Varasi Program Management User Guide

VARASI

www.varasi.com

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1. Welcome to Varasi Program Management

1.1 What is Program Management

A ‘Program’ is an organized event or series of events that is conducted on a schedule with 1 or more attendees. Below are the different aspects of program management that need to be supported.

- **Plan**: Programs need to be planned. Planning includes defining the content, picking a location, working out a schedule (sessions), selecting performers/instructors
- **Activate**: Once a program is planned, it needs to be activated. Activation makes it available for enrollment
- **Enrollment**: Beneficiaries/Students would enroll for the program. Performers/Instructors and Volunteers would be assigned to the program with appropriate role. Waitlist management capabilities should be part of enrollment
- **Communication**: Communication with various stakeholders at every stage of the program (planning to closure)
- **Attendance & Time Log :**Tracking attendance of beneficiaries/ Performers/ Volunteers. Tracking time for paid performers or volunteers.
- **Performer Payment Tracking:** Tracking performer payment details
- **Performance**: Measuring and tracking performance of attendees
- **Feedback**: Getting feedback from attendees
- **Finance**: Budget and Expense management for programs
- **Analytics**: Dashboard and reporting on key metrics

1.2 Why Varasi Program Management

Spreadsheets, smartphones, and sticky notes. It's a typical toolkit for program coordinators everywhere. You see it every day—your coordinator chasing data across disconnected systems, outdated email lists, and event signup sheets.

At **Varasi**, we believe native Salesforce app for Program Management will be efficient and easy to manage. And we'd like to show you how Varasi Program Management helps you to get rid of sticky notes and spreadsheets, so that you can focus on what really matters.

Varasi Program Management is 100% Salesforce Native application & Lightning Ready and is designed for those who want to manage their Programs in different locations with multiple sessions scheduled and the Enrollments towards these Programs.
Enrollment can be for Students, Volunteers & Instructor and you track their attendance against Program Sessions. Also manage the expenses against the budgets allocated to the program.

Maybe you're an experienced or new Salesforce admin. Or Super user managing users and permissions, or customizing page layouts. We have designed this user guide which will take you step by step and be there with you from start to finish.

1.3 Varasi Program Management for your Salesforce Instance

Varasi Program Management uses Standard Objects - Contact to manage the Contact details and the rest is taken care by the Custom Objects - Programs, Sessions, Enrollment, Attendance, Location, Expense

Type Of Object	Object Name	Description
Standard	Contact	Represents the individual enrolling for a Program
Custom	Program	Keeps track of the Program details
	Sessions	Tracks Sessions for the planned Programs
	Enrollment	Enrollments received towards the Program
	Attendance	Track Attendance details of the Candidate in a Session
	Location	Location/ Site where the Program is being organized
	Expense	Keeps track of the expenses incurred for conducting the Program

Table 1.3.1: List of Objects

The below diagram shows how these Objects are linked together:

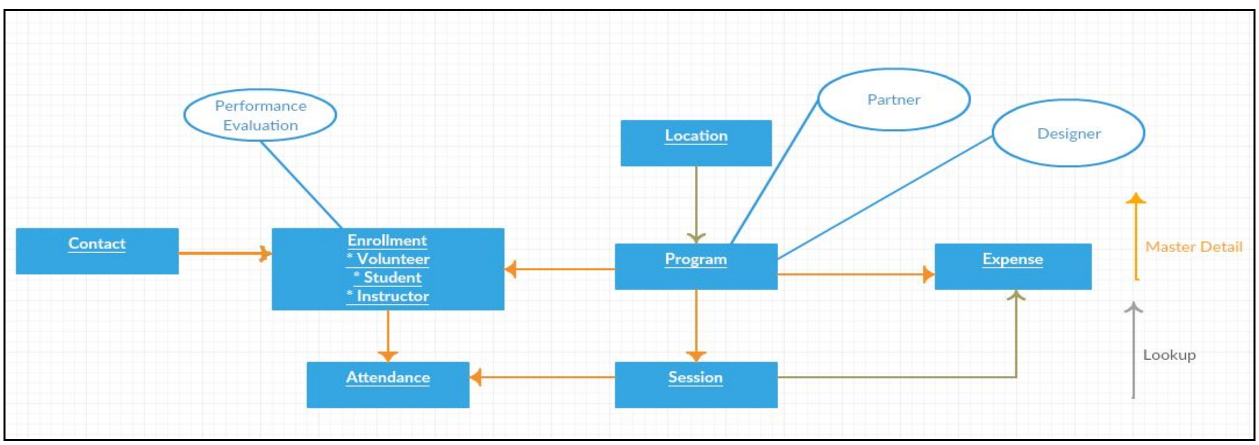

Fig 1.3.1: Object Diagram

1.4 Prerequisite

- My domain should be enabled and deployed for all users in the Salesforce Org.It's required for lightning component to work properly in the lightning interface, however it's not required if you are using Salesforce classic.

1.4.1 Steps to Enable My Domain

- From Setup, enter **Domain** in the Quick Find box, then select **My Domain**. You will find **My Domain** under **Company Settings** sub menu.

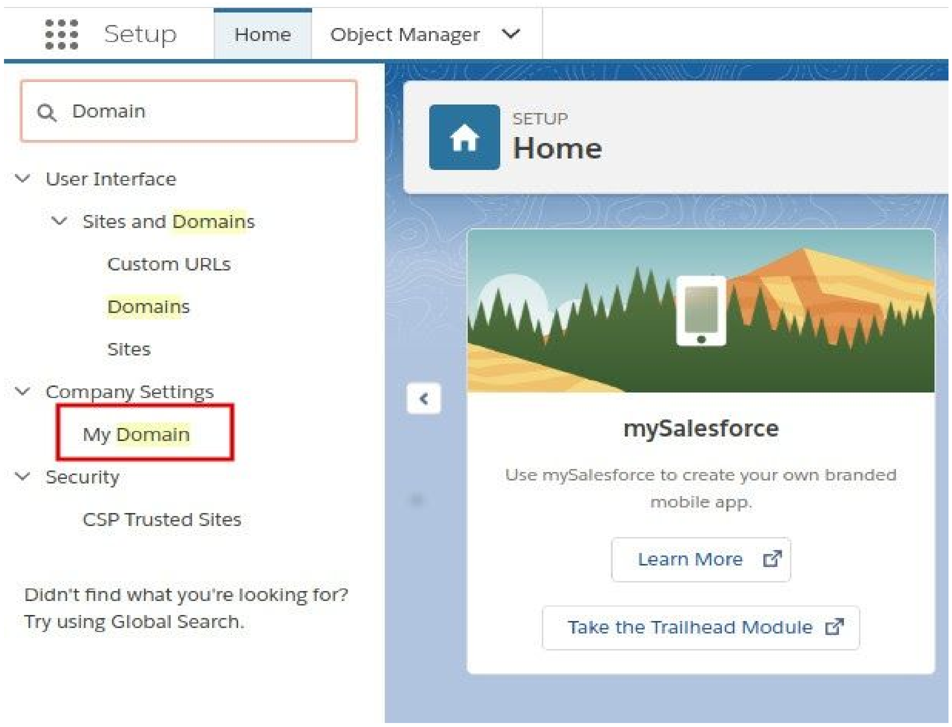

Fig 1.4.1: Search Domain in the Quick find box in Setup

- Enter the name for your subdomain (1). If you're doing this task in DE org, the domain name will be suffixed with **-dev-ed.my.salesforce.com**. Otherwise, in production org your domain will be suffixed with **my.salesforce.com** i.e without the -dev-ed.

