

Salesforce for Nonprofits Base Camp: Implementing the Program Management Module

Hands-On Workshop Guide

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Agenda

Each Basecamp session includes a hands-on exercise. Today's focus is on using Program Management Module (PMM) to track the good you do in the world.

Together we will:

- Learn how a fictional organization called COACH uses PMM to organize their work.
- Track attendance for clients who attended a training.
- Create a program, add services to the program, enroll a client in a service, and create bulk service deliveries.

Generate Your Workshop Org

The first thing you need to do is spin up a practice environment.

1. Navigate to <https://sforce.co/BaseCampWorkshop>
2. Wait for the deployer to run. It will take about 10 minutes to generate your org.
3. When the org is ready, click **Launch**. You can safely ignore the error message.

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 Salesforce DX Public Deployer

Deploying sfdo-csg-nonprofit-16428761113258c 100% Complete

An error occurred while deploying. See the browser console logs for more information.
A scratch org was created with username test-9eufuenm9odz@example.com, but the settings failed to deploy

Note: It can take up to 5 minutes for the DNS to propagate. If the scratch org doesn't load properly, wait a few minutes to launch.

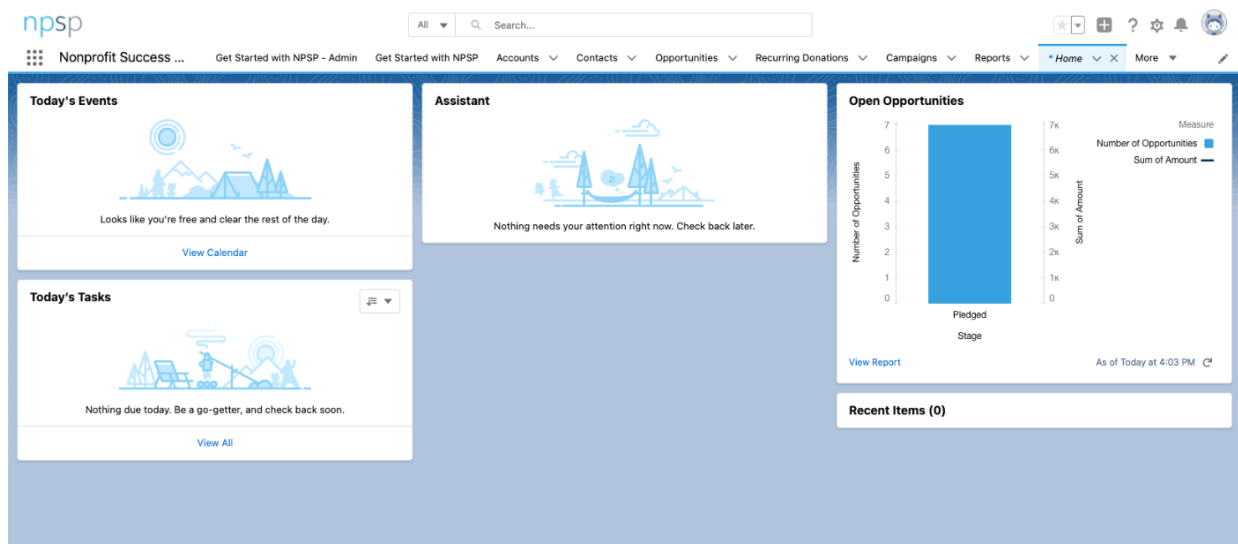
Your org is ready! Delete Launch

Note: Use the Launch button above to login for the first time
The credentials are for other uses (mobile app, integrations).
They auth to a sandbox (test.salesforce.com) not production (login.salesforce.com)
These credentials/button will continue working after the session-based Launch button stops.

