

Association Management Software

NimbleAMS™

by **communitybrands**®

**"Best AMS - Seriously,
don't waste your time
looking at anyone else"**

-Pamela Schroeder, Deputy
Executive VP, American Society
for Surgery of the Hand

**"Powerful, flexible and
easy to use for both staff
and our constituents"**

-Mark Kibble, Senior Technology
Manager, American Ceramic Society

**"Best decision we
have ever made"**

-Casey Hayes, Salesforce
Administrator, LeadingAge

**Click
to see
features** 

360-Degree View

View everything about your constituent (organization or individual) on a single page

Engagement scoring

Badges earned

Constituent can have multiple affiliations

The screenshot displays the Nimble AMS interface for a constituent named Mr. Michael Hartzler. The interface includes a navigation bar at the top with options like Home, Chatter, Reports, Dashboards, Accounts, Committees, and Affiliations. The main content area shows the constituent's profile with fields for Account Record Type (Individual), Title (Principal), Primary Affiliation (Hartzler & Associates), Member Status (MEMBER), and Engagement Status (GOLD). Below the profile, there are quick links for various categories: Parent Affiliations (4), Merchandise (4), Subscriptions (1), Cases (2), Committee Memberships (6), Registrations (3), Components (6), Schedules (0), Coupons (0), Schedule Lines (0), Donations (6), and Speakers (2). A table titled 'Badges (6+)' lists various badges earned by the constituent, including Webinar Season Pass, Speaker, Silver Engagement, Bronze Engagement, Season Pass, and Gold Engagement. On the right side, there is a section for 'Affiliations' showing three parent affiliations: Hartzler & Associates Membership, Fios Chicago Associate, and FutureScope Chicago Exhibiting.

| BADGE | SUBTYPE | ACTIVE | START DATE |
|-------|---------------------|-------------------------------------|------------|
| | Webinar Season Pass | <input checked="" type="checkbox"/> | 4/6/2022 |
| | Speaker | <input checked="" type="checkbox"/> | 10/4/2021 |
| | Silver Engagement | <input type="checkbox"/> | 11/17/2020 |
| | Bronze Engagement | <input type="checkbox"/> | 7/1/2014 |
| | Season Pass | <input checked="" type="checkbox"/> | 5/4/2022 |
| | Gold Engagement | <input checked="" type="checkbox"/> | 1/11/2022 |

| Affiliation ID | Status Flag | Parent Account | Role |
|---------------------|-------------------------------------|-----------------------|------------|
| Affiliation 0000191 | <input checked="" type="checkbox"/> | Hartzler & Associates | Membership |
| Affiliation 0000256 | <input checked="" type="checkbox"/> | Fios Chicago | Associate |
| Affiliation 0000254 | <input checked="" type="checkbox"/> | FutureScope Chicago | Exhibiting |

Simple and Powerful Order Processing

Accounting and orders made easy with step by step wizards

Multi-entity processing

Variable pricing

Order for Michael Hartzler
Add Merchandise

Customer ID: Michael Hartzler
Entity: ISEN
Price Class: Member

| Purchase | Product | Categories | Inventory | Unit Price |
|----------|---|--------------------------|-----------|------------|
| Remove | Webinar - Season Pass | Season Pass | | \$200.00 |
| + Add | Season Pass | Season Pass | | \$800.00 |
| + Add | Accounting Handbook | Accounting | 942 | \$32.00 |
| + Add | CHC Exam Preparation Review Guide | Certification | 992 | \$24.57 |
| + Add | Accounting Handbook - Digital Download | Downloadable, Accounting | | \$20.00 |
| + Add | Ethics in Accounting | Accounting | 0 | \$69.35 |
| + Add | Leadership - Power & Consequences | Leadership | | \$44.45 |
| + Add | Leadership Theory, Application, & Skill Development | Leadership | | \$208.40 |