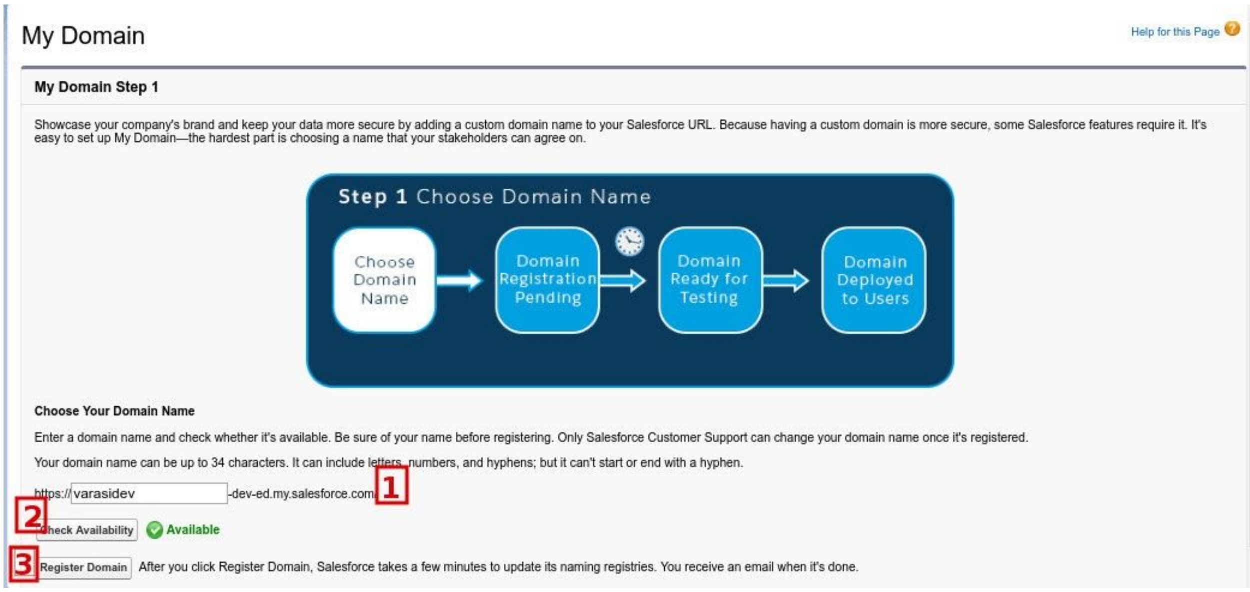

Fig 1.4.2: Give your own domain name and Click on Check Availability

- Click **Check Availability** (2). Salesforce checks whether this domain name is already in use.
- Click on **Register Domain** button when you see **Available** (2) green text.
- You will receive an email telling you that the process is completed. Behind the scenes, Salesforce prepares your subdomain and updates its domain name registries. It can take a few minutes.
- Refresh current page. You can see **Log In** button

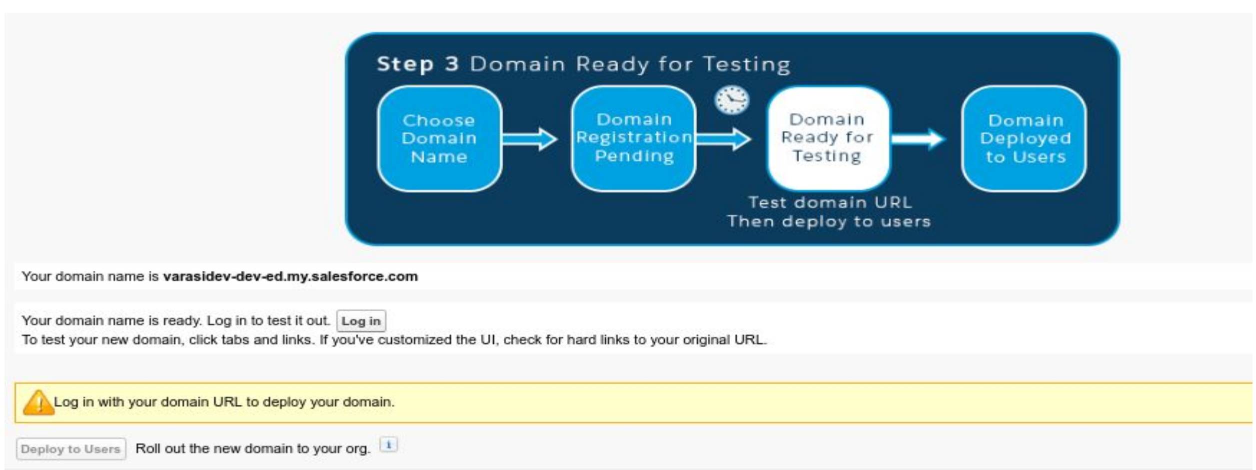

Fig 1.4.3: Acknowledgement of Domain ready

- Click on **Log In** button. Browser may prevent from opening login window. Log In into your org using above registered subdomain.
- Open **My Domain** page as mentioned in step 1. Now you can see that **Deploy to users** button is enabled

Fig 1.4.4: Once ready, click on Deploy to Users

- Click on **Deploy to users** button. You will receive confirmation popup with the message ‘When you deploy the new domain, we activate it immediately. Only Salesforce Customer Support can disable or change your domain name once it's deployed.’ Click **Ok**. Now you are done with all the steps necessary to register **My Domain**.

1.5 Getting Around with the Varasi Program Management

Once you have installed the Varasi Program Management package in your Org, follow the below steps to browse to Varasi Program Management App

- Click the App Launcher icon at the end of the navigation bar in Salesforce
- Click Program Management

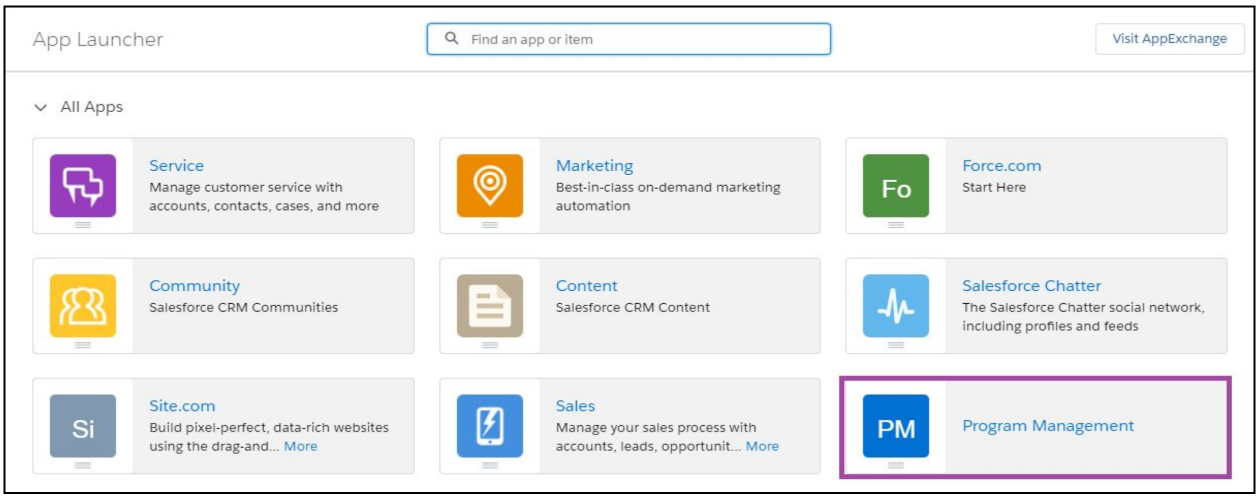

Fig 1.5.1: Program Management App in App Launcher

- Within the Program Management app, you see the different Program Management tabs.

