptionally Nimble

GL Account: 01-04-001
Entity: International Society for the Exceptionally Nimble
Name: Individual Dues
Status: Active

Created By: tradoc185 Org, 2/17/2022, 3:05 AM
Last Modified By: tradoc185 Org, 2/17/2022, 3:05 AM

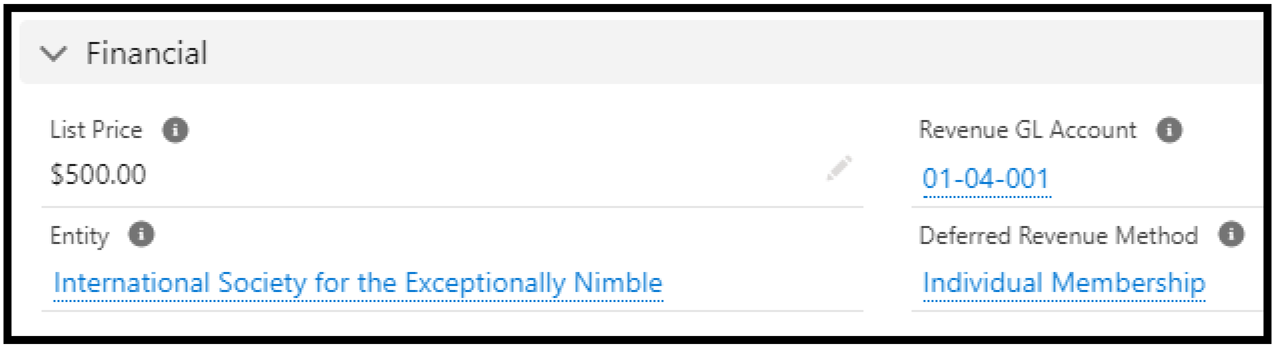
Membership Kit
Status: Inactive
List Price: $200.00
Inventory On ... 0

Professional Dues - 2 Year
Status: Active
List Price: $475.00
Inventory On ... 0

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.



List Price: $500.00

Revenue GL Account: 01-04-001

Entity: International Society for the Exceptionally Nimble

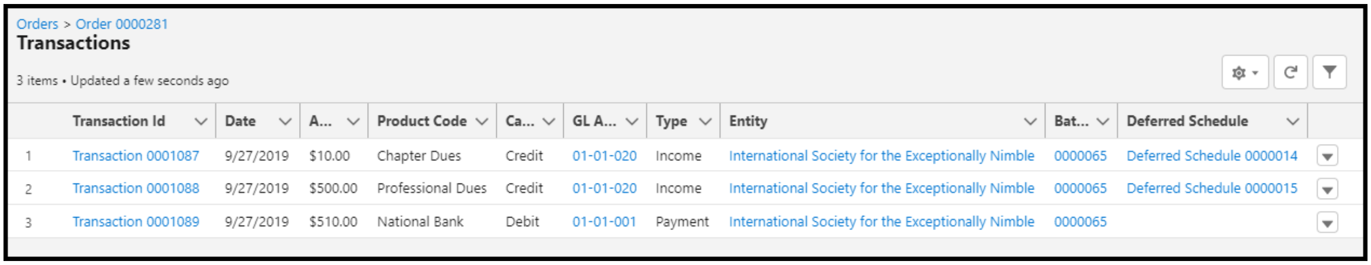
Deferred Revenue Method: Individual Membership

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.



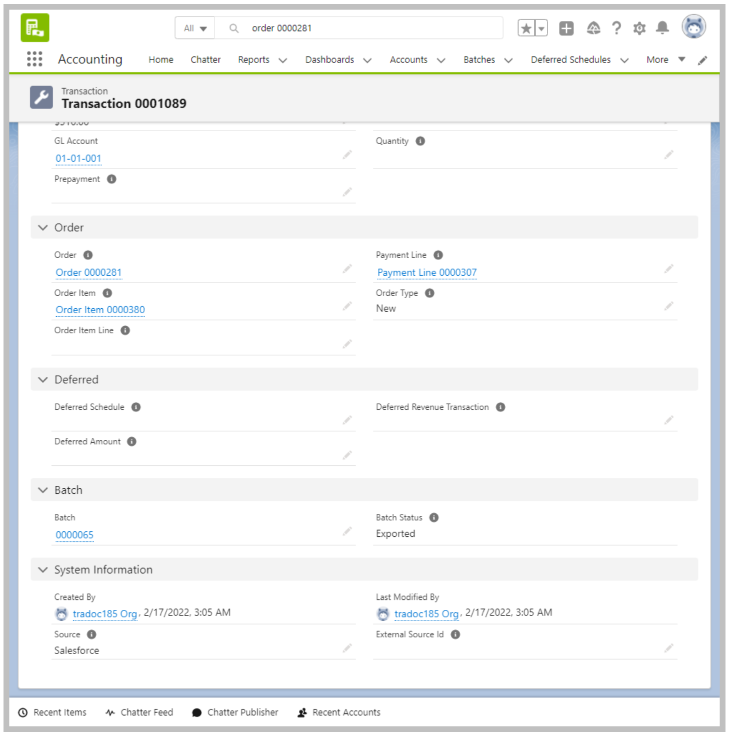
Orders > Order 0000281
Transactions

3 items • Updated a few seconds ago

	Transaction Id	Date	A...	Product Code	Ca...	GL A...	Type	Entity	Bat...	Deferred Schedule
1	Transaction 0001087	9/27/2019	$10.00	Chapter Dues	Credit	01-01-020	Income	International Society for the Exceptionally Nimble	0000065	Deferred Schedule 0000014
2	Transaction 0001088	9/27/2019	$500.00	Professional Dues	Credit	01-01-020	Income	International Society for the Exceptionally Nimble	0000065	Deferred Schedule 0000015
3	Transaction 0001089	9/27/2019	$510.00	National Bank	Debit	01-01-001	Payment	International Society for the Exceptionally Nimble	0000065	

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



Transaction
Transaction 0001089

GL Account
01-01-001

Quantity

Prepayment

Order

Order
Order 0000281

Payment Line
Payment Line 0000307

Order Item
Order Item 0000380

Order Type
New

Order Item Line

Deferred

Deferred Schedule

Deferred Revenue Transaction

Deferred Amount

Batch

Batch
0000065

Batch Status
Exported

System Information

Created By
tradoc185 Org, 2/17/2022, 3:05 AM

Last Modified By
tradoc185 Org, 2/17/2022, 3:05 AM

Source
Salesforce

External Source Id

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 such as:
  - When Scheduled Payments are made and resulting transactions generated.
  - When Deferred Income is auto transferred to Recognized Income.
  - When Inter-Entity transactions are generated.

Manual – Staff created by clicking on New Batch button and entering details – used very infrequently and usually to move outstanding carts from an unhealthy batch.

- Physically Created by Users by going to Batches and creating New.
- Used to collect orders by specific bank deposits or some other related grouping.

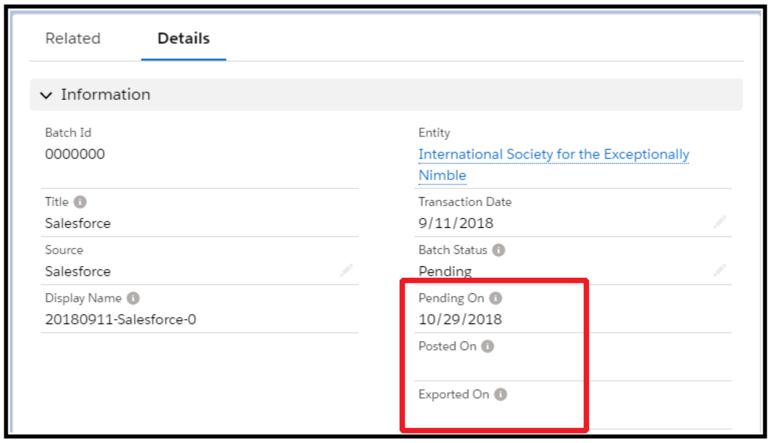
Automatic Batch Updates

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.



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

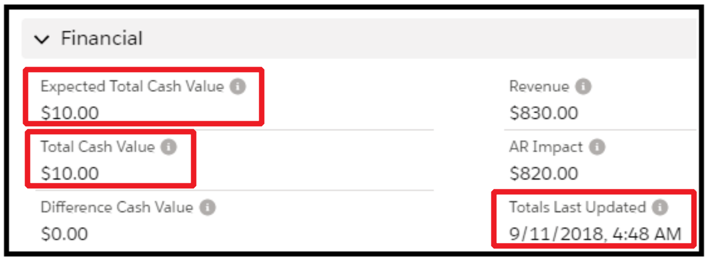
Exported On

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.



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

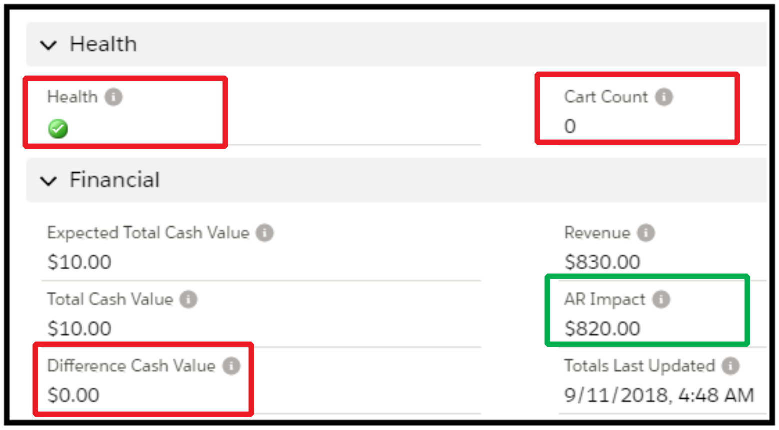
Batch Health

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.



Health

Health ✓

Cart Count 0

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

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.

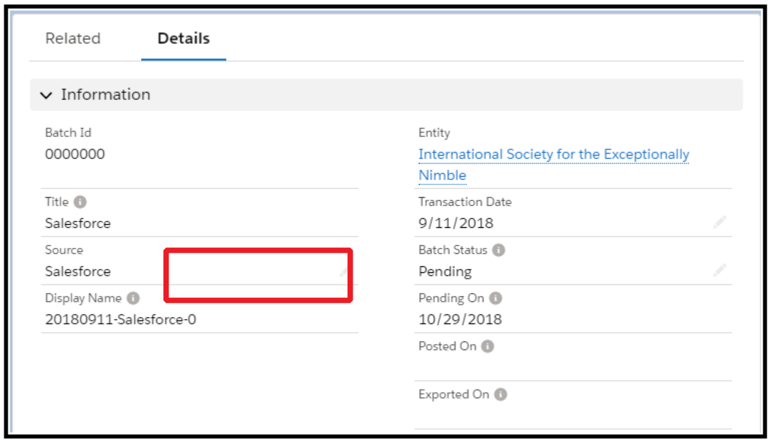
AR Impact Field found under the Financial section of the Batch record. See GREEN outlined box in previous screenshot above.

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 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

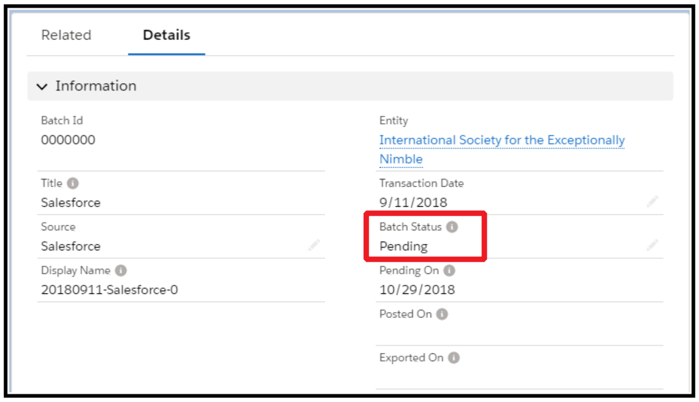
Exported On

Batch 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** or **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:** Used for two main reasons:
    - The Batch is a System generated Regular collection of transactions that capture the transfer of Deferred Income to Recognized Income. These Batches are usually generated on the first of each month to process 1/12th of that income transfer. This Batch occurs for ordered products such as Memberships or Subscriptions.
    - The Batch is a System generated Irregular collection of transactions of Deferred Income to Recognized Income. These batches are generated randomly throughout the month as they are tied to a particular date associated with the product. This Batch occurs for ordered Products such as Event Registrations, Sponsorships, and sometimes Exhibitors.
- **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 can be downloaded and imported into the user's 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.



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

Processing a Daily Batch

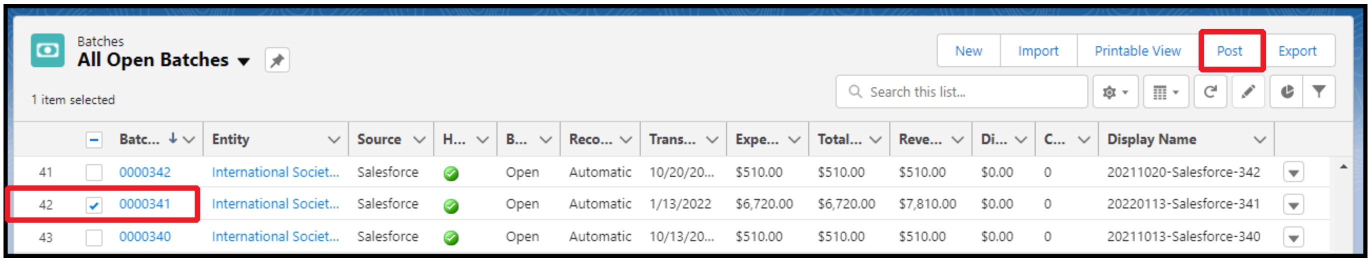
In the following exercises, users will progress a healthy batch from Open to Export to understand the entire daily processing of a normal daily batch. Four batches are available in the Training Org. IF stock processes for Nimble AMS Batching are followed, many different batches could present on a daily 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)

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** object.
3. Click on the **Recently Viewed** dropdown and select **ALL Batches**.
4. Scroll down and check the **box** next to **Batch ID 0000341**.
5. Click on the **Post** button.



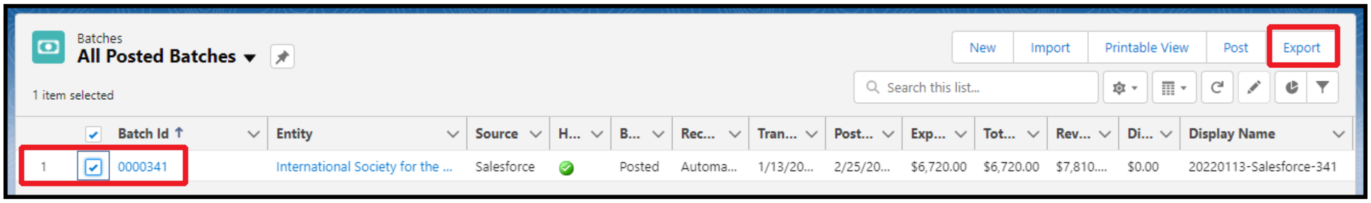
1 item selected

	☐	Batc...	Entity	Source	H...	B...	Reco...	Trans...	Expe...	Total...	Reve...	Di...	C...	Display Name
41	☐	0000342	International Societ...	Salesforce	✓	Open	Automatic	10/20/20...	$510.00	$510.00	$510.00	$0.00	0	20211020-Salesforce-342
42	☑	0000341	International Societ...	Salesforce	✓	Open	Automatic	1/13/2022	$6,720.00	$6,720.00	$7,810.00	$0.00	0	20220113-Salesforce-341
43	☐	0000340	International Societ...	Salesforce	✓	Open	Automatic	10/13/20...	$510.00	$510.00	$510.00	$0.00	0	20211013-Salesforce-340

6. Observe the **AR Impact Warning**; Click on the **Post Batch** button.
   - This warning is to indicate that one or multiple Orders are still owed Payments. For a client utilizing Accrual based Accounting, this would be normal. For Cash based accounting this message would indicate accounts are out of balance.
7. Click **[close]** button at the **Success** message.

EXPORTING A BATCH

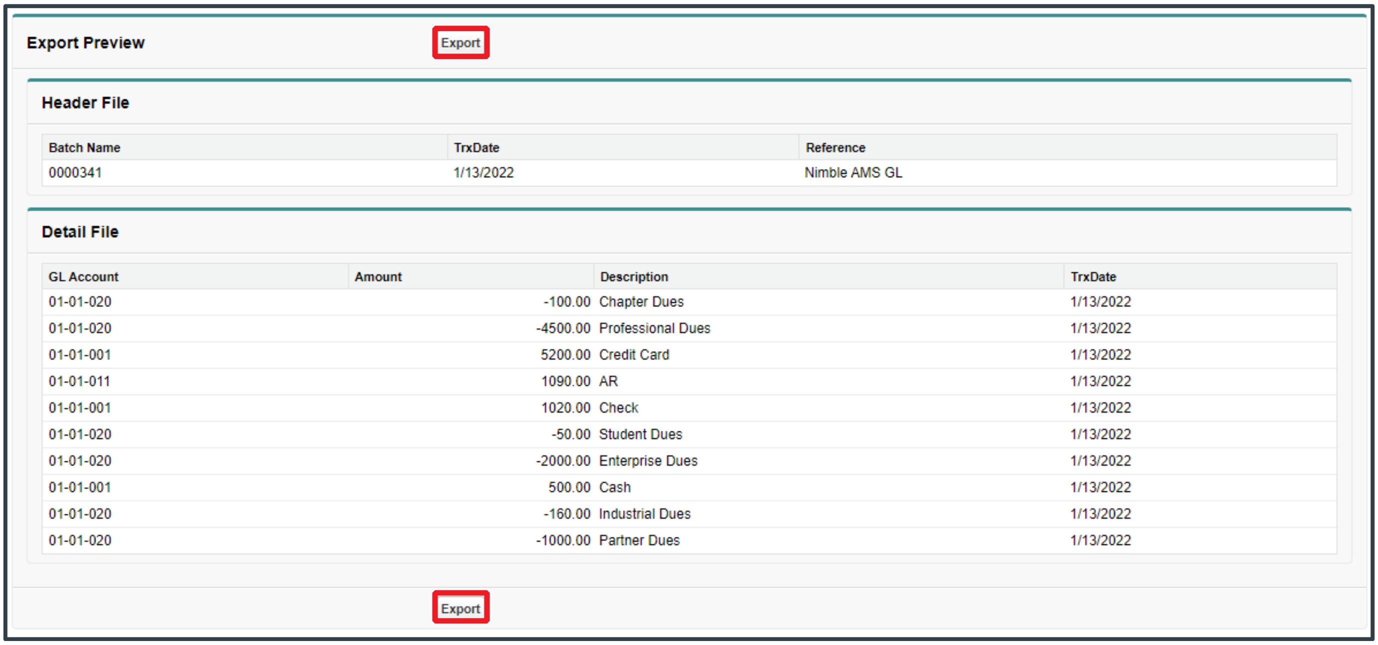
1. Click on the **Recently Viewed** dropdown and select **All Posted Batches**.
2. Check the **box** next to **Batch ID 0000341**.
3. Click on the **Export** button.



	☑	Batch Id	Entity	Source	H...	B...	Rec...	Tran...	Post...	Exp...	Tot...	Rev...	Di...	Display Name
1	☑	0000341	International Society for the ...	Salesforce	✓	Posted	Automa...	1/13/20...	2/25/20...	$6,720.00	$6,720.00	$7,810....	$0.00	20220113-Salesforce-341

- The **Export Preview** displays - Each **Transaction** is listed under the **Detail File** section.

8. Click on the **Export** button.



Header File

Batch Name	TrxDate	Reference
0000341	1/13/2022	Nimble AMS GL

Detail File

GL Account	Amount	Description	TrxDate
01-01-020	-100.00	Chapter Dues	1/13/2022
01-01-020	-4500.00	Professional Dues	1/13/2022
01-01-001	5200.00	Credit Card	1/13/2022
01-01-011	1090.00	AR	1/13/2022
01-01-001	1020.00	Check	1/13/2022
01-01-020	-50.00	Student Dues	1/13/2022
01-01-020	-2000.00	Enterprise Dues	1/13/2022
01-01-001	500.00	Cash	1/13/2022
01-01-020	-160.00	Industrial Dues	1/13/2022
01-01-020	-1000.00	Partner Dues	1/13/2022

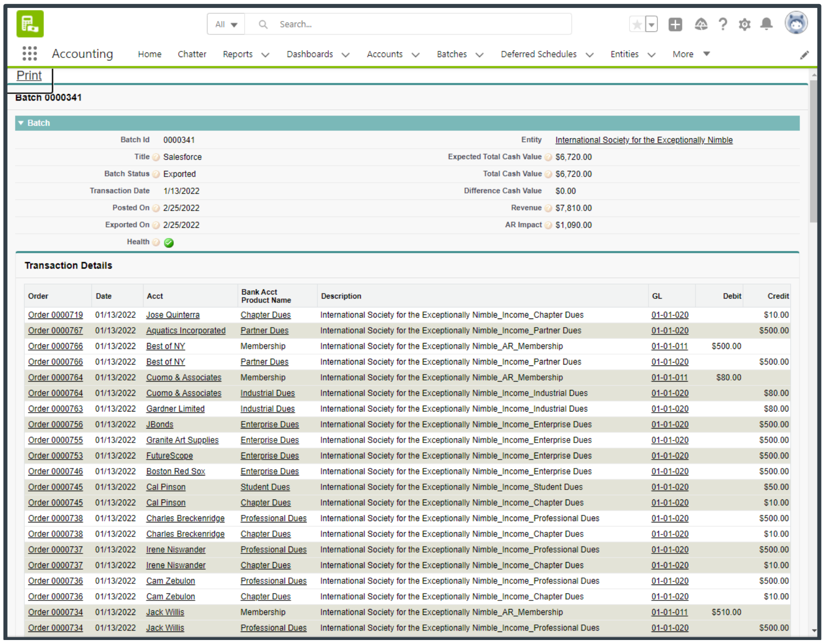
9. On the **Export warning** pop-up, click **OK**.
10. Observe the **Success** Message.
11. In a client configured system, the last step would be to access the exported file from a pre-determined shared drive/folder location, and import it to the accounting system of record.

Batch Summary Report

When a Batch is in ANY State: Open, Pending, Posted, or Exported, users can run the Batch Summary Report to review a comprehensive treatment of all aspects of the Batch.

Running the Batch Summary Report:

1. Click on the **Recently Viewed** dropdown and select **All Posted Batches**.
2. Click on the link for **Batch ID 0000341**.
3. Click on the dropdown in the upper right hand corner next to the **Post** button.
4. Select **View Report**.
5. The **Batch Summary Report** Displays.
   - Users can scroll down to view:
     - Transaction Details
     - Payment Details
     - Sales / Income Details
     - AR Details
     - GL Account Summary



Batch 0000341

Batch

Batch Id: 0000341
Title: Salesforce
Batch Status: Exported
Transaction Date: 1/13/2022
Posted On: 2/25/2022
Exported On: 2/25/2022
Health: ✓
Entity: International Society for the Exceptionally Nimble
Expected Total Cash Value: $6,720.00
Total Cash Value: $6,720.00
Difference Cash Value: $0.00
Revenue: $7,810.00
AR Impact: $1,090.00

Transaction Details

Order	Date	Acct	Bank Acct Product Name	Description	GL	Debit	Credit
Order 0000719	01/13/2022	Jose Quinterra	Chapter Dues	International Society for the Exceptionally Nimble_Income_Chapter Dues	01-01-020		$10.00
Order 0000767	01/13/2022	Aquatics Incorporated	Partner Dues	International Society for the Exceptionally Nimble_Income_Partner Dues	01-01-020		$500.00
Order 0000766	01/13/2022	Best of NY	Membership	International Society for the Exceptionally Nimble_AR_Membership	01-01-011	$500.00	
Order 0000766	01/13/2022	Best of NY	Partner Dues	International Society for the Exceptionally Nimble_Income_Partner Dues	01-01-020		$500.00
Order 0000764	01/13/2022	Cuomo & Associates	Membership	International Society for the Exceptionally Nimble_AR_Membership	01-01-011	$80.00	
Order 0000764	01/13/2022	Cuomo & Associates	Industrial Dues	International Society for the Exceptionally Nimble_Income_Industrial Dues	01-01-020		$80.00
Order 0000763	01/13/2022	Gardner Limited	Industrial Dues	International Society for the Exceptionally Nimble_Income_Industrial Dues	01-01-020		$80.00
Order 0000756	01/13/2022	JBonds	Enterprise Dues	International Society for the Exceptionally Nimble_Income_Enterprise Dues	01-01-020		$500.00
Order 0000755	01/13/2022	Granite Art Supplies	Enterprise Dues	International Society for the Exceptionally Nimble_Income_Enterprise Dues	01-01-020		$500.00
Order 0000753	01/13/2022	FutureScope	Enterprise Dues	International Society for the Exceptionally Nimble_Income_Enterprise Dues	01-01-020		$500.00
Order 0000746	01/13/2022	Boston Red Sox	Enterprise Dues	International Society for the Exceptionally Nimble_Income_Enterprise Dues	01-01-020		$500.00
Order 0000745	01/13/2022	Cal Pinson	Student Dues	International Society for the Exceptionally Nimble_Income_Student Dues	01-01-020		$50.00
Order 0000745	01/13/2022	Cal Pinson	Chapter Dues	International Society for the Exceptionally Nimble_Income_Chapter Dues	01-01-020		$10.00
Order 0000738	01/13/2022	Charles Breckenridge	Professional Dues	International Society for the Exceptionally Nimble_Income_Professional Dues	01-01-020		$500.00
Order 0000738	01/13/2022	Charles Breckenridge	Chapter Dues	International Society for the Exceptionally Nimble_Income_Chapter Dues	01-01-020		$10.00
Order 0000737	01/13/2022	Irene Niswander	Professional Dues	International Society for the Exceptionally Nimble_Income_Professional Dues	01-01-020		$500.00
Order 0000737	01/13/2022	Irene Niswander	Chapter Dues	International Society for the Exceptionally Nimble_Income_Chapter Dues	01-01-020		$10.00
Order 0000736	01/13/2022	Cam Zebulon	Professional Dues	International Society for the Exceptionally Nimble_Income_Professional Dues	01-01-020		$500.00
Order 0000736	01/13/2022	Cam Zebulon	Chapter Dues	International Society for the Exceptionally Nimble_Income_Chapter Dues	01-01-020		$10.00
Order 0000734	01/13/2022	Jack Willis	Membership	International Society for the Exceptionally Nimble_AR_Membership	01-01-011	$510.00	
Order 0000734	01/13/2022	Jack Willis	Professional Dues	International Society for the Exceptionally Nimble_Income_Professional Dues	01-01-020		$500.00

Accounting Reports

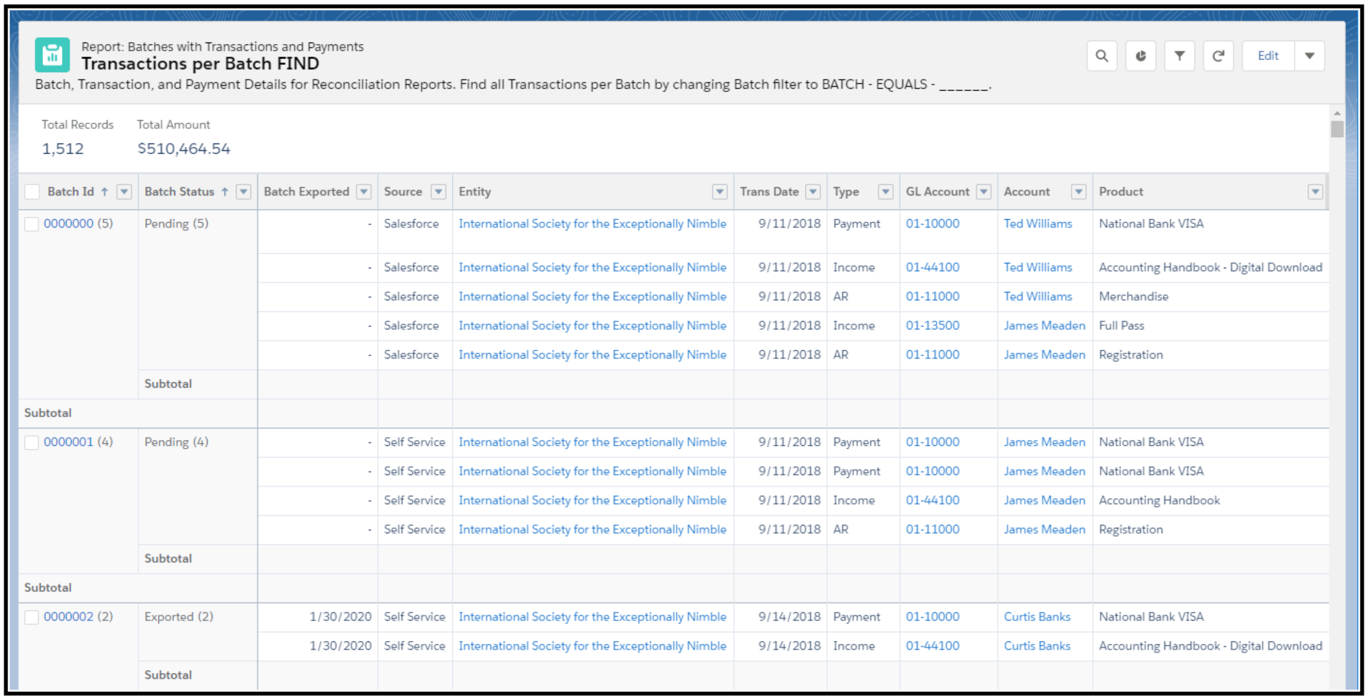
Nimble AMS includes a variety of standard reports that can assist an association with its accounting reconciliation requirements. These reports can also serve as great templates to meet the specific reconciliation needs or focus of an association. Here are a variety of standard Nimble AMS reports that 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



Report: Batches with Transactions and Payments

Transactions per Batch FIND

Batch, Transaction, and Payment Details for Reconciliation Reports. Find all Transactions per Batch by changing Batch filter to BATCH - EQUALS - ______.

