



Aptify®

Fundraising Class Description

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Duration Half Day (3-4 Hours)

Class begins promptly at 9:00 AM, with a morning break. Class is scheduled to end between 12:00 and 1:00 PM, but times 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
- Labs & Exams

Overview

This course provides an overview of the Fundraising add on module features of Aptify 6.0. The course is designed for individuals who will work within an organization's Fundraising Department. This course builds on the material from the Aptify Fundamentals class; there will be a short review of Fundamentals to start the class.

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

Who Should Attend

Course is intended for:

- Users who specialize in the Fundraising module

Course Prerequisites

Required

- Understanding of Fundamentals Course

Half Day

Aptify Review (30 Minutes) Optional

- Introduction
- Adding Applications and Services
- Navigating Aptify
- Aptify Terminology and Hierarchy
- Creating Views

Fundraising Setup (1 Hour)

- Creating Funds
- Creating Fundraising Campaigns
- Creating Solicitors
- Creating Gifts in Kind Categories
- Creating Campaign Match Rules

Recording Pledges and Payments (1 Hour)

- Recording a One-Time Cash Pledge
- Recording Multi-Payment Pledges
- Recording Pledge Payments
- Recording Unsolicited Contributions
- Recording Cash Pledges
- Cancelling Pledges
- Recording a Gift in Kind Pledge
- Recording a Volunteer Time Pledge

Evaluating Campaign Progress (30 Minutes)

- Reviewing Fundraising Progress
- Creating Targeted Fundraising Views
- Running Fundraising Reports

Working with DAFs, ISFs, and Grants (1 Hour)

- Creating a Donor Advised Fund
- Creating International Support Fund Categories
- Creating International Support Funds
- Creating Grant Records
- Allocating Money from a Donor Advised Fund
- Allocating Money to an International Support fund
- Reversing a Donor Advised Fund Allocation