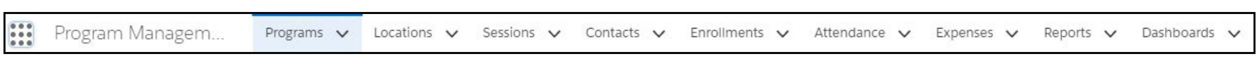

Fig 1.5.2: App Navigation Bar/ Tabs

- **Tabs Detail**
  - **Programs**: Browse to Program Object to manage Programs
  - **Location**: Manage Location/ Site
  - **Sessions**: Create/ View sessions related to Programs
  - **Contacts**: Create/ Manage Contacts to Enroll into the Program
  - **Enrollments**: Manage enrollments in a Program
  - **Attendance**: Track attendance for enrolled contacts in a Program Session
  - **Expenses**: Track expenses incurred during the Program
  - **Report/ Dashboards**: Create/ view various reports & dashboards

2. Track your Data

In Program Management, all types of data can be tracked and managed efficiently under different Objects.

2.1 Create a Contact

Create Contacts to Track Current & Potential Candidates who will Enroll for the Programs with Different Role i.e Student, Volunteer, Instructor

- Click on **Contacts** tab
- Click **New**
- Enter the Person's details such as Name, Contact Number, Email, Address, etc
- Click **Save**

2.2 Create a Location

Create a new Location record track the sites for conducting the Program

- Click the **Location** Tab
- Click **New** on the right side just below Tabs Navigation bar
- Enter the Location details i.e Name, Address, Manager, Type, Description
- Click **Save**.

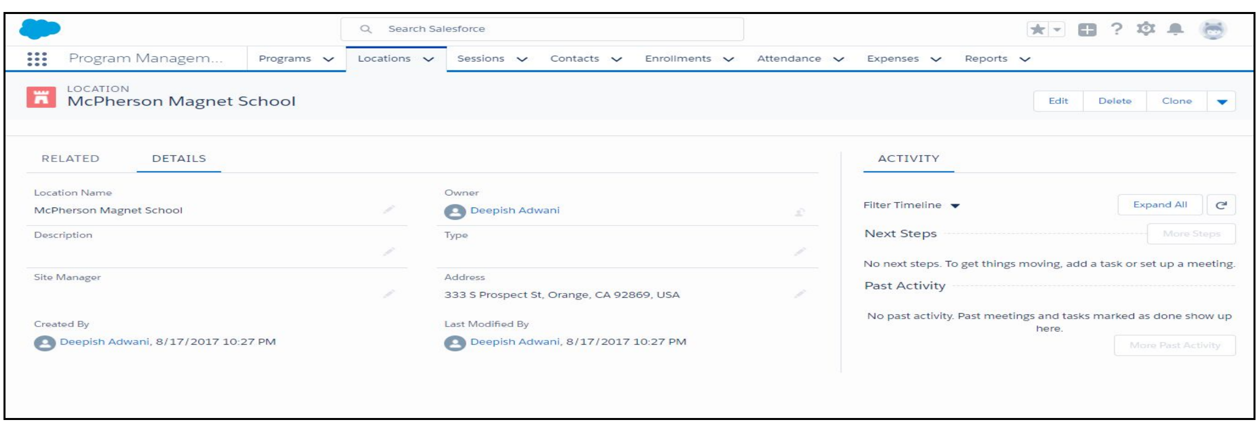

Fig 2.2.1: Location Record Details

2.3 Create a Program

Create a New Program to track the Programs which are in planned/ confirmed status

- Click the Program Tab
- Click **New** on the right side just below Tabs Navigation bar
- Enter the Program Details i.e Name, Start Date, End Date, Location, Capacity, Budget, etc
- Click **Save**.

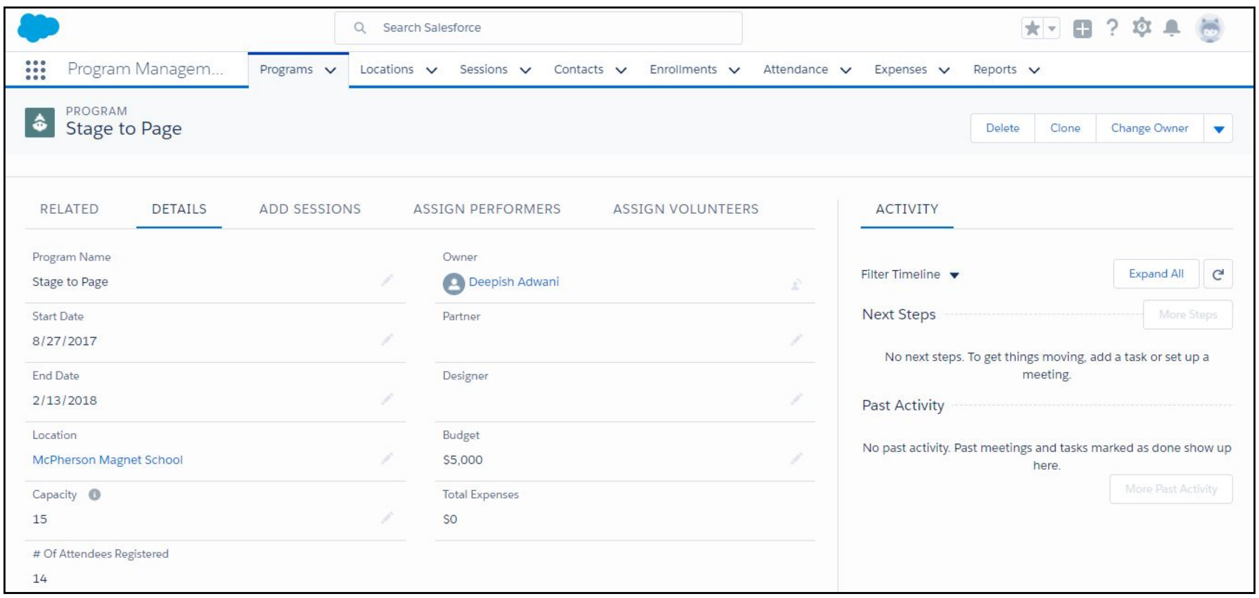

Fig 2.3.1: Program Record Details

2.4 Create a Session

Create Sessions required for the Program planned/ created

- Navigate to the **Add Session tab from the Program detail page**
- Select the Start-End Date/Time, Days of the Week when the Session going to be conducted, Weekly Occurrence, Duration of Each Session, No of Sessions to be Conducted, Prefix for the Session Name
- Click **Add Sessions** button to create a Sessions

