Program Details Data Entry

This list is subject to change, and was created by Scot from Exec Ed prior to his departure. For now it’s comprehensive. Please be sure to enter all information possible as it is key for data integrity and reporting. As Cyndy says, “Garbage in, Garbage out!”

Program Status marked as "Active": you can find this under the Program Details section of your program. Required Fields and Information:

1. **Locations**: Primary location is to go under "Location" then any additional locations in chronological order using "Location 2" and "Location 3"
2. **Default Room**: the primary room you are using during the program. If your room is not in the list, contact Scot.
3. **Client Home**: (if applicable)
4. **Hotel**: please be sure to assign a hotel to your program. If your hotel is not listed, add it to the list of Vendors.
5. **Vendor**: please include any vendors used for your program. If your vendor is not listed, add it to the list of Vendors.
6. **Staff and Guest Headcount**: found in Program Details, give an approximate estimation
7. **Program Coordinator**: this does not currently push from Salesforce, needs to be entered manually.
8. **Logistics**: experiment with the types of documents you want to live here, we’re still determining how we want to use this tab!
9. **Sessions**: all sessions for your program should be entered here. If an Instructor does not exist, create the Instructor; if your room is not available, contact Scot.
10. **Schedule Grid**: experiment with the schedule grid as well, entering in as much information as you have available.

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