Total Records 1,512

Total Amount $510,464.54

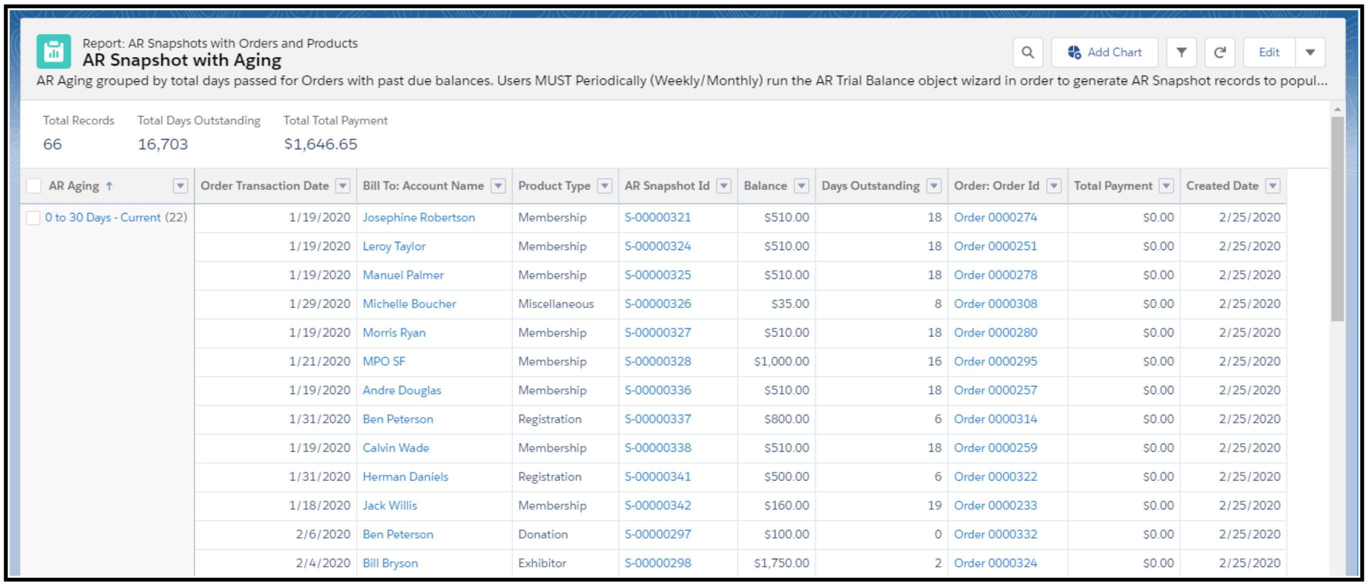
Batch Id ↑	Batch Status ↑	Batch Exported	Source	Entity	Trans Date	Type	GL Account	Account	Product
☐ 0000000 (5)	Pending (5)	-	Salesforce	International Society for the Exceptionally Nimble	9/11/2018	Payment	01-10000	Ted Williams	National Bank VISA
		-	Salesforce	International Society for the Exceptionally 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								

- 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

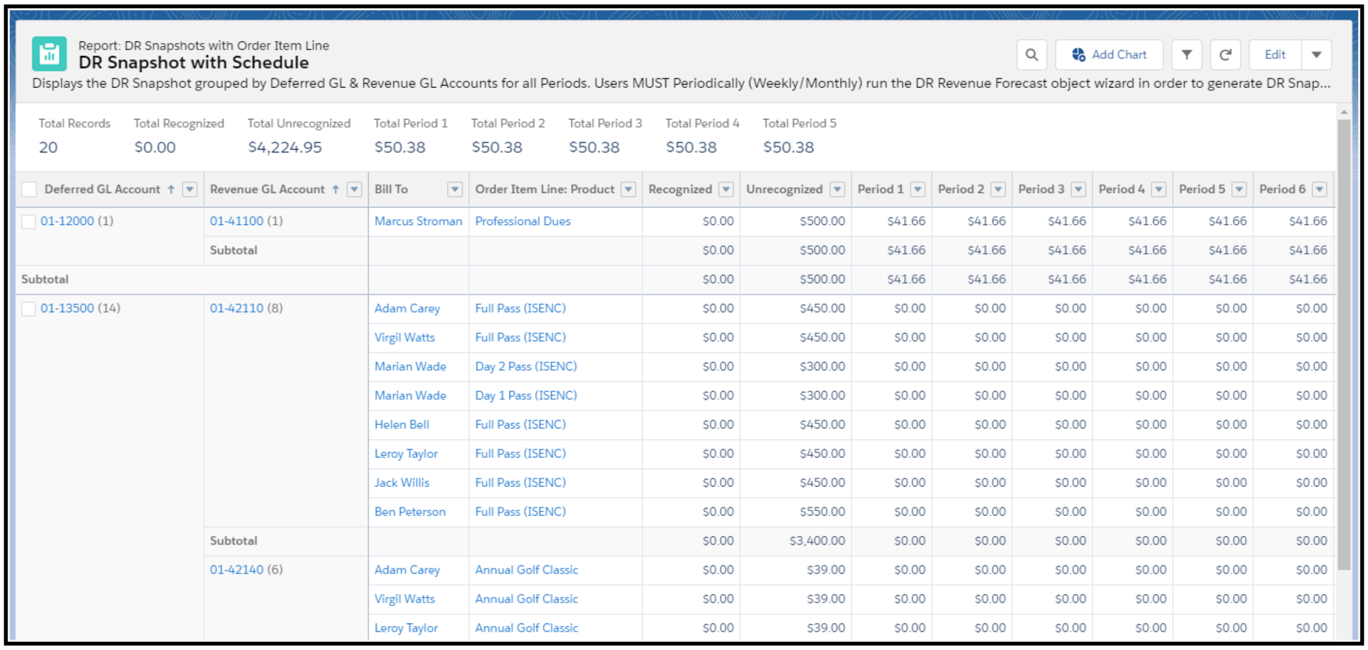
AR Aging ↑	Order Transaction Date	Bill To: Account Name	Product Type	AR Snapshot Id	Balance	Days Outstanding	Order: Order Id	Total Payment	Created Date
☐ 0 to 30 Days - Current (22)	1/19/2020	Josephine Robertson	Membership	S-00000321	$510.00	18	Order 0000274	$0.00	2/25/2020
	1/19/2020	Leroy Taylor	Membership	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



Report: DR Snapshots with Order Item Line

DR Snapshot with Schedule

Displays the DR Snapshot grouped by Deferred GL & Revenue GL Accounts for all Periods. Users MUST Periodically (Weekly/Monthly) run the DR Revenue Forecast object wizard in order to generate DR Snap...

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

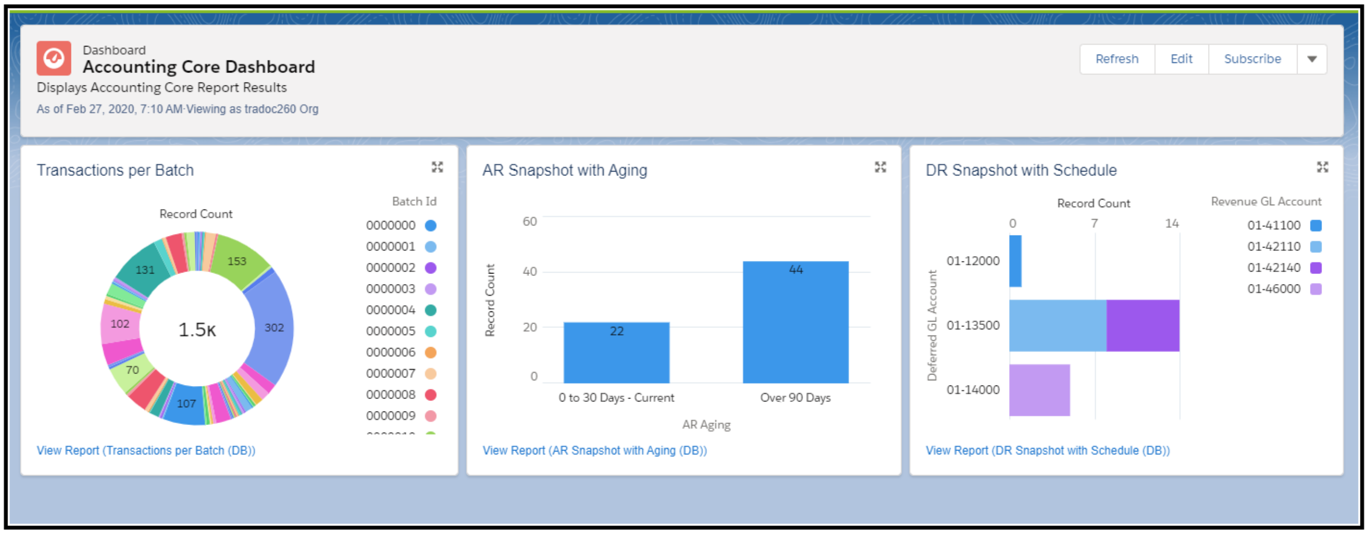
☐ Deferred GL Account ↑	Revenue GL Account ↑	Bill To	Order Item Line: Product	Recognized	Unrecognized	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6
☐ 01-12000 (1)	01-41100 (1)	Marcus Stroman	Professional Dues	$0.00	$500.00	$41.66	$41.66	$41.66	$41.66	$41.66	$41.66
	Subtotal			$0.00	$500.00	$41.66	$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**.

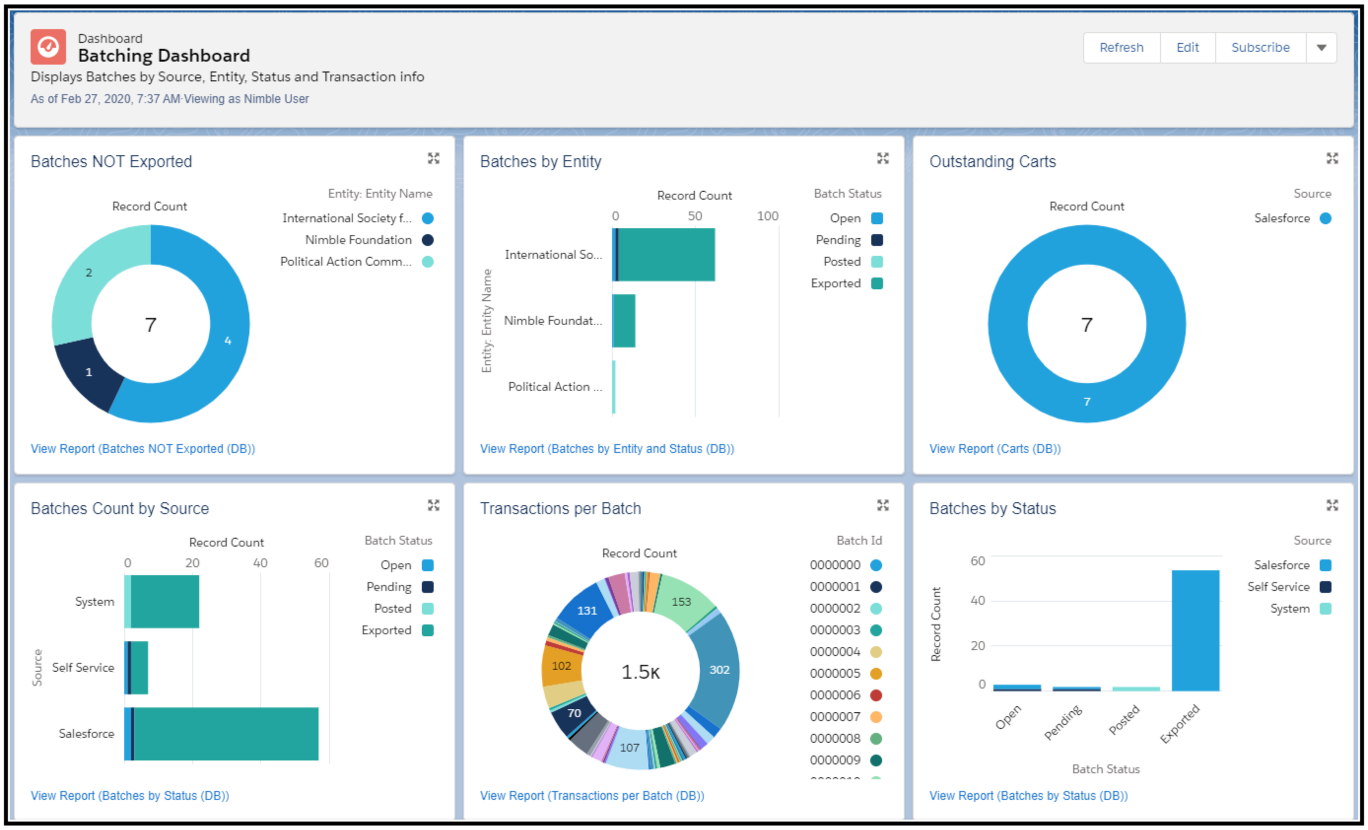

Dashboard
Accounting Core Dashboard
Refresh
Edit
Subscribe
Transactions per Batch
Record Count
Batch Id
1.5K
153
302
107
70
102
131
0000000
0000001
0000002
0000003
0000004
0000005
0000006
0000007
0000008
0000009
View Report (Transactions per Batch (DB))
AR Snapshot with Aging
Record Count
60
40
20
0
22
44
0 to 30 Days - Current
Over 90 Days
AR Aging
View Report (AR Snapshot with Aging (DB))
DR Snapshot with Schedule
Record Count
0
7
14
Deferred GL Account
01-12000
01-13500
01-14000
Revenue GL Account
01-41100
01-42110
01-42140
01-46000
View Report (DR Snapshot with Schedule (DB))

Displays Accounting Core Report Results

As of Feb 27, 2020, 7:10 AM·Viewing as tradoc260 Org

To display the **Batching Dashboard**:

1. Click the **Dashboards** Item.
2. Click the **Dashboards (Nimble AMS)** folder.
3. Click on the **Accounting Core Dashboard**.

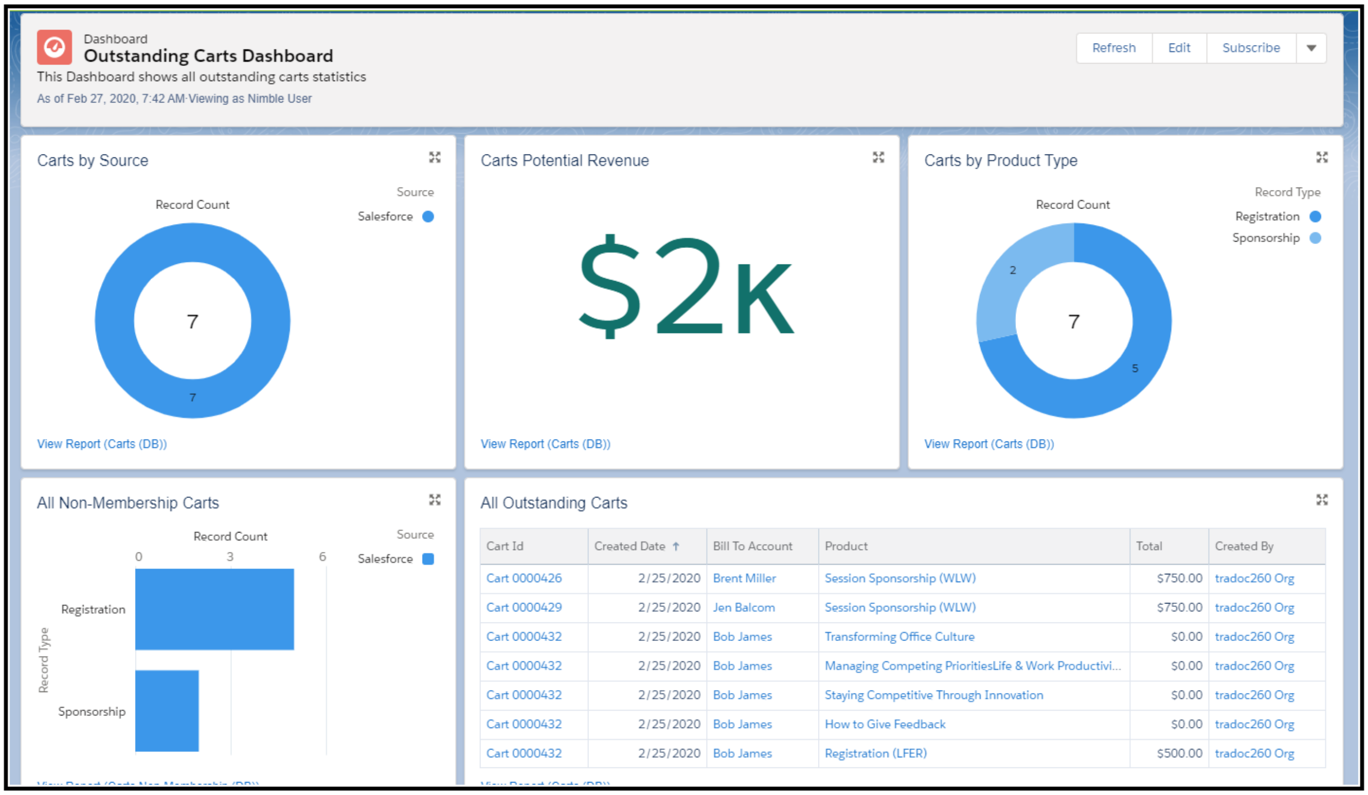


Dashboard
Batching Dashboard
Displays Batches by Source, Entity, Status and Transaction info
As of Feb 27, 2020, 7:37 AM·Viewing as Nimble User

Refresh
Edit
Subscribe
Batches NOT Exported
Record Count
Entity: Entity Name
International Society f...
Nimble Foundation
Political Action Comm...
7
2
1
4
View Report (Batches NOT Exported (DB))
Batches by Entity
Record Count
0
50
100
Batch Status
Open
Pending
Posted
Exported
Entity: Entity Name
International So...
Nimble Foundat...
Political Action ...
View Report (Batches by Entity and Status (DB))
Outstanding Carts
Record Count
Source
Salesforce
7
7
View Report (Carts (DB))
Batches Count by Source
Record Count
0
20
40
60
Batch Status
Open
Pending
Posted
Exported
Source
System
Self Service
Salesforce
View Report (Batches by Status (DB))
Transactions per Batch
Record Count
Batch Id
0000000
0000001
0000002
0000003
0000004
0000005
0000006
0000007
0000008
0000009
1.5K
131
153
102
302
70
107
View Report (Transactions per Batch (DB))
Batches by Status
Source
Salesforce
Self Service
System
Record Count
60
40
20
0
Open
Pending
Posted
Exported
Batch Status
View Report (Batches by Status (DB))

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**.


Refresh
Edit
Subscribe
Carts by Source
Source
Salesforce
Record Count
7
7
View Report (Carts (DB))
Carts Potential Revenue
$2K
View Report (Carts (DB))
Carts by Product Type
Record Type
Registration
Sponsorship
Record Count
2
7
5
View Report (Carts (DB))
All Non-Membership Carts
Record Count
0
3
6
Source
Salesforce
Record Type
Registration
Sponsorship
All Outstanding Carts

Dashboard
Outstanding Carts Dashboard
This Dashboard shows all outstanding carts statistics
As of Feb 27, 2020, 7:42 AM·Viewing as Nimble User

Cart Id	Created Date ↑	Bill To Account	Product	Total	Created By
Cart 0000426	2/25/2020	Brent Miller	Session Sponsorship (WLW)	$750.00	tradoc260 Org
Cart 0000429	2/25/2020	Jen Balcom	Session Sponsorship (WLW)	$750.00	tradoc260 Org
Cart 0000432	2/25/2020	Bob James	Transforming Office Culture	$0.00	tradoc260 Org
Cart 0000432	2/25/2020	Bob James	Managing Competing PrioritiesLife & Work Productivi...	$0.00	tradoc260 Org
Cart 0000432	2/25/2020	Bob James	Staying Competitive Through Innovation	$0.00	tradoc260 Org
Cart 0000432	2/25/2020	Bob James	How to Give Feedback	$0.00	tradoc260 Org
Cart 0000432	2/25/2020	Bob James	Registration (LFER)	$500.00	tradoc260 Org

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:

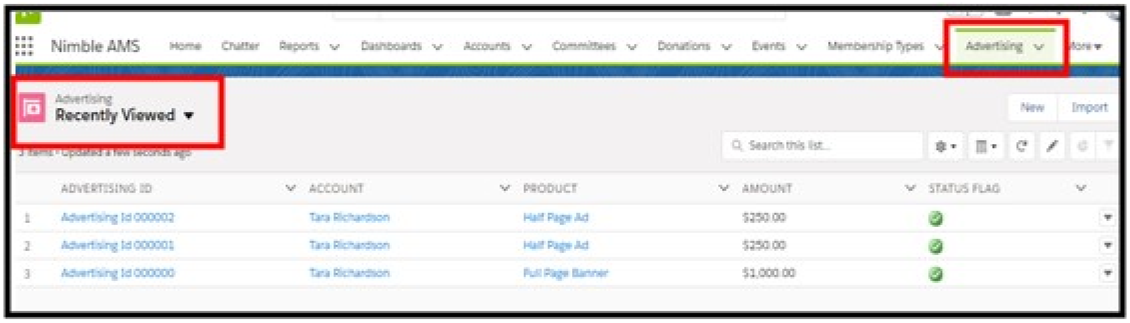
- Understand Advertising Object in Nimble AMS
- View Advertising record
- Order an Advertising record
- View Advertising reports & dashboards

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.


Nimble AMS
Home
Chatter
Reports
Dashboards
Accounts
Committees
Donations
Events
Membership Types
Advertising
More
Advertising
Recently Viewed
New
Import
Search this list...

3 items • Updated a few seconds ago

	ADVERTISING ID	ACCOUNT	PRODUCT	AMOUNT	STATUS FLAG
1	Advertising Id 000002	Tara Richardson	Half Page Ad	$250.00	✓
2	Advertising Id 000001	Tara Richardson	Half Page Ad	$250.00	✓
3	Advertising Id 000000	Tara Richardson	Full Page Banner	$1,000.00	✓

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

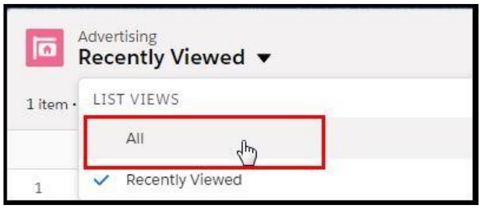
In Nimble AMS Advertising, revenue is generated, based on the configuration and subsequent location of Advertising in the targeted subscription product; magazine, journal, placard, billboard, etc. For example: to advertise on a Magazine, members purchase from the available/ linked products like inside 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.

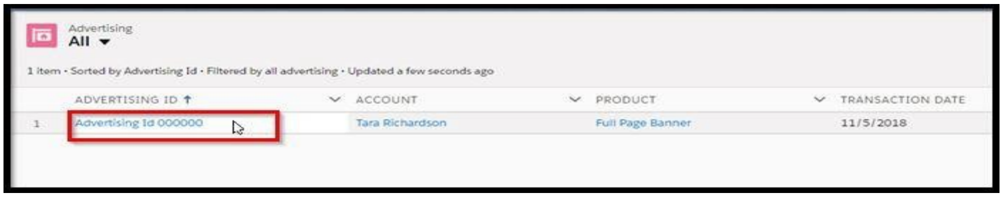
Advertising Record

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.**



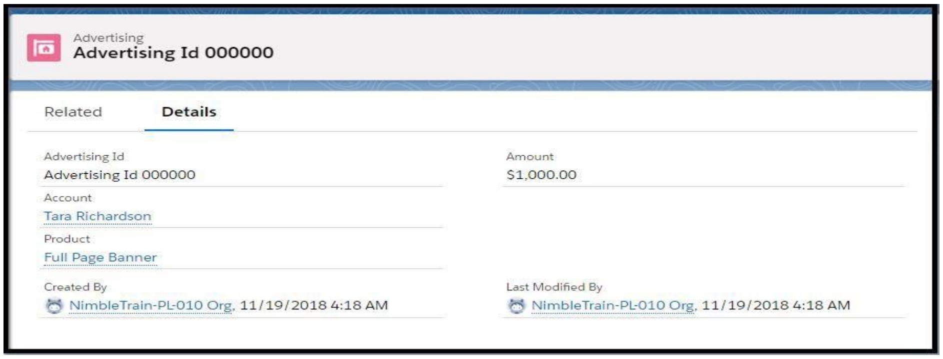
4. Click **Advertising ID 000000** in the list of **Advertising**.



1 item • Sorted by Advertising Id • Filtered by all advertising • Updated a few seconds ago

	ADVERTISING ID ↑	ACCOUNT	PRODUCT	TRANSACTION DATE
1	Advertising Id 000000	Tara Richardson	Full Page Banner	11/5/2018

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 Id
Advertising Id 000000

Amount
$1,000.00

Account
Tara Richardson

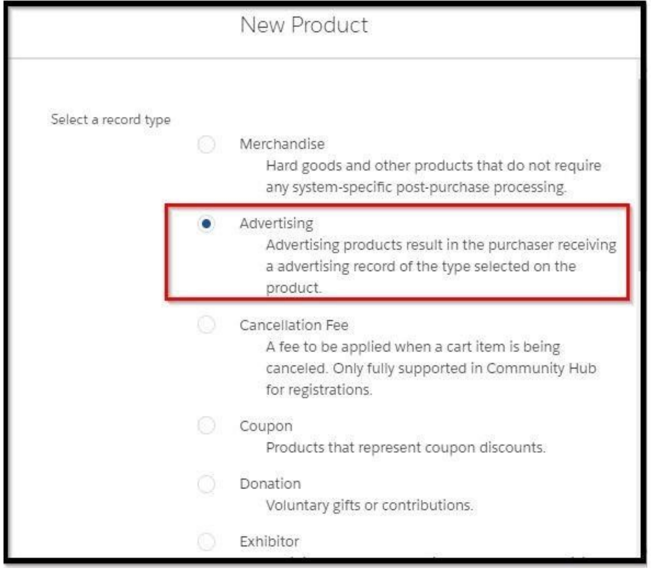
Product
Full Page Banner

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

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.



New Product

Select a record type

○ Merchandise
Hard goods and other products that do not require any system-specific post-purchase processing.

● Advertising
Advertising products result in the purchaser receiving a advertising record of the type selected on the product.

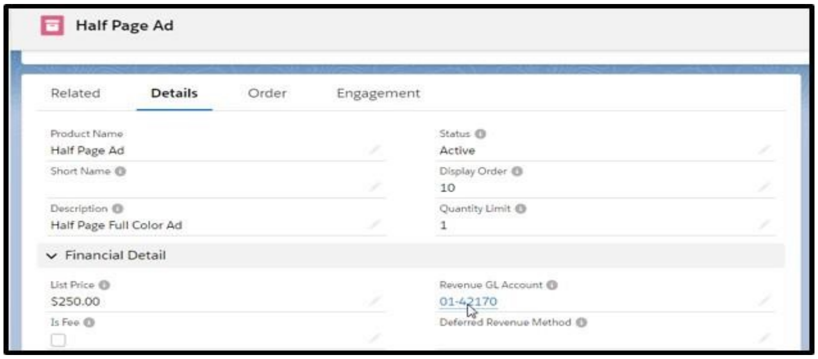
○ Cancellation Fee
A fee to be applied when a cart item is being canceled. Only fully supported in Community Hub for registrations.

○ Coupon
Products that represent coupon discounts.

○ Donation
Voluntary gifts or contributions.

○ Exhibitor

IMPORTANT NOTE: Observe an existing Advertising product **Half Page Ad**. Advertising type record stores information like **Product and Financial details**.



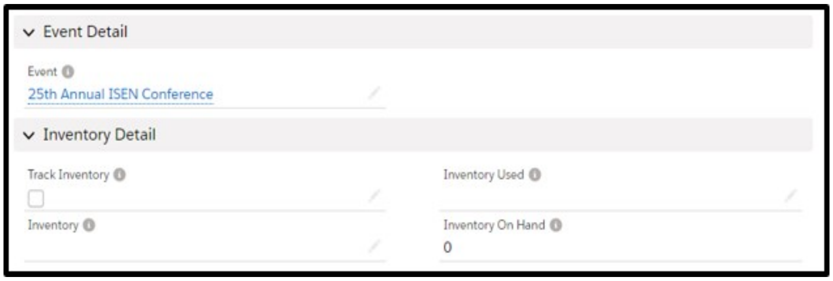
Half Page Ad

Product Name: Half Page Ad
Status: Active
Short Name:
Display Order: 10
Description: Half Page Full Color Ad
Quantity Limit: 1

Financial Detail

List Price: $250.00
Revenue GL Account: 01-42170
Is Fee: ☐
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**.



