



Aptify®

Go-Live Class Description

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Duration/ Location- 3-4 Days

Class start time is at the discretion of the Client. Times can be parsed out per small groups, individuals, and in multiple increments (repeat same course numerous times). Classes conducted during normal business hours (9-5). Classes will be conducted on site at the Client location.

Overview

- Clients will initially send users to a half to full day end user session; the length will depend on the complexity of the implemented system, the number of End Users, the time-frame provided, etc. During the first half to full day, the Instructor will introduce Aptify and take users through Basic Navigation, Creating/Managing Views, Creating/Managing Records, and Reports.
- This Introductory session can be conducted multiple times over the first 2- 3 days. A length of half - one day per session will enable clients to stagger the attendance to make sure departments are covered during work hours and send focused groups to training. Additional days will revolve around Client configurations and specific modular training.
- Clients can send focused groups to Product Setup, Membership, Meetings, Order Entry, Accounting, etc. **Trainers will meet with Client POCs well in advance to determine the exact Agenda.** Other topics can be incorporated as needed – clients can refer to the SAMPLE AGENDA on the following pages for setup.

Database and Configurations

- Instructors will also meet with Aptify PMs, BAs, and other support personnel to learn the client's specific configurations. When specific configured topics are covered on the second/third day of class it is expected that the client will have a Subject Matter Expert present to aid in the explanation of those topics as well as Aptify Consulting providing a dedicated resource to perform the same function if necessary/available.
- **Training will be conducted on the Clients Test DB.** It will be critical for Clients to provide access at least a week ahead of time to the Aptify instructor for review of their DB.

Who Should Attend

This course is intended for

- Clients that are preparing to Go-Live with Aptify
- Clients that are preparing to convert to a major upgrade of Aptify

Course Prerequisites

- New Clients only (or major upgrade qualified)

Setup

- Clients will need dedicated computer per attendee with access to Aptify test server environment/and or Web URL.
- Clients will need to provide projector and facility space for training. Instructor will provide own laptop.

Half Day Format – Aptify Basics

(Repeated over Multiple Days – AM & PM Sessions 9:00-1:00, 1:00-5:00)

Navigation (9:00-9:30)

- Aptify Hierarchy – Applications, Services, Views, Records
- Navigation Basics
- Dashboards – Home & Application
- Using the Quick and Global Search
- Favorites – Creating and Maintaining
- Aptify Settings – Logging In, Closing Tabs, Displaying Tabs, New Windows
- Adding/Removing Applications & Services

Using Views (9:30-11:00)

- Using and Maintaining Shared Folders
- Copying and Editing existing Views
- Using Views effectively – best practices & examples
- Basic View Creation
- Using Filters
- Prompted Views: Text, Dropdown, List, Between
- Multi-Prompt (Find Person example), AND vs. OR
- Grouping
- Base Views
- Charts
- Bulk Messaging
- Topic Codes & Functions
- Scheduling Views

Break 11:00-11:15

Reports (11:10 - 11:30)

- Exporting/Linking to Excel
- Running Reports
- Mailing Labels
- Client specific reports

Companies and Persons Records (11:30 – 12:15)

- Finding records in Quick Search
- Using linked fields
- Entering a Persons information
- Linking Persons to Companies (if applicable)
- Entering a Companies information
- Address information
- Navigating the Full Record

Understanding Records (12:15 – 12:45)

- Viewing Record History
- Cloning Records
- Creating Templates
- Handling Duplication

Modular/Department Specific Topics

(Mix and Match, Repeat, and/or offer over Multiple Days)

Products (1 hour)

- Understanding the Products Form
- Understanding Pricing
- Inventory Objectives

Orders & Payments (2 hours)

- Types of Orders
- Ordering a Product
- Creating a Quotation
- Processing a Price Adjustment
- Making a Partial Payment for an Order
- Paying Multiple Orders with One Payment
- Paying with a Purchase Order
- Marking Orders as Shipped
- Canceling an Order with the Order Cancellation Wizard

Membership (1 hour)

- Reading the Membership Dues Product
- Manual vs. Auto Renewing Memberships
- Ordering a Membership Dues Product
- Tracking Membership Dues Renewals

Meetings (Events) (1 hour)

- The Meeting Copy Wizard
- Creating Meeting Registrations
- Reading the Wait List
- Checking Meeting Registrations
- Canceling a Meeting Registration
- Closing a Meeting

Committees (45 Minutes)

- Committees Records
- Terms Records
- Adding Members
- Committee Views

Campaigns (45 Minutes)

- Campaign setup
- Reading Campaign Results
- Campaign Views

Additional Topics

(Incorporate into Agenda as Required)

Accounting & Batching (Finance) (1 hour)

- Accounting Information
- GLs on Orders, Payments, Products
- Batching
- Creating an Orders Batch
- Creating a Payments Batch
- Accounting Views
- Batching Views
- General Views
- Products: Membership, Meetings, Publications, etc

Education (1 hour)

- Overview of Education module
- Course Setup
- Class Setup
- Registering Students
- Views
- Analysis

Advertising (1 hour)

- Product Category
- Products
- Product Issues
- Rate Cards
- Advertising Contract Records
- Insertion Orders & Payments

Fundraising (1 hour)

- Creating Funds and Grants
- Creating Fundraising Campaigns
- Creating Pledges
- Evaluating Fundraising progress

SalesForce (1 hour)

- Creating Opportunities
- Opportunity Views

Admin Level Topics

User Accounts (30 Min)

- User and Group Administration Overview
- User Security Types
- Aptify Licenses
- Creating, Enabling, and Disabling Users
- Preferences and Profiles
- Modifying the Login Process

Advanced View Management (30 Min)

- The Views Service
- Managing Views
- Creating, Editing, and Copying Views from the Views service
- Reassigning Views

Creating Dashboards (30 Min)

- Copying/Editing Dashboards
- Button Bars
- Adding Views/Web Browsers
- Managing Dashboards for Users
- Assigning Dashboards

End User/Admin Best Practices

- Folder structure
- Views Deployment
- Navigation for SA/Admins