Your username is and your password is |whg6ubbTnsxd Launch via credentials

Log In to Your Workshop Org

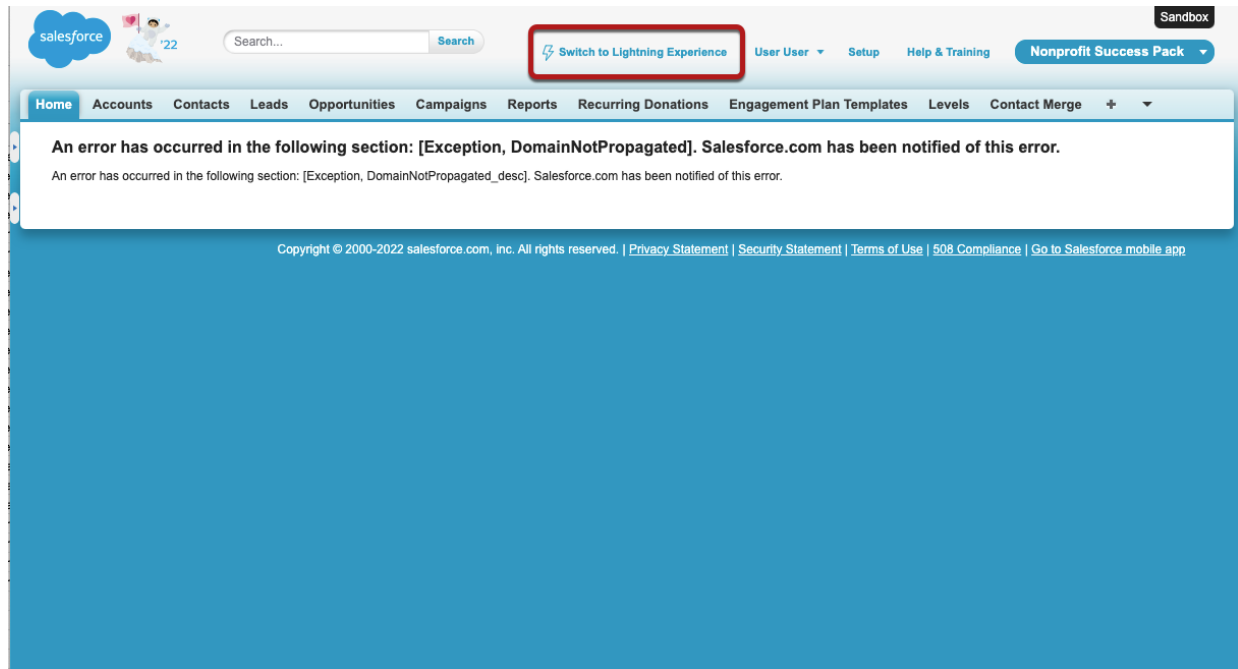
When you launch your workshop, you will begin on a homepage that includes Today's Events and Today's Tasks. Since this is a brand new org, you won't see any tasks assigned to you.



What if My Screen Doesn't Look Like That?

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If you receive an error upon logging in—such as in the screenshot below—click **Switch to Lightning Experience** at the top of the page.



Before We Begin

In today's workshop, we'll walk through step-by-step instructions to create program and service records in Salesforce. For these examples, we use Nonprofit Success Pack (NPSP) and Program Management Module (PMM) out-of-the-box without any customizations, though you make changes to reflect how your organization works.

Let's get started!

Navigate Program Management Module

Program Management Module (PMM) is a framework to track, manage, and deliver programs, services, and service deliveries. Let's start by opening the PMM app in Salesforce.

1. Click on the **App Launcher** icon.
2. Type Program in the search box to find and select **Program Management**.

Your first page is Home and the Program Management dashboard. Remember that this default homepage is just a starting point. Working with your admin, you can customize PMM to fit your organization's specific programs and services.

1. Click the **Refresh** button to make sure you have the latest data.
2. Notice the chart of All Active Program Engagements. These are the totals of constituents currently involved in each program.

Now let's check out a program record.

1. Click **Programs** in the navigation bar. (It may be under More depending on your browser's width.)

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2. Switch the list view by clicking **Recently Viewed** and selecting **All**.
3. Click **Basketball**.