Page 1 of 1. 10 15 20 Per Page

| Purchase | Product | Inventory | Unit Price | Quantity | Price |
|----------|-----------------------|-----------|------------|----------|----------|
| Remove | Webinar - Season Pass | | 200.00 | 1 | \$200.00 |

Subtotal (1 item): \$200.00

What Do You Want To Do?
Order Info
Add Items
Verify Cart (0)
Payment

Order Summary
Order Entity: ISEN
Cart Number: Cart 0000322
Subtotal: \$0.00
Tax & Shipping: \$0.00
Total: \$0.00
Payment: \$0.00
Scheduled Payments: \$0.00
Balance: \$0.00

Add Items
Delete Cart

Actionable Business Intelligence

Easily create dashboards and reports without IT help



Available on mobile too!

Mark your favorites



Reports are easy to build and can be displayed in dashboards

Schedule and distribute reports

Drag-and-Drop Reports

Easily build, share and manage reports for your organization

Save report to favorites

A screenshot of the 'MY FAVORITES' dropdown menu. The menu is open, showing a list of saved reports and dashboards. The items include:

- Hartzler & Associates Account
- Fios Consulting Account
- Curtis Banks Account
- Michael Hartzler Account
- Accounting Lightning Dashboard
- Engagement Lightning Dashboard
- Executive Summary Lightning Dashbo...

At the bottom of the menu, there is an 'Edit Favorites' link.

The screenshot shows the Nimble AMS interface. The top navigation bar includes 'Home', 'Chatter', 'Reports', 'Dashboards', 'Accounts', 'Committees', and 'Donations'. The current report is titled 'REPORT: ACCOUNTS WITH DONATIONS AND PRODUCT LYBUNT - All Donations'. Below the title, a subtitle reads: 'The LYBUNT report lists donors (from all donation segments) who gave Last Year But Unfortunately Not This Year.' The main content area displays a table with 6 records. The table has columns for Account Name, Billing State/Province, Transaction Date, Donation Name, and Product: Product Name. To the right of the table, there are 'Filters' and 'Cross Filters' sections. The 'Filters' section includes 'Show Me All accounts', 'Last Activity All Time', and 'Transaction Date equals LAST YEAR'. The 'Cross Filters' section includes 'Accounts without Donations' and 'Transaction Date equals THIS YEAR'.

| | Account Name | Billing State/Province | Transaction Date | Donation Name | Product: Product Name |
|---|----------------------------|------------------------|------------------|------------------|-----------------------|
| 1 | Rochester Innovation Group | New York | 7/20/2018 | Donation 0000027 | Research Donation |
| 2 | Nimble Hopes | - | 12/6/2018 | Donation 0000019 | Research Donation |
| 3 | Kristen Douglas | Pennsylvania | 3/16/2018 | Donation 0000013 | Research Donation |
| 4 | Fios Consulting | District of Columbia | 12/23/2018 | Donation 0000021 | Research Donation |
| 5 | Ben Peterson | Iowa | 3/6/2018 | Donation 0000018 | Education Foundation |
| 6 | Alpha Consulting | New York | 7/16/2018 | Donation 0000029 | Research Donation |

Use cross filters for more advanced query logic

Member Experience

Empower constituents to engage more with your association

NimbleAMS™
by communitybrands

Personal Snapshot Upcoming Events Store Member Directory Company Directory Checkout Log Out **Donate Now**

Personal Snapshot

View your latest notifications and snapshots of your profile.

- Personal Snapshot
- My Affiliations
- My Engagement**
- My Committees
- My Scheduled Payments
- My Orders
- My Downloads

Mr. Michael V Hartzler
Principal
Hartzler & Associates

| Subtype | Description |
|---------------------|---------------------------|
| Webinar Season Pass | Access webinars for free! |
| Gold Encouragement | You are awesome! |

Checkout
You currently have items in your cart.
Checkout

Engagement

Scheduled payments

Robust eCommerce Capabilities

Drive non-dues revenue - store, donations and more

Donations can be set to be recurring

Cross-sell recommended products

NimbleAMS™
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[Personal Snapshot](#)

[Upcoming Events](#)

[Store](#)

[Member Directory](#)

[Company Directory](#)

[Checkout](#)

[Log Out](#)

[Donate Now](#)

Online Store

Browse our catalog of online products.