Event Detail

Event: 25th Annual ISEN Conference

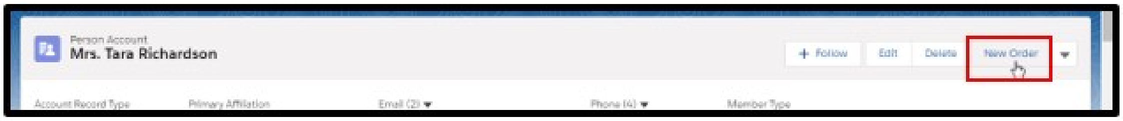
Inventory Detail

Track Inventory: ☐
Inventory Used:
Inventory:
Inventory On Hand: 0

Ordering an Advertising Product

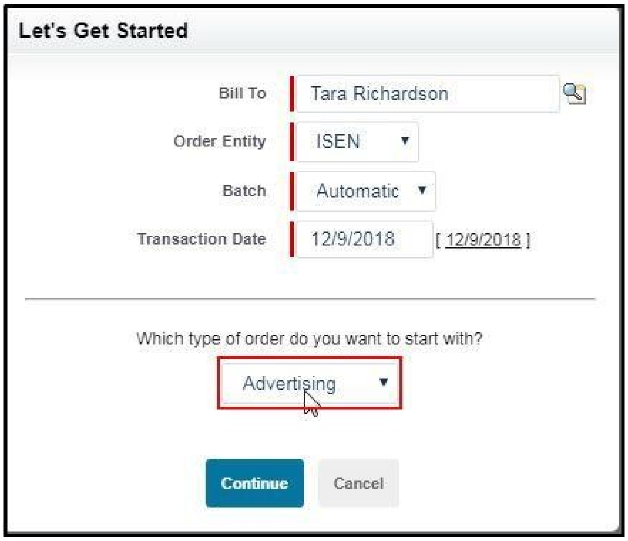
In this section, users will learn how to order an Advertising Product.

1. In the **Search box**, enter and select **Tara Richardson**.
2. Click the **New Order** button from the upper right corner.



Person Account
Mrs. Tara Richardson
+ Follow
Edit
Delete
New Order
Account Record Type
Primary Affiliation
Email (2)
Phone (4)
Member Type

3. Select **Advertising** for the **Which Type of order do you want to start with?** field drop-down



Let's Get Started

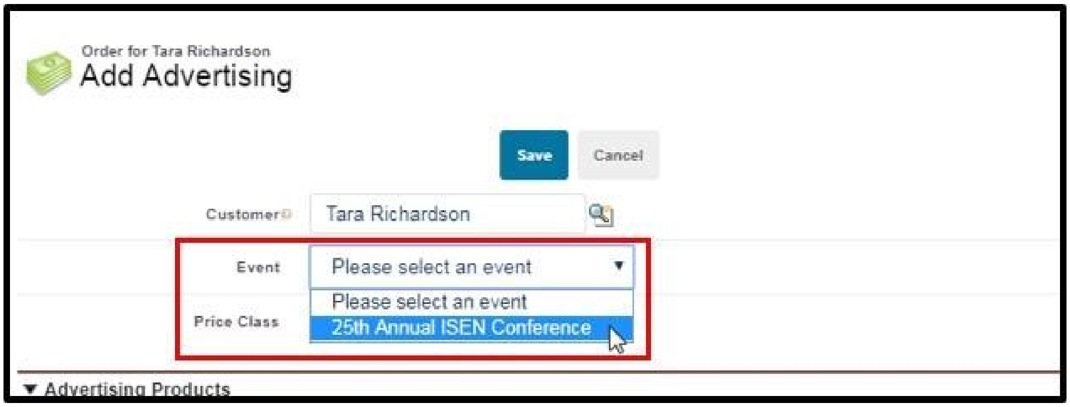
Bill To: Tara Richardson
Order Entity: ISEN
Batch: Automatic
Transaction Date: 12/9/2018 [12/9/2018]

Which type of order do you want to start with?
Advertising

Continue
Cancel

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.



Order for Tara Richardson

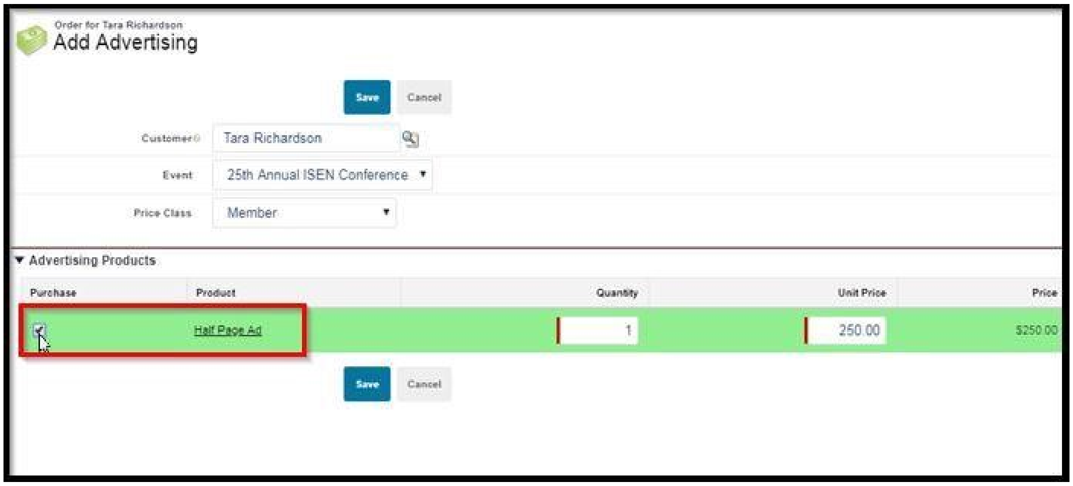
Add Advertising

Customer: Tara Richardson

Event: Please select an event

Save
Cancel
Please select an event
25th Annual ISEN Conference
Price Class
Advertising Products

6. Check the box for **the Half Page Ad**.



Order for Tara Richardson

Add Advertising

Customer: Tara Richardson

Event: 25th Annual ISEN Conference

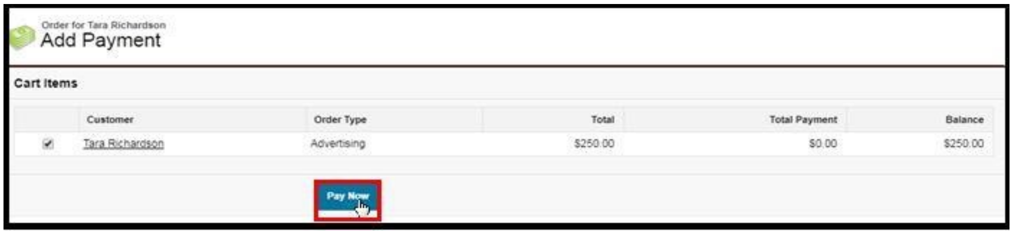
Price Class: Member

Advertising Products

Purchase	Product	Quantity	Unit Price	Price
☑	Half Page Ad	1	250.00	$250.00

Save
Cancel

7. Click **Save**.
8. Click on **Go to Payment** button (lower right).
9. **Review** the order.
10. Click **Pay Now**.



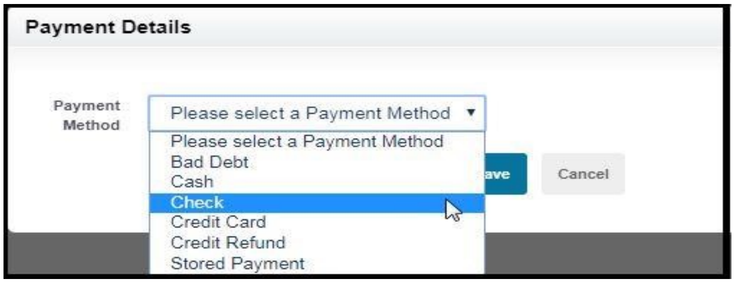
Order for Tara Richardson

Add Payment

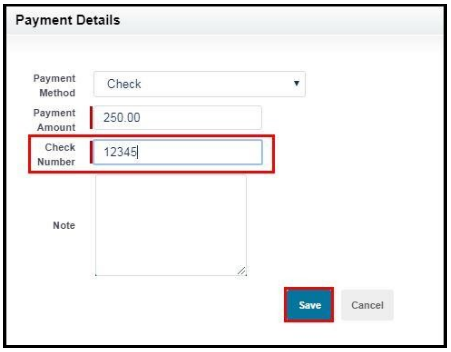
Cart Items

	Customer	Order Type	Total	Total Payment	Balance
☑	Tara Richardson	Advertising	$250.00	$0.00	$250.00

11. Select **Check** from **Payment Method** drop down.


Payment Details
Payment Method
Please select a Payment Method
Please select a Payment Method
Bad Debt
Cash
Check
Credit Card
Credit Refund
Stored Payment
ave
Cancel

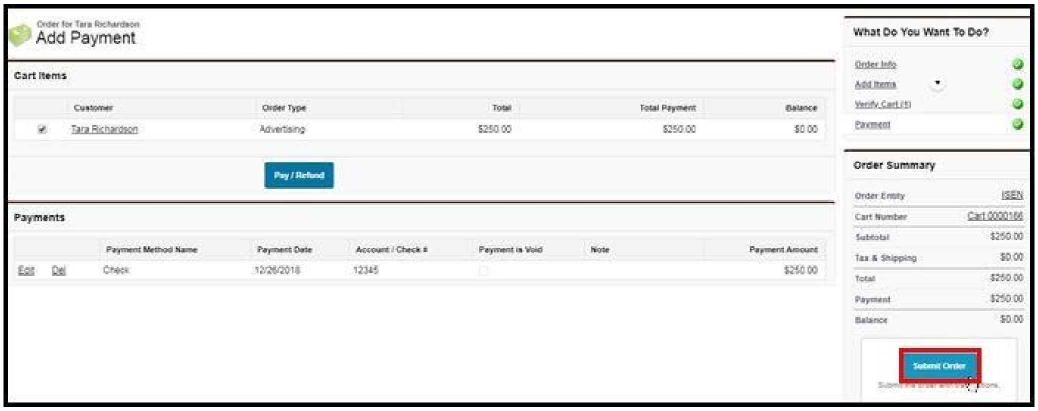
12. Enter **12345** in the Check Number field.


Payment Details

Payment Method: Check
Payment Amount: 250.00
Check Number: 12345
Note:

Save
Cancel

13. Click **Save** and then on **Submit Order** button (lower right)


Order for Tara Richardson

Add Payment

Cart Items

	Customer	Order Type	Total	Total Payment	Balance
☑	Tara Richardson	Advertising	$250.00	$250.00	$0.00

Payments

		Payment Method Name	Payment Date	Account / Check #	Payment is Void	Note	Payment Amount
Edit	Del	Check	12/26/2018	12345	☐		$250.00

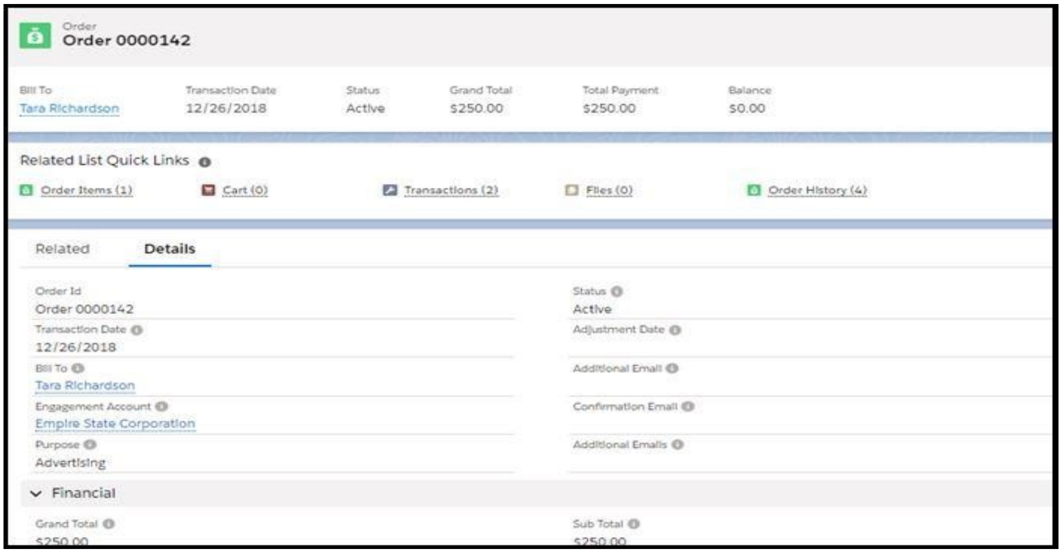
Order Summary

Order Entity	ISEN
Cart Number	Cart 0000166
Subtotal	$250.00
Tax & Shipping	$0.00
Total	$250.00
Payment	$250.00
Balance	$0.00

Pay / Refund
What Do You Want To Do?
Order Info
Add Items
Verify Cart (1)
Payment
Submit Order

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.


Related List Quick Links
Order Items (1)
Cart (0)
Transactions (2)
Files (0)
Order History (4)
Related
Details
Financial

Order
Order 0000142

Bill To	Transaction Date	Status	Grand Total	Total Payment	Balance
Tara Richardson	12/26/2018	Active	$250.00	$250.00	$0.00

Order Id: Order 0000142
Status: Active
Transaction Date: 12/26/2018
Adjustment Date:
Bill To: Tara Richardson
Additional Email:
Engagement Account: Empire State Corporation
Confirmation Email:
Purpose: Advertising
Additional Emails:

Financial
Grand Total: $250.00
Sub Total: $250.00

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.

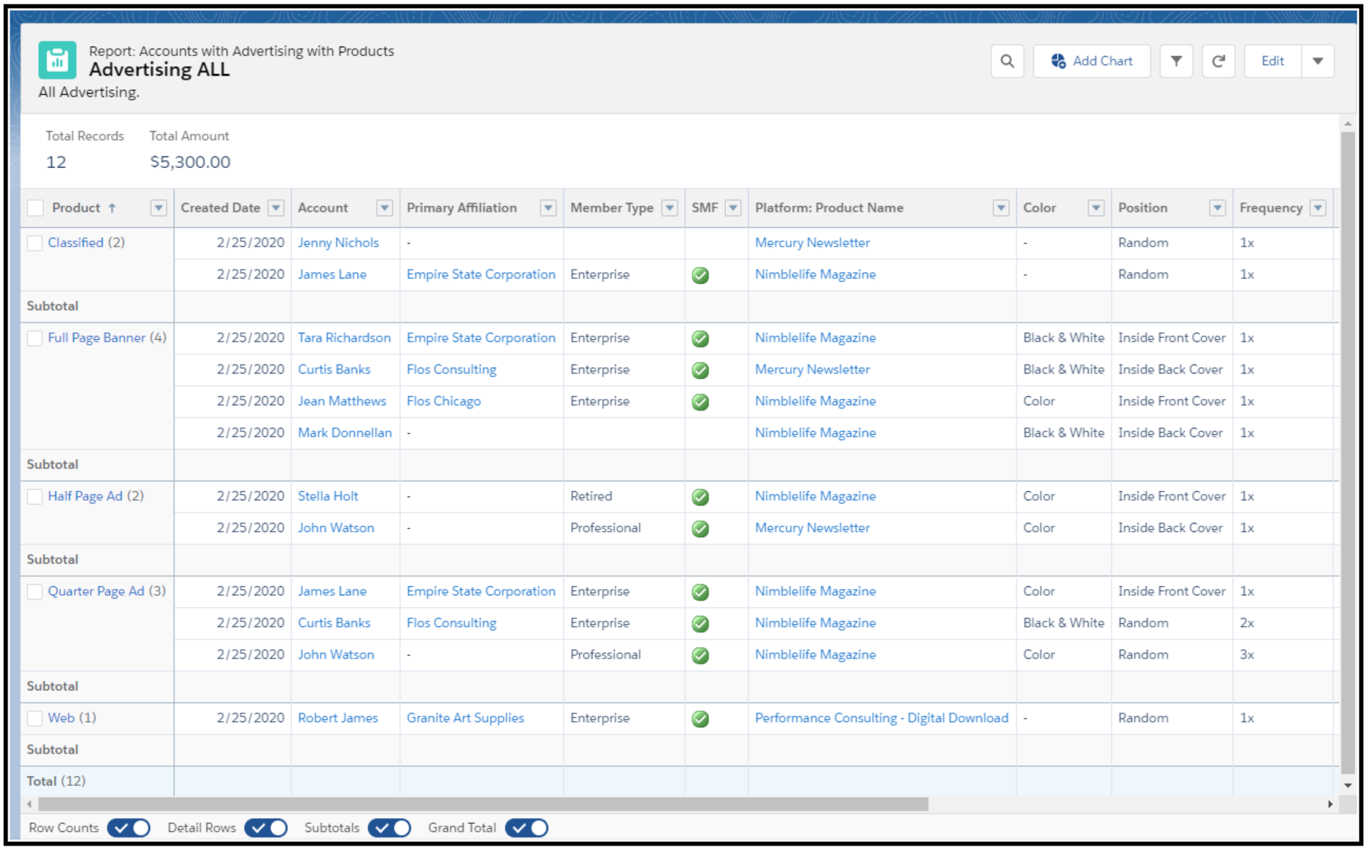
1. Click the **Advertising** Item.
2. From the **Available List Views,** select the **Find Advertising** list view.
3. If needed, sort by the latest **Transaction Date**.
4. Select **Tara Richardson's** Advertising record created in the previous exercise.
5. Click on the pencil icon to the right of each 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

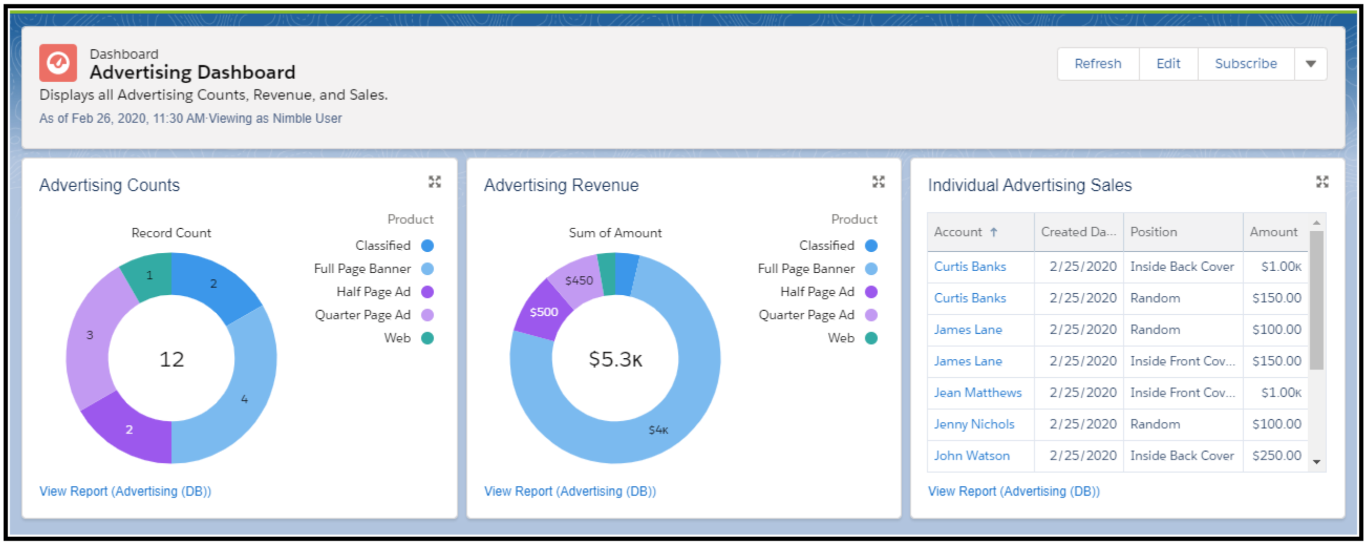
☐ Product ↑	Created Date	Account	Primary Affiliation	Member Type	SMF	Platform: Product Name	Color	Position	Frequency
☐ Classified (2)	2/25/2020	Jenny Nichols	-			Mercury Newsletter	-	Random	1x
	2/25/2020	James Lane	Empire State Corporation	Enterprise	✓	Nimblelife Magazine	-	Random	1x
Subtotal									
☐ 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.


Refresh
Edit
Subscribe
Advertising Counts
Record Count
Product
Classified
Full Page Banner
Half Page Ad
Quarter Page Ad
Web
12
1
2
3
4
2
Advertising Revenue
Sum of Amount
Product
Classified
Full Page Banner
Half Page Ad
Quarter Page Ad
Web
$5.3K
$450
$500
$4K

Dashboard
Advertising Dashboard
Displays all Advertising Counts, Revenue, and Sales.
As of Feb 26, 2020, 11:30 AM·Viewing as Nimble User

Advertising Counts

View Report (Advertising (DB))

Advertising Revenue

View Report (Advertising (DB))

Individual Advertising Sales

Account ↑	Created Da...	Position	Amount
Curtis Banks	2/25/2020	Inside Back Cover	$1.00K
Curtis Banks	2/25/2020	Random	$150.00
James Lane	2/25/2020	Random	$100.00
James Lane	2/25/2020	Inside Front Cov...	$150.00
Jean Matthews	2/25/2020	Inside Front Cov...	$1.00K
Jenny Nichols	2/25/2020	Random	$100.00
John Watson	2/25/2020	Inside Back Cover	$250.00

View Report (Advertising (DB))

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:

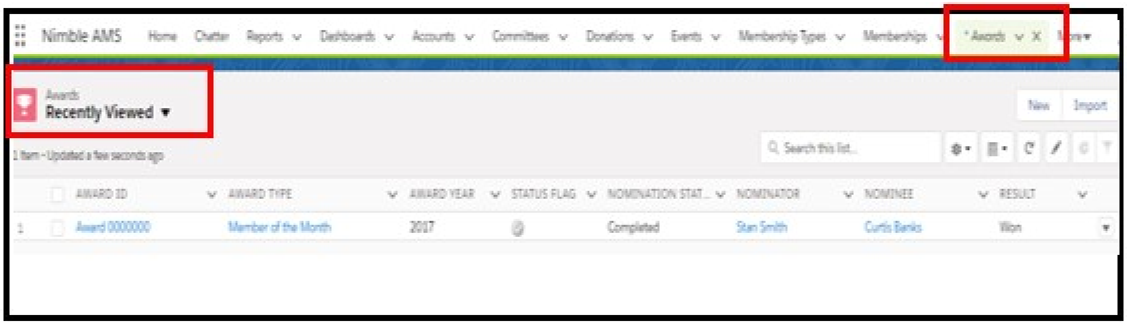
- Understanding and managing Awards Item
- Editing, viewing, finding Awards Record
- Awards Reports and Dashboards

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.


Nimble AMS
Home
Chatter
Reports
Dashboards
Accounts
Committees
Donations
Events
Membership Types
Memberships
* Awards
More
Awards
Recently Viewed
New
Import
Search this list...

1 Item • Updated a few seconds ago

	AWARD ID	AWARD TYPE	AWARD YEAR	STATUS FLAG	NOMINATION STAT...	NOMINATOR	NOMINEE	RESULT
1	Award 0000000	Member of the Month	2017		Completed	Stan Smith	Curtis Banks	Won

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.

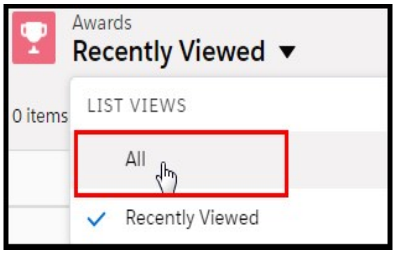
On locating the Awards views folder, users can select the Awards record to review information that is stored, or edit, update details as necessary. In the Awards record, users can manage nominations and results field data. Nimble AMS captures the record information and displays in reports and dashboards.

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.

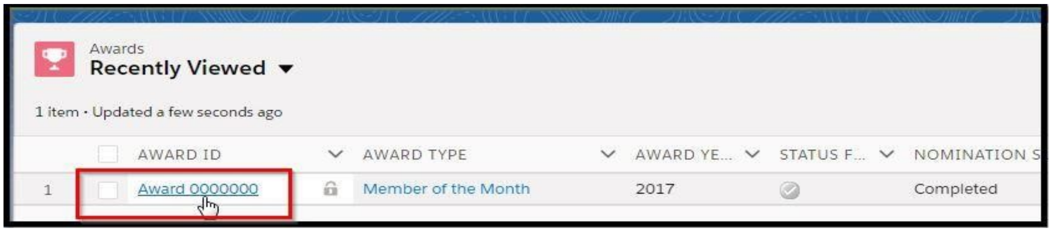
Awards' Record

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.



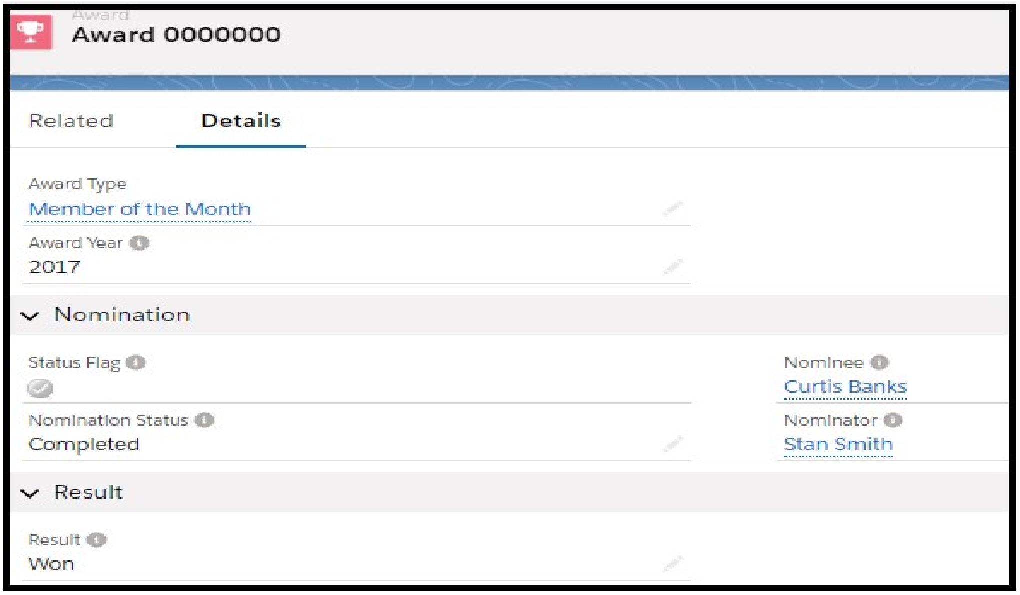
1 item • Updated a few seconds ago

	AWARD ID	AWARD TYPE	AWARD YE...	STATUS F...	NOMINATION S
1	Award 0000000	Member of the Month	2017		Completed

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)**



Award

Award 0000000

Award Type
Member of the Month

Award Year
2017

Nomination

Status Flag

Nominee
Curtis Banks

Nomination Status
Completed

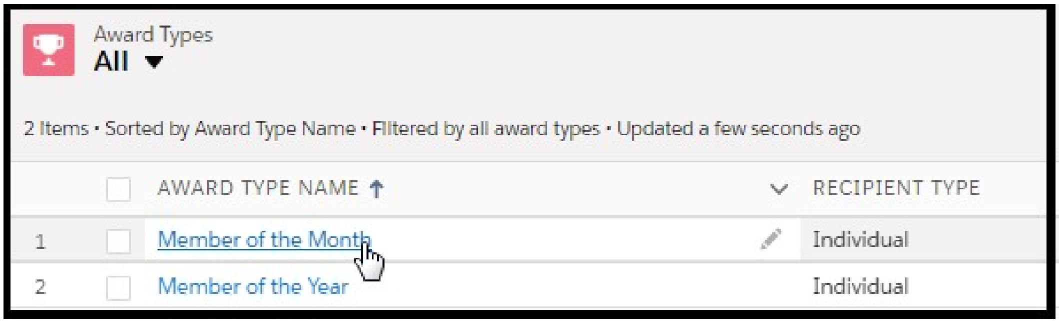
Nominator
Stan Smith

Result

Result
Won

Viewing Award Types

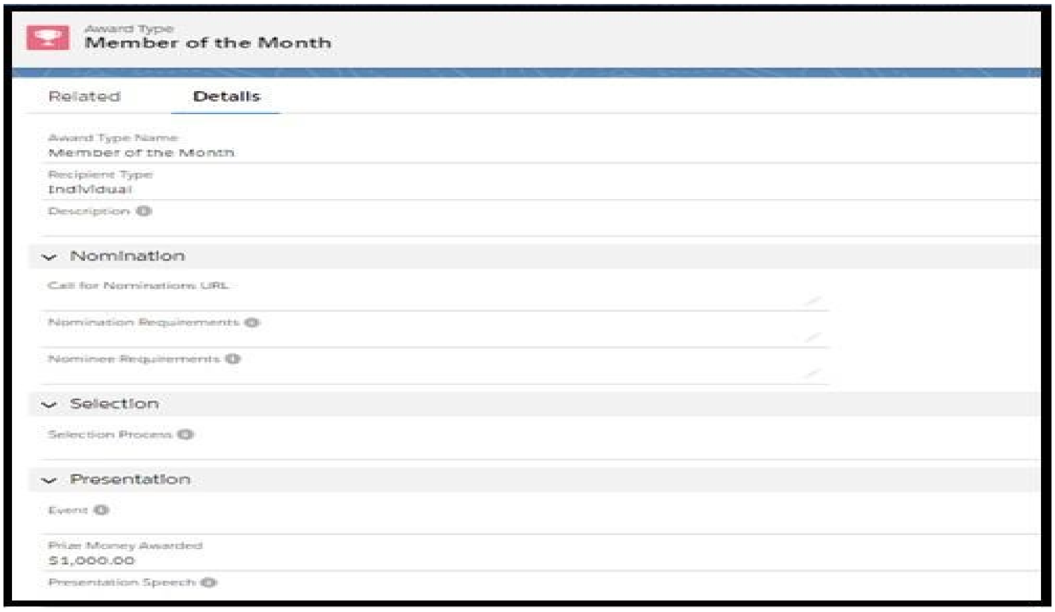
1. Go to **All Apps** ellipses and search or scroll to find **Award types Item.**
2. On the Navigation Bar, click **Award Types Item.**
3. Click the list view selection drop-down and change the view to **All Awards.**
4. Click **Member of the Month** in the list of **Award types**. The Award type controls 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.