Let's explore this **Program** record:

The screenshot displays the Salesforce interface for the 'Basketball' program. The top navigation bar includes tabs for 'Programs', 'Program Cohorts', 'Services', 'Reports', 'Tasks', and 'More'. The 'Programs' tab is selected, and a red arrow points to it. The main content area is divided into two columns. The left column contains the 'Information' section (1) and the 'Additional Details' section. The right column contains three related lists: 'Services (3)' (2), 'Program Engagements (6+)' (3), and 'Program Cohorts (3)' (4). Red numbered callouts highlight these sections. The 'Services (3)' list shows three services: '9-11 Year Olds Coaching Workshop', '12-14 Year Olds Coaching Workshop', and 'Parent 3 Day Intensive Series'. The 'Program Engagements (6+)' list shows six engagements, including 'Joanna Colquit 2020-09-15: Basketball', 'Candra Pooley 2020-09-01: Basketball', 'Vick Taysbil 2020-09-01: Basketball', 'Jocelin Byham 2020-09-01: Basketball', 'Wells Hook 2020-09-01: Basketball', and 'Ula Skiplorne 2020-09-01: Basketball'. The 'Program Cohorts (3)' list shows one cohort: 'Sunrise Woods Elem. Basketball 21-...'.

There are two columns on the program record.

- In the left column, you can review **Information (1)** about the program.
- In the right column, the **Services (2)** related list displays services offered within that program: The (3) **Program Engagements** related list displays the people enrolled in each program. And, the (4) **Program Cohorts** related list includes three program cohorts. COACH groups trainees into cohorts based on the school year and athletic league or school affiliation.

Next, let's check out a **Program Engagement** record. At COACH, we want to see how the Basketball Program is working for a student-athlete named Joanna Colquit.

1. In the Program Engagement related list, click **Joanna Colquit 2020-09-15: Basketball**. This record shows Joanna's participation in the basketball program events. Think of a program engagement record as an overall enrollment in a program.

Let's explore this **Program Engagement** record:

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The screenshot shows the Salesforce interface for a Program Engagement record. The top navigation bar includes 'Program Engagemen...', 'Program Engagements', 'Bulk Service Deliveries', 'Contacts', 'Programs', 'Program Cohorts', 'Services', 'Reports', 'Tasks', and 'More'. The record title is 'Joanna Colquit 2020-09-15: Basketball'. The left sidebar contains the 'Information' section with fields: Program Engagement Name, Owner (Simone Chen), Stage (Completed), Client (Joanna Colquit), Household Account, Program (Basketball), Program Cohort (Sunrise Woods Elem. Basketball 20-21), Attendance Summary, and Consecutive Absences. The right sidebar contains the 'Service Deliveries (2)' table, 'Service Participants (1)' table, and 'Files (0)' section. Red callout boxes with numbers 1 through 5 highlight specific elements: 1 points to the Owner field, 2 points to the Program field, 3 points to the Attendance Summary field, 4 points to the Service Deliveries table, and 5 points to the Files section.

Service Delivery Name	Delivery Date	Attendance Status	Quantity
Joanna Colquit 2020-10-15: 12-14 Y...	10/15/2020	Present	1.00
Joanna Colquit 2020-10-08: 12-14 ...	10/8/2020	Present	1.00

Service Participant Name	Contact	Service	Sign Up Date
Joanna Colquit - Fall 2020 Sunrise ...	Joanna Colquit	12-14 Year Olds Coaching Workshop	9/15/2020

There are two columns on the Program Engagement record.

- In the left column, we can review important information such as that she **(1)** completed the program as a member of **(2)** an elementary school cohort, and more. There's also a field for **(3)** attendance, though it's empty now.
- In the right column, the **(4)** Service Deliveries list shows us each time she **attended** a basketball class session. The **(5)** Service Participants list shows us each time she **signed up or enrolled** in a basketball class

Last, let's explore a **Service** record.

1. Go back in your browser to return to the program record for **Basketball** (or click the Program Name: **Basketball**).
2. In the **Services** related list, click the **9-11 Year Olds Coaching Workshop**. At a glance, this service record shows us details about the scheduled events, enrollment, and attendance.

