



The **Kintera Public Workshop** is designed to provide you the ideal opportunity to optimize your Kintera tools. This comprehensive 3-day training program will help you master Sphere Fundamentals and prepare your organization for implementing Sphere.

Kintera provides innovative software solutions to help organizations deliver The Giving Experience™ to donors online - including giving convenience, financial transparency, feedback about the social impact of their gifts, and a sense of belonging and appreciation.

www.kintera.com

Program Overview:

The workshop is an intensive, hands-on training in an interactive and collaborative environment. You'll learn from your peers, sharing challenges and best practices with others in the nonprofit sector.

Built on the belief that training with the product is the quickest approach to skill advancement, you'll be given hands-on practice, scenario-based learning and a case study, all of which you'll develop in your own Kintera Sphere Training Account.

This workshop will provide you the skills to:

- Setup and Administer Sphere
- Increase online donations by fully understanding Sphere capabilities
- Interact with other experts in the nonprofit arena
- Leverage your investment with Kintera
- Run your organization more efficiently
- Promote awareness of your mission

WWW.KINTERA.COM/PUBLIC_WORKSHOP_AGENDA

Kintera Education to provide:

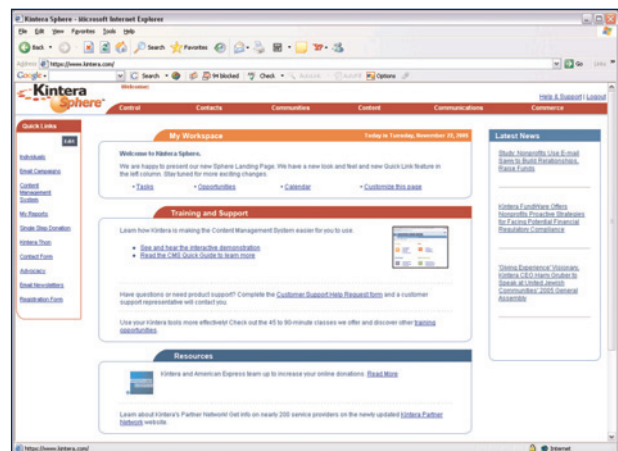
- Technical training classroom with a computer for each student with high-speed Internet access
- Participant notebooks, including take-home exercises
- Continental breakfast, snacks and drinks

To ensure that students get the most out of these workshops, enrollment is limited. To sign up today, please click here and fill out the registration form.

WWW.KINTERA.COM/PUBLIC_WORKSHOP_REGISTER

(you must be connected to the internet in order for the link to work)

If you have any questions please
 e-mail us at workshopquestions@kintera.com
 or contact your Kintera Sales Manager.



Cancellation Policy

- More than 10 business days prior to workshop = 100% refund
- Within 10 business days of workshop = 50% refund
- Within 5 business days of workshop = Reschedule for another workshop
- No show = No refund, no reschedule

Workshop Agenda

Day One

9:00am – 9:15am

Welcome

9:15am – 10:15am

Sphere Overview

- Capabilities of Sphere
- Introduction to the Case Study
- Sphere Navigation, Login, Help and Support

10:15am – 10:45am

Sphere Administration

- Personal Setup
- Organization Setup
- Managing Users
- Creating New Users
- Inactivating Users
- Functional Access Rights and Permissions
- Setup Funds
- Tools

10:45am - 11:00am

Break

11:00am – 12:00pm

Customer Relationship Management (Contacts)

- Managing Contacts
- Adding New Contacts (individually or batch import)
- Searching the Database
- Editing Contacts (Individuals, Organizations)

12:00pm – 1:00pm

Lunch Break

1:00pm – 2:00pm

Database Management (Infrastructure)

- Import Data
- CSV files
- Templates and Their Value
- Export Data

- Duplicate Checker
- Run Duplicate Check on Entire Database
- Define Duplicate Checking Criteria
- Best Practices on De-duplication
- Attribute Setup
- Segmentation

2:00pm – 4:00pm

Forms

- Forms Overview
- Create a Donation Form
- Build a Single Step
- Demonstrate a Multi-Step
- Create a Registration Form
- Demonstrate a Multi-Step Registration Form
- Define and Show an Example of Contact Form

Day Two

9:00am – 9:15am

Welcome

9:15am – 11:15am

Thon/FAF

- Overview
- FAF (Front-End)
- Thon (Back-End)
- Creating a Thon

11:15am - 11:30am

Break

11:30am – 12:00pm

E-Communications

- Overview
- Create a Single Mailing
- Demonstrate sequential and split mailings

12:00pm – 1:00pm

Lunch Break

1:00pm – 2:00pm

E-Communications Continued

- E-newsletter
- Template Library
- Direct Mail

2:00pm – 3:00pm

Bookkeeping

- Overview of Financial Process
- Receiving a Payment
- Crediting a Payment
- Support
- Methods for Bookkeeping
- Contact Level
- Event Level-Thon

3:00pm – 4:00pm

Reporting

- Overview of Reporting
- Summary Reports
- Event Level Reporting
- Control Reports
- Saving Reports

Day Three

9:00am – 9:15am

Welcome

9:15am – 12:00pm

Hands-On Case Study

12:00pm – 1:00pm

Lunch Break

1:00pm – 4:00pm

Content Management (CMS)

- Overview
- Planning
- Keys to successful Web sites
- Creating Web Site Rights and Privileges
- CMS Navigation

- Creating a New Web Page
- Creating Tools
- Hyperlinks
- Images
- Registration and Donation forms