2 Items • Sorted by Award Type Name • Filtered by all award types • Updated a few seconds ago

	☐	AWARD TYPE NAME ↑	RECIPIENT TYPE
1	☐	Member of the Month	Individual
2	☐	Member of the Year	Individual

5. This opens the selected **Award type.**



Award Type Name
Member of the Month

Recipient Type
Individual

Description

Call for Nominations URL

Nomination Requirements

Nominee Requirements

Selection Process

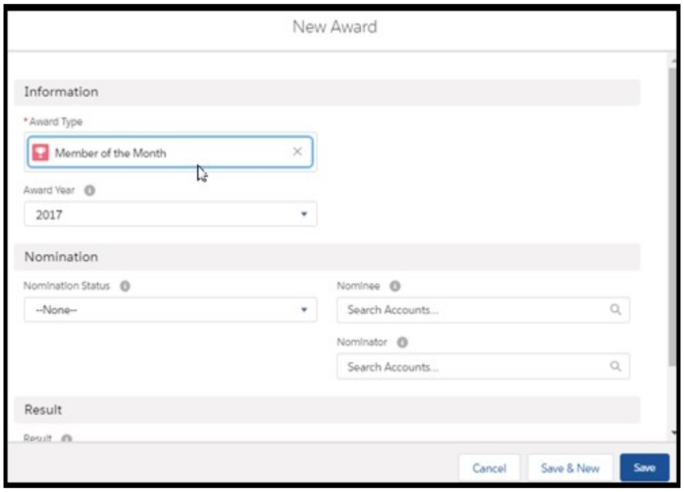
Event

Prize Money Awarded
$1,000.00

Presentation Speech

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.



New Award

Information

* Award Type
Member of the Month

Award Year
2017

Nomination

Nomination Status
--None--

Nominee
Search Accounts...

Nominator
Search Accounts...

Result

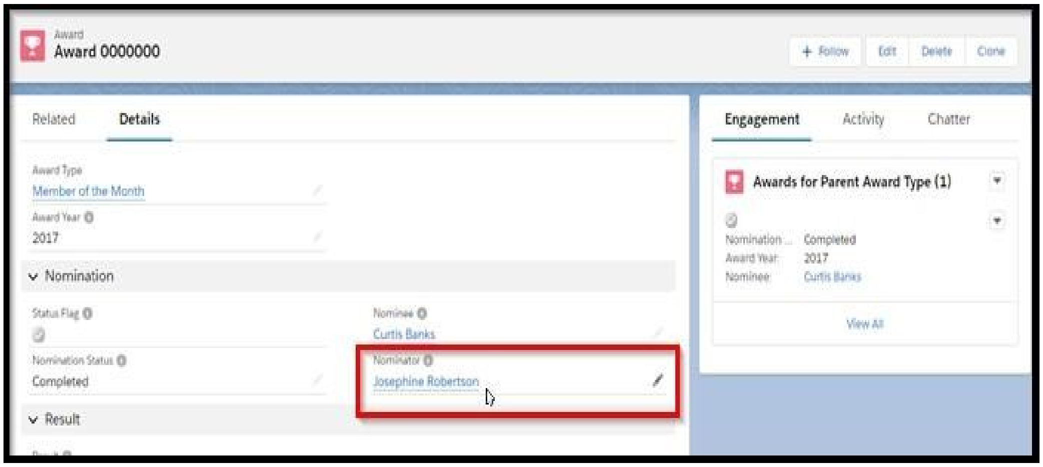
Result

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.


Award
Award 0000000
+ Follow
Edit
Delete
Clone
Related
Details
Engagement
Activity
Chatter
Nomination
Result
Awards for Parent Award Type (1)
View All

Award Type: Member of the Month

Award Year: 2017

Status Flag

Nominee: Curtis Banks

Nomination Status: Completed

Nominator: Josephine Robertson

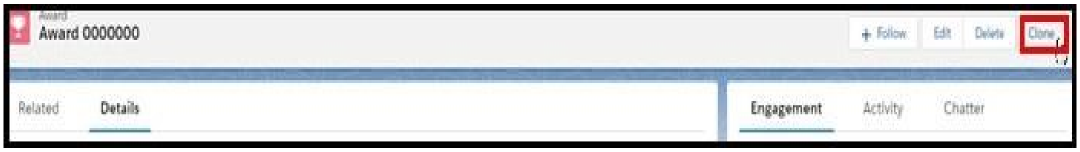
Nomination ...: Completed

Award Year: 2017

Nominee: Curtis Banks

Cloning Awards Record

1. Navigate to an **Award** record.
2. Click the **Clone** button at the top of the page.


Award
Award 0000000
+ Follow
Edit
Delete
Clone
Related
Details
Engagement
Activity
Chatter

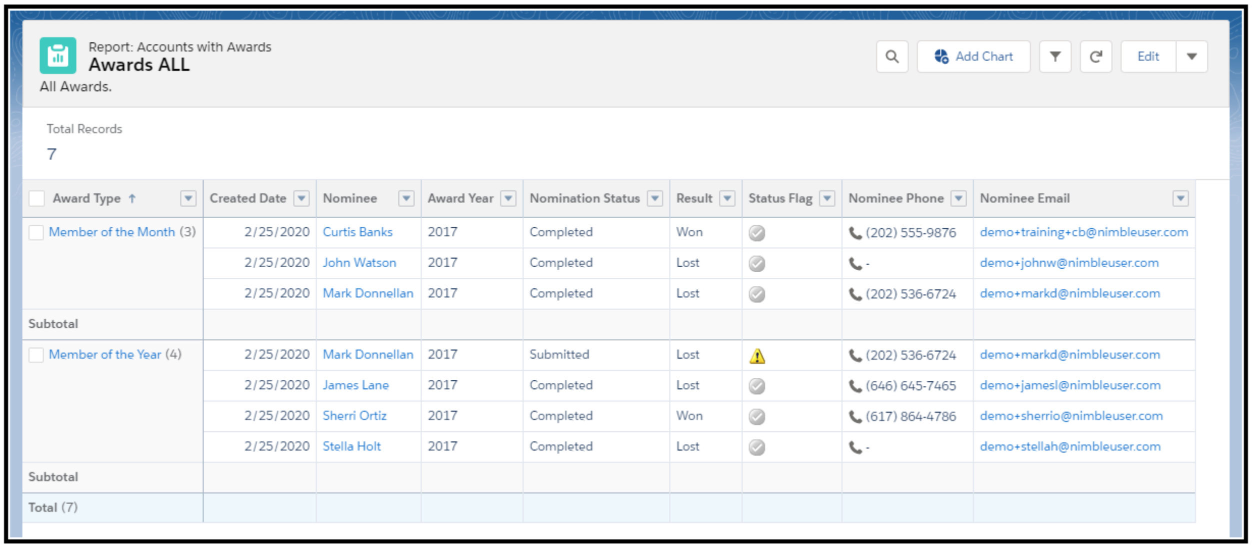
3. Make the appropriate changes to **the new Award record**.
4. Click **Save.**

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.



Report: Accounts with Awards

Awards ALL

All Awards.

Total Records

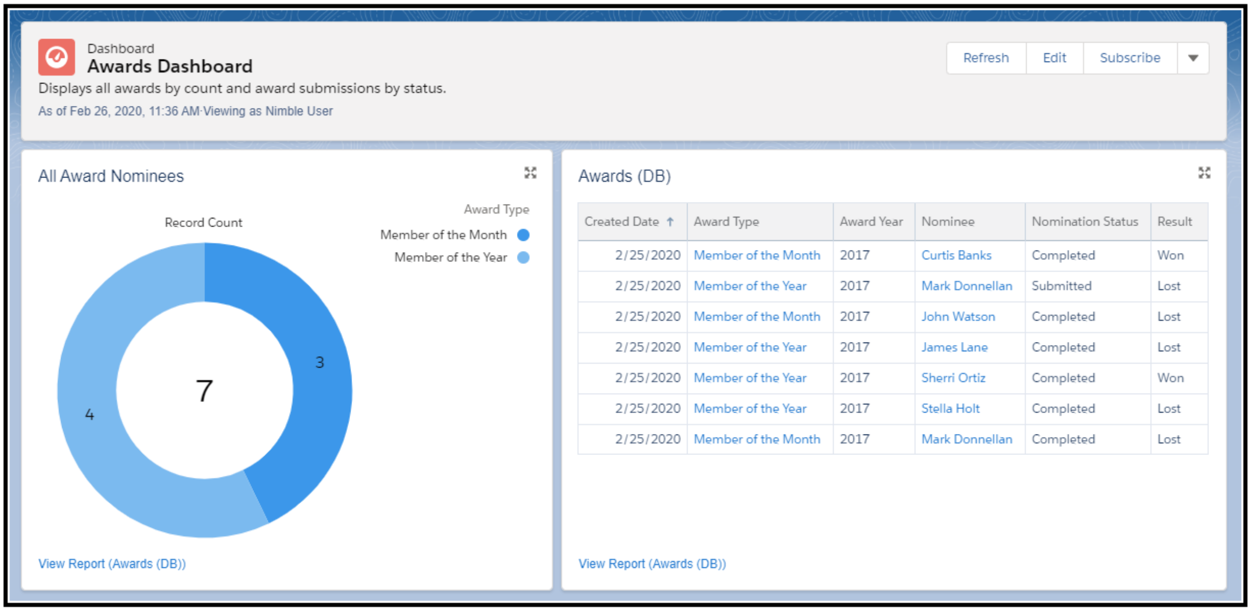
7

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.


Dashboard
Refresh
Edit
Subscribe
All Award Nominees
Record Count
Award Type
Member of the Month
Member of the Year
7
3
4
View Report (Awards (DB))
View Report (Awards (DB))

Awards Dashboard

Displays all awards by count and award submissions by status.

As of Feb 26, 2020, 11:36 AM·Viewing as Nimble User

Awards (DB)

Created Date ↑	Award Type	Award Year	Nominee	Nomination Status	Result
2/25/2020	Member of the Month	2017	Curtis Banks	Completed	Won
2/25/2020	Member of the Year	2017	Mark Donnellan	Submitted	Lost
2/25/2020	Member of the Month	2017	John Watson	Completed	Lost
2/25/2020	Member of the Year	2017	James Lane	Completed	Lost
2/25/2020	Member of the Year	2017	Sherri Ortiz	Completed	Won
2/25/2020	Member of the Year	2017	Stella Holt	Completed	Lost
2/25/2020	Member of the Month	2017	Mark Donnellan	Completed	Lost

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

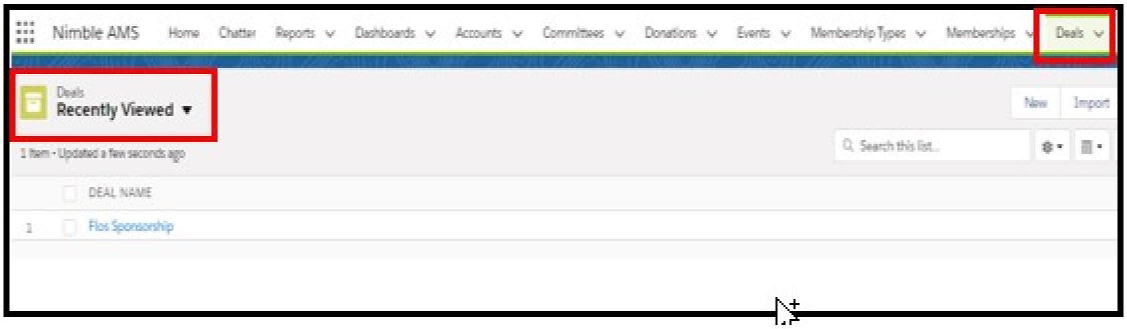
Deals in Nimble AMS enables users to manage pipeline and sales opportunities. It is a great first step for prospectus to be turned into actual orders. Deals connects together the sales cultivation on accounts to complete and finalize orders. Managing Deals is quite a simple process.

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.


Nimble AMS
Home
Chatter
Reports
Dashboards
Accounts
Committees
Donations
Events
Membership Types
Memberships
Deals
Deals
Recently Viewed
1 Item • Updated a few seconds ago
New
Import
Search this list...
DEAL NAME
1
Flos Sponsorship

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)**

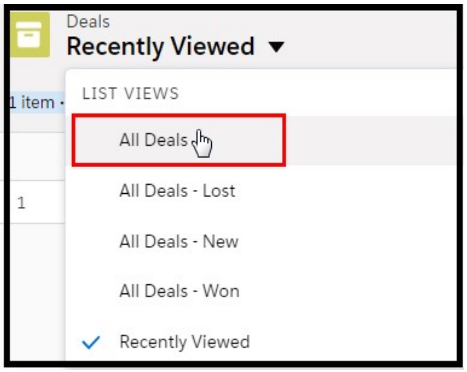
Understanding Deals

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.

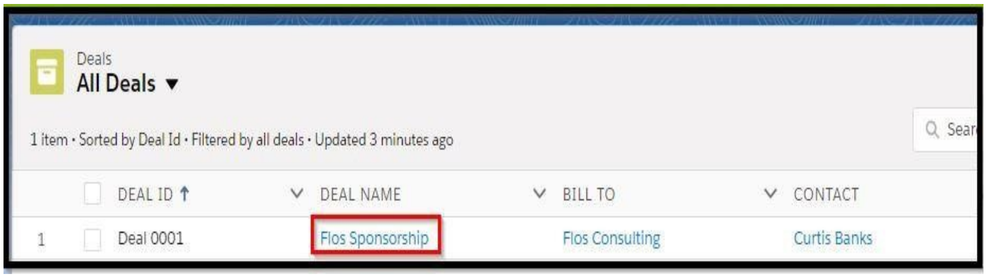
Deals' Record

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.**


Deals
Recently Viewed
1 item ·
LIST VIEWS
All Deals
All Deals - Lost
All Deals - New
All Deals - Won
Recently Viewed
1

4. Click **Flos Sponsorship** in the list of **Deals**.

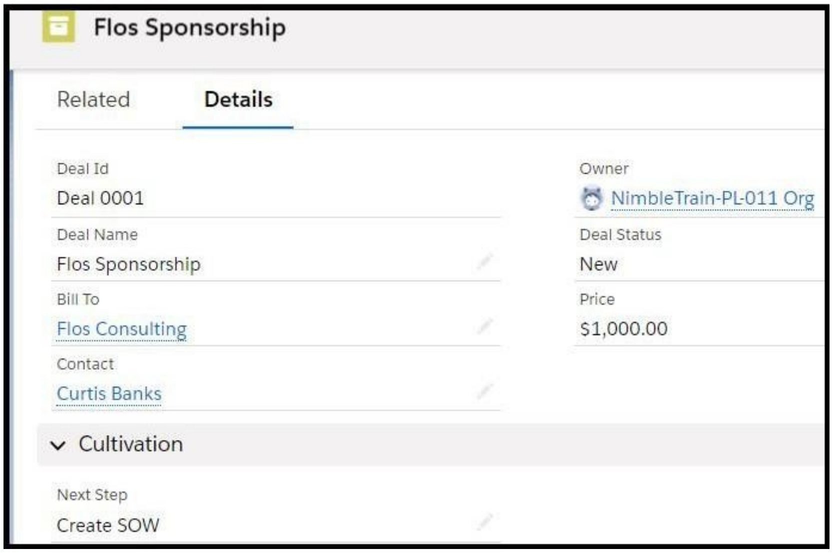

Deals
All Deals
Sear

1 item • Sorted by Deal Id • Filtered by all deals • Updated 3 minutes ago

		DEAL ID	DEAL NAME	BILL TO	CONTACT
1	☐	Deal 0001	Flos Sponsorship	Flos Consulting	Curtis Banks

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.



Deal Id
Deal 0001

Owner
NimbleTrain-PL-011 Org

Deal Name
Flos Sponsorship

Deal Status
New

Bill To
Flos Consulting

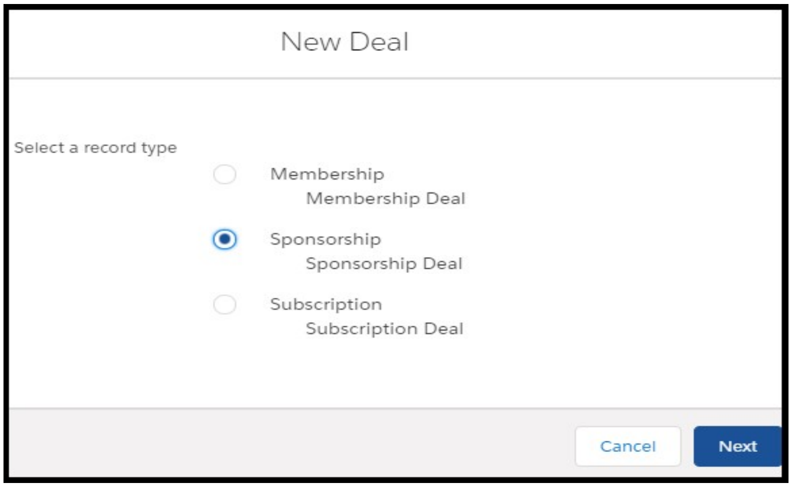
Price
$1,000.00

Contact
Curtis Banks

Next Step
Create SOW

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.


New Deal

Select a record type

○ Membership
Membership Deal

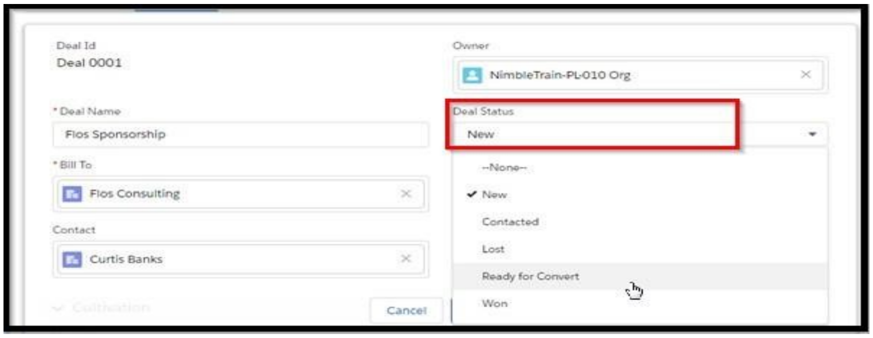
● Sponsorship
Sponsorship Deal

○ Subscription
Subscription Deal

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.



Deal Id
Deal 0001

Owner
NimbleTrain-PL-010 Org

* Deal Name
Flos Sponsorship

Deal Status
New

* Bill To
Flos Consulting

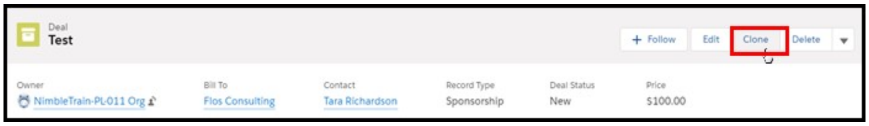
Contact
Curtis Banks

--None--
✓ New
Contacted
Lost
Ready for Convert
Won
Cancel

3. Click **Save.**

Cloning Deals

1. Navigate a **Deal record**.
2. Click the **Clone** button at the top of the page.



Deal
Test

Owner
NimbleTrain-PL-011 Org

Bill To
Flos Consulting

Contact
Tara Richardson

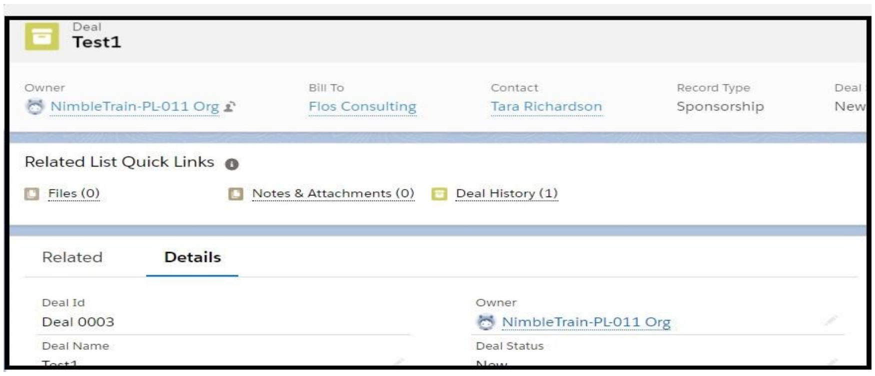
Record Type
Sponsorship

Deal Status
New

Price
$100.00

+ Follow
Edit
Clone
Delete

3. Make the appropriate changes to the **new Deal**.



Deal
Test1

Owner
NimbleTrain-PL-011 Org

Bill To
Flos Consulting

Contact
Tara Richardson

Record Type
Sponsorship

Deal
New

Related List Quick Links
Files (0)
Notes & Attachments (0)
Deal History (1)
Related
Details

Deal Id
Deal 0003

Owner
NimbleTrain-PL-011 Org

Deal Name

Deal Status

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

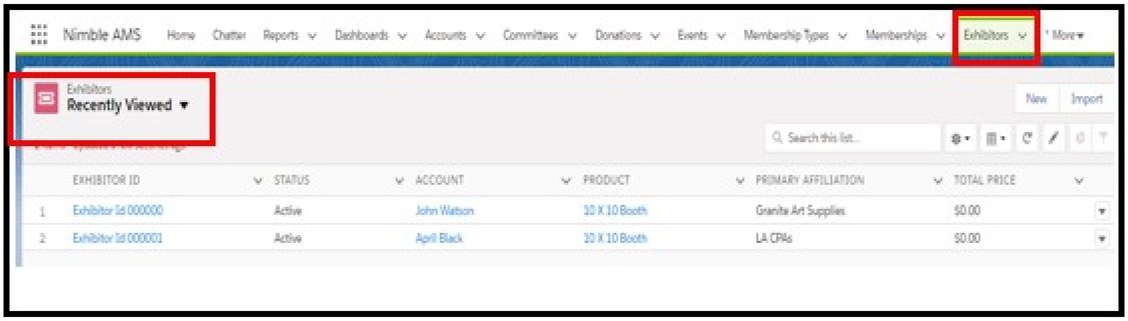
Objective

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.


Nimble AMS
Home
Chatter
Reports
Dashboards
Accounts
Committees
Donations
Events
Membership Types
Memberships
Exhibitors
More
Exhibitors
Recently Viewed
New
Import
Search this list...

	EXHIBITOR ID	STATUS	ACCOUNT	PRODUCT	PRIMARY AFFILIATION	TOTAL PRICE
1	Exhibitor Id 000000	Active	John Watson	10 X 10 Booth	Granite Art Supplies	$0.00
2	Exhibitor Id 000001	Active	April Black	10 X 10 Booth	LA CPAs	$0.00

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)**

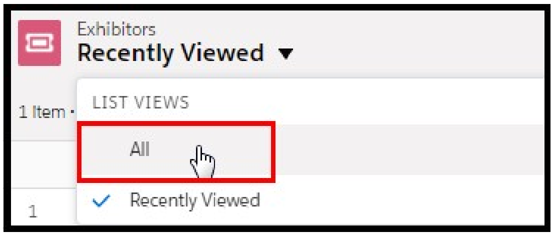
Understanding Exhibitors

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.

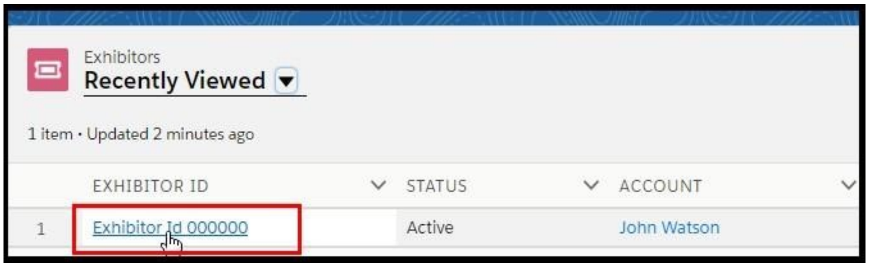
Exhibitor Record

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.**


Exhibitors
Recently Viewed ▼
1 Item ·
LIST VIEWS
All
1
✓ Recently Viewed

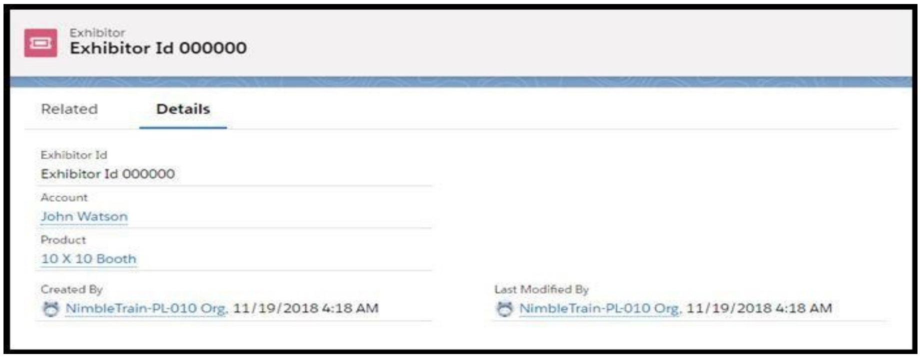
4. Click **Exhibitor ID 000000** in the list of **Exhibitors**.


Exhibitors
Recently Viewed ▼

1 item · Updated 2 minutes ago

	EXHIBITOR ID	STATUS	ACCOUNT
1	Exhibitor Id 000000	Active	John Watson

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
Exhibitor Id 000000
Related
Details

Exhibitor Id
Exhibitor Id 000000

Account
John Watson

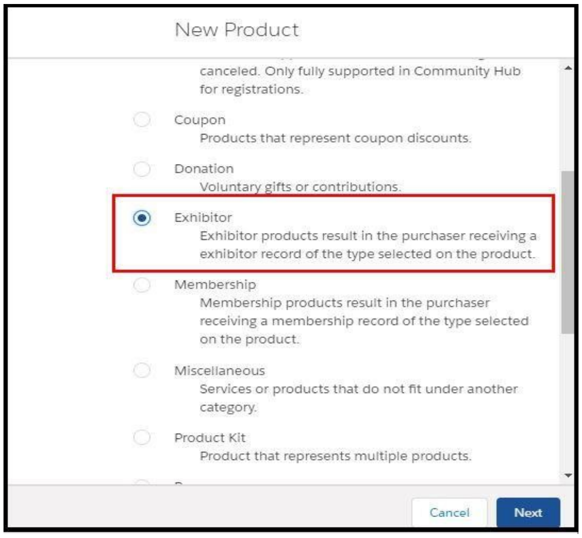
Product
10 X 10 Booth

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

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.



New Product

canceled. Only fully supported in Community Hub for registrations.

○ Coupon
Products that represent coupon discounts.

○ Donation
Voluntary gifts or contributions.

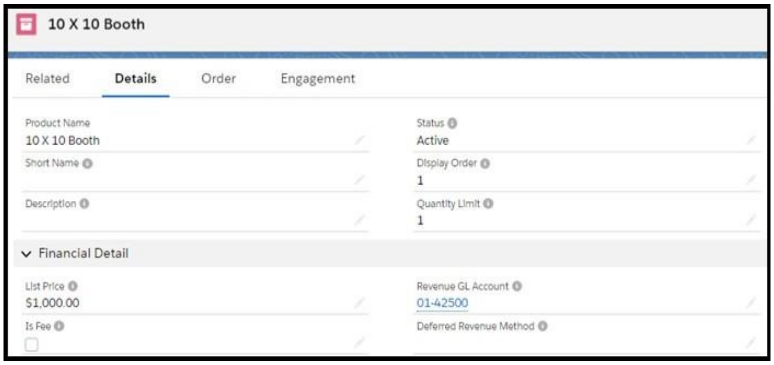
● Exhibitor
Exhibitor products result in the purchaser receiving a exhibitor record of the type selected on the product.

○ Membership
Membership products result in the purchaser receiving a membership record of the type selected on the product.

○ Miscellaneous
Services or products that do not fit under another category.

○ Product Kit
Product that represents multiple products.

IMPORTANT NOTE: Observe an existing Sponsorship product Session Exhibitor. Exhibitor type record stores information like Product and Financial details.