Let's explore this **service** record.

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The screenshot shows the Salesforce interface for a service record titled "9-11 Year Olds Coaching Workshop". The interface is divided into two main columns. The left column contains the "Information" and "System Information" sections. The right column contains the "Service Schedules (1)", "Service Deliveries (6+)", and "Service Participants (6+)" sections. Red circles with numbers 1 through 4 highlight specific areas: 1 points to the "Information" section, 2 points to the "Service Schedules (1)" section, 3 points to the "Service Deliveries (6+)" section, and 4 points to the "Service Participants (6+)" section.

Information Section:

- Service Name: 9-11 Year Olds Coaching Workshop
- Program: Basketball
- Description: Boys & Girls
- Unit of Measurement: Training
- Status: Active
- Attendance Summary

System Information Section:

- Service Delivery Field Set: Bulk Service Deliveries
- Created By: User User, 8/17/2022, 8:11 AM
- Owner: Simone Chen
- Last Modified By: Ines Manta, 8/17/2022, 8:11 AM

Service Schedules (1) Section:

Service Schedule Name	Participant Capacity	Primary Service Provider
Spring 2022 9-11 Year Olds Coaching Sessions	50	Fancie Galbraith

Service Deliveries (6+) Section:

Service Delivery Name	Delivery Date	Attendance Status	Quantity
Anna-diana Heath 2022-04-04: 9-11 Year Olds Coaching Sessions	4/4/2022	Unexcused Absence	0.00
Ash Hadgkiss 2022-04-04: 9-11 Year Olds Coaching Sessions	4/4/2022	Present	1.00
Cloe Capner 2022-04-04: 9-11 Year Olds Coaching Sessions	4/4/2022	Present	1.00
Davey Antoniutti 2022-04-04: 9-11 Year Olds Coaching Sessions	4/4/2022	Present	1.00
Elston Boolisen 2022-04-04: 9-11 Year Olds Coaching Sessions	4/4/2022	Present	1.00
Gar Schwandermann 2022-04-04: 9-11 Year Olds Coaching Sessions	4/4/2022	Present	1.00

Service Participants (6+) Section:

Service Participant Name	Contact	Program Engagement	Sign Up Date
Anna-diana Heath - Spring 2022 9-11 Year Olds Coaching Sessions	Anna-diana Heath	Anna-diana Heath 2021-10-01: Basketball	2/8/2022
Ash Hadgkiss - Spring 2022 9-11 Year Olds Coaching Sessions	Ash Hadgkiss	Ash Hadgkiss 2021-10-01: Basketball	2/8/2022
Cloe Capner - Spring 2022 9-11 Year Olds Coaching Sessions	Cloe Capner	Cloe Capner 2021-10-01: Basketball	2/8/2022
Davey Antoniutti - Spring 2022 9-11 Year Olds Coaching Sessions	Davey Antoniutti	Davey Antoniutti 2021-10-01: Basketball	2/8/2022
Elston Boolisen - Spring 2022 9-11 Year Olds Coaching Sessions	Elston Boolisen	Elston Boolisen 2021-10-01: Basketball	2/8/2022
Gar Schwandermann - Spring 2022 9-11 Year Olds Coaching Sessions	Gar Schwandermann	Gar Schwandermann 2021-10-01: Basketball	2/8/2022

There are two columns on the Service record.

- In the left column, we can review **Information (1)** about the service, similar to the program record.
- In the right column, **Service Schedule (2)** shows us the basketball workshop events detail and status. The **Service Deliveries (3)** list helps us track attendance details. **Service Participants (4)** lists who was enrolled in the program.

We included links in the Resource Guide to help your admin build out Service Schedules. This is very similar to creating class rosters that would make it easy for users to mark attendance.

Create a New Program

Now that we've reviewed the basics of how Program, Program Engagement, and Service records work together, let's create a new soccer program, a coaching workshop service, add a client to the program, and record the attendance.

