

## FUNDAMENTALS TRAINING COURSE STRUCTURE

Day 1		
	<b>General Features of AdvantageNFP Fundraiser</b>	<ul style="list-style-type: none"> <li>▪ Walk through of AF Features, e.g. browsers, icons, dates, pick lists and how they work etc.</li> <li>▪ Recognise the layout of the system and how to access different areas</li> </ul>
	<b>Understanding Database Configuration</b>	<ul style="list-style-type: none"> <li>▪ Explanation of reference data and how it is used</li> </ul>
	<b>Supporters</b>	<ul style="list-style-type: none"> <li>▪ Adding supporters to the database and multiple supporters at the same address, address de-duplication</li> <li>▪ Adding supporter details e.g. Date of birth, Marital Status, Website etc.</li> </ul>
	<b>Searching and Selection</b>	<ul style="list-style-type: none"> <li>▪ Using the search functionality within the system to find records</li> </ul>
	<b>Supporter Relationships</b>	<ul style="list-style-type: none"> <li>▪ Creating and managing relationships between supporters e.g. organisations and contacts</li> </ul>
	<b>Received Payments and Monetary Income</b>	<ul style="list-style-type: none"> <li>▪ Receiving donations and contributions and recording it against a supporter</li> <li>▪ Splitting payments into several monetary incomes</li> <li>▪ Allocating monetary income to Earmarks and Fundraising activities</li> <li>▪ Reversals – incorrectly entered or money not received</li> </ul>
	<b>Gift Aid</b>	<ul style="list-style-type: none"> <li>▪ Set up Gift Aid declarations</li> </ul>
	<b>Tasks</b>	<ul style="list-style-type: none"> <li>▪ Setting up and using tasks (reminders/notifications etc.)</li> <li>▪ Setting tasks for staff members</li> <li>▪ Setting tasks on behalf of supporters</li> <li>▪ Setting Team tasks</li> </ul>
Day 2		
	<b>Commitments</b>	<ul style="list-style-type: none"> <li>▪ Set up commitments</li> <li>▪ Payment of commitments</li> </ul>
	<b>Earmarking Monetary Income</b>	<ul style="list-style-type: none"> <li>▪ Allocating money to Earmark and using Earmark categories</li> </ul>
	<b>Fundraising Activity</b>	<ul style="list-style-type: none"> <li>▪ Setting up an Activity and involving supporters in the activity</li> </ul>
	<b>Communication with Supporters</b>	<ul style="list-style-type: none"> <li>▪ Non-correspondence periods (Do Not Mail, holidays etc.)</li> <li>▪ Deceased</li> <li>▪ Letter templates</li> <li>▪ Communication items</li> <li>▪ Logging communications</li> </ul>
	<b>Reporting – An Introduction</b>	<ul style="list-style-type: none"> <li>▪ An introduction to standard reports</li> <li>▪ Running standard reports and Group By</li> </ul>
	<b>Search &amp; Selection – Use &amp; Creation of Filters</b>	<ul style="list-style-type: none"> <li>▪ Using filters to refine data selection</li> <li>▪ Building and saving filters</li> <li>▪ Applying filters to standard reports</li> </ul>
	<b>Using the Tray</b>	<ul style="list-style-type: none"> <li>▪ Sending letters through the tray</li> <li>▪ Mail merge using the tray</li> <li>▪ Reporting through the tray</li> <li>▪ Updating records through the tray</li> </ul>

Disclaimer: This is the structure of the course and has to run in the order it is presented for the training to flow. Data you set up earlier in the course is later used for other communication and activities. If you require the course content to be amended, this would become a bespoke course and would be charged accordingly.