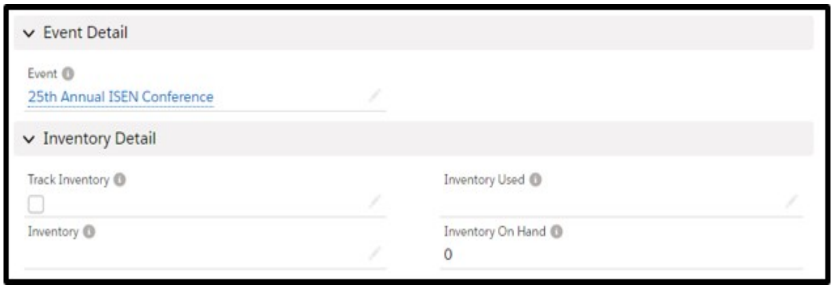
10 X 10 Booth

Product Name: 10 X 10 Booth
Short Name:
Description:
Status: Active
Display Order: 1
Quantity Limit: 1

Financial Detail

List Price: $1,000.00
Is Fee: ☐
Revenue GL Account: 01-42500
Deferred Revenue Method:

The Exhibitor product linked to a related event by adding the **Event details**. In the inventory section, users manage the **product inventory**.



Event Detail

Event: 25th Annual ISEN Conference

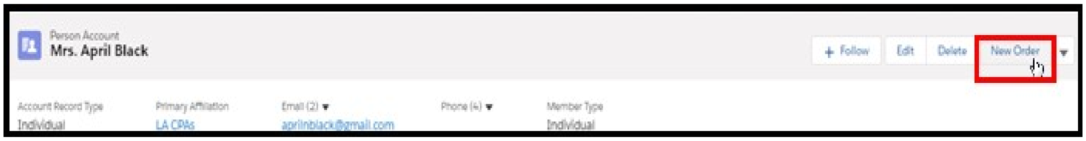
Inventory Detail

Track Inventory: ☐
Inventory:
Inventory Used:
Inventory On Hand: 0

Ordering an Exhibitor Product

In this section, users will learn how to order an Exhibitor Product

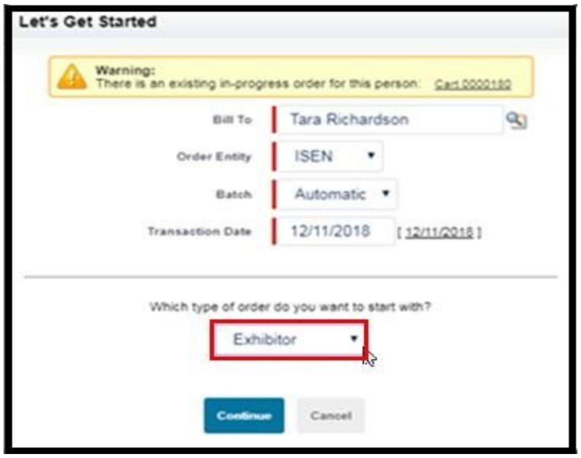
1. In the **Search box**, enter and select **Tara Richardson**.
2. **Click** on the **New Order** button from the upper right corner.



Person Account
Mrs. April Black

Account Record Type: Individual
Primary Affiliation: LA CPAs
Email (2): aprilnblack@gmail.com
Phone (4)
Member Type: Individual

3. Select **Exhibitor** for the **Which Type of order do you want to start with?** field drop- down



Let's Get Started

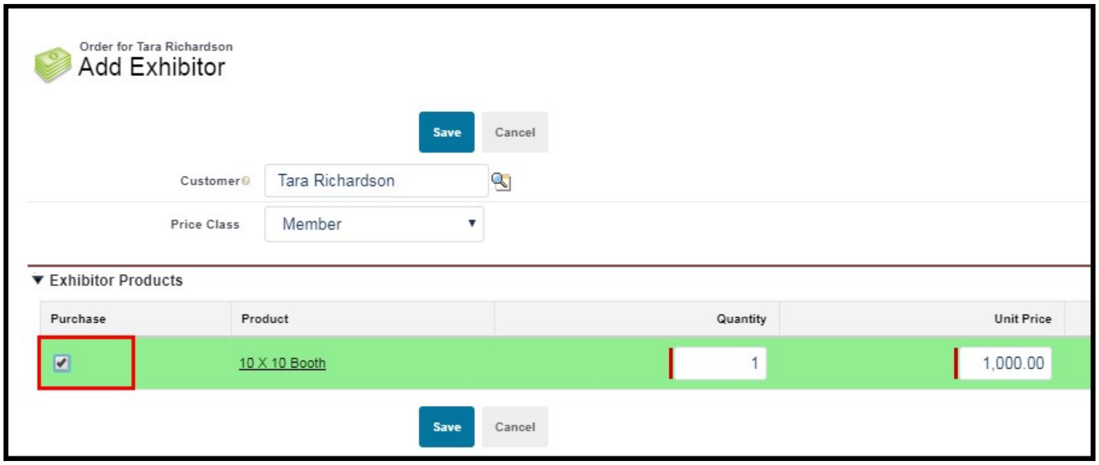
Warning:
There is an existing in-progress order for this person: Cart 0000180

Bill To: Tara Richardson
Order Entity: ISEN
Batch: Automatic
Transaction Date: 12/11/2018 [12/11/2018]

Which type of order do you want to start with? Exhibitor

4. Click **Continue**.

   Note: Review the details and select the Exhibitor product **10X10 Booth** by checking the **purchase box**.



Order for Tara Richardson
Add Exhibitor

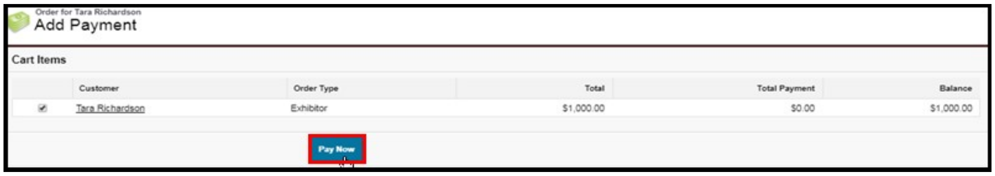
Customer: Tara Richardson
Price Class: Member

Exhibitor Products

Purchase	Product	Quantity	Unit Price
☑	10 X 10 Booth	1	1,000.00

5. Click **Save** and then click on **Go to Payment** button (lower right).

6. Click **Pay Now**.



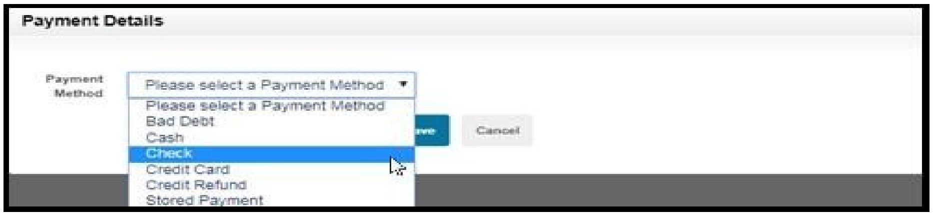
Order for Tara Richardson

Add Payment

Cart Items

	Customer	Order Type	Total	Total Payment	Balance
☑	Tara Richardson	Exhibitor	$1,000.00	$0.00	$1,000.00

7. Select **Check** from **Payment Method** drop down.

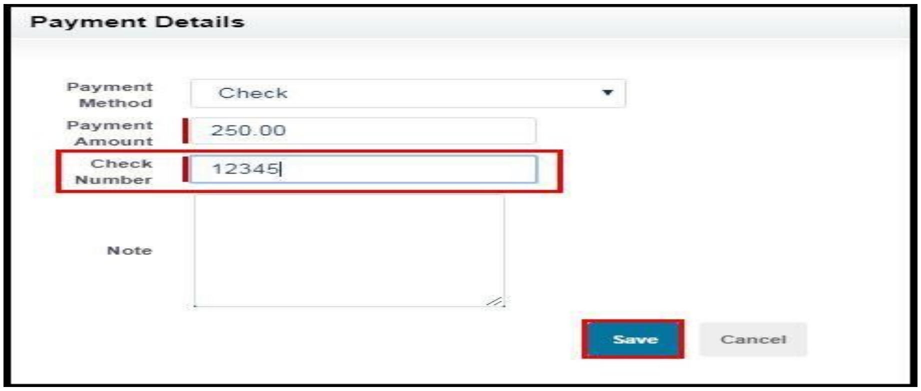


Payment Details

Payment Method: Please select a Payment Method

Please select a Payment Method
Bad Debt
Cash
Check
Credit Card
Credit Refund
Stored Payment
Save
Cancel

8. Enter **12345** in the **Check Number** field.



Payment Details

Payment Method: Check

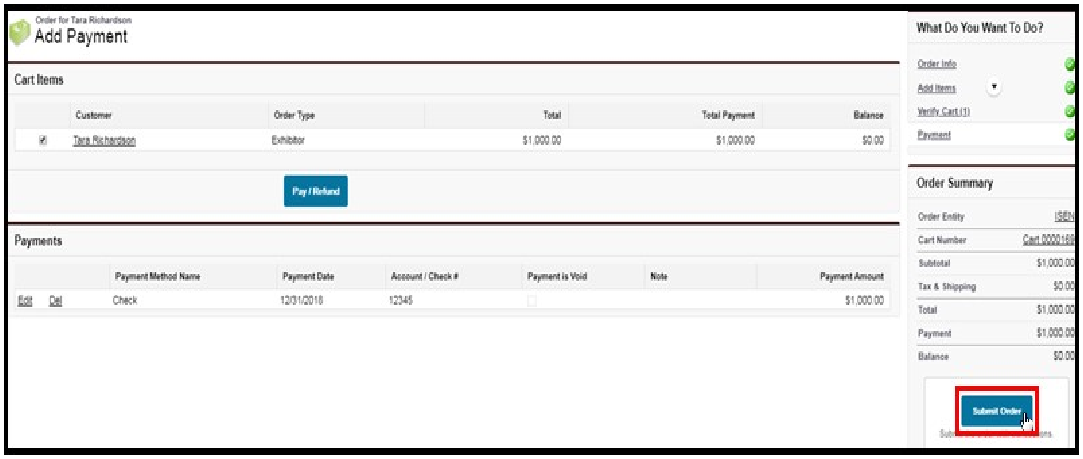
Payment Amount: 250.00

Check Number: 12345

Note:

Save
Cancel

9. Click **Save** and then **Submit Order** (lower right).



Order for Tara Richardson

Add Payment

Cart Items

	Customer	Order Type	Total	Total Payment	Balance
☑	Tara Richardson	Exhibitor	$1,000.00	$1,000.00	$0.00

Payments

	Payment Method Name	Payment Date	Account / Check #	Payment is Void	Note	Payment Amount
Edit Del	Check	12/31/2018	12345	☐		$1,000.00

What Do You Want To Do?

Order Info ✓
Add Items ✓
Verify Cart (1) ✓
Payment ✓

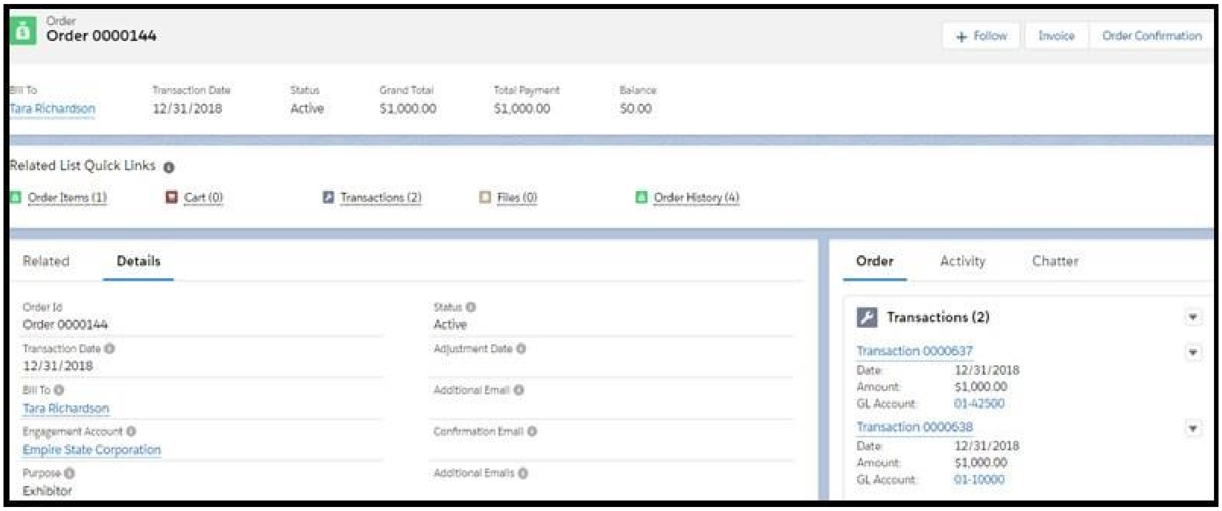
Order Summary

Order Entity	ISEN
Cart Number	Cart 000016
Subtotal	$1,000.00
Tax & Shipping	$0.00
Total	$1,000.00
Payment	$1,000.00
Balance	$0.00

Pay / Refund
Submit Order

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.


+ Follow
Invoice
Order Confirmation
Related List Quick Links
Order Items (1)
Cart (0)
Transactions (2)
Files (0)
Order History (4)
Related
Details
Order
Activity
Chatter

Order
Order 0000144

Bill To	Transaction Date	Status	Grand Total	Total Payment	Balance
Tara Richardson	12/31/2018	Active	$1,000.00	$1,000.00	$0.00

Order Id: Order 0000144
Status: Active
Transaction Date: 12/31/2018
Adjustment Date:
Bill To: Tara Richardson
Additional Email:
Engagement Account: Empire State Corporation
Confirmation Email:
Purpose: Exhibitor
Additional Emails:

Transactions (2)

Transaction 0000637
Date: 12/31/2018
Amount: $1,000.00
GL Account: 01-42500

Transaction 0000638
Date: 12/31/2018
Amount: $1,000.00
GL Account: 01-10000

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.

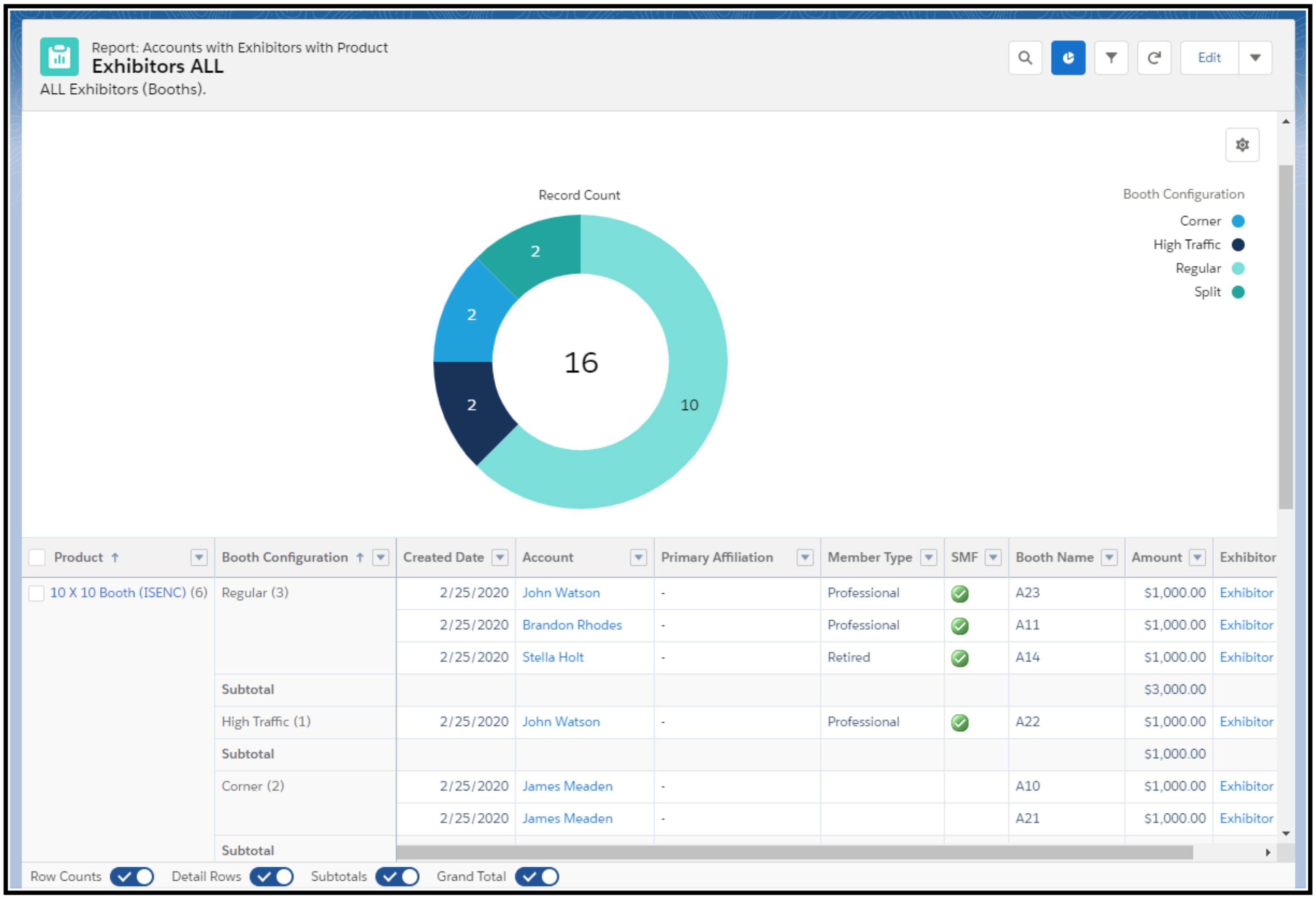
Exhibitors Reports and Dashboard

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



Report: Accounts with Exhibitors with Product
Exhibitors ALL
Edit
Record Count
16
10
2
2
2
Booth Configuration
Corner
High Traffic
Regular
Split

ALL Exhibitors (Booths).

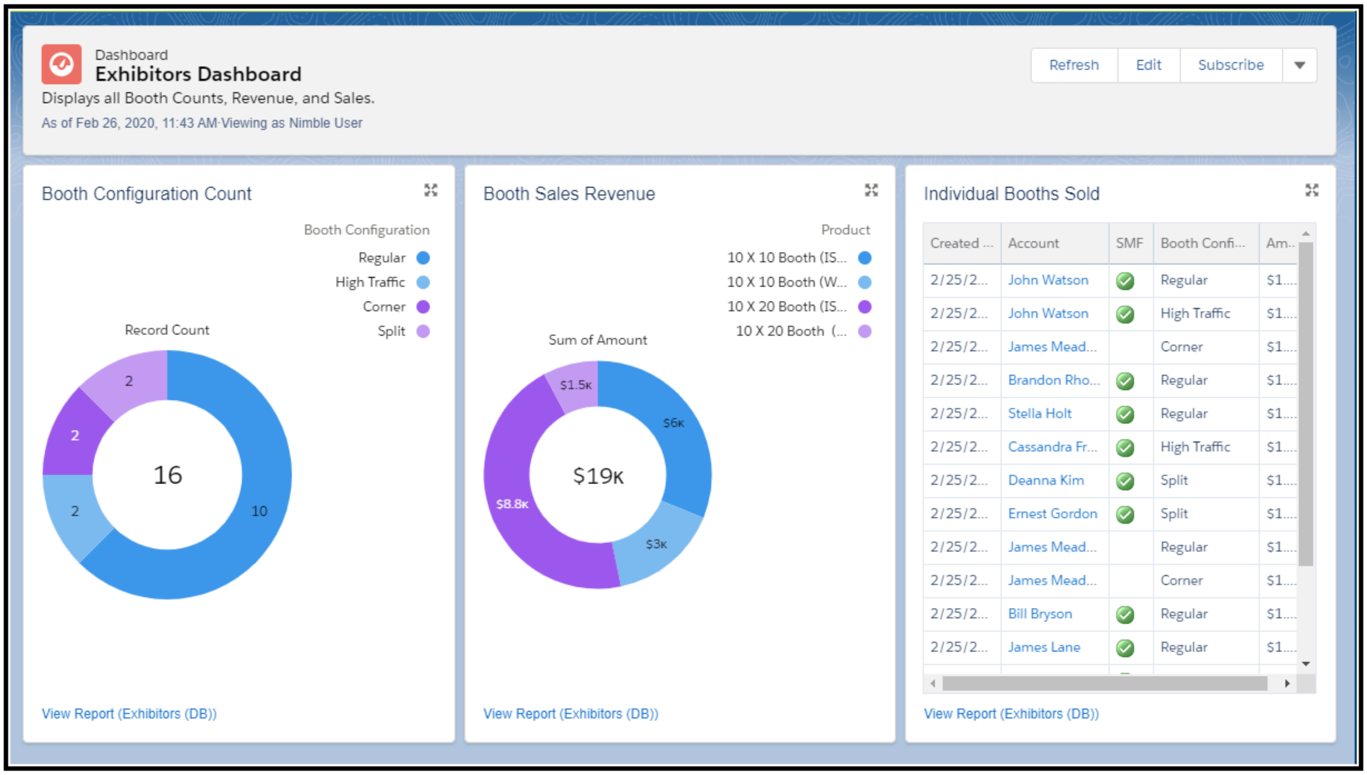
☐ Product ↑	Booth Configuration ↑	Created Date	Account	Primary Affiliation	Member Type	SMF	Booth Name	Amount	Exhibitor
☐ 10 X 10 Booth (ISENC) (6)	Regular (3)	2/25/2020	John Watson	-	Professional	✓	A23	$1,000.00	Exhibitor
		2/25/2020	Brandon Rhodes	-	Professional	✓	A11	$1,000.00	Exhibitor
		2/25/2020	Stella Holt	-	Retired	✓	A14	$1,000.00	Exhibitor
	Subtotal							$3,000.00	
	High Traffic (1)	2/25/2020	John Watson	-	Professional	✓	A22	$1,000.00	Exhibitor
	Subtotal							$1,000.00	
	Corner (2)	2/25/2020	James Meaden	-			A10	$1,000.00	Exhibitor
		2/25/2020	James Meaden	-			A21	$1,000.00	Exhibitor
	Subtotal								

Row Counts ✓ Detail Rows ✓ Subtotals ✓ Grand Total ✓

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.


Refresh
Edit
Subscribe
Booth Configuration
Regular
High Traffic
Corner
Split
Record Count
2
2
2
16
10
Product
10 X 10 Booth (IS...
10 X 10 Booth (W...
10 X 20 Booth (IS...
10 X 20 Booth (...
Sum of Amount
$1.5K
$6K
$19K
$8.8K
$3K

Dashboard

Exhibitors Dashboard

Displays all Booth Counts, Revenue, and Sales.

As of Feb 26, 2020, 11:43 AM·Viewing as Nimble User

Booth Configuration Count

View Report (Exhibitors (DB))

Booth Sales Revenue

View Report (Exhibitors (DB))

Individual Booths Sold

Created ...	Account	SMF	Booth Confi...	Am...
2/25/2...	John Watson	✓	Regular	$1....
2/25/2...	John Watson	✓	High Traffic	$1....
2/25/2...	James Mead...		Corner	$1....
2/25/2...	Brandon Rho...	✓	Regular	$1....
2/25/2...	Stella Holt	✓	Regular	$1....
2/25/2...	Cassandra Fr...	✓	High Traffic	$1....
2/25/2...	Deanna Kim	✓	Split	$1....
2/25/2...	Ernest Gordon	✓	Split	$1....
2/25/2...	James Mead...		Regular	$1....
2/25/2...	James Mead...		Corner	$1....
2/25/2...	Bill Bryson	✓	Regular	$1....
2/25/2...	James Lane	✓	Regular	$1....

View Report (Exhibitors (DB))

APPENDIX

E Programs

Objective E.1
Overview E.2
Program Type Item E.3
Understanding Program Types E.4
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

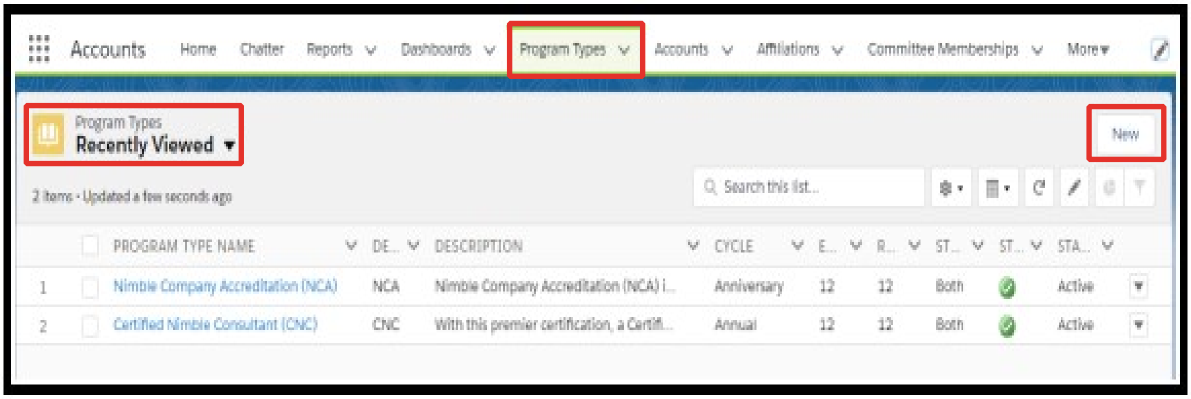
Overview

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.


Accounts
Home
Chatter
Reports
Dashboards
Program Types
Accounts
Affiliations
Committee Memberships
More
Program Types
Recently Viewed
New
Search this list...

2 items • Updated a few seconds ago

	PROGRAM TYPE NAME	DE...	DESCRIPTION	CYCLE	E...	R...	ST...	ST...	STA...
1	Nimble Company Accreditation (NCA)	NCA	Nimble Company Accreditation (NCA) i...	Anniversary	12	12	Both	✓	Active
2	Certified Nimble Consultant (CNC)	CNC	With this premier certification, a Certifi...	Annual	12	12	Both	✓	Active

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:

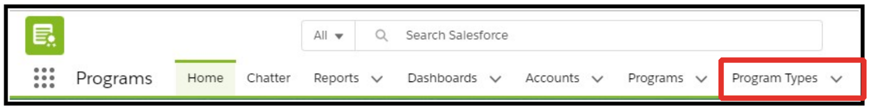
- Program Types
- Program Type Product Links
- Program Products
- Milestone Types
- Milestone Type Component Links
- Component Types

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.

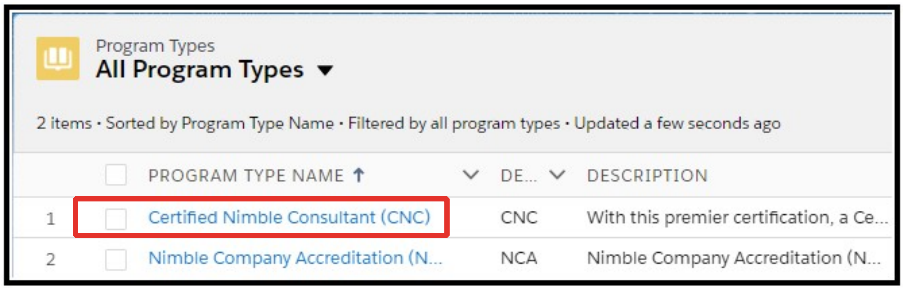
In this chapter, users will look at how to join a program and how a user is progressed through this process.

Program Type Parts

1. Navigate to the **Programs App** using the app launcher.
2. On the Navigation Bar, click **Program Types.**


All
Search Salesforce
Programs
Home
Chatter
Reports
Dashboards
Accounts
Programs
Program Types

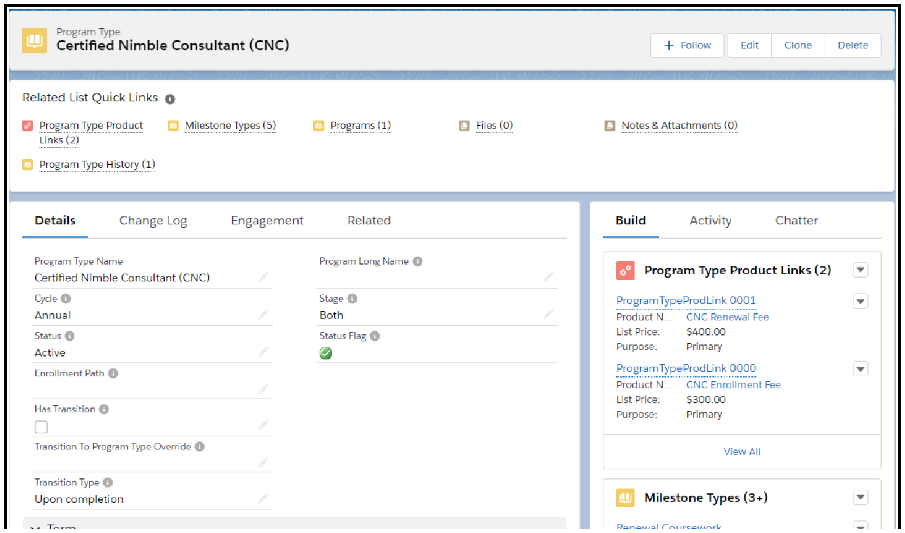
3. Click the view selection drop-down and change the view to **All Program Types.**
4. Click **Certified Nimble Consultant** in the list of program types.