1. Go to **Programs** in the navigation bar and click the down arrow to open the Programs menu.
2. Click + **New Program**.
3. Create a Program with these details.
 - a. Program Name: Soccer
 - b. Status: **Active**
 - c. Short Summary: Training for soccer coaches
 - d. Target Population: Volunteer athletic coaches
 - e. Description: The soccer program trains community volunteers to coach youth soccer from 5 to 14.
 - f. Start Date: **October 1, 2022**
 - g. Program Issue Area: **Education**
4. Click **Save**.

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The new program record will open in your browser. Check it out.

Create a New Service

Now that we've created our new program, let's create a service to go with it. Remember that services are the activities that make up your program.

1. On your Soccer program record, click **New** in the Services related list .
2. Enter these details:
 - a. Service Name: **5 to 9 Coaching Workshop**
 - b. Description: **Train volunteers to coach kids ages 5 to 9.**
 - c. Unit of Measurement: **Trainings**
 - d. Status: **Active**
3. Click **Save**.

Add a Client to a Program

Now that we've created our new program and a related service, let's add a client (using the contact record) to the program and create a program engagement record.

1. On the Soccer program record, click **Add Contact to Program** in the upper right section of the page with the action buttons.
2. Enter these details:
 - a. Client: Find and select **Davie Rattery**.
 - b. Role: **Client**
 - c. Stage: **Enrolled**
 - d. Click **Save**

Create Bulk Service Deliveries by Group

You can use the Bulk Service Deliveries feature when you don't have a roster to know ahead of time who's planning to drop-in. To reduce tedious data entry, use Bulk Service Deliveries by Group.

1. From the navigation bar, click the **Bulk Services Delivery** tab
2. Click button: **Create by Group**
3. For Service, find and select **9 to 11 year olds Workshop**
4. For Trainings, enter **1**
5. For Delivery Date, leave the default date as today's date
6. Click **Next**. The moment you click Next, you will see all the Contacts who were enrolled or active for the event.
7. To narrow our list, in the Filter by Program Cohort, click the drop-down arrow, then select **Sunrise Woods Elem Basketball 20-21**
8. From the list of Contact enrolled:
 - a. Click **Add All**
 - b. Or, click the **Add** button next to the names who attended
9. If you need to add a new Contact who dropped in without prior enrollment, Click **New**
10. Once your list of Selected Contacts is complete, click **Next**

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11. You can modify the details and add entries as needed
12. Double-check that your list of names is correct. You can modify the details and add entries, as needed.
13. Click **Save**

Congratulations! We created a new program, service, added a client to a program, and processed bulk service deliveries at once! To keep building on the basics, we provided an optional Track Attendance exercise to try on your own.

Track Attendance to a Service Session (optional)

To keep building on this example, we provided an optional exercise to Track Attendance. Let's check out the service schedule record and update attendance for a few clients.

Our Spring 2022 9-11 Year Olds Coaching Sessions service schedule includes three service sessions, the three times we'll be training coaches for 9-11 year olds.

1. From the navigation bar, click the dropdown arrow next to **Services** and select "**9-11 Year Olds Coaching Workshop**"
2. From the Service record, in the **Service Schedules** list, click **Spring 2022 9-11 Year Olds Coaching Workshop**.
3. From the Service Schedule record, in the Service Sessions list, click **4/10/2022: Spring 2022 9-11 Year Olds Coaching Workshop**.
4. Let's use the Track Attendance section of the page.
 - a. Change the Attendance Status of Anna-diana Heath to **Unexcused Absence**.
 - b. Notice the Training column lists **1** for each person. except for Anna-diana now has 0. Training is the unit of measurement for this service.
 - c. Click **Submit**.
5. Notice the Status of the service session, in the left column, changed from Pending to Complete.
6. Refresh the page in your browser.
7. Scroll down to check the Service Deliveries related list. These records represent each person and their attendance—or lack thereof—at this particular service session.

Now it's time for you to explore Program Management Module (PMM). What Programs and Services would you like to manage using PMM to drive more impact?

Be sure to check out the Base Camp: Implementing Program Management Module Resource Guide to learn more!