NIMBLE AMS CHOICE CLASS DESCRIPTION

Duration 1 - 5 Days

Class starts promptly at 9:00 am. There will be a 15-minute morning break, an hour lunch break, and a 15-minute afternoon break each day. Class ends 4/ 5:00 PM every day - may vary depending on questions & projects.

Overview

Clients choose from any/all **End User, Accounting, Administrator, Administrator II, CHUB Administrator, Reports and Dashboards,** and **Create,** topics to create a personalized agenda. The **All Nimble Topics for Choice Training** section in this document outlines content options with relevant time frames. Entire classes can be selected.

Content taught in any desired format; large or small groups, one on one, repeated over multiple sessions, etc.

Clients are encouraged to put all **new** users of Nimble through a **Nimble Basics** ½ day session covering the topics: Intro to **Navigation**, **Accounts**, **List Views**, **Reports**, **Dashboards**, **Chatter**, and **Community Hub**. Nimble Basics can be repeated twice a day to ensure smaller groups receive more individual attention.

Clients can also choose sessions conducted in a **Q/A format** around topics, rather than traditional trainer led instruction. Time Frames for Q/A format estimated based on the Topics clients select in the outline in this document, but can be expanded based on client wishes.

Clients can additionally include sessions that function as hands-on workshops for building **List Views, Reports and Dashboards**. Sessions conducted in the clients Production org if desired.

Recording: Clients can request any Basic Topics: End User, Accounting, or Reports and Dashboard be recorded. All Advanced Topics: Administrator I, Administrator II, CHUB Administrator, and Create topics NOT recorded.

Manuals: At no additional charge, clients receive relevant Nimble AMS manual chapters (in PDF) that reflect the content covered. If a client requests training on the entire course, clients receive the complete manual (in PDF).

Pricing

The time frames listed after each topic will be used to determine the agenda content and pricing. Hours will be added for non-instruction, trainer preparation time. Price will vary depending on whether clients select from Basic or Advanced topics and is charged at an hourly rate.

- **Basic:** End User, Accounting, Reports & Dashboards and any Add On Module: Education, Fundraising, or Advertising
- **Advanced:** Administrator, Developer, Developer II, Web Developer, or EBusiness

The time frames listed after each topic will be used to determine the agenda content and pricing. Hours will be added for non-instruction, trainer preparation time.

Clients should reach out to Jen Frantom (Jennifer.Frantom@CommunityBrands.com) for more information re: pricing and purchasing.

Timing/Preparation

Instructor will conduct a 1-2-hour pre-class phone conference to discuss the desired topics, agenda and class length.

The assigned Trainer will instruct all End User and Reports and Dashboard topics predominantly on the Client's Staging Org. It is therefore critical that the client's Staging org be updated, or have been updated recently, to reflect the current Production org.

ALL Advanced level Training topics (Administrator, Administrator II, Create, and Community Hub Administrator) will be instructed using the Nimble AMS Training Org. A copy of the org will be distributed the day before training with login instructions. Clients will have use of the Org for 30 days to use in conjunction with the distributed manual.

When covering topics such as List Views, Reports, and Dashboards, users will be encouraged to access their Production Org. This will provide students, when applicable, the opportunity to interface with/edit, the live system. The trainer may also utilize the Nimble Training Org for modular specific exercises and to showcase best practices.

Prior to the Class the Trainer will need:

1. Access to the Clients Org 1-2 weeks prior to Training in order to become acclimated
2. A technical walkthrough of the Org by a client SME that can explain ANY unique processes the client desires covered in class
3. Record and process examples that the client wants used as examples/replicated in the class

Who Should Attend

Existing Clients (Post-Go Live) only
Any users of Nimble AMS at Client location

Attendance is unlimited BUT should not exceed a 10-12 maximum for a given session

Setup

Clients will need dedicated computer per attendee with internet capability.

Clients will need to provide projector and facility space for training.

Please contact Jennifer Frantom / Dave O'Connell at Nimble for Pricing.

