



NetFORUM[®]

Virtual Training Course Catalog

One-on-one training | on your schedule | custom courses available

NetForum offers a variety of virtual one-on-one trainings designed and taught by NetForum staff. Choose one of the courses below, or we can design one for you based on your organization's training needs. Trainings are scheduled at your convenience and are available for purchase on a subscription basis. Contact your customer account manager to get started!

Fundraising

Basic Training – Fundraising (2 hrs)

During this session, users will learn how to perform basic configuration of the fundraising module to effectively track donors and prospects, process standard donations including gifts, pledges, and recurring gifts, and send out gift acknowledgements. Additionally, users will be introduced to key baseline gift reports and query tools for high level analysis of donors and donations.

Sample topics:

- Constituent Management
- Creating Constituent Records
- Tracking Donor Attributes
- Tracking Donor Interactions
- Tracking Giving Levels
- Tracking Donor RFM (“Recency Frequency Monetary”) Statistics/Milestones
- Gift and Pledge Processing
- Fund, Campaign, and Appeal Set Up
- Gift, Recurring Gifts, and Pledge Entry – iWeb and eWeb
- Upgrading and Downgrading Pledge
- Pledge Payments
- Gift Acknowledgements
- Basic Donation Reports and Queries

Advanced Training - Fundraising (2 hrs)

During this session, users will learn how to set up and process more complex donation types, such as corporate matching gifts, in-kind gifts, tribute gifts, and stock gifts. Users will also learn how to use soft credits in NetForum, as well as best practices for various type of gift adjustments and cancellations. Finally, users will complete high level training on tracking fundraising appeals, including an introduction to ask ladder configuration to send out more dynamic, personalized appeals.

Prerequisite – Basic Training in Fundraising, or equivalent knowledge of the features of the module

Sample topics:

- Gift and Pledge Processing
- Soft Credits
- Corporate Matching Gift Programs
- Tributes and Notificants
- In-Kind Gifts
- Stock Gifts
- Gift Adjustments
- Gift transfers
- Pledge and recurring gift schedule adjustments
- Voids and cancellations
- Appeals and Solicitations
- Configuration of Dynamic Ask Ladders
- Pledge Renewals and Installment Payment “Chases”
- Tracking outgoing appeals

Advanced Training – Fundraising – Individual Major Giving and Foundation/Government Grants (2 hrs)

This session is designed for foundation and development staff that handle “high touch” donors and prospects, including individual major donors, foundations, and government funders. Users will learn how to configure NetForum to track the stages and status of gift and grant opportunities, as well as to track and analyze the success of various touchpoints in the donor cultivation and stewardship process.

Prerequisite – Basic Training in Fundraising, or equivalent knowledge of the features of the module
Sample topics:

- Opportunity Configuration
- Assigning Solicitation Teams
- Cultivation, Solicitation, and Stewardship Workflow
- Tracking Interactions, Notes, Deadlines, Actions/Assignments, and Documents
- Linking Gifts and Pledge to Opportunities
- Tracking Planned Gifts
- Reports and Dashboards to Monitor Opportunities

Fundraising - Training Package Add Ons

Prerequisite – at least one initial training or consulting session in the Fundraising module to establish a base of knowledge – full training program recommended, depending on the organization’s business practices.

- Review of configuration/follow up Q&A (2 hrs)

- Following training, receive feedback from a NetForum fundraising expert on your organization's configuration of NetForum to ensure it's aligned with best practices and positions you for effective use of the module and powerful analytics
- Meet with your fundraising trainer in a follow up session to ask additional questions and gain clarification on topics covered during the original training session(s)
- Quarterly check-ins for review/Q&A (8 hrs – 4 one hour meetings + follow up)
 - Build on the momentum gained during training by committing to ongoing sessions with a NetForum fundraising expert for a year following the training sessions.
 - During the quarterly sessions, users will have the opportunity to review and discuss configuration with the NetForum trainer, ask follow up questions, gain clarification on topics previously covered, and identify new opportunities for leveraging the NetForum's fundraising tools.

Accounting

Basic Training – Accounting (2 hrs)

This training is designed for new users of NetForum, or those looking for a refresher in the basics of the Accounting module. This session will help users gain an understanding of the fundamentals of NetForum's accounting module. Using these tools, users will be able to set up business units, including payment methods, fiscal years, and general ledger accounts. Additionally, users will learn how invoices, payments, voids, and cancellations work in NetForum, as well as best practices for batch management. Finally, users will be introduced to key baseline reports for using NetForum's accounting features.

