

Day 1 Introduction to FIMS

Learn best practices of maintaining profiles and mailing lists, sending mass emails, mass adding contacts and reminders, displaying data in multiple formats (reports, exports, and data grids), and learning how to merge FIMS data with Microsoft Word.

- Profile Entry and Maintenance
- Running Reports and Exports
- Creating and Using Data Grids
- Word Merging with FIMS Data
- Managing Profiles
- Managing Mailing Lists
- Contact Management

Day 2 Gifts and Grants (Prerequisite is Day 1 – Intro to FIMS or adequate knowledge of listed topics)

Optimize your grantmaking efforts, learning about data entry time-savers, restructuring and improving your grant coding, and learning about different purposes for adding condition records for grants or scholarships. Streamline development efforts in your organization by using affiliation codes to indicate donor interest, use reporting efficiently to see which donors haven't given recently or how many new funds have been created this year, and finally learn how to restructure and improve your development coding.

- Entering and Processing Grant Applications
- Improving Grantee and Grant Coding
- Analyzing Your Grantmaking Efforts in Reports
- Entering and Acknowledging Gifts
- Improving Donor and Gift Coding
- Analyzing Your Development Efforts in Reports

Day 3 Finance Staff – Basic/Intermediate

Learn the basics of the financial modules including how the General Ledger is designed, how the outer modules integrate with the General Ledger, adding and posting vouchers, printing checks, reconciling checking accounts, creating your own financial statements, and reconciling investment statements.

- Maintaining General Ledger
- Automating your Journal Entry processes
- Adding Payables and Printing Checks
- Designing Financial and Fund Statements
- Reconciling Investment Statements in FACTS
- Everything in Reverse – How to Correct Anything Financial

Costs are as follows:

| Training Days | User 1 | User 2, 3, etc. |
|---------------|--------|-----------------|
| 1 Day | \$550 | \$275 |
| 2 Days | \$995 | \$497 |
| 3 Days | \$1425 | \$712 |

Multi-person Discount: MicroEdge offers a discount for the attendance of more than one FIMS user from the same organization – half price for everyone after the first attendee.

Please contact Donna Jones, Director of Finance & Administration (donna@cfsloco.org) or by phone at (805)543-2323 x11