



Aptify®

End User Class Description

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Duration 2 days

Class begins promptly at 9:00 AM, with a morning break, hour lunch break, and an afternoon break. Class is scheduled to end at 4:00 PM each day, but times may vary based on student questions and discussions.

Hours Estimates

All hours listed in parenthesis are estimates—actual times will differ based on many variables such as:

- Student Ability
- Questions
- Side Discussions

Overview

This course provides an overview of the basic features of Aptify 6.0 Web. The course is designed to familiarize the student with its Association Membership Management System. Students use the standard product configuration with a fictitious association's database to gain hands-on experience with a wide variety of system applications, including Views, Order Entry, and Customer Management.

Students will walk through the operation by partaking in real-time interactions, labs, and short, mid-term and final evaluations. The focus of the class is on learning the application by using the system.

Who Should Attend

Course is intended for:

- End users
- Department Managers
- Database Administrators
- Business Professionals
- Project Managers
- Database Developers

Course Prerequisites

Required

- Familiarity with Microsoft Windows environment

Preferred

- Familiarity with databases
- Familiarity with Web Browsers

Day 1

Intro to Aptify (30 Minutes)

- Introduction to End User Training
- Log in to Aptify
- Navigating Aptify
- Aptify Terminology and Hierarchy

Aptify Basics (1 Hour)

- Aptify Display
- Applications and Favorites
- Settings Button
- Managing Settings
- Quick & Global Search
- Most Recently Used Records and Views
- Spaces/Tabs

Creating & Managing Records (1 Hour)

- Records Overview
- Creating a New Record
- Record Landing Page
- Create a Persons Record
- Address Options
- Review Record History
- Adding a Record to Favorites
- Cloning Records
- Wizards
- Avoiding Duplication

Views (2 Hours)

- Understanding Views
- Creating List Views
- Using View Filters
- Display Fields
- Sorting Data in Views
- Advanced View Filters
- Additional Filter Options
- Using the Between Operator
- Creating a Multi-Prompt View
- Scheduling Views
- Creating a Bulk Message
- Base Views
- Creating a Chart View
- Creating a Card View
- Creating a Calendar View
- Topic Codes
- Grouping Views
- Copying Views
- Managing and Sharing Views

Reports (30 Minutes)

- Exporting a view to Microsoft Excel
- How Reporting Works
- Running a Standard Export Report
- Running a Crystal Report

Contact Logs (30 Minutes)

- Understand Contact Logs
- Creating a Contact Log Record from the Persons record.
- Using the New Contact Log Entry Wizard

Day 2

Committees (30 Minutes)

- Creating Committees and Committee Terms
- Adding Members to a Committee Term
- Editing Committee Member Information

Products & Inventory (1 Hour)

- Understanding Products
- Creating a New Products Record
- Understanding Pricing
- Adding Prices to a Product
- Creating a Related Product Prompt
- Enabling Inventory Tracking
- Creating a Kit Product

Order Entry (1 Hour)

- Order Overview
- Ordering a Product
- Ordering a Multi-Line Order
- Creating a Quotation
- Company Only Orders
- Ordering a Kit Product
- Making a Partial Payment for an Order
- Applying a Discount
- Marking Orders as Shipped
- Creating a Bulk Order
- Canceling an Order with the Order Cancellation Wizard

Payments (30 Minutes)

- Making a Payment
- Multiple Payments to an Order
- A Single Payment to Multiple Orders and to Multiple Order Lines
- Processing Over Payments

Membership Dues & Subscriptions (1 Hour)

- Creating a Membership Dues Product
- Ordering a Membership Dues Product
- Manually Renewing Subscriptions
- Auto-Renewing Subscriptions
- Fulfilling the Auto-Renewal Standing Order
- Using the Order Cancellation Wizard to Cancel a Subscription

Campaign Management (30 Minutes)

- Setting up a Campaign
- Adding Prospects to a Campaign
- Creating a Campaign Segment
- Applying Campaign Discounts to an Order

Meeting Management (1 Hour)

- Using the New Meeting Wizard
- Creating Meeting Registrations
- Placing a Person on the Wait List
- Canceling a Meeting Registration
- Transferring a Meeting Registration
- Closing a Meeting

Additional Topics

Any of the Additional Topics can be incorporated into the class if desired. These are variable modules that are available for training if incorporated into the Implementation.

Case Management (30 Minutes)

- Creating Cases
- Tracking Cases

Awards (20 Minutes)

- Defining Award Types
- Tracking Award Nominations
- Tracking Awards and Incentives

Sales Force Automation (20 Minutes)

- Understanding Sales Force in Aptify
- Creating Opportunities Records

Accounting & Batching (45 Minutes)

- Accounting Information
- Batching
- Creating an Orders Batch
- Creating a Payments Batch
- Expanding a Scheduled Transaction Group
- Creating a Scheduled Transactions Batch
- Cash Control Batches

Expo Management

- Creating an Expos Record
- Venues & Floorplans
- Adding Booths to Floorplans
- Working with Booths
- Copying an Existing Floorplan
- Expo Pricing
- Linking Meetings to Expos
- Taking an Order for an Expo Booth
- Canceling a Booth Reservation

Publication Functions

- Altering the Delivery Schedule of a Publication
- Understanding How to Use the Fulfillments Service
- Adding Publication Contributors