Search

Go

[Store Home](#)

[Accounting](#)

[Certification](#)

[Consulting](#)

[Leadership](#)

[Management](#)

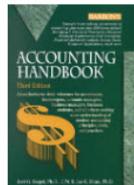
[Season Pass](#)

All

Featured

Showing all 5 products in the **Accounting** category.

Accounting Handbook



Retail Price: \$40.00

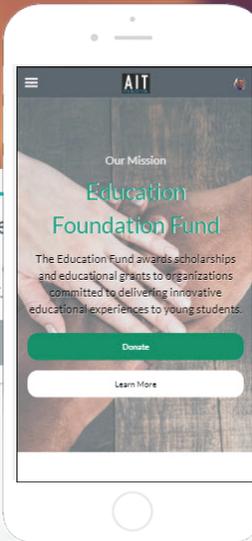
Member Price: \$32.00

Availability: **IN STOCK**

Short Description

The newly updated edition of this authoritative reference volume deserves a place in the library of every accountant.

Details



Save Time with Easy & Fast Payments

Easy and flexible payments with scheduled, installment, and automatic payments

The screenshot shows the NimbleAMS Express Payment interface. At the top, the logo 'NimbleAMS by communitybrands' is on the left, and navigation links 'Upcoming Events', 'Store', 'Log In', and a 'Donate Now' button are on the right. The main heading is 'Express Payment' with the subtext 'Review and pay your outstanding balance.' Three callouts are present: a teal circle on the left labeled 'Guest Payer' with a yellow arrow pointing to the checkout area; a teal circle on the right labeled 'Express pay with a unique payment URL'; and a teal circle at the bottom left labeled 'Guest Payer' pointing to the 'Set Up Recurring Payments' modal.

Guest Payer

Express Payment
Review and pay your outstanding balance.

Express pay with a unique payment URL

You are not currently logged in. Please **log in** now or **create an account**. To checkout as a guest, simply complete the information below.

Set Up Recurring Payments

| PRODUCT | FREQUENCY | SUBTOTAL |
|-------------------------------|-----------|----------|
| Membership | | \$250.00 |
| Experienced Professional Dues | Yearly | \$250.00 |

*Method
AMEX ending in 0002

You can cancel the recurring charge, change your payment method from the "My Scheduled Payments" page at any point in time.

