**Nimble AMS Familiarization Agenda**

**DAY ONE**

**Navigation (9:30 - 10:15)**

* Navigation, Terminology, & Hierarchy
* Displaying Apps/Items
* Dashboards – Home & Application
* Finding Data
* Favorites – Creating and Maintaining
* Personalization/Tricks

**Accounts (10:15 - 11:00)**

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

**BREAK 11:00-11:15**

**List Views (11:15 - 12:15)**

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

**LUNCH 12:15-1:00**

**Reports (1:00 - 2:00)**

* Understanding Reports
* Using Existing Reports
* Creating a New Report
* Report Options

**Dashboards (2:00 - 2:30)**

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

**BREAK 2:30 - 2:45**

**Chatter (2:45 - 3:00)**

* Understanding Chatter
* Chatter Publisher
* Chatter Posts
* Chatter Questions
* Chatter Polls

**Committees (3:00 - 3:30)**

* Committees Records
* Adding Committee Membership Records
* Committee Views, Reports, and Dashboards

**DAY TWO**

**Products (9:30 - 10:00)**

* Understanding the Products Form
* Understanding Pricing
* Creating Special Prices
* Category Links
* Inventory & Quantities
* Shipping
* Merchandise Product Categories
* Product Forms: Subscriptions, Exhibitors, Sponsorships, & Adverts
* Product Views, Reports, and Dashboards

**Orders & Payments (10:00 - 10:45)**

* Types of Orders
* Ordering a Merch Product
* Ordering Subs, Exhibitors, Sponsorships, & Adverting Products
* Reading the Order Form
* Adjusting Orders – Edit - Add Pay, Cancel, Refunds
* Editing & Deleting Carts
* Bulk Invoicing and Order Confirmation
* Order Views, Reports, and Dashboards

**BREAK 10:45-11:00**

**Membership (11:00 - 11:45)**

* Membership Types
* Membership Products
* Membership Type Product Links
* Viewing Membership Information
* Purchasing Membership and Results
* Membership Reports and Dashboards

**Events (11:45 - 12:30)**

* Creating an Event
* Event Questions
* Event Session Groups & Product Links
* Creating Event Registrations
* Canceling an Event Registration
* Closing an Event

**LUNCH 12:30-1:00**

### Donations (1:00 - 1:30)

* Understanding Donations
* Review Product Setup
* Suggested Donation Amounts & Checkout URL
* Creating Appeals and Appeal Product Links
* Processing Donation Orders
* Donation Reports and Dashboards

**Community Hub (1:30 - 2:00)**

* Logging into Community
* Community Hub Profile
* Ordering from Store, Events, & Renew/Join Membership
* Donations
* Checkout

**BREAK 2:00-2:15**

### Basic Accounting (2:15 - 3:00)

* Entities
* GLs
* Product GLs
* Order Transactions
* Payment Transactions
* Batching
* Accounting Dashboard & Reports