Implementations - How to Create a Training Request (Legacy)

01/04/2024 4:42 pm EST

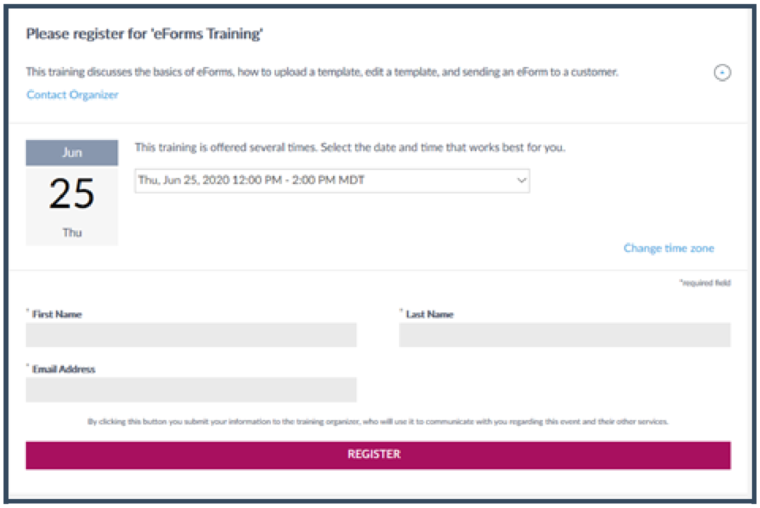
Introduction

This document will outline the required steps to correctly create a training request for the appropriate Bold Product.

AlarmBiller Rotating Trainings

Step 1: Locate the Training Document with Training dates

- Kaitlyn has pre-assigned dates for trainings. They are all scheduled out months in advance.
- To locate these training dates, times, and GoTo links
  - Go to the Project Management Group in Teams
  - Choose Files
  - Scroll to find the correct training
    - Sales Automation
    - AlarmBiller Basic
    - Inventory
    - Setup Table
    - AlarmBiller Tech
    - Vendor
    - eForms
  - By clicking into the word document, you can see all the available dates with the time.
- Click the https://attendee.gototraining.com This will bring up the registration page
  - If the customer would like to sign themselves up for training, they can do so. Simply send the customer the appropriate training link.
- Choose the date that the customer will be attending the training
- Enter their first name, last name, email address, and change to the customers time zone and then choose register
  - Note: register all attendees. If there are 3 people from one company wanting to attend the training, register each person.



Manitou, SedonaOffice and AlarmBiller 1x1 Trainings

Step 1: Navigate to Teams > Bold Group Training > General

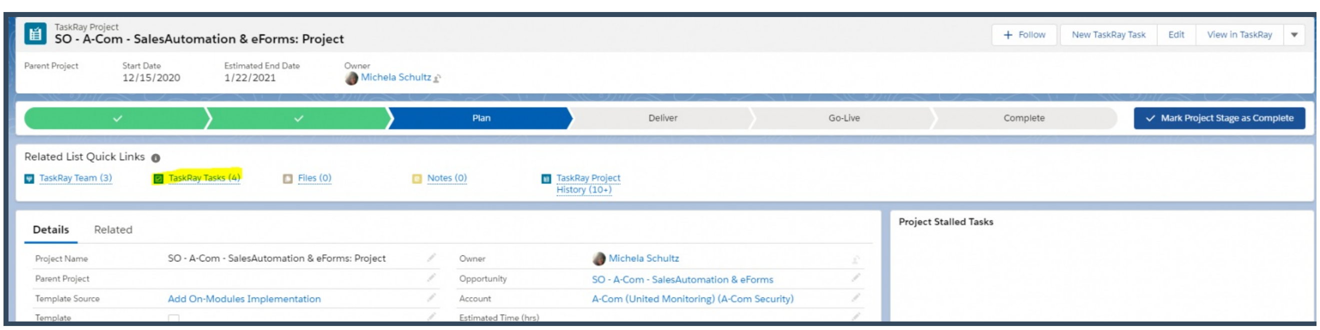
For SedonaOffice Sales Automation and eFroms follow the AlarmBiller training request process

In this step of the Implementation process, we are creating a Training Request for the Training Staff within Teams. Here they will be able to reach out to the customers to schedule training hours.

