Training Status – January 4, 2018

Training site: http://training.pencildave.com
User: potrain
Pw: geek2B

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

PO Systems Integration Tasks

Status	Task	Comment
Complete	Change "Opportunities" naming convention for PO process	
Complete	Batch update routines – Square, PayPal	Dependent on Systems Administration
Complete	Enable "Acknowledgment Date"	
Complete	Expand ticket types (raffle, etc.)	
Complete	"Campaign Type"	For campaigns
Complete	Process for Matching Gifts	
Complete	"Primary Campaign Source"	For campaigns
Complete	Add "Solicitor" to Opportunity	For campaigns
Complete	Enable "Opportunity Source"	For tracking payment type
In-Progress	Update to auto-integration – Square, PayPal	Dependent on Systems Administration
In-Progress	Auto-Acknowledgment emails, letters	Dependent on Systems Administration

PO Systems Training Tasks

Status	Task	Comment
Complete	Create Initial Plan (Oct. 19 Schedule presentation)	
Complete	Prepare initial training website	http://training.pencildave.com
Complete	Prepare initial training manual	For 3-ring binder and website
In-progress	Prepare training facilities	Remote video conference software, LCD projector, video recording, etc.
In-progress	Training Module – Computer Survival Skills	Target second week January
In-progress	Training Module – Systems, processes	Target second week January
In-progress	Training Module – MailChimp basics	Target third week January
In-progress	Training Module – Salesforce Query	Target third week January
In-progress	Training Module – Salesforce Entry, Maintenance	Target fourth week January

PO Systems Training Tasks

Status	Task	Comment
In-progress	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**	