



Aptify®

IT Starter Class Description

10.21.2019

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Duration 1 day

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.

Overview

This is an accelerated class designed to get Administrators and IT professionals as the designated clients up to speed so that they can immediately begin working on Aptify AND be positioned to successfully partake in required Developer level classes.

The course will be partially hands on – students will be provided a test, Aptify database to log into, but will also be made up of demos by the instructor on some of the more involved concepts. The goal is to balance an accelerated, one day overview, with accurate knowledge transfer.

Who Should Attend

Course is intended for:

- Designated Super Users of Aptify
- Database Developers
- Database Administrators

Course Prerequisites

Required

- Familiarity with Microsoft Windows environment
- Proficiency in dealing with software, systems, and databases due to the accelerated timeline

Day 1

Intro to Aptify

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

Aptify Basics

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

Creating & Managing Records

- 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

- 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
- Pivot Grids
- Topic Codes
- Grouping Views
- Copying Views
- Managing and Sharing Views

Reports

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

Contact Logs

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

Case Management

- Creating Cases
- Tracking Cases

Committees

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

Products & Inventory

- 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

- 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

- 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

- 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

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

Meeting Management

- 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

User Accounts

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

Advanced View Management

- Managing Views
- Creating and Copying Views
- Reassigning Views

Managing Dashboards

- Dashboard Structure (Areas, Parts, Components)
- Button Bars
- Embedded Views
- Managing Dashboards for Users

Introduction to Entities

- Entity Attributes
- Creating and Modifying Fields
- Creating Multiple Base Views
- Entity Security

Security

- User/Group Security Model
- Security Best Practices
- Security Groups
- Field Level Security
- Attachment Security

Form Templates

- Form Template Metadata Model
- Form Template Display Logic
- Preventing Form Modifications

Data Operations and Management

- Importing Data
- Creating Entity Bulk Operations