



NIMBLE AMS CREATE CLASS DESCRIPTION

Duration

1 Day

This class conducted VIRTUALLY unless the designated trainer is at the client site for other training classes. Class starts promptly at 9:00 am. There will be breaks every 90 minutes with a one-hour lunch break. Class will end no later than 3:00 PM, but this may vary depending on questions and student projects. Classes held at this level will NOT be recorded.

Hours Estimates

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

- Student Abilities
- Questions
- Side Discussions
- Lab & Exams

NOTE: An additional One (1) Hour of Prep Time will be assigned to the total training hours assessed for this class for all Implementation (pre Go-Live) classes due to the setup of the Training orgs & agenda comms.

Overview

The Nimble AMS Create class provides a detailed look at the creation and maintenance of Nimble Create based formal Reports. Users will learn best practices in generating Create reports through hands on construction of examples in the Nimble Training environment, and, when possible, in their live or test system. This course covers advanced, technical aspects of Nimble AMS and is designed for individuals designated as Administrator-level users of the system and for IT personnel.

Training will be conducted using the Nimble AMS Training Org. A copy of the org will be distributed the day before training with login instructions and the Nimble AMS Create Manual. Clients have active Org for 30 days to practice lessons learned/reinforce with manual.

Who Should Attend:

- User Administrators
- System Administrators
- IT Personnel

Prerequisites

Nimble AMS End User (Hard Requirement)

Nimble AMS Administrator (Admin License Hard Requirement)

Basic Salesforce Object Query Language (SOQL) (recommended; not necessary)

Basic HTML and CSS (recommended; not necessary)

Nimble AMS Create Training Manual included with attendance

Introduction (Optional) (30 min)

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

SOQL (1.5 Hours)

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

Create Templates (1.5 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
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