# Scheduling Support Resources for Services Project Training Tasks

01/09/2024 10:34 am EST

## Contents



## Purpose

The occasion may arise when Services Trainers' schedules are booked out beyond acceptable time frames to provide quick turnaround for customer projects.  During such periods, the Services team may request approval from other departments to help deliver training to ease the backlog.

This document walks through the process to request time from the Business Management Support team to quickly schedule and deliver training. At this time, the following modules training can be delivered by that team for add-on module projects only:

- Sedona-X Mobile
- SalesAutomation
- eForms
- Time & Attendance

The above modules for new customer implementations should continue to be delivered by Services, as these sessions may include related topic discussions that require more in-depth conversations

Top of Document

## Resources

The following resources within the Support organization have delivered training sessions in the past, and have been identified to deliver training for the modules listed above:

- SedonaOffice - Jesslynn Lupo

- AlarmBiller - Erick Steckel

Support will reserve 2 hours each day for training sessions during the hours of 1 pm and 3 pm ET.   They will need 1 week's notice for any training session.
During the sessions, other support resources may be scheduled by the Support Manager to join for learning purposes but will refrain from asking questions during customer training time.

Top of Document

# Prerequisites

The following items should be completed PRIOR to requesting training time:

1. Sedona-X Mobile
    a. The customer should have received all Sedona-X Mobile documentation and reviewed it prior to the training session
    b. Customer should have at least one user that has successfully logged into the API and Sedona-X Mobile application
2. SalesAutomation
    a. Confirm the services have been tested and are running
        i. From SalesAutomation select Setup/Services
        ii. Click Test Service
    b. Confirm the Sync is working
        i. From SalesAutomation select Setup/Sync Management
        ii. Click the Sync All Entities button

Top of Document

# Scheduling

To schedule a support resource, follow the steps below, a minimum of one week prior to delivery date:

1. Project Manager sets the task owner to themselves

2. Open a case for the customer

    a. Enter the customer contact name

    b. Enter your name as Secondary Case Owner

    c. Subject - enter 'TRAINING - Module name'

    d. Description - provide full details on the module to be trained

        i. Module Name

        ii. Hours allotted for training

        iii. Confirm customer prerequisites have been completed

            i. Sedona-X Mobile

                i. The customer has received all Sedona-X Mobile documentation and reviewed it prior to the training session

                ii. The customer has at least one user that has successfully logged into the API and Sedona-X Mobile application

            ii. SalesAutomation

                i. Confirm the services have been tested and are running

                ii. Confirm the Sync is working

        iv. Change the Owner

i. Owner = Fiona Beckstrom

ii. Check the Notification box to send an email the owner was changed

v. Save the case

vi. Copy the case number and enter it in the project task for reference

3. Support schedules the session with the customer

   a. Fiona will review the resource's schedule and work with the customer to confirm the dates

   b. Support will provide the customer with a meeting link

   c. Support will update the case and @mention the Project Manager when scheduled

Top of Document

# Delivering Training

The following information provides detail on processing the case and project task during delivery and completion of service:

1. Support delivers Training

   a. Support will @mention Project Manager with any issues during training that need immediate assistance

      i. IM is fine - but an update of the support case with details of IM should also be done for historical purposes

   b. Support should make every effort to stay within the allotted time to prevent budget overruns

2. Support completes the training session

   a. Support will add notes on any items of mention, include the hours delivered, issues that arose that prevented completion, etc., and inform the Project manager when complete.

i. Support can then close the case

3. Project Manager completes the project task
    a. Enter task time - the Project Manager will enter the time delivered on the task, however, the following will need to be changed
        i. Timecard owner - change to Support resource if available or leave blank
        ii. Quota - if a Quota record is linked, remove the link
            i. This may require a second update to the timecard record.  Make sure you confirm it has been removed
    b. Update the Chatter notes
    c. Complete the task

Top of Document

# Additional Time Required

Should additional time be required to complete the allotted training session for any reason, Support will inform the Project Manager for approval of the budget and reschedule determination.

Top of Document

# No Show

If a customer does not show up for their training session, the Support resource will give them 15 minutes to join before ending the session.   The 15 minutes (or wait time) will be billed to the customer.  Update the case and inform the Project Manager the training will need to be rescheduled and the time that needs to be billed.

Top of Document