Prerequisite – Understanding of general accounting principles

Sample topics:

- Business unit features
- Payment Method Set Up
- Invoice terms
- GL Account Set Up
- Default GL Accounts
- Invoices and payments
- Managing Proforma Invoices
- Adjustments vs Voids vs Returns
- Write offs and refunds
- Batch set up, reconciliation, and close
- Understanding basic accounting reports

Advanced Training – Accounting Use Cases (2 hrs)

This session is designed to show users the general ledger entries that are created in the most common transactional scenarios in NetForum. From simple invoices and payments to variations in deferred invoices to cancellations and voids, the trainer will demonstrate how to perform the transaction in NetForum iWeb and will show what general ledger entries are created upon batch or period close.

Prerequisite – Understanding of general accounting principles, and completion of Basic Training – Accounting or equivalent knowledge of the features of the module

Sample topics:

- Understanding Common Accounting Use Cases – GL Transactions
- Invoice with payment
- Discounted invoice with payment
- Deferred invoice
- Discounted deferred invoice
- Prorated deferred invoice
- Installment invoice with multiple payments
- Voided invoice
- Partially voided invoice
- Partially recognized voided invoice
- Cancelled and refunded invoice/payment
- Cancelled and refunded and partially recognized invoice/payment

CRM

Basic Training – CRM (90 min)

This course provides a general overview of the customer management functions of NetForum's core module: CRM. Users will learn how to create and maintain individual and customer records, as well as best practices for leveraging relationships and other key elements of the customer profile.

Sample topics:

- Creating individual records
- Creating organization records
- Address, phone, and other contact information
- Standard demographics
- Relationship tracking
- Navigating the CRM profile

Advanced Training – CRM (1 hr)

In this course, users will gain an understanding of more complex features of the CRM module, including best practices for merging duplicate records, validating addresses, and managing households. It is designed for NetForum power users.

Prerequisite – Basic Training in CRM, or equivalent knowledge of the features of the module
Sample topics:

- Identifying duplicates
- Merging records
- Address validation tools
- Household records
- Advocacy issue tracking

Customer Activity Tracking- Customer Requests, Assignments, and Tasks – CRM (90 min)

Tracking touchpoints with members and customers is an important element if measuring customer engagement – and timely, effective follow up on those touchpoints is even more critical to maintaining that engagement. Following this course, users will be able to configure and manage NetForum's assignments and requests for optimal reporting, follow up activity, and customer service.

Prerequisite – Basic Training in CRM, or equivalent knowledge of the features of the module.

Sample topics:

- Request and Assignment Configuration
- Activity
- Reason
- Status
- Origin
- Creating Requests and Assignments
- Managing Requests and Assignments
- Follow Up Tasks
- Basic Reports and Dashboards

Inventory

Basic Training- Product Set Up and Overview (2 hrs)

Participants in this course will learn the basics for set up of the most commonly used products in NetForum: merchandise, publications, miscellaneous products, and discounts. Users will learn how to categorize products and set up effective pricing based on customer attributes, as well as how the products are sold in iWeb and eWeb.

Sample topics:

- Product Categories and Types
- Creating a Merchandise Product
- Creating a Publication Product
- Creating a Miscellaneous Product
- Prices and Price Attributes
- Related Products
- Creating a Discount Product
- COE – Selling Products on iWeb
- Online Store – Selling Products on eWeb

Advanced Training- Product Set Up and Overview – Taxes, Shipping, and Bundled Products (90 mins)

This course will cover the more complex products in NetForum's Inventory module: taxes, shipping fees, and bundles products. Users will understand best practices and use cases for these product types, which are critical to product sales at most associations.

Prerequisite – Basic Training in Inventory – Product Set Up, or equivalent knowledge of the features of the module.

Sample topics:

- Tax Types
- Adding a Tax Product
- Tax Percentages
- Selling Taxable Items in iWeb and eWeb
- Creating a Miscellaneous Product
- Shipping Carriers and Regions
- Adding Shipping Products
- Flag Rate Shipping Fees
- Dynamic Shipping Fees
- Selling Shippable Items in iWeb and eWeb
- Bundles, Kits, and Packages – Overview
- Creating Bundled Products

- Selling Bundled Products in iWeb and eWeb

Advanced Training- Product Fulfillment (90 mins)

This course provides an overview in using NetForum's inventory management features. Following the course, users will understand how to set up warehouses, vendors, and inventory accounts for detailed inventory management. Additionally, users will be able to execute the fulfillment process to produce packing slips and pick lists for in-house or third party fulfillment of products sold or claimed. Users will also be introduced to basic inventory reports to monitor items needing to be re-allocated or stocked.

