



Atlas Level Two Training Topics

Membership

- Member Level Management - Configuration & Usage
- Retention & Engagement Reporting
- Batch Drop Process - Configuration & Usage
- Management
- Custom Fields & Affiliation Code Tracking
- Committee Management

Events

- Complex Event Pricing
- Custom Field Usage
- Certification Setup and Tracking
- Accepting Online Registrations
- Editing Registrations
- Issuing Refunds
- Event Revenue Reporting

Admin

- Manage User Permissions
- Manage Advanced Codes
- Configuring System Preferences
- Custom Fields
- Audit Reporting
- Additional Reporting

Finance

- Revenue Code Management
- Payment Code Management
- Adjustment Code Management
- Reporting
- Auto Increase/Decrease Tool
- Accounting Package Integration
- Collection Efforts

Communication

- Advanced Capabilities of Mass Communicator
- Advanced List Management
- Online Directory Configuration
- Directory Listing Configuration

- Members Only Portal Configuration
- Contact Tracking
- Reporting for Engagement and Retention
- Social Media Integration

Reporting

- Data Export/Reporting Tool
- Dashboard Reporting
- Advanced Queries with Selector Tools

Atlas Level Three Training Topics

**Includes Roundtable Best Practices Discussions for each topic*

Membership

- Advanced Membership Reporting
- Project Templates for Retention
- Referrals / ROI / VOI Reporting
- Managing Data - Importing/Merging, Best Practices

Events

- Advanced Event Reporting
- Project Templates for Event Coordination

Finance

- Related Revenue Items
- Posting Transactions
- Deferred Revenue
- Advanced Reporting
- Additional Invoicing Capabilities
- ARC Codes

Reporting

- Basic SQL Usage
- Other Reporting Options Available
 - CrystalReports
 - PowerBIandPowerPivot
 - MissionControlDashboards