Girls Inc. x Compass-360 Onboarding

Week 1: Getting Started

Welcome

Welcome to the Compass-360 Association (C360) and your new Participant Management Software!

Resources

Familiarize yourself with the knowledge base, where supporting documentation for all things C360 lives. These are constantly updating and changing as new features are released and functionality is upgraded.

If at any point you stumble across something that hinders your ability to execute a task and you cannot find support for the issue/task in the knowledge base, you can reach out to the C360 Help Support via email at gi-help@compass-360.org or directly to Randi Nandyal, our Director of Engagement at RNandyal@compass-360.org

Addressing The Elephant

From the beginning we discovered the complications with Trax that have prevented a common process and data model across affiliates. This led to affiliates creating unique and crafty ways to *work around* the construct to meet their needs. While challenging, **we need to remove this narrative completely (how we did X in Trax) and shift the paradigm of how to do things now**. With this comes an inherently complex transformation of data and practices, there are documents that provide the understanding of what we did and why.

Data Model

Please take the opportunity to review the import report to understand how data was transferred into C360. While you are working through the onboarding subjects, verify that the data reflects correctly in C360.

Import Report

Review the import report.

Terminology

Review the Compass-360 data models to understand terminology and how Trax data was transferred over.

Money Trax Users

Please review the import report in regards to how we handled Money Trax records. You'll need to export a snapshot of your transaction history for external reference.

Navigation

Logging In

You have been provided a specific link to your organization's database in the form of a URL. To begin, log in to your database using the log-in credentials provided to you by your organization's implementation point-of-contact.

For quick access, bookmark your organization's URL.

Module Overview

As a new member of the Compass-360 Association, you will have access to all of the *modules* that C360 has to offer. However, you won't get access to all of the modules until the completion of the Participant Management Software project, which concludes in December of 2021.

What you will have access to are the modules included in the C360 web-client, which has everything you need for participant tracking and management, as well as a handful of other modules to accomplish all related tasks (as per our agreement with Girls Inc. National.)

After the completion of the Participant Management Software project, you will get access to the full C360 desktop-client, which includes additional modules and their supporting documentation.

Initial Configuration

A few things need to be manually configured before we get started - there is more to come next week, but let's start with two fundamentals: managing your user accounts and setting up your merchant processor.

Adding Users

You have complete autonomy to manage your database's User Accounts. There is no limit to the amount of accounts that can be created, but management of them does fall on your organization. Adding someone who isn't a constituent yet? Add them as a constituent first!

Be mindful and create internal processes to help protect your data, like limiting the Admin user to one or two team members (commonly a second-in-command or CFO) and ensuring that each user has their own account. C360 does have a *change log*, which can track what user account made changes, should a breach of security arise.

If a member of your team reaches out to the Help Desk for User Account support, changes cannot be made with the permission of your database point-of-contact on file. If there is any uncertainty of who that is, we will connect with GI National first to ensure your Affiliate's security.

Merchant Account

Stripe is a widely used payment processor that C360 uses in the background to process transactions. To get started, create an account* and integrate it with your C360 database. You will need some sensitive information about your organization that may require your accounting department or CEO. ***Integrating your account is a one-time set-up accessed with a unique link sent to you via email by the Migration Team during Week 1.***

At a bare minimum you will need one Stripe account, linked to a bank account, to begin taking payments.

*If you already have a Stripe account, you can use your current Stripe account - rather than creating a new one through the unique link, log-in.