Prerequisite – Basic Training in Inventory – Product Set Up, or equivalent knowledge of the features of the module.

Sample topics:

- Warehouse Set Up
- Vendor Set Up
- Allocation of Inventory
- One-Step Fulfillment
- Two-Step Fulfillment
- Picklists, Packing Slips, and Shipping Labels
- Claims
- Cost of Goods Sold
- Basic Inventory Management Reports

Admin

Basic Training- Admin (1 hr)

This fast-paced session will prepare NetForum administrators to set up and manage basic user security in iWeb. The session will focus on creating and modifying security groups, populating privileges for users in those groups, and best practices for setting up roles and privileges for various types of users.

Prerequisite – Basic understanding of NetForum navigation and module structure; user has administrative privileges and responsibilities for NetForum at his or her organization

Sample topics:

- Setting up new security groups
- Modifying existing security groups
- Setting up roles
- Setting up sales reps

- Setting up super users
- Setting up personal preferences
- Configuration of Super Search (Bonus topic for Power Users!)

General

Skill Up in Queries (2 hrs)

This session will provide users with hands on experience building queries with some advance features of the query tool in iWeb – little to no SQL experience required! Following this session, users will be able build queries with dynamic parameters, groupings, and aggregated columns. Users will also gain an understanding to combine multiple queries to create an “Audience” or to convert an existing query into a lightly formatted report using NetForum’s Dataset functionality.

Prerequisite – Basic understanding of NetForum navigation and module structure; some experience using the query tool in iWeb.

Sample topics:

- Advanced features of iWeb query tool
- Use column
- Create SQL
- Query Grouping
- Audiences
- Datasets

NetForum 101 (1 hr)

This course is designed for brand new users of NetForum, or for anyone looking for a refresher in NetForum’s basic navigation and terminology. This is a good course to take prior to more in-depth module training in order to lay the foundation of how NetForum works.

Sample topics:

- Navigation
- Terminology
- Preferences

Membership

Membership Set Up (90 mins)

This course will train users on NetForum's configurable elements for managing an organization's membership structure. Users will gain an understanding of how to set up member types, terms, and packages to match the association's business rules, as well as how to best leverage options for membership flowdown and linking subscriptions and memberships together. While all users can benefit from understanding how membership is structured in NetForum, the content of this course is best suited for power users who are responsible for the configuration of NetForum.

Sample topics:

- Association Set Up
- Membership Terms
- Member Types
- Member Benefit Flowdown
- Member Statuses
- Member Benefits
- Adding New Membership Packages
- Modifying Member Packages
- Prorating Memberships

Basic Training – Managing Your Memberships (2 hrs)

Following this course, users will be able to execute the most critical tasks for managing memberships in NetForum: Joins, Renewals, Rejoins, Transfers, and Terminations. The first part of the session will focus on processing memberships for one customer at a time, in both iWeb and eWeb. Users will also be introduced to standard membership reports available in NetForum. The second part of the session will cover bulk processes for renewals, status changes, and terminations – it is designed for the administrative users who will handle these tasks on a regular basis.

Prerequisite(s) – Membership Set Up training, or previous completed configuration of the membership module; Basic Training in CRM, or equivalent knowledge of the features of the module

Sample topics:

- Part 1 – Single Membership Transactions
 - Selling a New National Membership
 - Selling a New Chapter Membership
 - Membership Renewals
 - Enrollment in Automatic Renewals
 - Membership Termination
 - Re-joining a Membership
 - Editing a Membership
 - Transferring a Membership to a New Type or Package

- Inherited Memberships
- Online Joins
- Online Renewals
- Online Membership Directory
- Standard Membership Reports
- Part 2 – Bulk Membership Transactions
 - Mass Renewals
 - Membership Status Changes
 - Membership Drop Process (Termination)

Basic Training – Chapter Management (1 hr)

Chapter functionality in NetForum is a hybrid of features from the Membership modules, as well as CRM. This course will help users understand how to create and manage chapter records in iWeb, including best practices for tracking chapter relationships, membership dues, officers, and key chapter activities. Users will also learn about role-based access for chapter members to baseline eWeb pages for each chapter.

Prerequisite – Basic Training in CRM, or equivalent knowledge of the features of the module.

Sample topics:

- Chapter Set Up
- Creating a New Chapter
- Chapter Demographics
- Chapter Relationships
- Chapter Officers
- Setting Up Chapter Memberships and Dues
- Selling Chapter Memberships
- Other Chapter Invoices and Payments
- eWeb Access for Chapter Members