Open Program Registration

The following process is used to open registration in Flatbridge for programs that were newly created in Salesforce. 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 Flatbridge.

Step-by-step guide:

Note: These steps cannot be completed unless a new program has been created in Salesforce. Follow the process outlined here for assistance.

Salesforce Program information and updates are synchronized to Flatbridge every hour. Within an hour or two a 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 somit@yale.edu. Provide the program name, and time of day you entered it.

Complete the Details in Flatbridge to Open Registration

1. Login to Flatbridge with your UserID and password. Note: Flatbridge does not use the yale NetID and password. This would be a separate ID and password, typically your eMail address and a unique password.

2. From the Programs menu on the home page, select Search to find the new program you created in Salesforce.

3. By default the search screen allows you to type in the three to four letter acronym for the program, however you can search by other criteria as well such as Program Name, or Short Code.
4. After selecting the type of search and entering a few of the matching letters, click Submit.

5. A list of matching programs should appear, provided your criteria matched a program record.

6. Single-Click the hyperlink under the Name column to open up the Program Overview.

7. When the Program Overview is displayed, select Edit Program Details.

8. The Edit Program Details pane will be displayed:

8. It will display all the basic information about the Program you created in Salesforce.

9. Verify the information is correct, ensure the Program Status is Active. Continue to scroll down.

10. Ensure the Program Manager is correct - this will be the signatory on the registration confirmation emails.
11. Double check the Fee is set correctly before making the Registration url public or using it in any custom communications to Contacts. You can cut/paste this url as needed and use it on web pages, including the Executive Programs Web site for registration. *(note: in the image above the url was cut-off intentionally)*

12. If you have updated any information, click the Update button at the bottom of the screen to make sure your changes take effect. If you are just viewing information, you can simply select another option to navigate away from the information. Please refer to the FB data entry reference also created when Flatbridge was first implemented.

13. Congratulations - You are now ready to open registration for this program!
Related articles

- Reunion Pledge Gift Processing - DRAFT for training
- Leads and Contacts Duplicate report
- Custom Program Registration Process and Steps
- Program Creation Process
- Creating Programs for Registrations that go through Salesforce