All Nimble Topics for Choice Training

End User Topics

Nimble Basics

Navigation (45 minutes)

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

Accounts (1 Hour)

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

List Views (45 minutes)

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

Reports (1 Hour)

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

Dashboards (30 minutes)

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

Chatter (30 minutes)

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

Community Hub (30 minutes)

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

Modular Topics

Products (30 minutes)

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

Orders & Payments (1 Hour)

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

Membership (45 minutes)

- Membership Types
- Membership Type Product Links
- Membership Products
- Purchasing Membership and Results

- Viewing Updated Membership Information
- Membership Views, Reports, and Dashboards

Events (45 minutes)

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

Committees (30 minutes)

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

Basic Accounting (45 minutes)

- Entities
- GLs
- Product GLs
- Order Transactions
- Payment Transactions
- Accounting Dashboard
- Accounting Views, Reports, and Dashboards

Donations (30 minutes)

- Understanding Donations
- Creating a Donation
- Appeals Configuration
- Creating an Appeal
- Cloning an Appeal
- Creating an Appeal Product Link
- Processing Donations
- Donation Views, Reports, and Dashboards

Programs (30 minutes)

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

Sponsorships (30 minutes)

- Creating a Sponsorship Product
- Ordering a Sponsorship
- Viewing Sponsorship Views, Reports, and Dashboards

Exhibitors (30 minutes)

- Creating a Booth Product
- Ordering a Booth
- Viewing Booth Views, Reports, and Dashboards

Advertising (30 minutes)

- Creating an Advertising Product
- Ordering Advertising
- Viewing Advertising Views, Reports, and Dashboards

Surveys (30 minutes)

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

Accounting Topics

Introduction to Nimble Accounting (9:00 AM – 9:30 AM)

- Financial Management Systems Integration
- Accounting Best Practices
- Day to Day Accounting
- Accounting Dashboard
- Nimble Basics Training (Optional)

Entities (9:30 AM – 10:00 AM)

- Understanding Entities
- Entity Information on Related Items
- AR Aging
- Payment Gateways
- Bank Accounts
- Credit Card Issuer
- Payment Method
- Sales Tax
- Fiscal Year Setup
- Multi-Entity Accounting

Transactions and GL Accounts (10:00 AM – 10:30 AM)

- Transaction Items
- Transactions
- GL Accounts

Products (10:45 AM – 11:30 AM)

- Understanding Products
- Editing a Product
- Enabling a Product for Community Hub
- Deactivating a Product
- Pricing
- Product Links
- Ship Methods

Deferred Revenue (11:30 AM – 12:00 PM)

- Understanding Deferred Revenue
- Setting a Product to be Deferred
- Order a Deferred Product
- Deferred Schedules

Orders and Payments (12:30 PM – 1:00 PM)

- Understanding Orders and Payments
- Orders Tab
- Order Process
- Placing an Order
- Creating a New Order
- Adjusting Orders
- Running Order Analytics
- Running Order Reports
- Generating Bulk Invoices or Order Confirmations
- Payment Preferences
- Payment Processing

Batches (1:00 PM – 1:30 PM)

- Understanding Batches
- Creating a Batch
- Viewing Batches
- Editing a Batch
- Posting a Batch
- Correction an Unhealthy Batch
- Deleting a Batch
- Exporting a Batch

Reconciliation & Reports (1:30 PM – 2:00 PM)

- Understanding Reconciliation
- Creating Reports
- Accounts Receivable Statements
- AR Trial Balance
- Deferred Revenue Report

Administrator Topics

Licenses, Permissions, and Profiles (1 hour)

- Reviewing Licenses
- Profiles
- Permission Sets
- Public Groups
- Users and Passwords

Managing COMMUNITY HUB USERS (1 HOUR)

- User CH Settings
- Resetting Passwords
- License Recycling
- Password Settings
- Logging In
- Photos
- Handing Multiple Community Hubs

Managing Fields, Records, and Layouts (1.5 hours)

- Updating and Editing Page Layouts
- Field Level Security
- Adding Help Text
- Adding a Value to a Pick List
- Editing Record Summary Fields
- Editing Record Related List Quick Links
- Adding a Details Section to an Account Record
- Adding Buttons to Forms