Cancel Save

Order Information

Order Id: Order 0000684
Transaction Date: 3/7/2019

Membership for Flos Consulting
1/1/2019 - 12/31/2019

| | Total Price |
|--------------|-------------|
| Company Dues | \$15,000.00 |

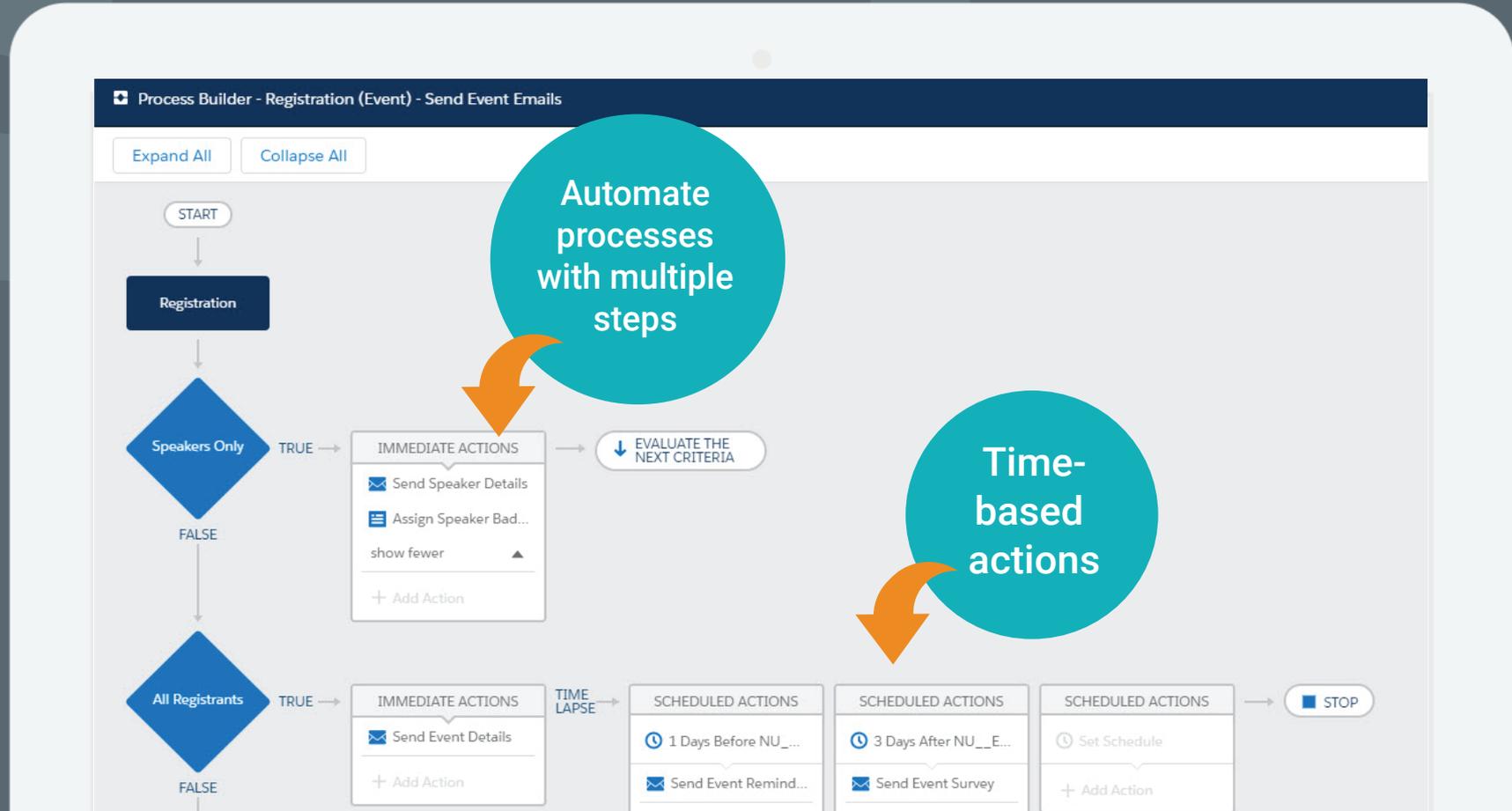
Auto-Renew Options

The membership you selected is eligible to automatically renew until you cancel, which ensures it won't expire. When you opt in, you will select the stored payment method at checkout.