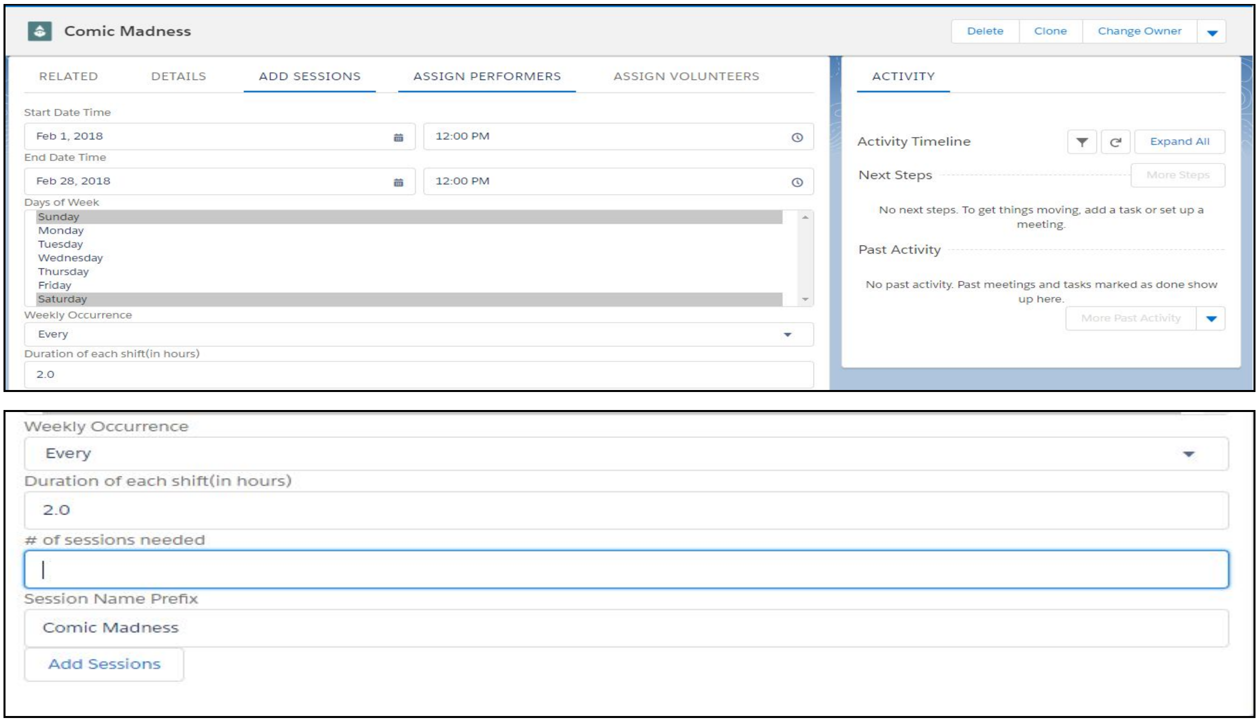

Fig 2.4.1: Add Sessions to Program

2.5 Create an Enrollment

Once the Program and its sessions are created we will go ahead and enroll the Contacts to the Program with different Role.

- Enrollments can be created in 2 ways:
    - Browse to the Related tab from the Program Detail page and then create an Enrollment for that Program (Program Field will be Auto-populated)
    - Click on the Enrollment tab on the Navigation bar and click New
- Fill in the Details like Program Name (Lookup), Attendee (Lookup to Contact), Role, Status, etc.
- Click **Save**
- Once the **Enrollment** is created, **Attendance** record will be Auto created for that **Enrolled Attendee for all the Sessions for a Program** so that the Program coordinator can mark the attendance for the Attendee and get the report for the Same.

- There is a checkbox field named **Attended ?** on the Attendance record which can be used to track the **Attendance** for the enrolled **Attendee**

