Training Status – January 24, 2018

Training site: http://training.pencildave.com

David Lindstrom – http://it.pencildave.com

PO Systems Integration Tasks

Status	Task	Comment
Complete	Update to auto-integration – Square, PayPal	
Complete	Auto-Acknowledgment emails, letters	
In-Progress	Upgrade MailChimp to Salesforce integration	Current level: batch update

PO Systems Training Tasks

Status	Task	Comment
Complete	Prepare training facilities	Remote video conference software, LCD projector, video recording, etc.
Complete	Training Module – Computer Survival Skills	Second week January
Complete	Training Module – Accounts, Passwords, Security	Second week January
Complete	Training Module – Systems, processes	Second week January
Complete	Training Module – MailChimp Basics part 1	Second week January
Complete	Training Module – MailChimp Basics part 2	Second week January
Complete	Week 1 Training Session videos	On training site

PO Systems Training Tasks

Status	Task	Comment
In-progress	Training Module - Basics of CRM and Salesforce	Target fourth week January
In-progress	Training Module – Salesforce Query	Target fourth week January
In-progress	Training Module – Salesforce Entry, Maintenance	Target fifth week January
In-progress	Training Module – Basics Spreadsheets	Target fifth week January
In-progress	Training Module – Basic Graphics	Target fifth week January
Not Started	Training Module – Advanced Mailchimp	Target - TBD
Not Started	Training Module – Systems Administration	Target - TBD
Not Started	Training Module – Targeted Session	Target - TBD
Not Started	Training Module – Refresher Session	Target - TBD

Appendix

Salesforce Integration / Training Schedule
Oct. 19, 2017

Target Dates	Involved	Goals	
November	Dave	**System programing / upgrades / integration** (Salesforce, PayPal, Square, MailChimp)	
December	Dave	**Training preparation** (sandbox, class sessions, exercises, materials, classroom logistics)	
January	Staff, Board Members, Volunteers	**Training sessions**	
February	Staff, Board	**Review**	
March	TBD	**Refresher session**	