Auto-Renew Membership

Automate Anything

Streamline processes and tasks through point and click configuration

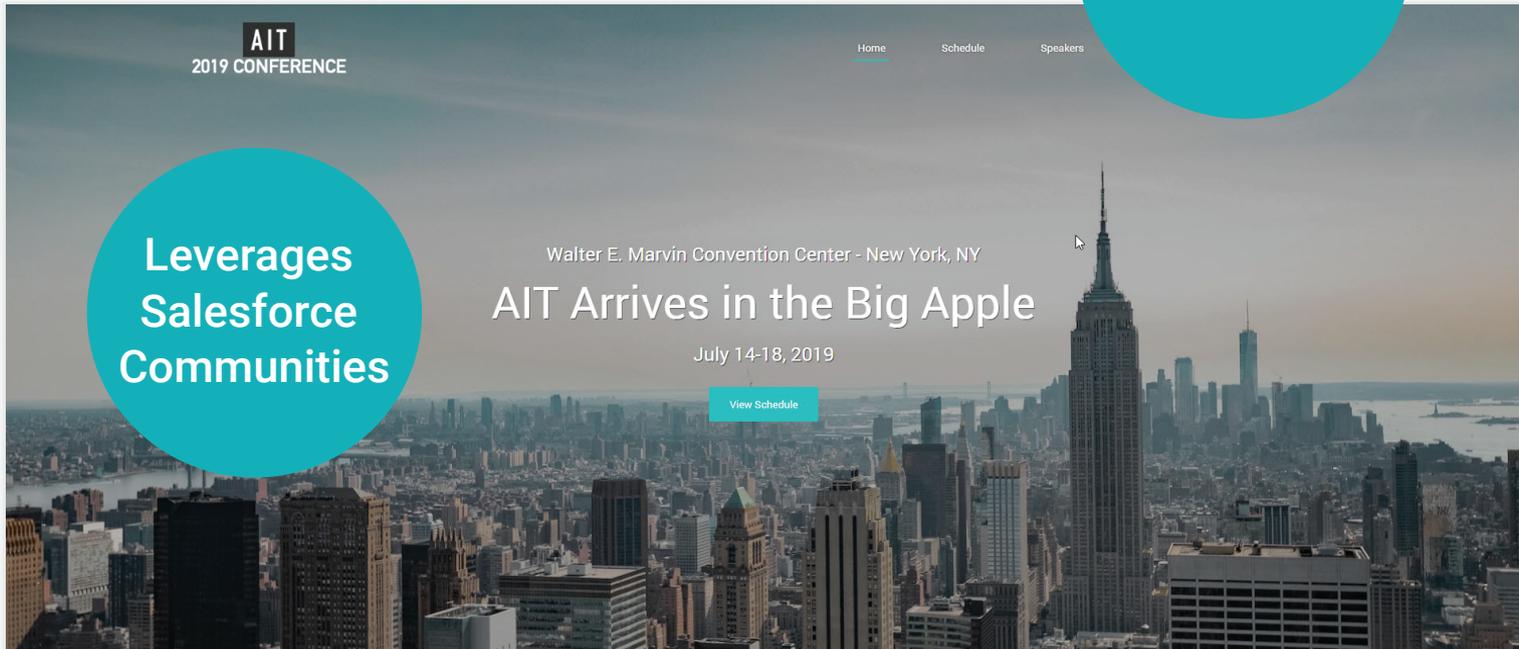


Beautifully Branded Microsites

Excite constituents with engaging event or donation sites

Blended with
eCommerce

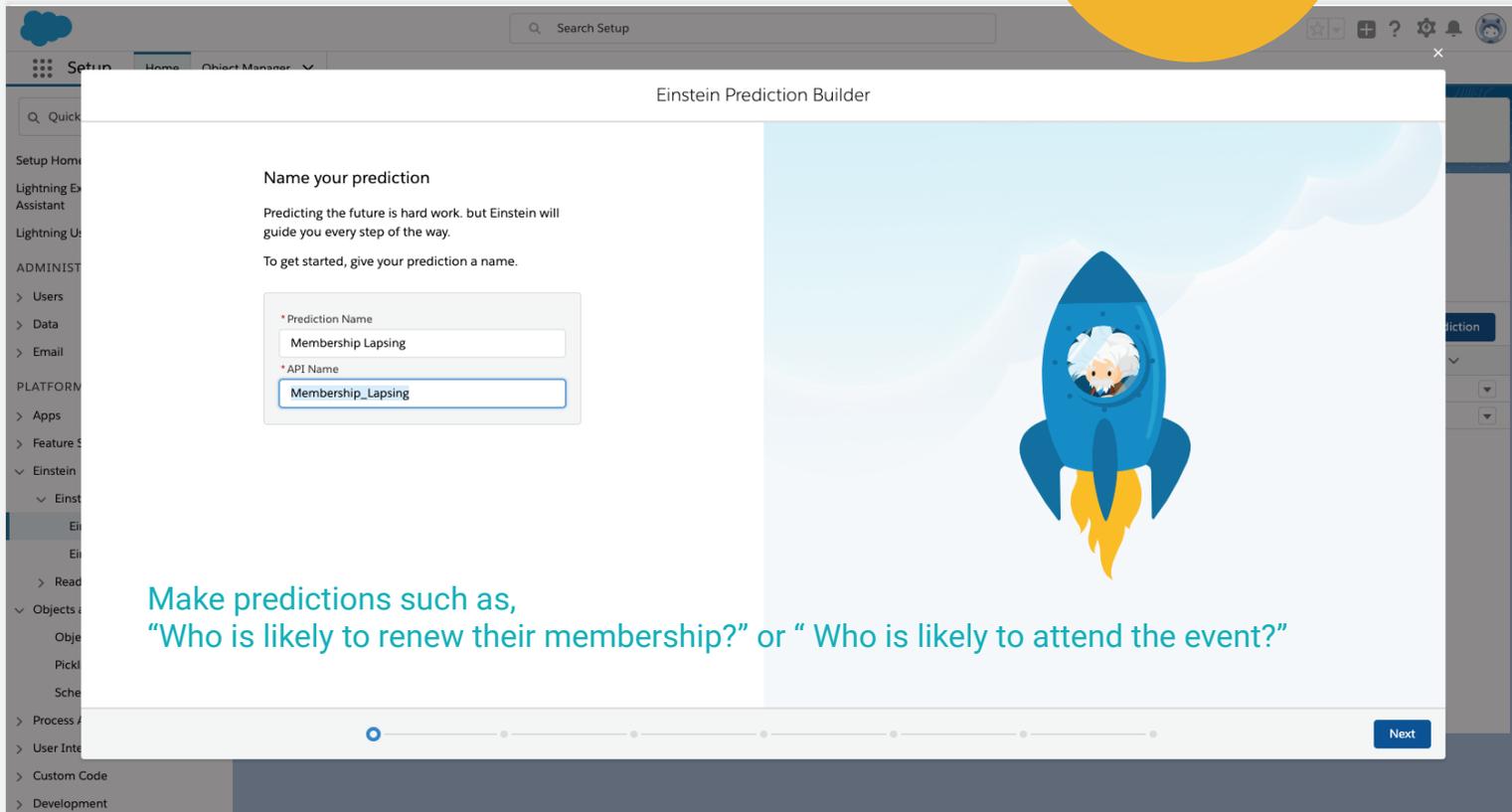
Leverages
Salesforce
Communities



Artificial Intelligence (AI) for All

Salesforce Einstein makes member predictions easy

Point and
click wizard



The screenshot displays the 'Einstein Prediction Builder' interface. The main heading is 'Name your prediction'. Below it, a sub-heading reads 'Predicting the future is hard work, but Einstein will guide you every step of the way.' followed by the instruction 'To get started, give your prediction a name.' There are two input fields: '* Prediction Name' with the value 'Membership Lapsing' and '* API Name' with the value 'Membership_Lapsing'. To the right of the form is a large illustration of a blue rocket with a yellow flame, featuring a cartoon character resembling Albert Einstein inside the cockpit. At the bottom of the interface, there is a progress bar with five dots, the first of which is filled, and a 'Next' button.

Name your prediction

Predicting the future is hard work, but Einstein will guide you every step of the way.

To get started, give your prediction a name.

* Prediction Name
Membership Lapsing

* API Name
Membership_Lapsing

Make predictions such as,
“Who is likely to renew their membership?” or “Who is likely to attend the event?”

Next

Nimble AMS exclusive tools to help you with reports, integrations, and collaboration.