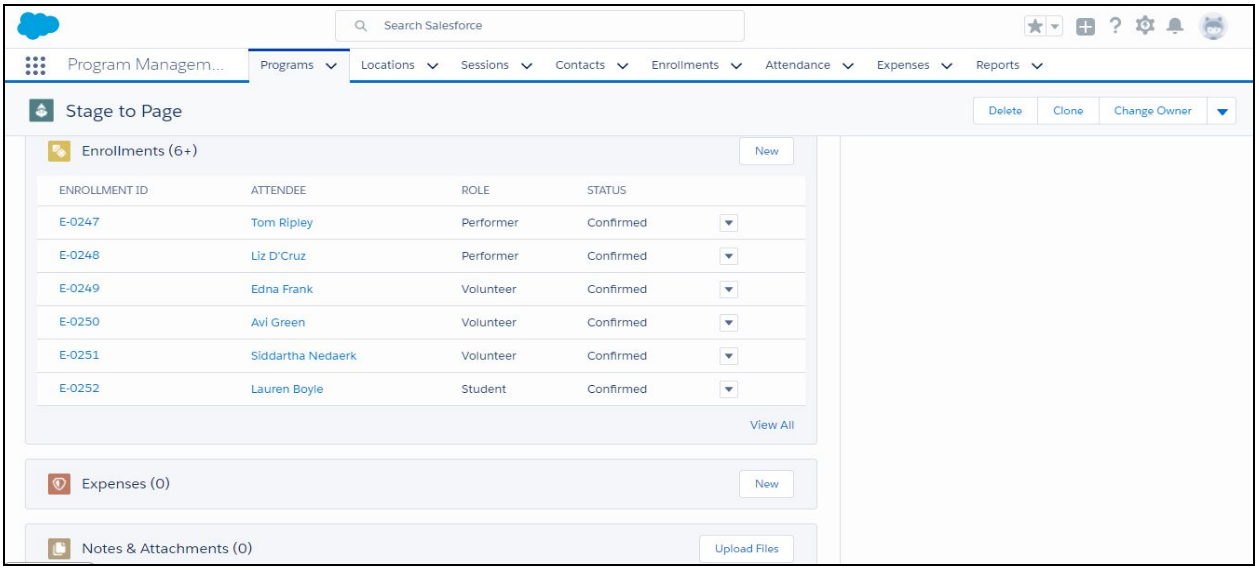

Fig 2.5.1: Create Enrollment

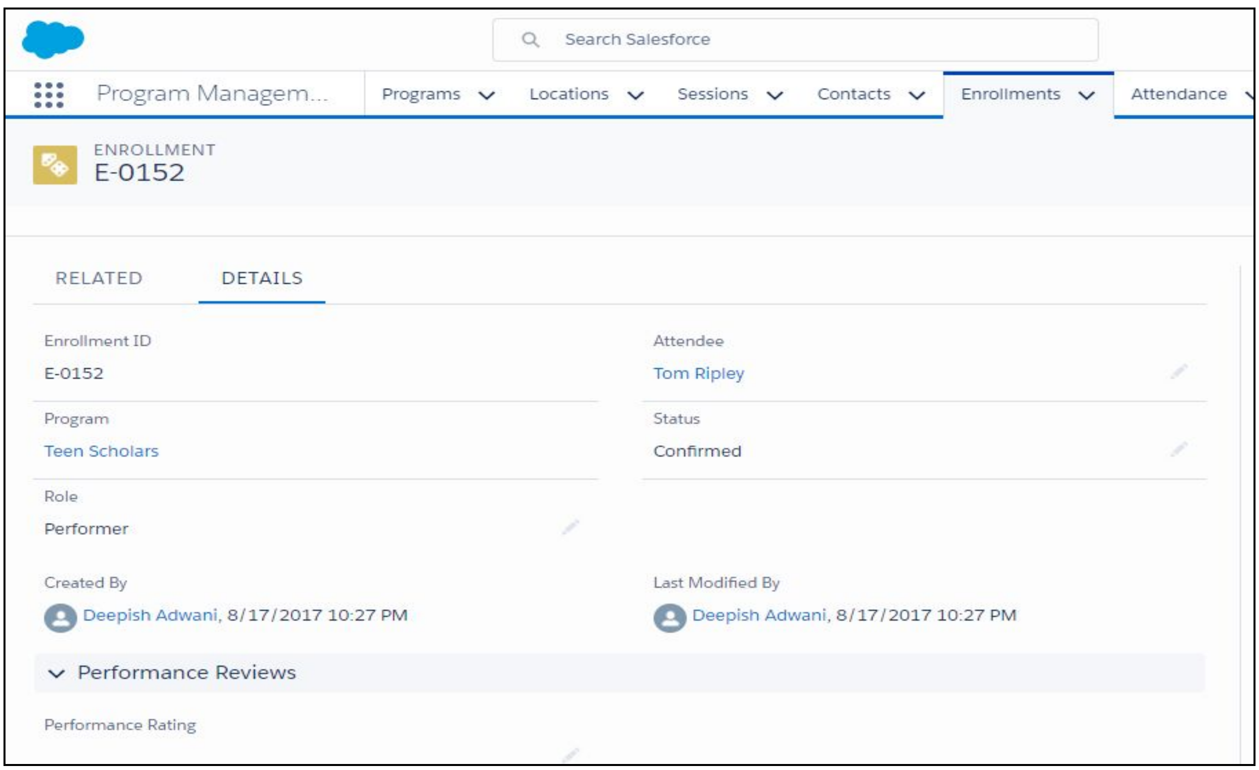

Fig 2.5.2: Enrollment Record Detail

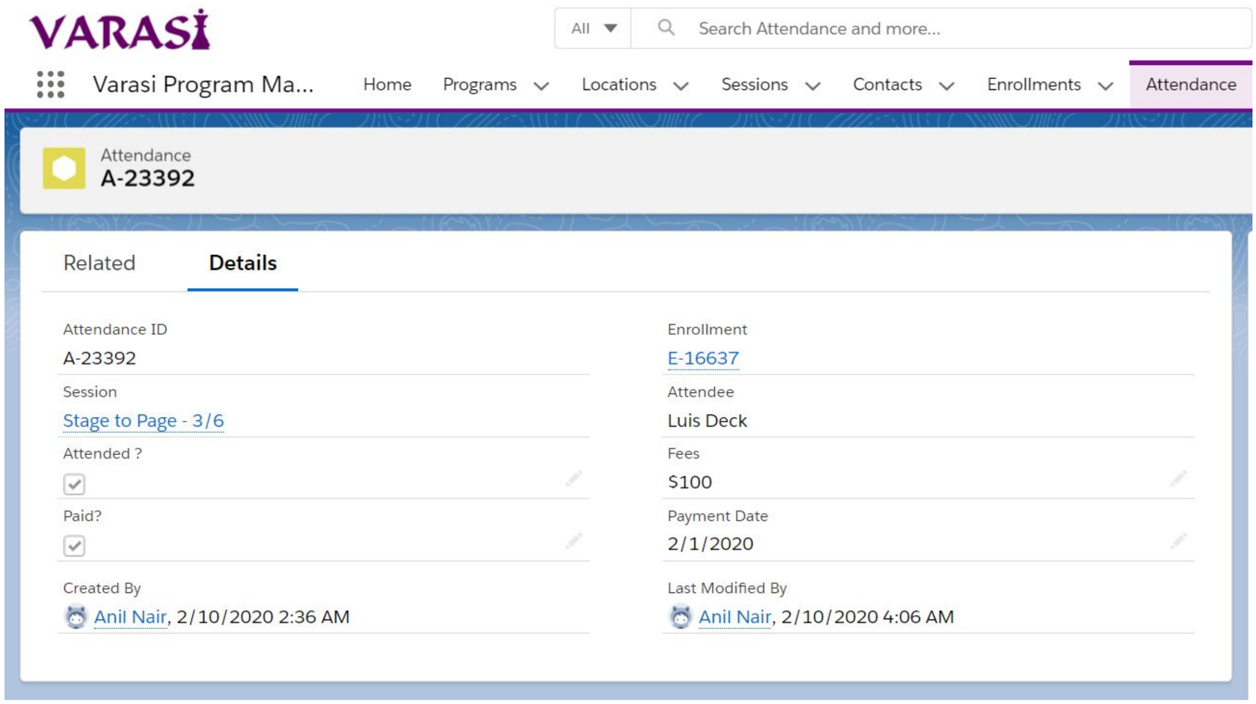

Fig 2.5.3: Attendance Record Detail

2.5.1 Create a Session based Enrollment

- **Enrollment** can also be created on the **Session level**. By default, **Enrollment** is recorded on the whole Program. If you want to make an **enrollment on a single session** then while creating Enrollment, **uncheck the For All Sessions** checkbox field and select the **Session** for which you want to create an Enrollment.
- Attendance record will be created only for that particular session of the Program.

