

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.

Please register for 'eForms Training'

This training discusses the basics of eForms, how to upload a template, edit a template, and sending an eForm to a customer.
[Contact Organizer](#)

Jun 25 Thu

This training is offered several times. Select the date and time that works best for you.
 Thu, Jun 25, 2020 12:00 PM - 2:00 PM MDT

[Change time zone](#)

* First Name

* Last Name

* Email Address

By clicking this button you submit your information to the training organizer, who will use it to communicate with you regarding this event and their other services.

REGISTER

Manitou, SedonaOffice and AlarmBiller 1x1 Trainings

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

For SedonaOffice Sales Automation and eForms 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

TaskRay Project
 SO - A-Com - SalesAutomation & eForms: Project

Parent Project Start Date 12/15/2020 Estimated End Date 1/22/2021 Owner Michela Schultz

Plan Deliver Go-Live Complete

Related List Quick Links

- TaskRay Team (3)
- TaskRay Tasks (4)
- Files (0)
- Notes (0)
- TaskRay Project History (10+)

Details		Related	
Project Name	SO - A-Com - SalesAutomation & eForms: Project	Owner	Michela Schultz
Parent Project		Opportunity	SO - A-Com - SalesAutomation & eForms
Template Source	Add On-Modules Implementation	Account	A-Com (United Monitoring) (A-Com Security)
Template		Estimated Time (hrs)	

Project Stalled Tasks

Select the training task

4 Items • Sorted by Sort Order • Updated a few seconds ago

☐	Task Name	Sort Order ↑	List	Task Gr...	Start Date	Estimated End Date	Actual C...	Project Resource Role	Owner Alias
1	Click Off Call	1	Completed				12/16/2020	Project Manager	mschu
2	Install Module	4	Needs Schedu...					IT Support	mschu
3	Training	5	Needs Schedu...					Training Specialist	mschu
4	Project Complete	7	Needs Schedu...		1/4/2021	1/22/2021		Project Manager	mschu

Navigate to Chatter

TaskRay Task Training

Project SO - A-Com - SalesAutomation & eForms: Project Estimated End Date List Needs Scheduled Owner Michela Schultz

Needs Scheduled Scheduled In Progress Stalled Completed Mark List as Complete

Details Related

Task Name	Training	Owner	Michela Schultz
Project	SO - A-Com - SalesAutomation & eForms: Project	Project Resource Role	Training Specialist
Task Group		Estimated Time (hrs)	
List	Needs Scheduled	Actual Time (hrs)	0.00
Priority	Normal	Hidden	☐

Activity Send With DocuSign Chatter

Email Log a Call New Event New Task

Write an email... Compose

Filters: All time • All activities • All types

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

Activity Send With DocuSign Chatter

Post Poll

@[Kaitlyn Denninger] customer purchased 6 hours of 1x1 SA and eForms training. This has not been installed yet. I will let you know when install is complete for you to reach out for training

B I U G Ix [Icons]

To Link to a record, enter / then start typing the record name.

To Training

Saving... 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](#)