List Views, Reports, and Dashboards (1.5 hours)

- Managing List Views
- Managing Reports
- Creating and Editing Report Types
- Adding Fields to an Existing Report Type

- Managing Dashboards
- Editing the Home Dashboard
- Embedding Dashboards in the Navigation Bar

Rules (45 min)

- Validation Rules
- Workflow Rules
- Sharing Rules
- Escalation Rules
- Triggers

Managing Chatter Groups (30 min)

- Creating Chatter Groups
- Customizing Groups
- Managing Members
- Private Groups
- Archived Groups

Mobile for Administrators (45 min)

- Salesforce Mobile App
- Logging into Salesforce Mobile
- User Management

Importing and Exporting Data (30 min)

- Importing
- Exporting
- Apex Data Loader
- Security Tokens

Data Integrity (1 hour)

- Data Controls
- Sandbox Creation
- Change Sets

Customization vs. Configuration (30 min)

- Definitions
- Problem Solving and Requirements

Setting Up Complex Objects (1 hour)

- Membership
- Events
- Merchandise
- Programs
- Coupons

Administrator II Topics

Is Automation the right choice? (2 hour)

- Evaluation of the Process
- Review of the tools offered for automation
- Review of common use cases
- Business process considerations
- The differences of the tools

Workflows (1 hour)

- How workflows work
- Understanding the order of execution
- Creating a workflow

Approval Processes (1 hours)

- Defining the Approval process
- Planning the Approval Process
- Creating an approval process

Process Builder (1.5 hours)

- Familiarization of the Process Builder tool
- The use case for Process Builder
- Defining criteria
- Defining and adding Actions

Flow Builder (2.5 hours)

- The most Complex tool available
- Comparison between tools
- Flow considerations
- Adding a Flow for User usage
- Other Flow functionality

Change Sets (30 min)

- Creating a Change Set
- Limitations of Change Sets

Community Hub Administrator Topics

Community Hub (1 hour)

- Pages
- Cards
- Card Types
- Fields
- Create a Page Exercise
- Create a Card with Fields Exercise

Buttons and Queries (1 hour)

- Viewing, Editing, Adding and Creating Buttons
- Managing Buttons

Data Sources and Queries(1 hours)

- Queries
- Data Sources
- Creating a Data Source
- Exercise Creating a Data source from a Query

Community Hub Settings and Access Control (1.5 hours)

- Account Settings and Creating New Account Settings
- Password Strength Meter
- Logos and Themes

User Management, Additional Settings and Emails (1.5 hours)

- User Management
- Automated User Creation
- Error Messages for Community Hub
- Send Grid
- Change Sets

Common Issues and FAQ (1.5 hours)

- Review Common Issues
- Review FAQs
- Q & A

Intro to the Lightning Store (45 min)

- Planning the Store
- Architecture of the Parent and Child Products
- Create a Parent Product with a Child Exercise

Lightning Store Features (1.5 hours)

- Product Types
- Review of Lightning Store Components
- Creating a Page
- Previewing a Page
- Publishing a Page

Mobile for Lightning Store (30 min)

- How does it look on other platforms?

Create Topics

Introduction (Optional) (30 min)

- Navigation, Terminology, & Hierarchy
- The objects needed for Nimble Create
- The Create Order of Process

SOQL (2 Hours)

- SOQL – Salesforce Object Query Language
- Using SOQL
- Writing SOQL with the Query Builder
- Developer Console
- SOQL Syntax
- SOQL Exercises

Create Templates (2 Hours)

- Templates
- Creating Templates
- Writing SOQL for Templates
- Authoring Templates
- Formatting Templates
- Working with Sub-templates
- Parent Templates
- Previewing Templates
- Using the Advanced Template Viewer
- Creating Custom Buttons
- Email Templates

Nimble Create Extensions (1.5 Hours)

- Creating an Apex Class (Advanced)
- Creating a Button
- Adding a Button to a Page Layout
- Testing the Template
- Using an automated process

- Q&A