Program Creation Process

The following process is used to create new Executive Education Programs which will be managed in Flatbridge. The process starts in Salesforce and continues to Flatbridge, where the registration is managed. Pre-requisites include having the appropriate role to create new programs in Salesforce. Prior to Flatbridge, Program Registrations were managed in Salesforce. For programs which are not yet managed in Flatbridge see this document for program and form setup.

Step-by-step guide:

Create the Program Basics in Salesforce

1. Login to Salesforce and use your NetID and password. 
   Note: Executive Ed Salesforce users have the same general profile, however, only certain users have permission to create Program Objects. If you need permission to create program objects for Exec Ed, you can place a service request at somit@yale.edu

2. From the Program menu select New Program

3. A data entry screen for the New Programs will be displayed:

4. In the first section on Program Details the following fields are required:
1. **Program Name** (using a standard - Program Name, Month spelled out, 4 digit year - must be unique). For more information, you can refer to Standards for Program Creation.
2. **Program Display Name** is what shows up on web sites and in confirmation eMails (does not have to be unique).
3. **Program Start Date** - Date the Program Begins.
4. **Program End Date** - Final date of the Program.
5. **Primary Program Manager** - Must be an Exec Ed user in Salesforce. This name becomes the signatory on confirmation eMails.
6. **Program Type** - Custom or Open Enrollment.
7. **Program Acronym** - The short initials for the program only:
   - WLP
   - BEI
   - NSOM
   - WOB
   - YGELP
   - YPC
   - BEI
   - CIMA
   - CEBG
   - CPWA

5. Scrolling down to Additional Information:

1. Enter the maximum class size in **Target Class Size** field.
2. Continue to scroll down to the section **Display Information on the form**.
7. Enter the following required fields:
   1. **Program Location** - The actual location the program is taking place
   2. **Display Name of the Program** - This shows up on websites and in confirmation eMails, so do not include dates.
   3. **Program Short form** - This is the short initials acronym of the Program followed by “-” (dash) two digit month start; four digit year (mmyyyy). There should not be a case where two of the same programs start in the same month, and therefore this should be unique.
   4. **Cost of Program for each Person** - program rate
   5. **Note:** While **Discount** rates are listed here, they do NOT transfer over to Flatbridge, and therefore have no effect on program rates. In the future if these are used, they are entered as integers (ie 15) and then Salesforce converts them to % during data validation (shows as 15%)

8. When you have completed the data entry at the bottom of the screen click Save, and the record will be saved to Salesforce.

Salesforce Program information and updates are synchronized to Flatbridge every hour. Within the next hour this new program should show up in Flatbridge for final configuration details and to make it active. If after a reasonable period of time has passed (2 hours or more) and the program is still not visible in Flatbridge, you can place a support ticket in with somil@yale.edu. Provide the program name, and time of day you entered it.
Help us improve

Your Rating: ★★★★★    Results: ★★★★★  3 rates

Related articles

- Program Creation Process
- Creating Programs for Registrations that go through Salesforce
- Pardot User and System Steps
- Pardot and Salesforce
- Marketing, Sales and Program Management