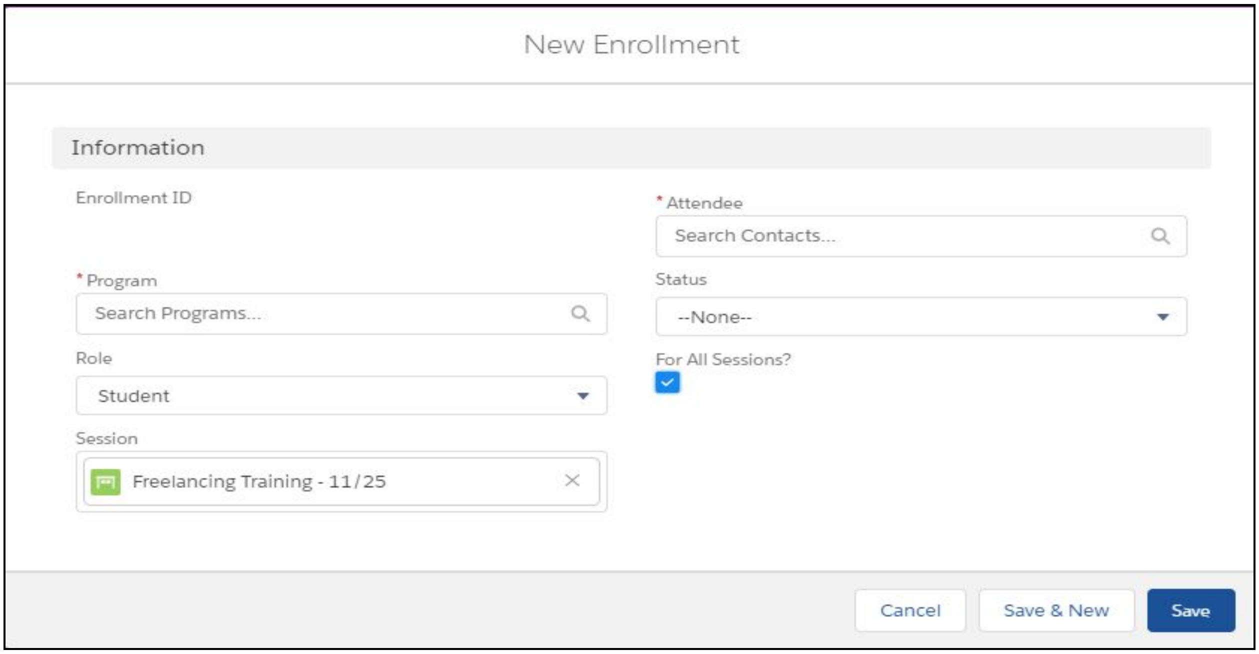

Fig 2.5.1.1: Session Based Enrollment

2.5.2 Bulk Enrollment

- **Bulk enrollment for Students** can be done on the **Session and Program level.**
- Component will show all the **available contacts in the list** and the user can **select the contacts he wants to enroll**.
- **Duplicate Enrollment** for the same person can't be made in the same session.
- If a Student is enrolled on the **Particular session first,** then if enrollment is done for the **whole Program** then the **Attendance record for the Session Enrollment** will be deleted.

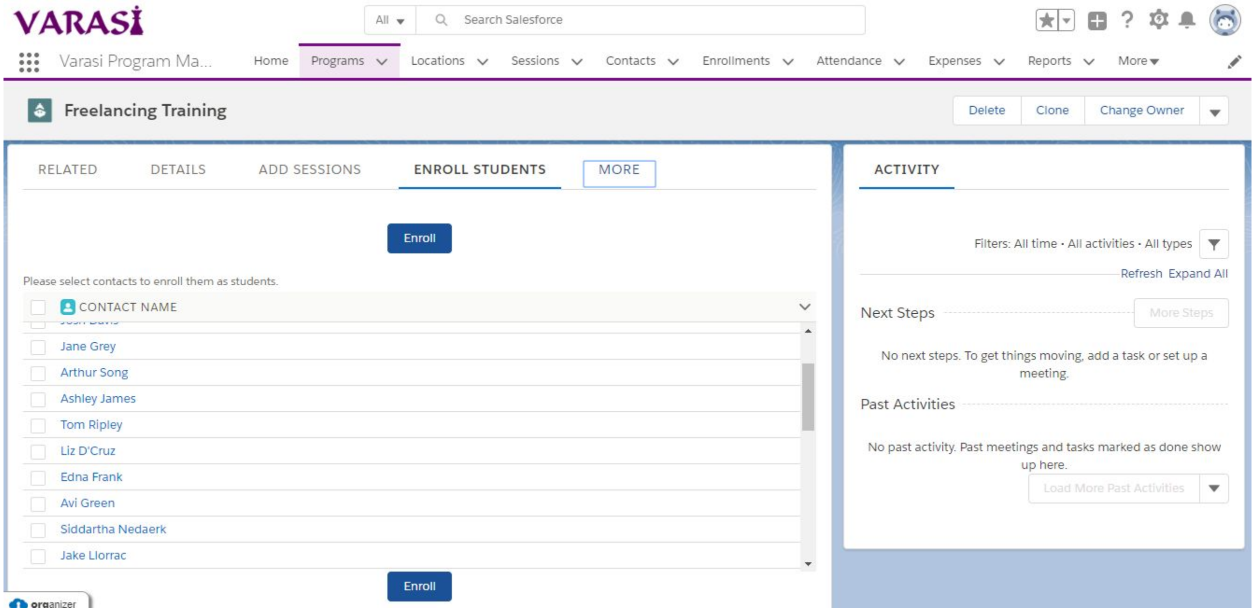

Fig 2.5.2.1: Program based Bulk Enrollment

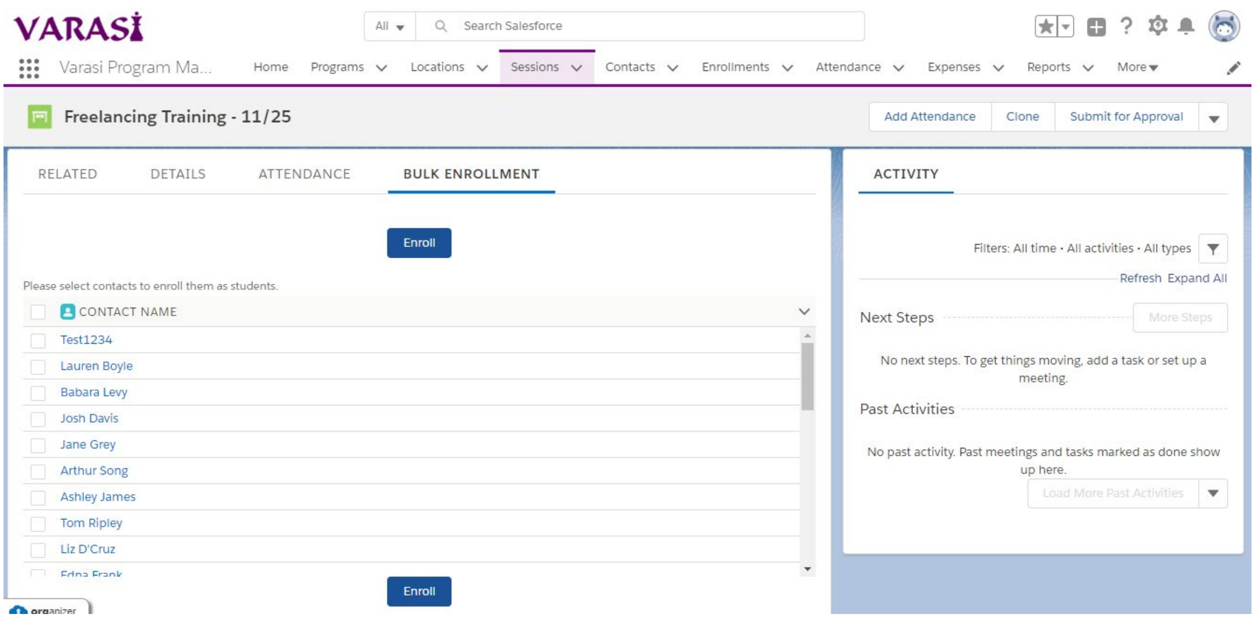

Fig 2.5.2.2: Session based Bulk Enrollment

2.6 Performer & Volunteer Assignment

You might not want to repeat the same process for enrolling Volunteer & Performer for a Program and want to have a simplified approach. We have got this covered for you.

- Click on any **Program**, where you want to **Assign Performer & Volunteer**
- Click on the **Assign Performer/ Volunteer** Tab on the Program Navigation bar.
- Choose a **Contact** you want to Assign as a Performer/ Volunteer
- Choose a **Role** to assign this performer. The roles can be configured on "Role" picklist in Enrollment object
- Record information about **per session fee** for the performer
- Click **Assign Performer/ Volunteer** button.
- You will be able to see the **Performer/ Volunteer** details that you assigned.
- You can also **Unassign** the Performer/ Volunteer from that Component.
- You can also **Mark the Performer as a Lead Performer (only one performer can be a Lead)** or **Lock Volunteer hours for the Volunteer**.

