

Training Status – March 20, 2018

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

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

Summary Training

Project Complete

| Half-Day Training Sessions | Modules | Comment |
|----------------------------|---|----------|
| 1 | Salesforce Reports (Part 1 and 2), Spreadsheet Basics | Complete |
| 2 | Spreadsheet Basics, Salesforce Donor Acknowledgments | Complete |
| 3 | One-on-One coaching: Mailchimp (Robyn) | Complete |
| 4 | One-on-One coaching: Salesforce Reports (Nancy), | Complete |
| 5 | One-on-One coaching: Donor Acknowledgments Emails, Letters, Entering Checks (Cindy) | Complete |

Summary Integration

Project Complete

| Status | Task | Comment |
|----------|--|---|
| Complete | Salesforce Customization | Additional field validation, Acknowledgment emails, letters tailoring, reports customization, dashboard customization |
| Complete | Integration of Salesforce with PayPal, Square, MailChimp, Network For Good | Upgrade integration to ETL (Extract, Transform, Load) software (Skyvia, Talend) |

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 | |