Program Types
All Program Types

2 items • Sorted by Program Type Name • Filtered by all program types • Updated a few seconds ago

		PROGRAM TYPE NAME	DE...	DESCRIPTION
1	☐	Certified Nimble Consultant (CNC)	CNC	With this premier certification, a Ce...
2	☐	Nimble Company Accreditation (N...	NCA	Nimble Company Accreditation (N...

5. The program type record is displayed. The top of the screen displays the record information, including the program name, stage, cycle, and status.


+ Follow
Edit
Clone
Delete
Details
Change Log
Engagement
Related
Build
Activity
Chatter
View All

Program Type
Certified Nimble Consultant (CNC)

Related List Quick Links
Program Type Product Links (2)
Milestone Types (5)
Programs (1)
Files (0)
Notes & Attachments (0)
Program Type History (1)

Program Type Name: Certified Nimble Consultant (CNC)
Program Long Name:
Cycle: Annual
Stage: Both
Status: Active
Status Flag: ✓
Enrollment Path:
Has Transition: ☐
Transition To Program Type Override:
Transition Type: Upon completion
Term

Program Type Product Links (2)

ProgramTypeProdLink 0001
Product N... CNC Renewal Fee
List Price: $400.00
Purpose: Primary

ProgramTypeProdLink 0000
Product N... CNC Enrollment Fee
List Price: $300.00
Purpose: Primary

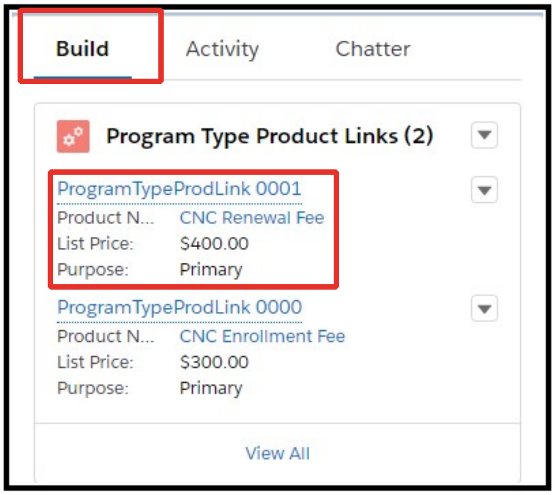
Milestone Types (3+)
Renewal Coursework

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.

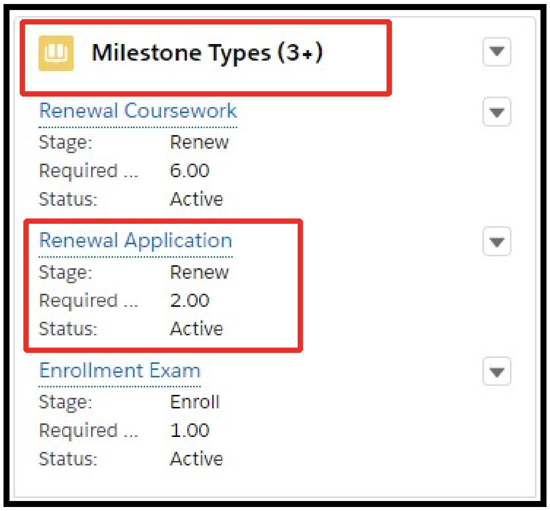


Program Type Product Links (2)

ProgramTypeProdLink 0001
Product N... CNC Renewal Fee
List Price: $400.00
Purpose: Primary

ProgramTypeProdLink 0000
Product N... CNC Enrollment Fee
List Price: $300.00
Purpose: Primary

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.



Milestone Types (3+)

Renewal Coursework
Stage: Renew
Required ... 6.00
Status: Active

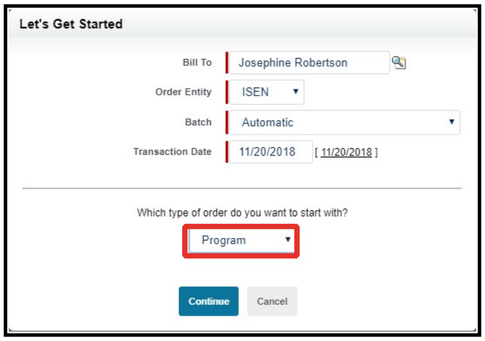
Renewal Application
Stage: Renew
Required ... 2.00
Status: Active

Enrollment Exam
Stage: Enroll
Required ... 1.00
Status: Active

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.**



Let's Get Started

Bill To: Josephine Robertson

Order Entity: ISEN

Batch: Automatic

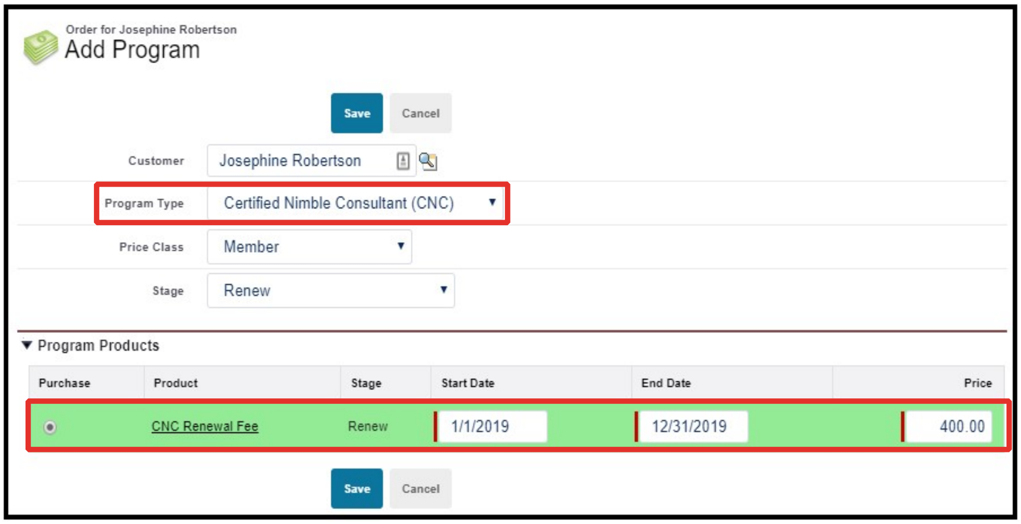
Transaction Date: 11/20/2018 [11/20/2018]

Which type of order do you want to start with?

Program

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
●	CNC Renewal Fee	Renew	1/1/2019	12/31/2019	400.00

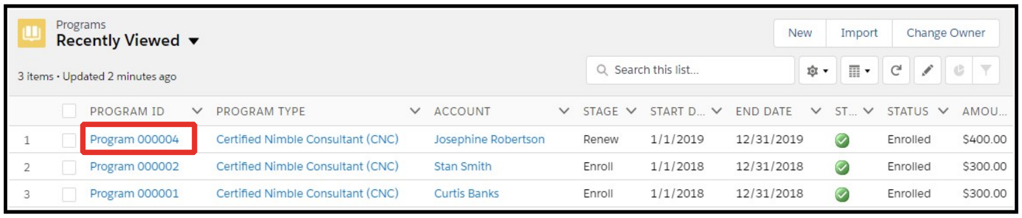
Save
Cancel

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.

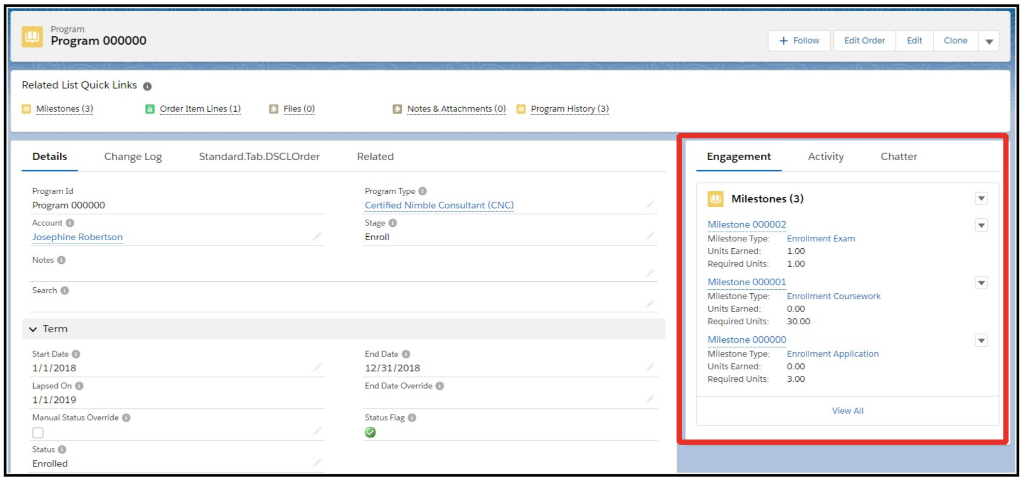
1. Click the **Programs** Item.
2. The list of all program enrollments will display. Users can create **List Views** to display only the enrollments needed, such as new enrollments this week or with a specific status, etc. For further analysis users can access the **Reports** listed as the end of this section.
    - Click the **Program ID** for **Josephine Robertson**.


Programs
Recently Viewed ▼
New
Import
Change Owner
Search this list...

3 items • Updated 2 minutes ago

	☐	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
Program 000000
+ Follow
Edit Order
Edit
Clone
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
Engagement
Activity
Chatter
Term
View All

Program Id: Program 000000
Program Type: Certified Nimble Consultant (CNC)
Account: Josephine Robertson
Stage: Enroll
Notes:
Search:
Start Date: 1/1/2018
End Date: 12/31/2018
Lapsed On: 1/1/2019
End Date Override:
Manual Status Override: ☐
Status Flag: ✓
Status: Enrolled

Milestones (3)

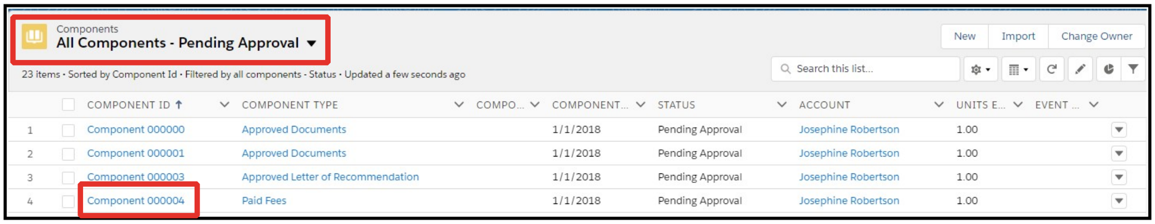
Milestone 000002
Milestone Type: Enrollment Exam
Units Earned: 1.00
Required Units: 1.00

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

Updating Program Components

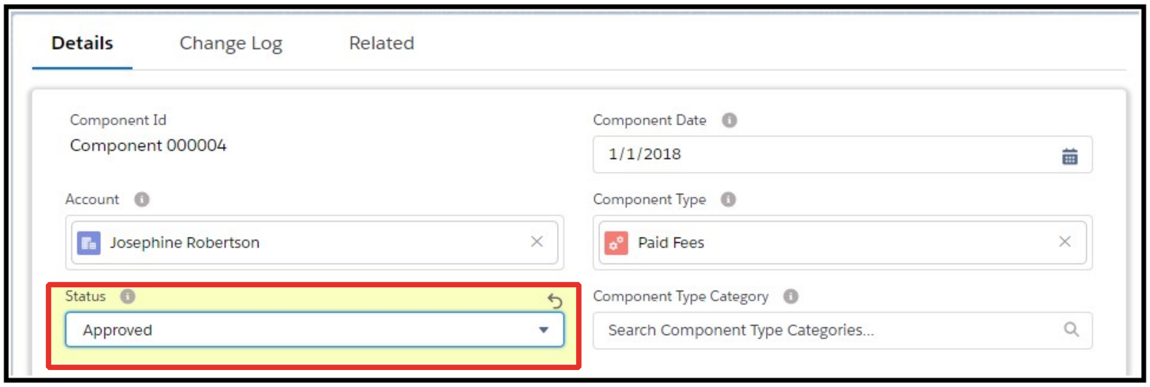
1. The next step is to update the components with Josephine's activity for the program.
    - Click the **Components** Item to display all components.
    - Change the View to **All Components - Pending Approval**.
    - Click on the **ID** next to Stan's **Paid Fees** component.



23 items • Sorted by Component Id • Filtered by all components - Status • Updated a few seconds ago

	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**.



Component Id: Component 000004

Component Date: 1/1/2018

Account: Josephine Robertson

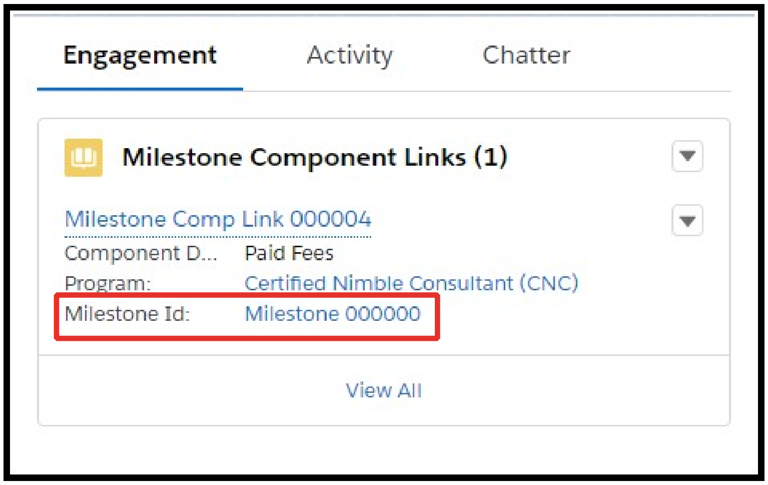
Component Type: Paid Fees

Status: Approved

Component Type Category: Search Component Type Categories...

5. Click **Save.**

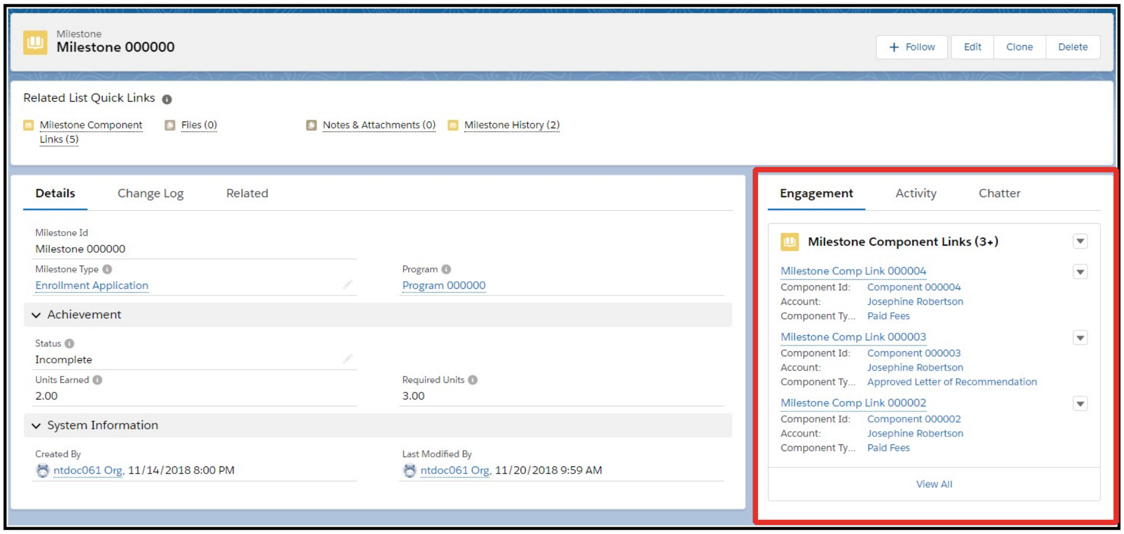
6. To ensure that the milestone has been updated, users can click the **Milestone ComponentID** in the **Engagement** section.



Milestone Component Links (1)

Milestone Comp Link 000004
Component D... Paid Fees
Program: Certified Nimble Consultant (CNC)
Milestone Id: Milestone 000000

The Enrollment Application Milestone record is displayed along with the three Milestone Component links that must be fulfilled to complete this Component.



Milestone
Milestone 000000

Related List Quick Links
Milestone Component Links (5)
Files (0)
Notes & Attachments (0)
Milestone History (2)

Milestone Id: Milestone 000000
Milestone Type: Enrollment Application
Program: Program 000000

Achievement
Status: Incomplete
Units Earned: 2.00
Required Units: 3.00

System Information
Created By: ntdoc061 Org, 11/14/2018 8:00 PM
Last Modified By: ntdoc061 Org, 11/20/2018 9:59 AM

Milestone Component Links (3+)

Milestone Comp Link 000004
Component Id: Component 000004
Account: Josephine Robertson
Component Ty... Paid Fees

Milestone Comp Link 000003
Component Id: Component 000003
Account: Josephine Robertson
Component Ty... Approved Letter of Recommendation

Milestone Comp Link 000002
Component Id: Component 000002
Account: Josephine Robertson
Component Ty... Paid Fees

7. 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.

8. 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.

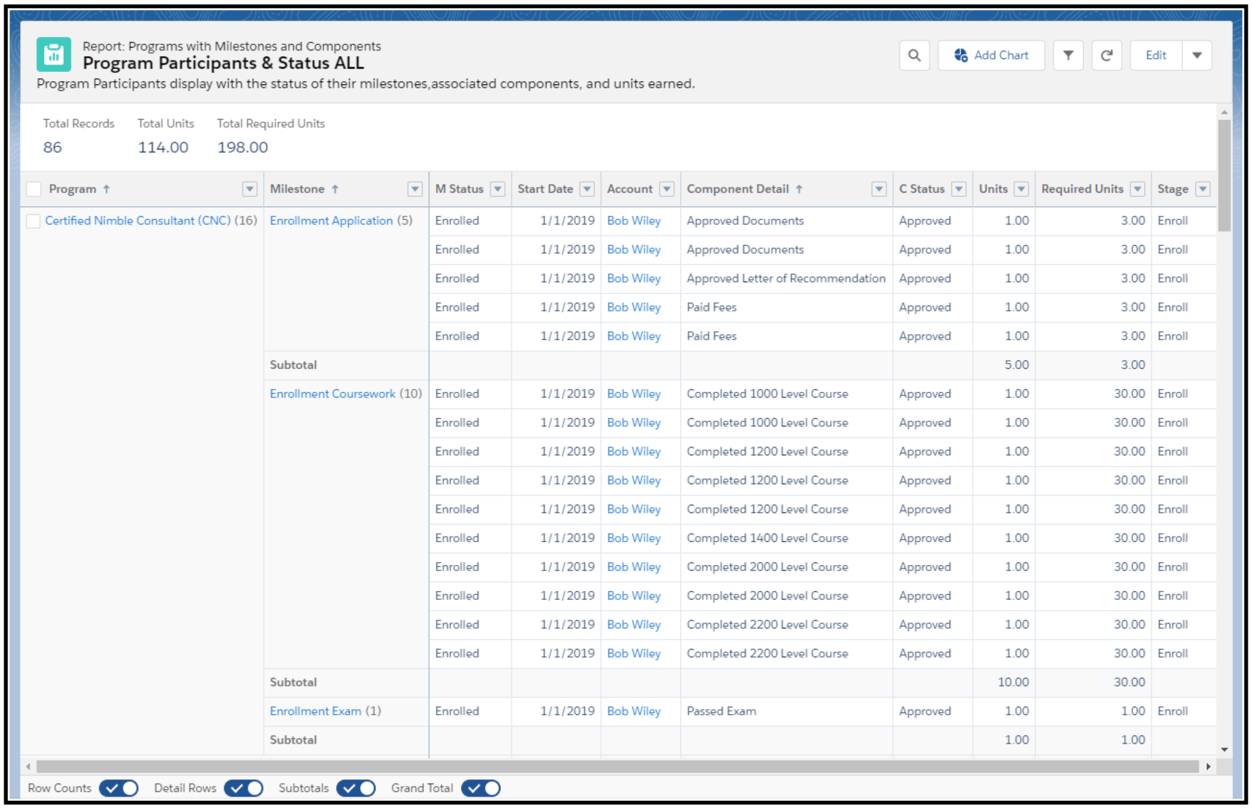
Programs Reports and Dashboard

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.

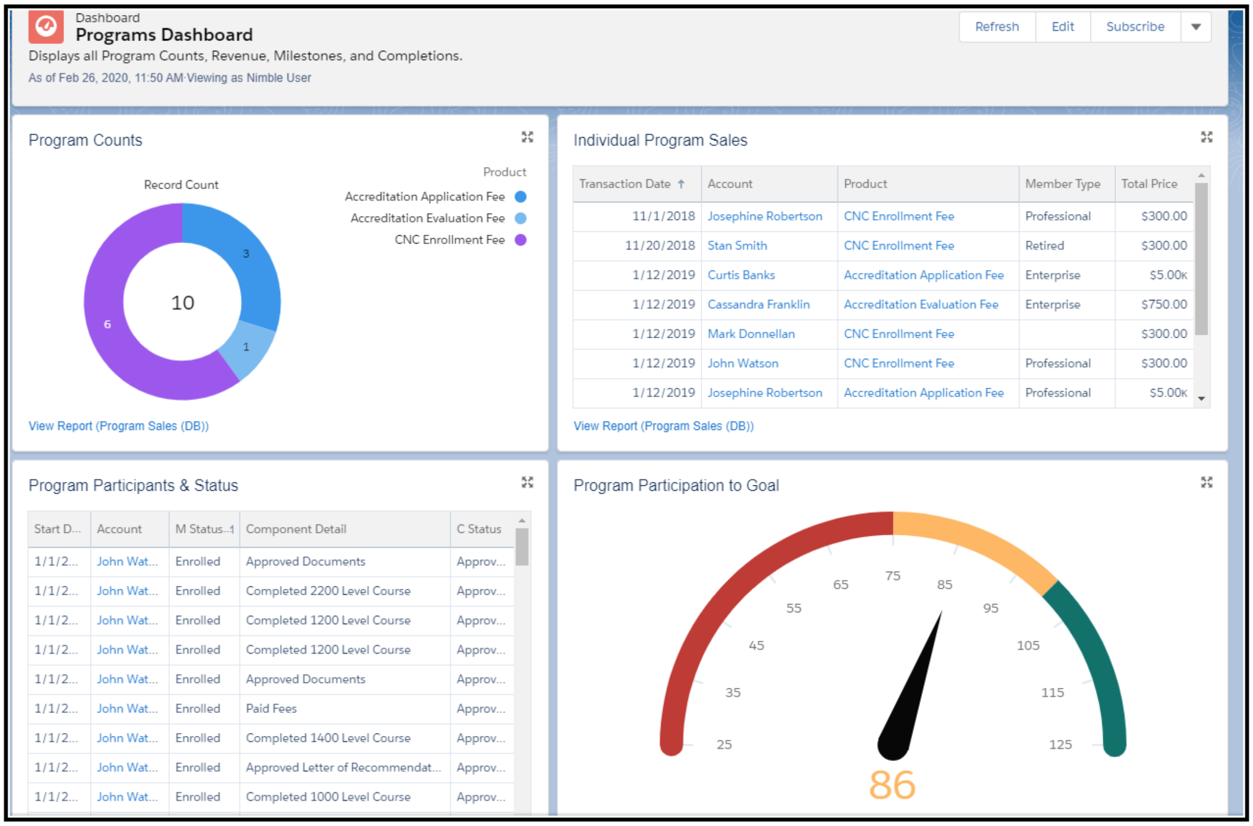
Total Records	Total Units	Total Required Units
86	114.00	198.00

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	

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.



Programs Dashboard

Displays all Program Counts, Revenue, Milestones, and Completions.

As of Feb 26, 2020, 11:50 AM·Viewing as Nimble User

Program Counts

View Report (Program Sales (DB))

Individual Program Sales

Transaction Date ↑	Account	Product	Member Type	Total Price
11/1/2018	Josephine Robertson	CNC Enrollment Fee	Professional	$300.00
11/20/2018	Stan Smith	CNC Enrollment Fee	Retired	$300.00
1/12/2019	Curtis Banks	Accreditation Application Fee	Enterprise	$5.00K
1/12/2019	Cassandra Franklin	Accreditation Evaluation Fee	Enterprise	$750.00
1/12/2019	Mark Donnellan	CNC Enrollment Fee		$300.00
1/12/2019	John Watson	CNC Enrollment Fee	Professional	$300.00
1/12/2019	Josephine Robertson	Accreditation Application Fee	Professional	$5.00K

View Report (Program Sales (DB))

Program Participants & Status

Start D...	Account	M Status ↓	Component Detail	C Status
1/1/2...	John Wat...	Enrolled	Approved Documents	Approv...
1/1/2...	John Wat...	Enrolled	Completed 2200 Level Course	Approv...
1/1/2...	John Wat...	Enrolled	Completed 1200 Level Course	Approv...
1/1/2...	John Wat...	Enrolled	Completed 1200 Level Course	Approv...
1/1/2...	John Wat...	Enrolled	Approved Documents	Approv...
1/1/2...	John Wat...	Enrolled	Paid Fees	Approv...
1/1/2...	John Wat...	Enrolled	Completed 1400 Level Course	Approv...
1/1/2...	John Wat...	Enrolled	Approved Letter of Recommendat...	Approv...
1/1/2...	John Wat...	Enrolled	Completed 1000 Level Course	Approv...

Program Participation to Goal

APPENDIX

F Sponsorships

Objective F.1
Overview F.1
Sponsorships Item F.2
Understanding Sponsorships....F.3
Sponsorship Record F.4
Sponsorship Product....F.6
Ordering a Sponsorship Product....F.8
Updating Sponsorship Records F.11
Sponsorships Reports and Dashboard F.12

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

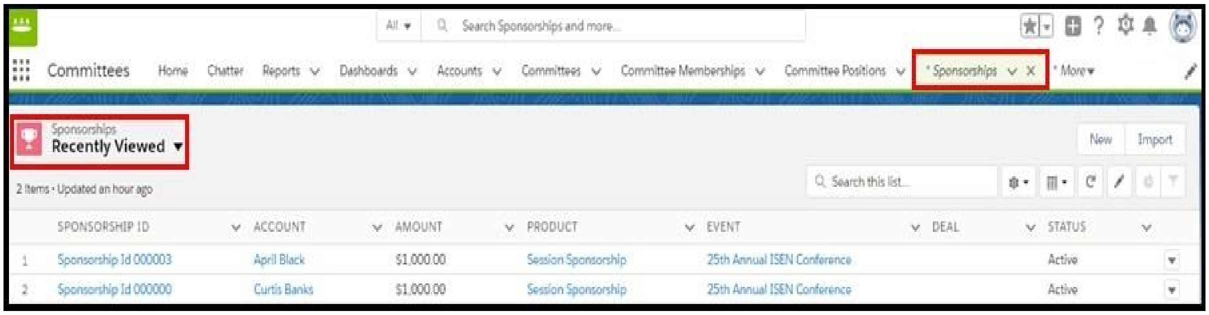
Overview

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.


All ▾
Search Sponsorships and more...
Committees
Home
Chatter
Reports
Dashboards
Accounts
Committees
Committee Memberships
Committee Positions
* Sponsorships
* More ▾
Sponsorships
Recently Viewed ▾
New
Import
Search this list...

2 Items • Updated an hour ago

	SPONSORSHIP ID	ACCOUNT	AMOUNT	PRODUCT	EVENT	DEAL	STATUS
1	Sponsorship Id 000003	April Black	$1,000.00	Session Sponsorship	25th Annual ISEN Conference		Active
2	Sponsorship Id 000000	Curtis Banks	$1,000.00	Session Sponsorship	25th Annual ISEN Conference		Active

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.

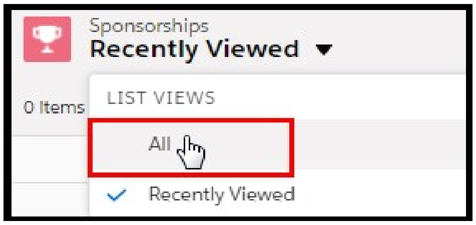
The Sponsorship Item stores Account and Product related details in the record. On purchasing Sponsorship Product, users can open the Sponsorship Item record and view all the details like Account, Product, and Event etc.

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.

