



NIMBLE AMS END USER CLASS DESCRIPTION

Duration 2 Days

Class starts promptly at 9:00 am. There will be a 15-minute morning break, an hour lunch break, and a 15-minute afternoon break each day. Class ends no later than 4:00 PM every day, but this may vary depending on questions and student projects.

Class will be held virtually unless otherwise arranged. 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

Overview

The Nimble AMS End User class is an overview of Nimble AMS basic features and its purpose is to instruct users with the core functions and best practices of Nimble AMS. It offers a solid background for users to become acquainted with the system as it introduces 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.

IMPORTANT NOTE: This class is for EXISTING Nimble client personnel who require an introduction to Nimble because they are newly hired, need refresher training, are new Nimble partners, or new Nimble personnel and wish to attend a scheduled class in either Nimble's Tysons or Chicago locations. In some circumstances, class can be held at a client's site and topics can be incorporated into the Nimble AMS Choice class as desired.

This class is NOT designed for newly signed, Implementation clients. Those users will be attending FAMILIARIZATION and/or GO-LIVE Training. This class is conducted solely on the Nimble Training org; it will NOT have any client data. For Training conducted on site, and on an existing (post-implementation) client's org, clients should request Nimble CHOICE Training.

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 Administrator Manual. Clients have active Org for 30 days to practice lessons learned/reinforce with manual.

This course intended for:

- End Users
- Department Managers
- Project Managers
- Database Administrators
- Database Developers

Prerequisites: NONE – THIS IS AN INTRO LEVEL COURSE

Nimble AMS End User Training Manual included with attendance

Day 1

Navigation (45 minutes)

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

Accounts (1 Hour)

- Accounts Overview
- Account Types: Persons & Organizations
- Account Sections
- Affiliations
- Activities

List Views (45 minutes)

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

Reports (1 Hour)

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

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

Chatter (15 minutes)

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

Committees (30 minutes)

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

Day 2

Products (30 minutes)

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

Orders & Payments (45 minutes)

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

Community Hub (30 minutes)

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

Basic Accounting (45 minutes)

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

Additional Topics – Optional

Donations (30 minutes)

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

Exhibitors (30 minutes)

- Creating a Booth Product
 - Ordering a Booth
 - Updating Booth Records
 - Viewing Booth Views, Reports, and Dashboards
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Advertising (30 minutes)

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

Surveys (30 minutes)

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

Mobile (15 minutes)

- Mobile Tour
 - MOB Customer Summary
 - MOB Global Menu
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