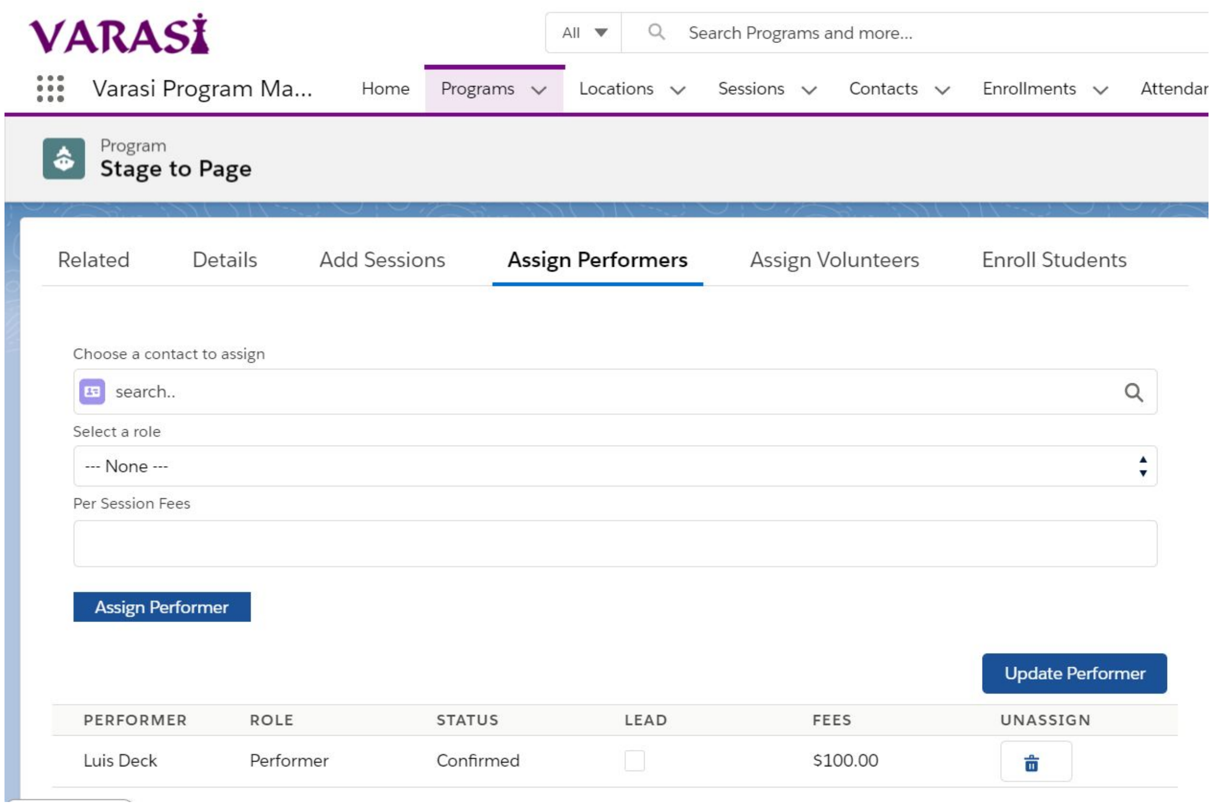

Fig 2.6.1: Assign Performer

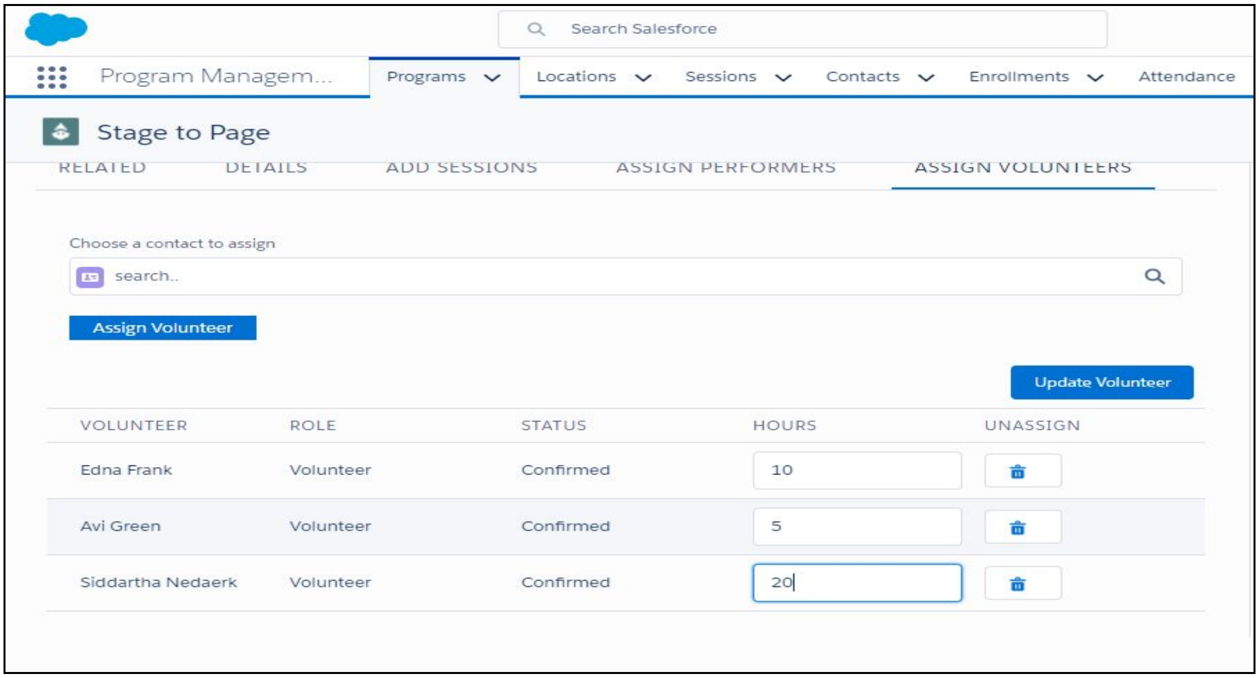

Fig 2.6.2: Assign Volunteer

2.7 Create an Expense

Create an Expense record to Track the expenses incurred during the Program Planning, Setup and Conducting.

- Click the Expense Tab
- Click **New** on the right side just below Tabs Navigation bar
- Enter the Expense Details i.e Program, Session, Expense Line Item, Amount, Transaction Date, Business Purpose, Vendor (to whom expense was made), Comments (if any), etc
- Click **Save**.
- The expense amount entered will the **rolled-up on the Program record** and you can get to *track all the Expense incurred for the Program vs the allotted Budget*.