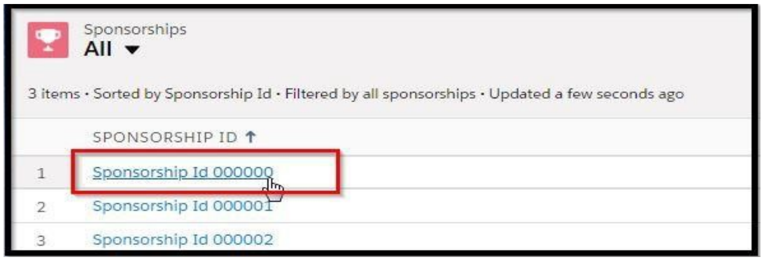
Sponsorship Record

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.**


Sponsorships
Recently Viewed
0 Items
LIST VIEWS
All
Recently Viewed

4. Click **Sponsorship ID 000000** in the list of **Sponsorships**.

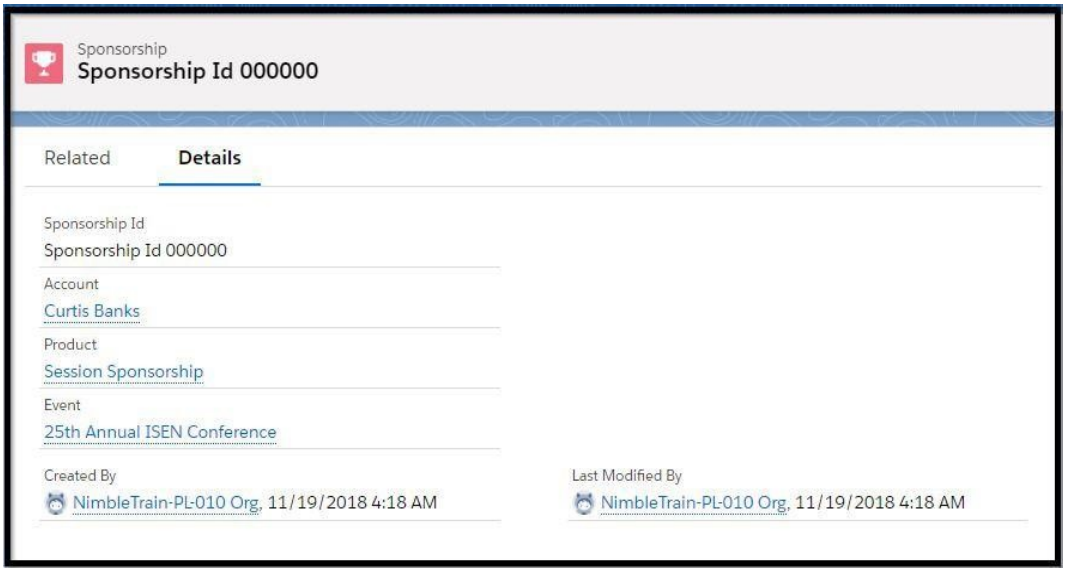

Sponsorships
All
3 items • Sorted by Sponsorship Id • Filtered by all sponsorships • Updated a few seconds ago
SPONSORSHIP ID
1
Sponsorship Id 000000
2
Sponsorship Id 000001
3
Sponsorship Id 000002

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.



Sponsorship Id
Sponsorship Id 000000

Account
Curtis Banks

Product
Session Sponsorship

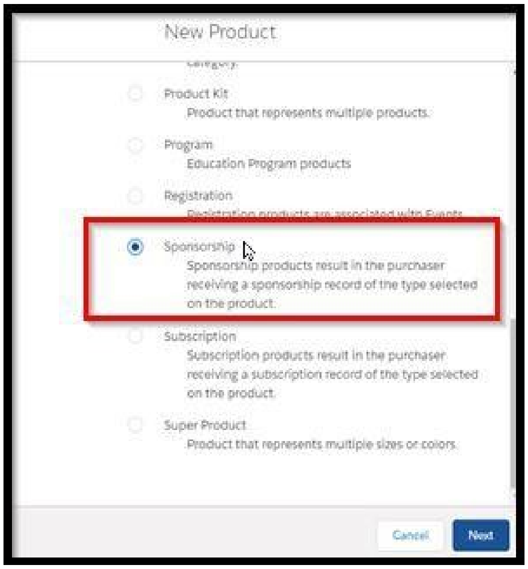
Event
25th Annual ISEN Conference

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.



○ Product Kit
Product that represents multiple products.

○ Program
Education Program products

○ Registration
Registration products are associated with Events

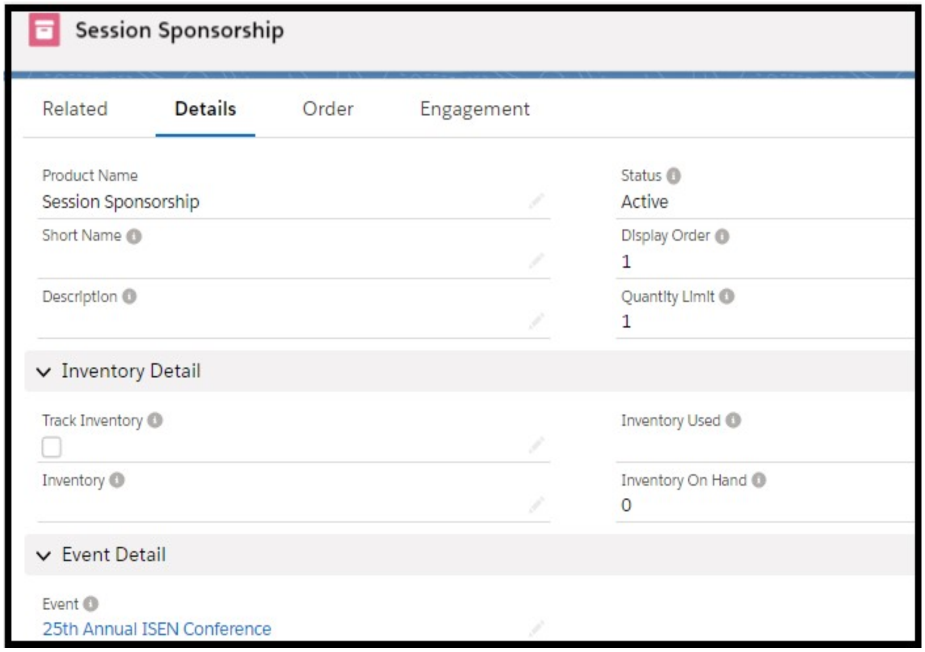
● Sponsorship
Sponsorship products result in the purchaser receiving a sponsorship record of the type selected on the product.

○ Subscription
Subscription products result in the purchaser receiving a subscription record of the type selected on the product.

○ Super Product
Product that represents multiple sizes or colors.

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

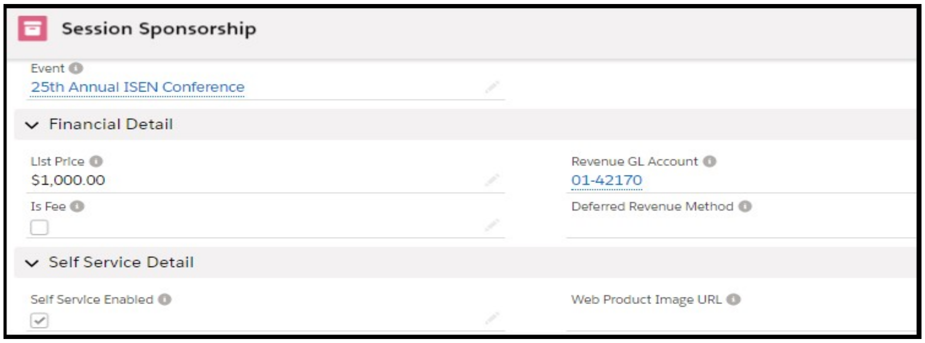
Product Name: Session Sponsorship
Status: Active
Short Name:
Display Order: 1
Description:
Quantity Limit: 1

Inventory Detail

Track Inventory: ☐
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: ☐
Deferred Revenue Method:

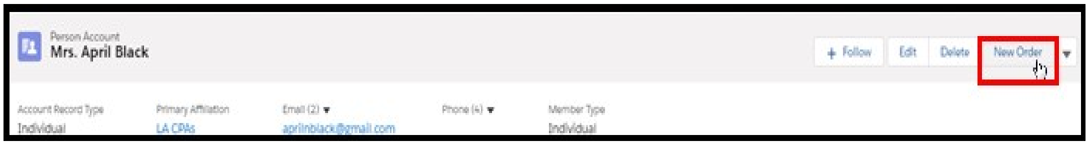
Self Service Detail

Self Service Enabled: ☑
Web Product Image URL:

Ordering a Sponsorship Product

In this section, users will learn how to order a Sponsorship Product

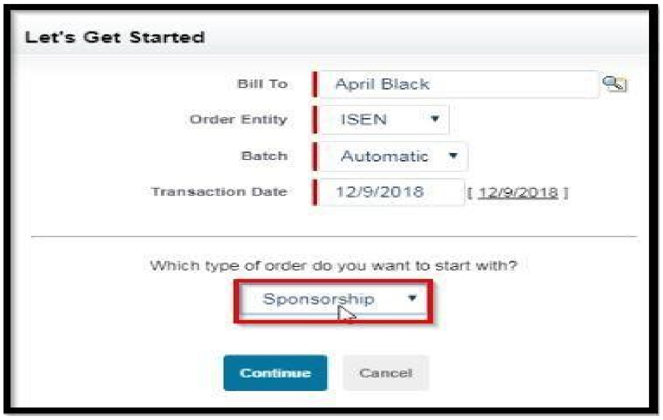
1. In the **Search box**, enter and select **April Black**.
2. Click on the **New Order** button from the upper right corner.



Person Account
Mrs. April Black

Account Record Type: Individual
Primary Affiliation: LA CPAs
Email (2): aprilnblack@gmail.com
Phone (4)
Member Type: Individual

3. Select **Sponsorship** for the “**Which Type of order do you want to start with?”** field drop- down.



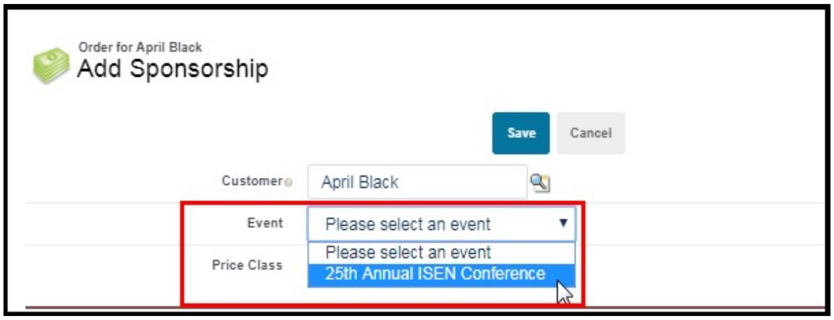
Let's Get Started

Bill To: April Black
Order Entity: ISEN
Batch: Automatic
Transaction Date: 12/9/2018 [12/9/2018]

Which type of order do you want to start with?
Sponsorship

4. Click **Continue**

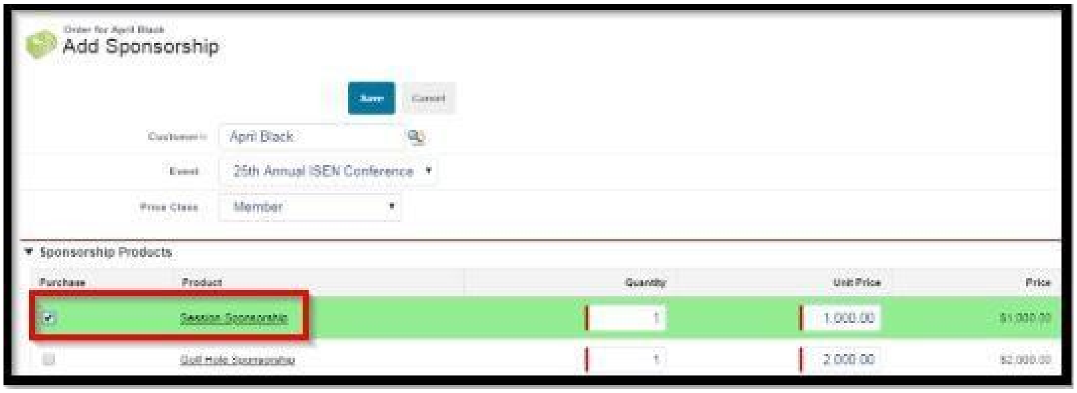
   Note: Observe that on selecting **25th Annual ISEN Conference** from the **Event drop- down** field, the related Sponsorship products are displayed in the below order-line. Review the details and select the **Session Sponsorship** product by checking the **purchase- box**.


Order for April Black
Add Sponsorship
Save
Cancel
Please select an event
25th Annual ISEN Conference

Customer: April Black

Event: Please select an event

Price Class


Order for April Black
Add Sponsorship
Save
Cancel

Customer: April Black

Event: 25th Annual ISEN Conference

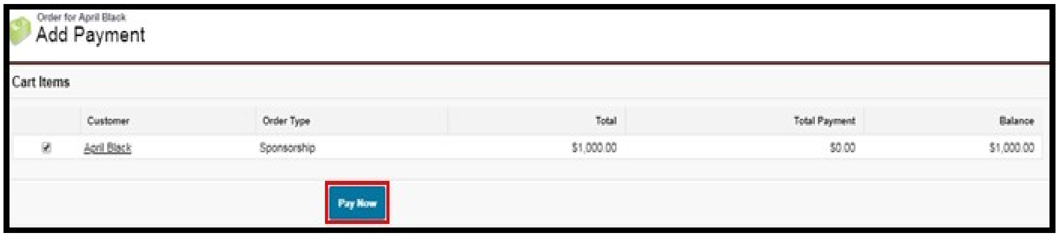
Price Class: Member

Sponsorship Products

Purchase	Product	Quantity	Unit Price	Price
☑	Session Sponsorship	1	1,000.00	$1,000.00
☐	Golf Hole Sponsorship	1	2,000.00	$2,000.00

5. Click **Save** and then click on **Go to Payment** (lower right).

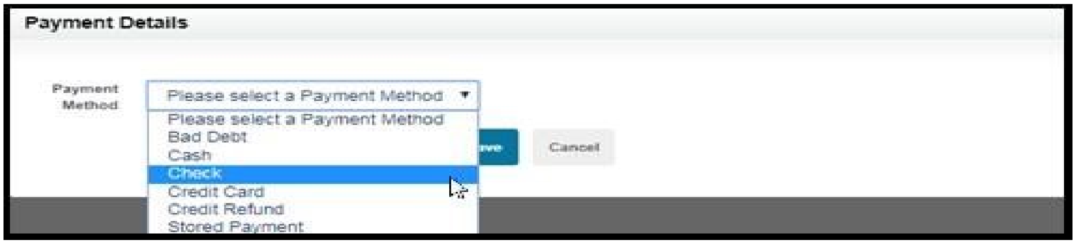
6. Click **Pay Now**.


Order for April Black
Add Payment
Pay Now

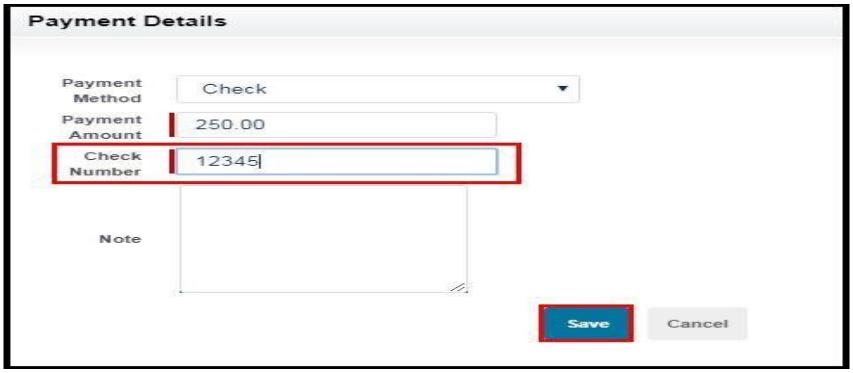
Cart Items

	Customer	Order Type	Total	Total Payment	Balance
☑	April Black	Sponsorship	$1,000.00	$0.00	$1,000.00

7. Select **Check** from **Payment Method** drop down.


Payment Details
Payment Method
Please select a Payment Method
Please select a Payment Method
Bad Debt
Cash
Check
Credit Card
Credit Refund
Stored Payment
ave
Cancel

8. Enter **12345** in the **Check Number** field.


Payment Details

Payment Method: Check

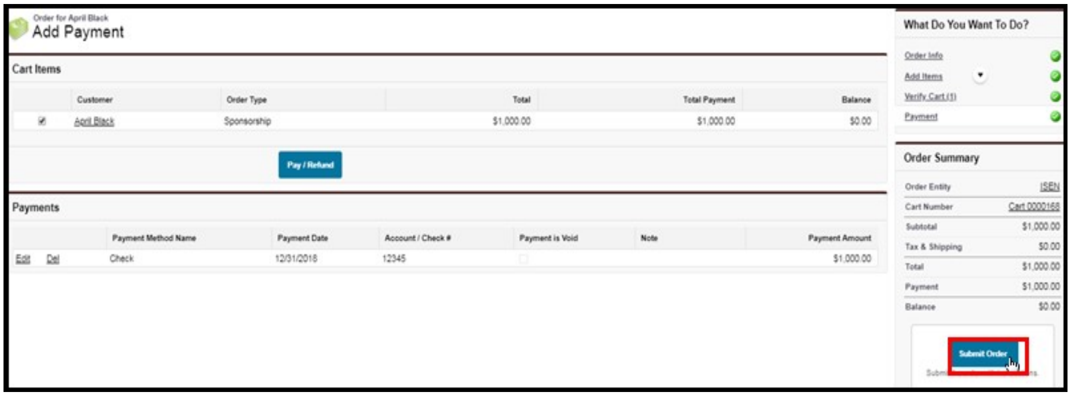
Payment Amount: 250.00

Check Number: 12345

Note:

Save
Cancel

9. Click **Save** and then **Submit Order** (lower right)


Order for April Black

Add Payment

Cart Items

	Customer	Order Type	Total	Total Payment	Balance
☑	April Black	Sponsorship	$1,000.00	$1,000.00	$0.00

Payments

		Payment Method Name	Payment Date	Account / Check #	Payment is Void	Note	Payment Amount
Edit	Del	Check	12/31/2018	12345	☐		$1,000.00

What Do You Want To Do?

- Order Info
- Add Items
- Verify Cart (1)
- Payment

Order Summary

Order Entity	ISEN
Cart Number	Cart 0000168
Subtotal	$1,000.00
Tax & Shipping	$0.00
Total	$1,000.00
Payment	$1,000.00
Balance	$0.00

Pay / Refund
Submit Order

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.

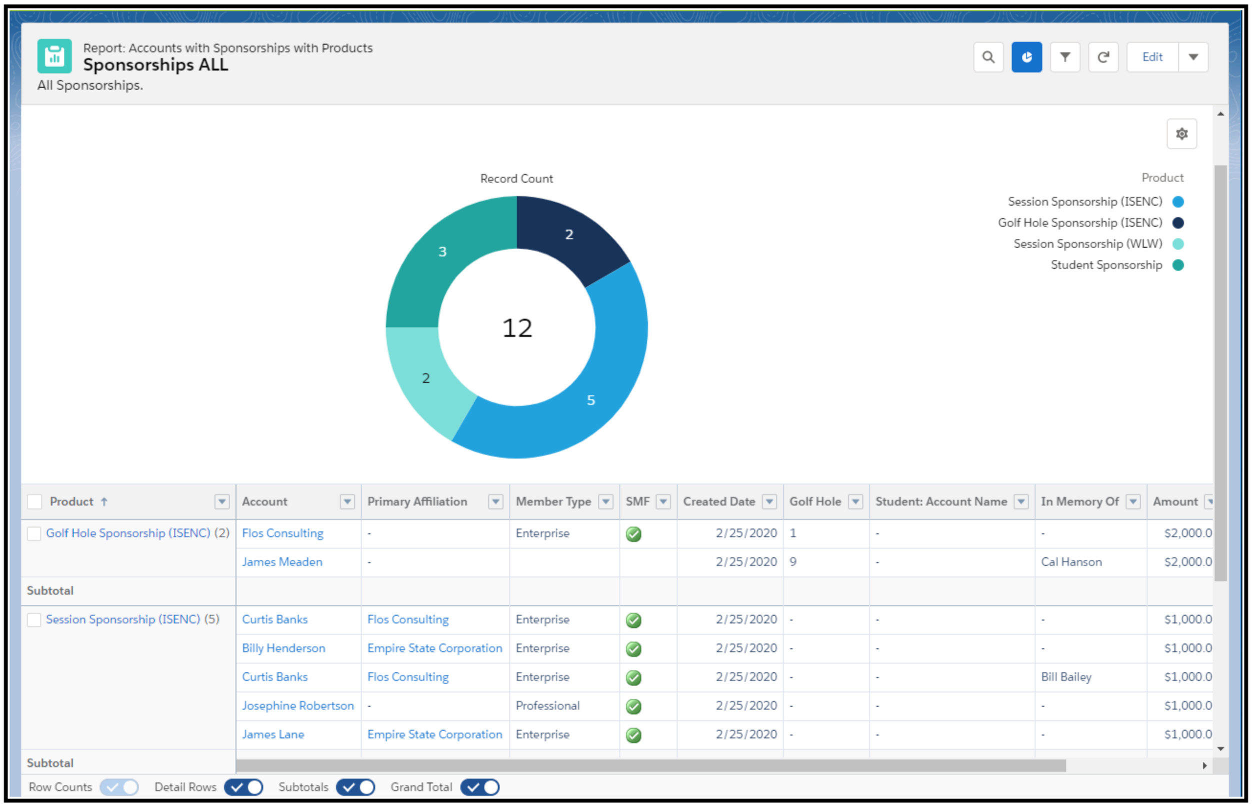
Sponsorships Reports and Dashboard

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



Report: Accounts with Sponsorships with Products

Sponsorships ALL

All Sponsorships.

Edit
Record Count
12
2
5
2
3
Product
Session Sponsorship (ISENC) ●
Golf Hole Sponsorship (ISENC) ●
Session Sponsorship (WLW) ●
Student Sponsorship ●

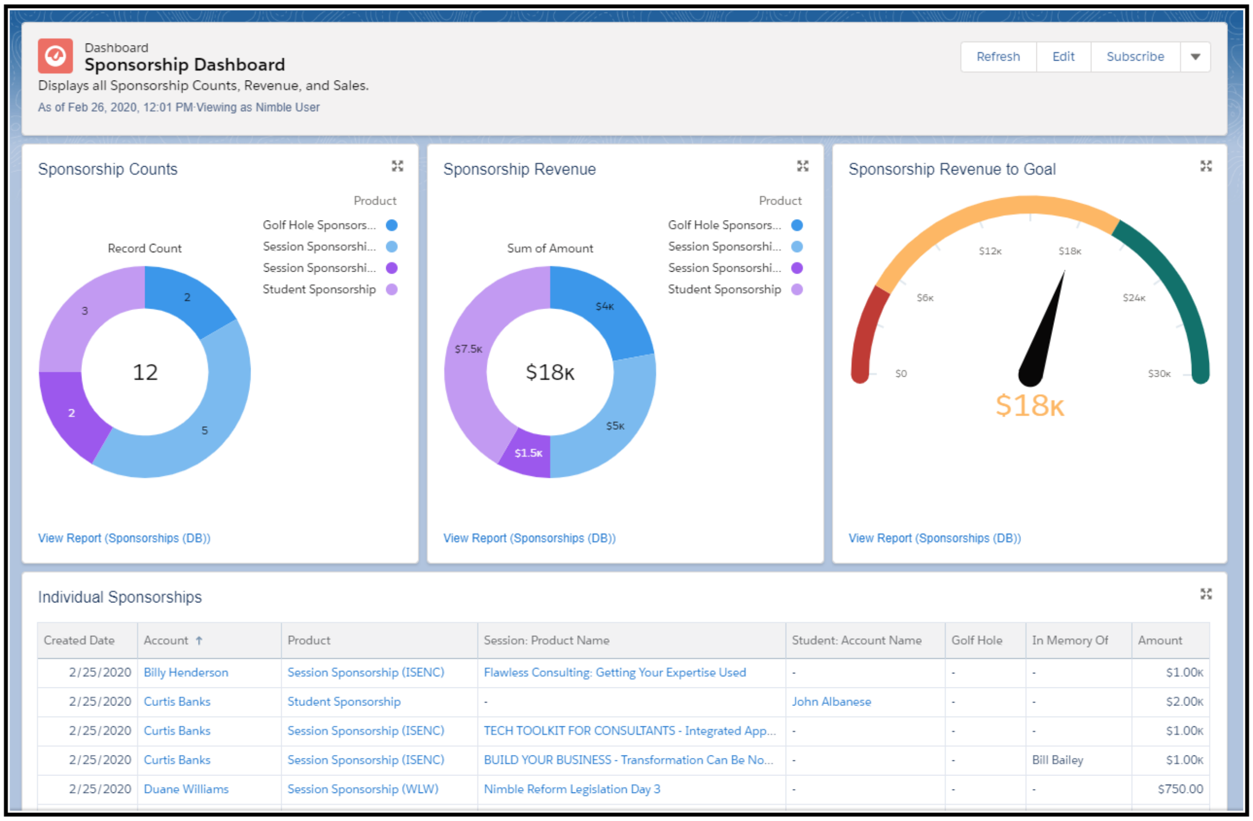
☐ Product ↑	Account	Primary Affiliation	Member Type	SMF	Created Date	Golf Hole	Student: Account Name	In Memory Of	Amount
☐ Golf Hole Sponsorship (ISENC) (2)	Flos Consulting	-	Enterprise	✓	2/25/2020	1	-	-	$2,000.0
	James Meaden	-			2/25/2020	9	-	Cal Hanson	$2,000.0
Subtotal									
☐ Session Sponsorship (ISENC) (5)	Curtis Banks	Flos Consulting	Enterprise	✓	2/25/2020	-	-	-	$1,000.0
	Billy Henderson	Empire State Corporation	Enterprise	✓	2/25/2020	-	-	-	$1,000.0
	Curtis Banks	Flos Consulting	Enterprise	✓	2/25/2020	-	-	Bill Bailey	$1,000.0
	Josephine Robertson	-	Professional	✓	2/25/2020	-	-	-	$1,000.0
	James Lane	Empire State Corporation	Enterprise	✓	2/25/2020	-	-	-	$1,000.0
Subtotal									

Row Counts
Detail Rows
Subtotals
Grand Total

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.


Refresh
Edit
Subscribe
Sponsorship Counts
Product
Golf Hole Sponsors...
Session Sponsorshi...
Session Sponsorshi...
Student Sponsorship
Record Count
12
2
5
2
3
View Report (Sponsorships (DB))
Sponsorship Revenue
Product
Golf Hole Sponsors...
Session Sponsorshi...
Session Sponsorshi...
Student Sponsorship
Sum of Amount
$18K
$4K
$5K
$1.5K
$7.5K
View Report (Sponsorships (DB))
Sponsorship Revenue to Goal
$0
$6K
$12K
$18K
$24K
$30K
$18K
View Report (Sponsorships (DB))
Individual Sponsorships

Dashboard

Sponsorship Dashboard

Displays all Sponsorship Counts, Revenue, and Sales.

As of Feb 26, 2020, 12:01 PM·Viewing as Nimble User

Created Date	Account ↑	Product	Session: Product Name	Student: Account Name	Golf Hole	In Memory Of	Amount
2/25/2020	Billy Henderson	Session Sponsorship (ISENC)	Flawless Consulting: Getting Your Expertise Used	-	-	-	$1.00K
2/25/2020	Curtis Banks	Student Sponsorship	-	John Albanese	-	-	$2.00K
2/25/2020	Curtis Banks	Session Sponsorship (ISENC)	TECH TOOLKIT FOR CONSULTANTS - Integrated App...	-	-	-	$1.00K
2/25/2020	Curtis Banks	Session Sponsorship (ISENC)	BUILD YOUR BUSINESS - Transformation Can Be No...	-	-	Bill Bailey	$1.00K
2/25/2020	Duane Williams	Session Sponsorship (WLW)	Nimble Reform Legislation Day 3	-	-	-	$750.00

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 *n* DAYS	Starts at 12:00:00 a.m. *n* days before the current day and continues up to the current second. (The range includes today.)
NEXT *n* DAYS	Starts at 12:00:00 a.m. on the next day and continues for the next *n* 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 *n* QUARTERS	Starts at 12:00:00 a.m. on the first day of the quarter *n* quarters ago and continues to the end of the quarter before the current quarter. (The range does not include the current quarter.)
NEXT *n* 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 *n* 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 *n* YEARS	Starts at 12:00:00 a.m. on January 1 of the year *n* years ago and continues through December 31 of the year before the current year.
NEXT *n* 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 *n*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**. **Note**: None of the FISCAL dates are supported when creating mobile custom views.
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 *n* FISCAL QUARTERS	Starts 12:00:00 am on the first day of the fiscal quarter *n*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 *n* 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 *n*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

Objective 1
Why Surveys? 2
Enable the Survey Item 3
Survey Sharing 5
Create a Survey 6
Configure Pages 8
Add Logic to a Survey 13
Send the Survey 15
Analyze the Survey. 17
Survey Reports 18
Creating the Survey Report Type (Optional) 19

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 deprioritzed. 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:

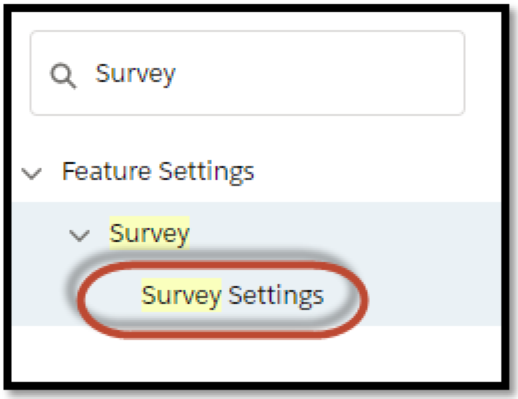
- Event evaluation survey
- Speaker/Instructor survey
- Services survey
- Facilties survey
- Product offering survey

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.

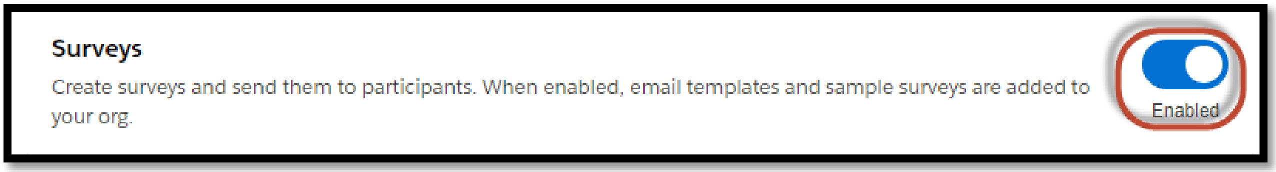
In this exercise users will turn on the Survey Item for use.