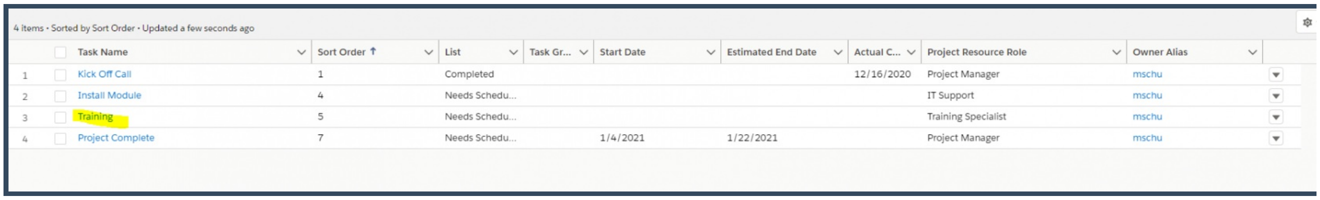
Navigate to SalesForce > Task > Chatter

- If the training is individual training please request a time via chatter

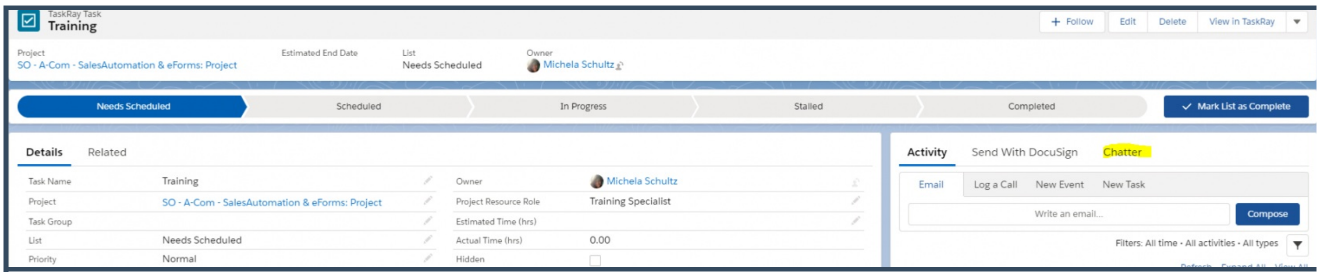
Step 2: Navigate to the TaskRay Task via the Project Page



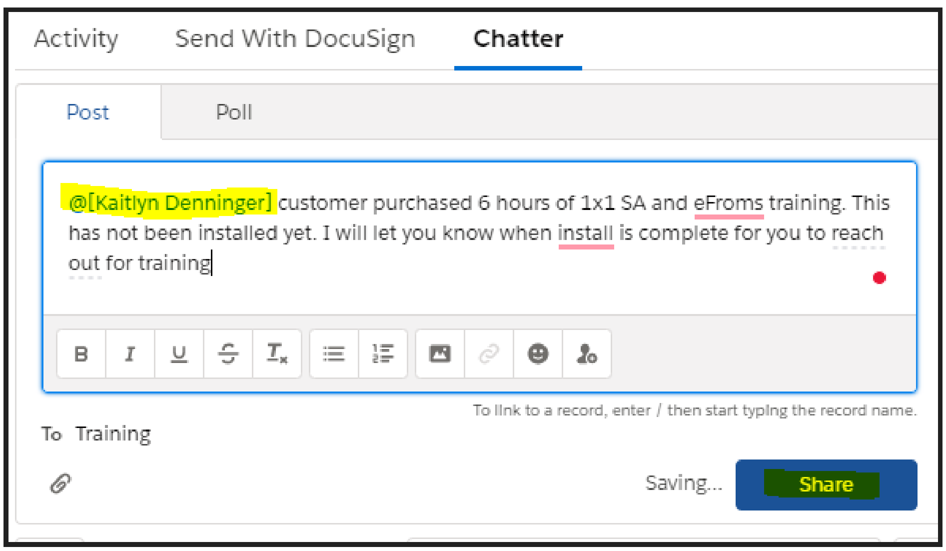
Select the training task



Navigate to Chatter



Leave the request according to the sales order and @ the trainer's name and click share



Step 3: The training resource will email the customer

- The training resource that the training request was tasked to will reach out to the customer to schedule training
- The training resource will also send you an email stating that they have reached out to the customer

Next Process Link

Links for the next Implementation Process per Project type can be found below:

For AlarmBiller Data Conversion Go-Live follow the link

For AlarmBiller No-Data Conversion Go-Live follow the link

For AlarmBiller Add-On MOdule follow the link

For Manitou Standard implementation follow the link

For SedonaOffice Enterprise Go-Live follow the link

For SedonaOffice Add-On Module follow the link