1. Click the **Setup Icon,** ⚙ and select **Setup**.
2. In the **Quick Find box** type, **Survey**.
3. Click on **Survey Settings.**



Survey

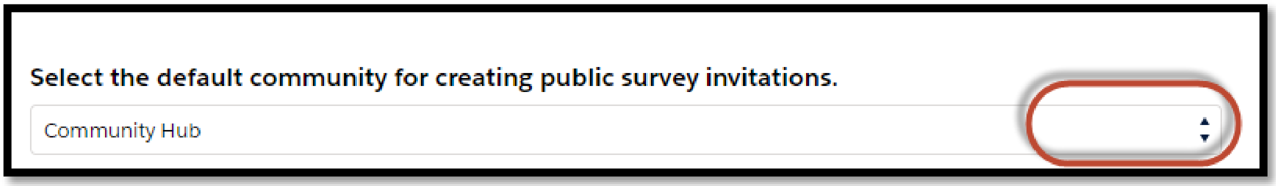
4. Toggle the Surveys Item to **Enabled**.



Surveys

Create surveys and send them to participants. When enabled, email templates and sample surveys are added to your org.

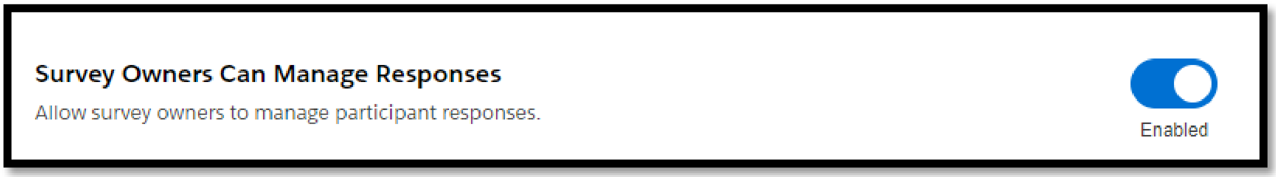
5. Select the **default community for creating pubic survey invitations from the drop-down box.**



Select the default community for creating public survey invitations.

Community Hub

6. Click on the Enabled button to turn on the **Survey Owners can Manage Responses** function**.**



Survey Owners Can Manage Responses

Allow survey owners to manage participant responses.

Enabled

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.

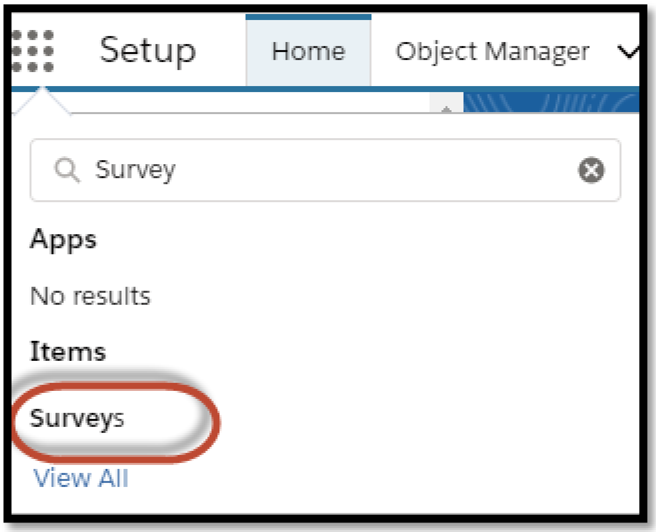
Create a Survey

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.

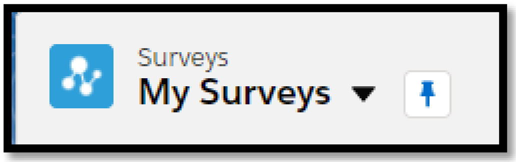
In this exercise users will create a new survey to deploy.

1. From the App Launcher

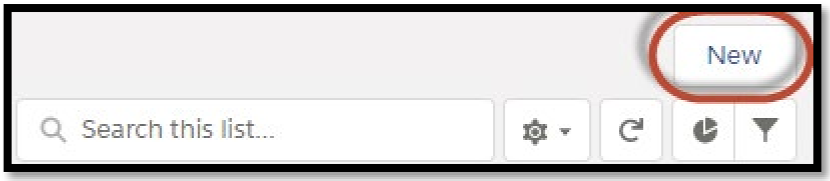
, find and select the **Surveys** Item.


Setup
Home
Object Manager
Survey
Apps
No results
Items
Surveys
View All

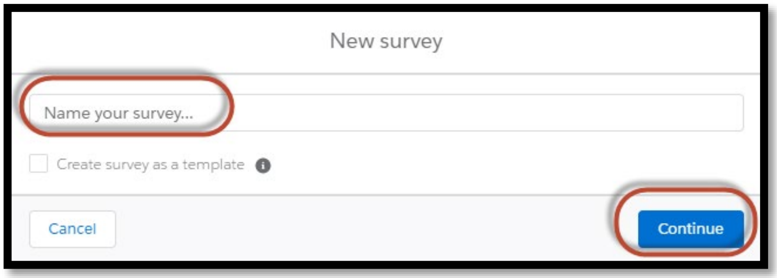
Observe : The Survey Item by default has 2 views - **My Surveys** and **Recent Surveys**.


Surveys
My Surveys

2. Click the **New** button to create a new survey.

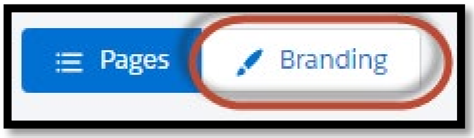

New
Search this list...

3. **Enter the Survey name** and click the **Continue** button.

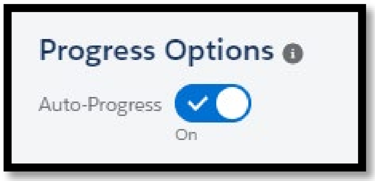

New survey
Name your survey...
Create survey as a template
Cancel
Continue

- 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.

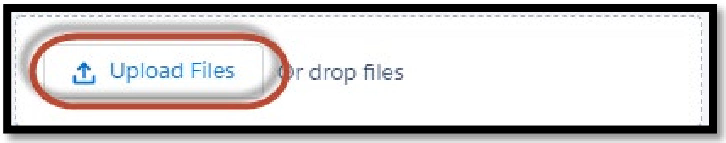
4. Click on the **Branding** button (upper left).


Pages
Branding

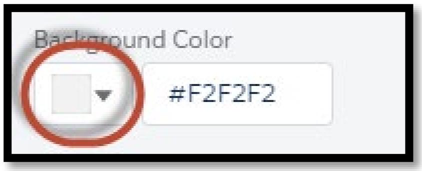
5. Turn on **Auto-Progress** to let survey participants automatically move to the next page after responding to the last question on a page.


Progress Options
Auto-Progress
On

6. In the **Background Image** section, click **Upload Files** and select a preferred image.


Upload Files
Or drop files

7. **Background** color, **Question** color, **Answer** color, and **Start**, **Next** and **Finish** button colors can be configured to represent any branding choices.

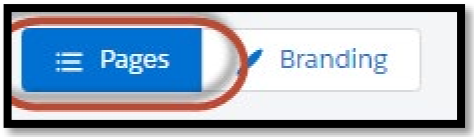

Background Color
#F2F2F2

Configure Pages

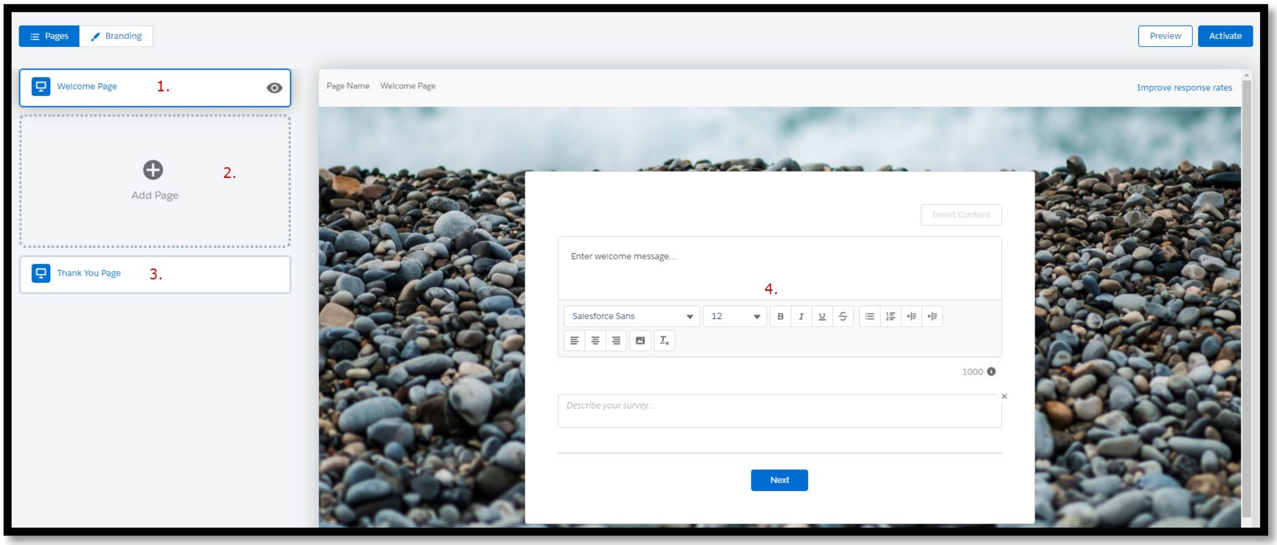
Configuring a survey pages enables users to add the actual questions that a survey will gather information from. It also enable users to set stylistic elements such as backgrounds and graphics on pages.

In this exercise, users will configure and add questions to three survey pages.

1. Click the **Pages** button (upper left).


Pages
Branding

- **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.

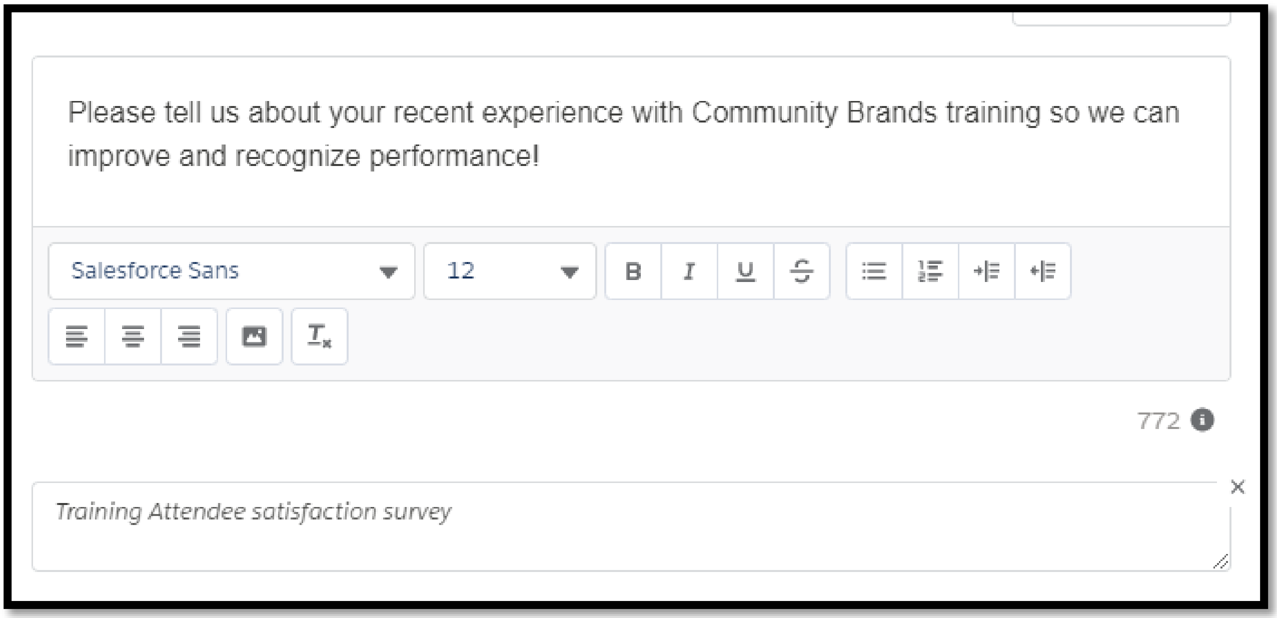

Pages
Branding
Preview
Activate
Welcome Page
1.
Add Page
2.
Thank You Page
3.
Page Name
Welcome Page
Improve response rates
Insert Content
Enter welcome message...
4.
Salesforce Sans
12
1000
Describe your survey...
Next

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.

---

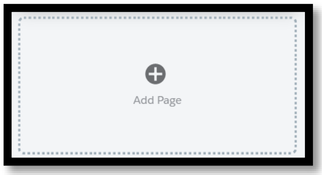
4. Enter a description: **Training Attendee satisfaction survey**.



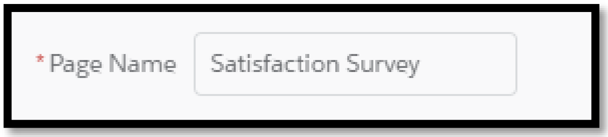
Please tell us about your recent experience with Community Brands training so we can improve and recognize performance!

Training Attendee satisfaction survey

5. Click **Add Page**.

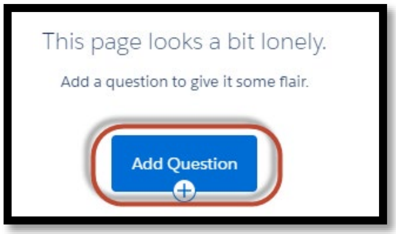


6. Enter the Page Name, **Satisfaction Survey**.



* Page Name: Satisfaction Survey

7. Click the **Add Question button** on the canvas.



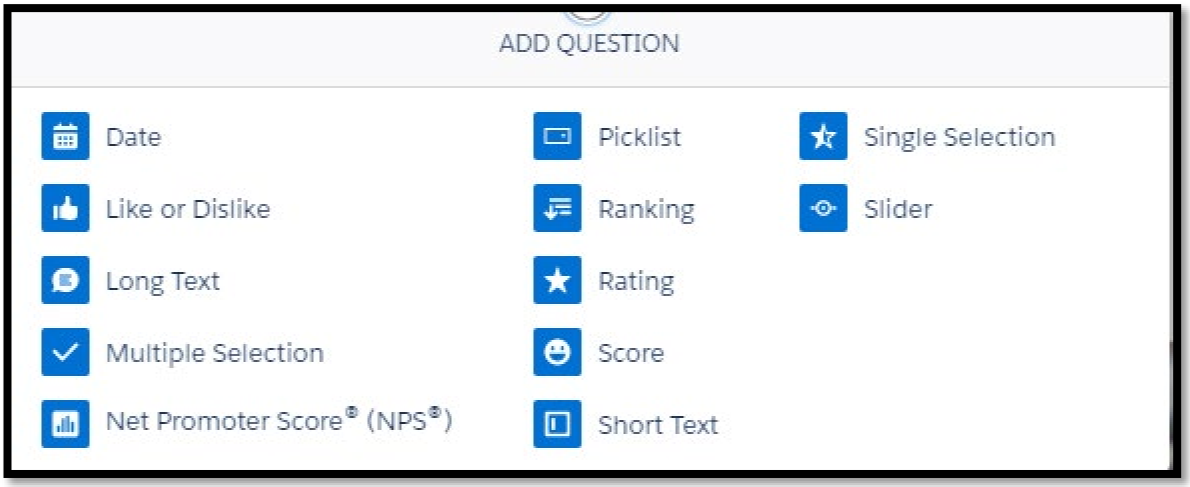
This page looks a bit lonely.

Add a question to give it some flair.

Add Question

8. Select **Rating** for this example.

IMPORTANT NOTE: There are 12 different types of Survey questions including **NPS** (**Net Promoter Score**).

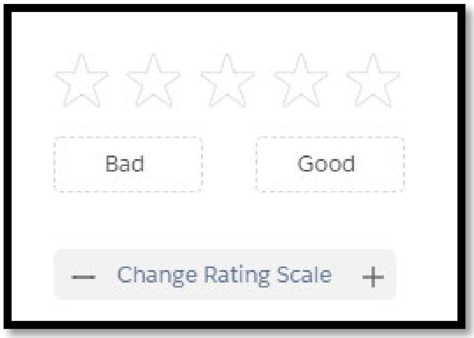


ADD QUESTION
Date
Like or Dislike
Long Text
Multiple Selection
Net Promoter Score® (NPS®)
Picklist
Ranking
Rating
Score
Short Text
Single Selection
Slider

---

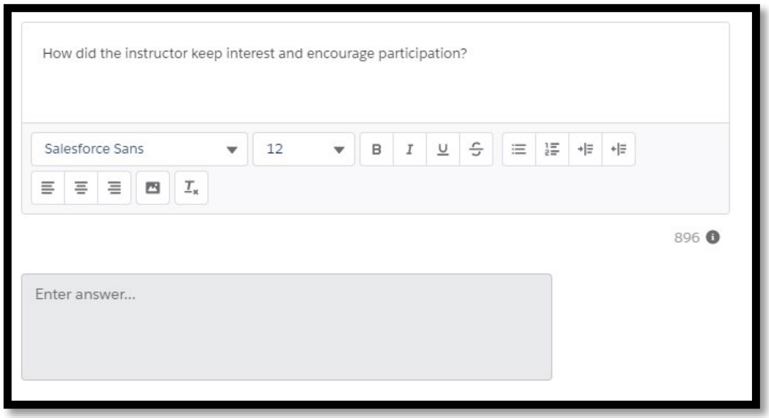
9. Enter the **prompt/inquiry** or **question, Overall Instructor Rating**.

10. Set the **scale for a rating question**. In this example, keep the default of five stars.



Bad
Good
— Change Rating Scale +

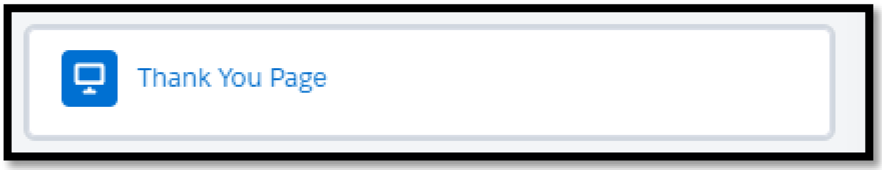
11. Click the **Add Question** button.
12. Select **Long Text.**
13. Enter in the **Queston** box the text, **How did the instructor keep interest and encourage participation?**



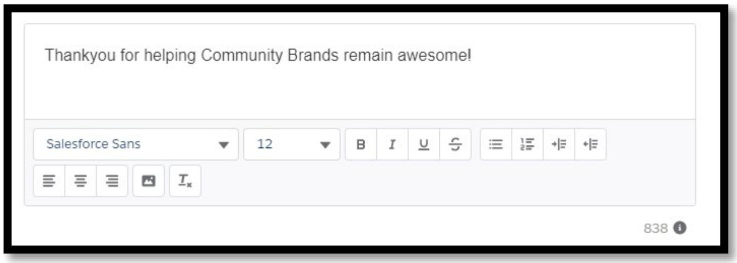
How did the instructor keep interest and encourage participation?

Salesforce Sans
12
B
I
U
896
Enter answer...

14. Click the **Thank you Page** button.


Thank You Page

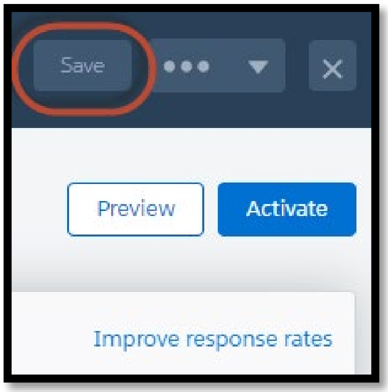
15. Enter, **Thank you for helping Community Brands remain awesome!** in text box.



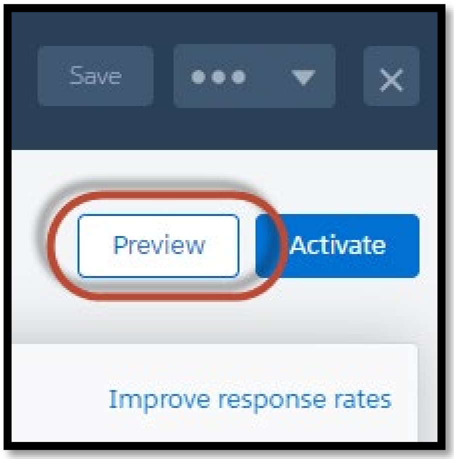
Thankyou for helping Community Brands remain awesome!

Salesforce Sans
12
B
I
U
838

16. Click the **Save** button (upper right).


Save
Preview
Activate
Improve response rates

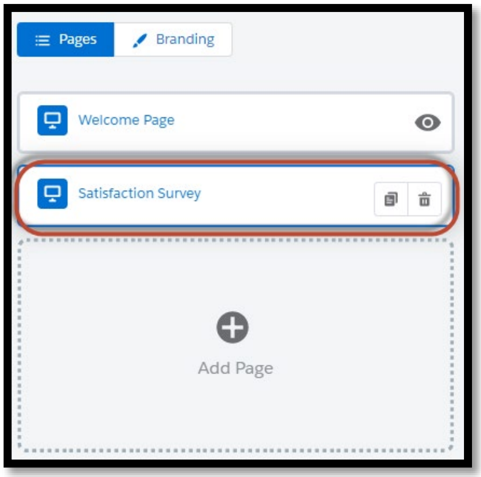
17. Click **Preview** to step through the survey just like a regular participant.


Save
Preview
Activate
Improve response rates

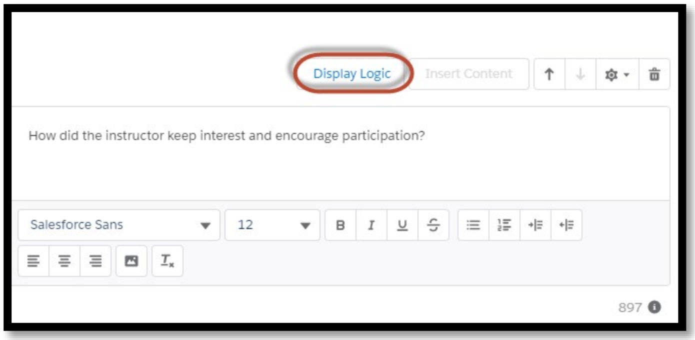
Add Logic to a Survey

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.


Pages
Branding
Welcome Page
Satisfaction Survey
Add Page

2. Click **Display Logic** above the question that is logic eligible.


Display Logic
Insert Content
Salesforce Sans
12
897

How did the instructor keep interest and encourage participation?

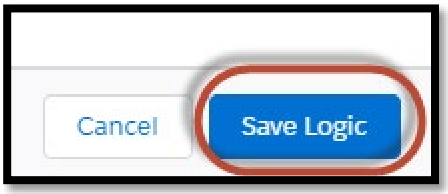
3. **Define the condition**. For this example provide the rules of behavior as outlined:

- **Select Condition** : All conditions are met
- **Selection Question**: “How did the instructor keep interest and encourage participation?”
- **Select Operator**: equals
- **Response**: 3

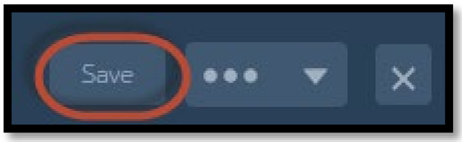
Note: Additional Conditions can be added until requirements of the survey are met.

---

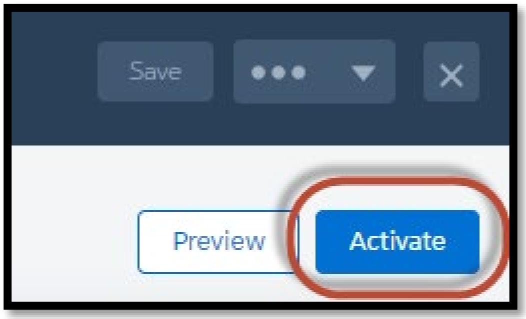
4. Click the **Save Logic** button.


Cancel
Save Logic

5. Click the **Save** button.



6. **Activate** the Survey.


Save
Preview
Activate

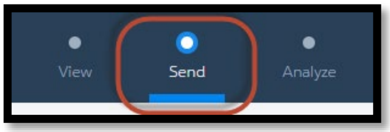
7. Observe the warning when clicking on the **Activate** button: Active surveys **CANNOT** be edited.

Send the Survey

Sending a survey solicits feedback from the survey participant.

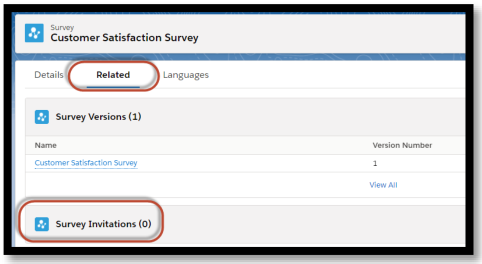
In this exercise users will send a survey to gather results.

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**.


View
Send
Analyze

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.


Survey
Customer Satisfaction Survey
Details
Related
Languages
Survey Versions (1)
View All
Survey Invitations (0)

Name	Version Number
Customer Satisfaction Survey	1

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.

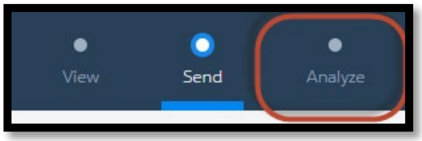
IMPORTANT NOTE: There are four Invitation link settings 1. Unique Link 2. Anonymize responses 3. Don’t require authentication 4. Auto Expires.

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.

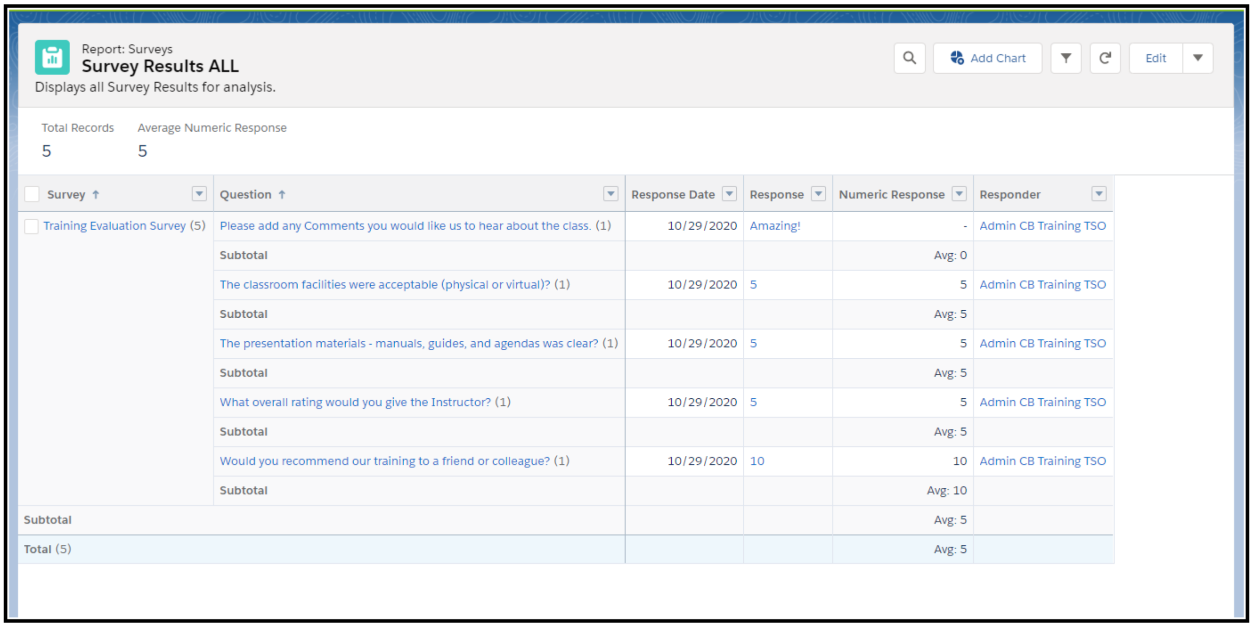
   In order to review and track results from multiple surveys users should use the Reports Item and/or the Dashboard Item.

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 **Survery 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.



Report: Surveys

Survey Results ALL

Displays all Survey Results for analysis.

Total Records 5

Average Numeric Response 5

☐ 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	

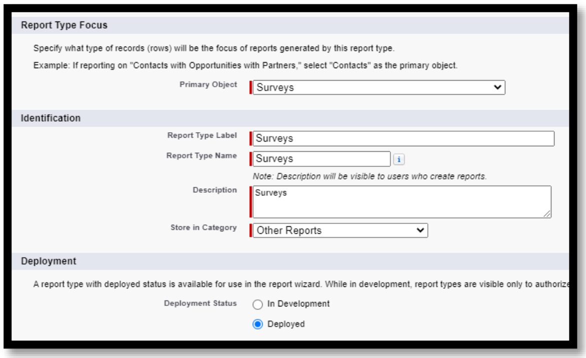
Creating the Survey Report Type (Optional)

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 authorize

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