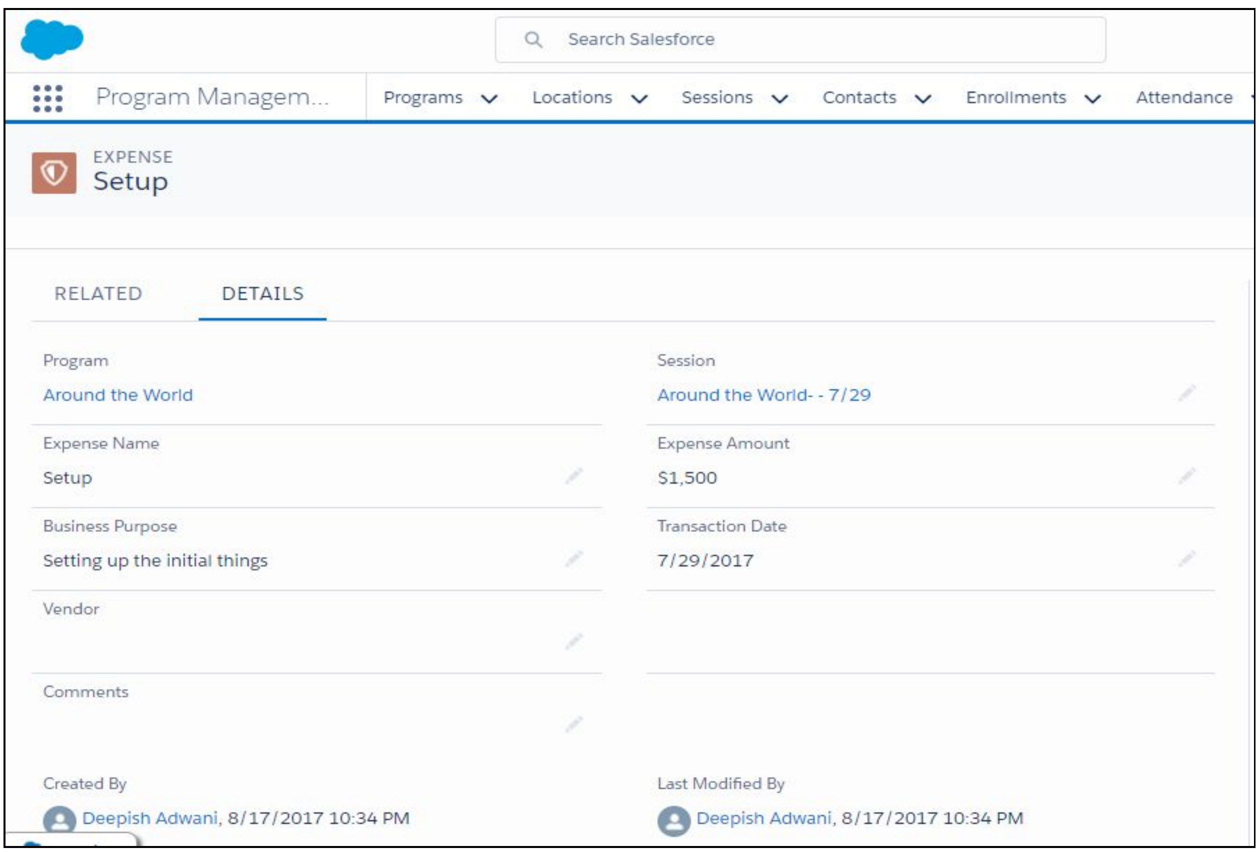

Fig 2.7.1: Expense Record Detail

2.8 Mark Attendance and Record Payment Details for Session Attendee

As we have already stated earlier, there will be an Attendance record Auto-created for all the Sessions of the Program for the Enrolled Candidate. Now even though attendance records are created there has to be a quick/ simplified way to mark the attendance for all the attendees for a Particular session. Our package provides the component to Update the Attendance for any particular attendee for any session.

- Browse through the **Session from the Session Tab** on the App Navigation Bar and select any session for which you want to **Update Attendance**
- Click on the **Attendance** tab (right most tab) on the Session Navigation Bar
- Tab shows the list of Attendees enrolled for the Session (Program)
- Update the **Attended ?** checkbox for all the **Attendees**
- Edit **Payment Date** and **Paid?** checkbox which shows up for all Performers
- Click on **Update Attendance** to Mass update **attendance** for the Session

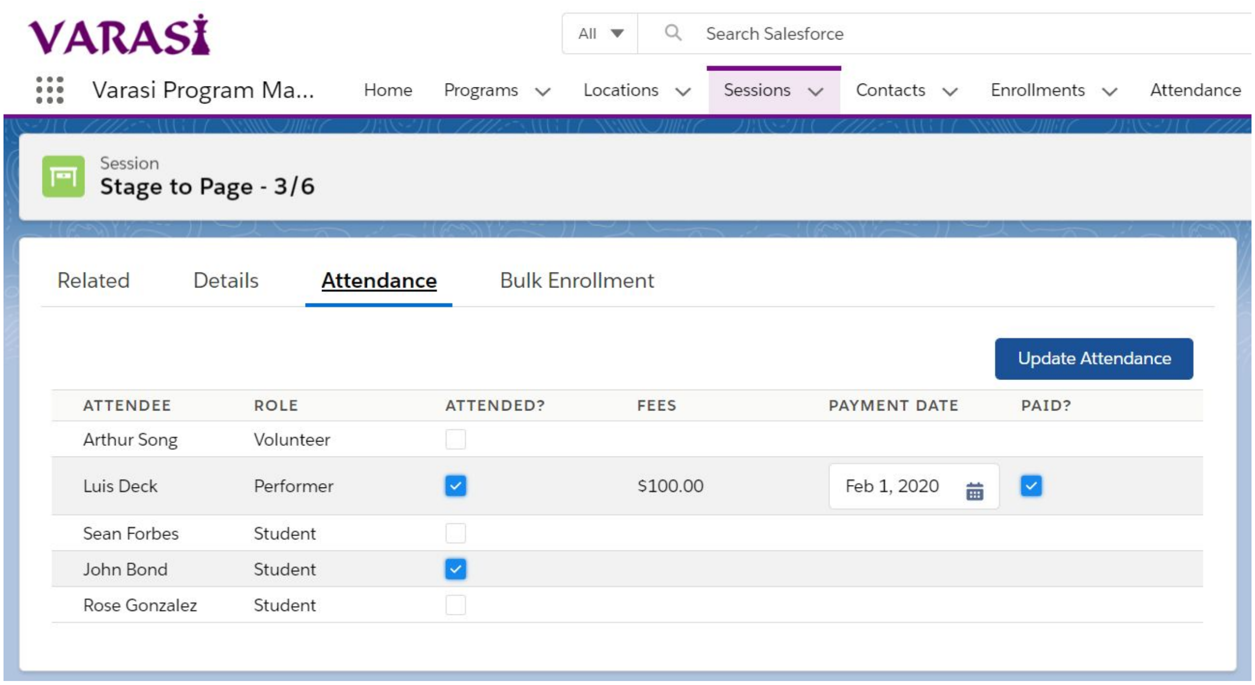

Fig 2.8.1: Add Attendance

2.9 Performance Reviews/ Rating

- Instructor or Admin user can track Students performance using the Custom Object **Performance Reviews**.
- **Performance Reviews** has a lookup to the **Enrollment and Program object** to track Students performance for a Particular program.
- There are list of few Custom fields created for the **Performance Tracking (Picklist field)** and a **corresponding response Number field to track the performance.**
- There is also a provision for the **Overall Comments custom field** where the User can fill in the free text of the Performance reviews.
- Functionality can be further extended to **Roll-Up/ Aggregate the response value** as per the need and requirement.

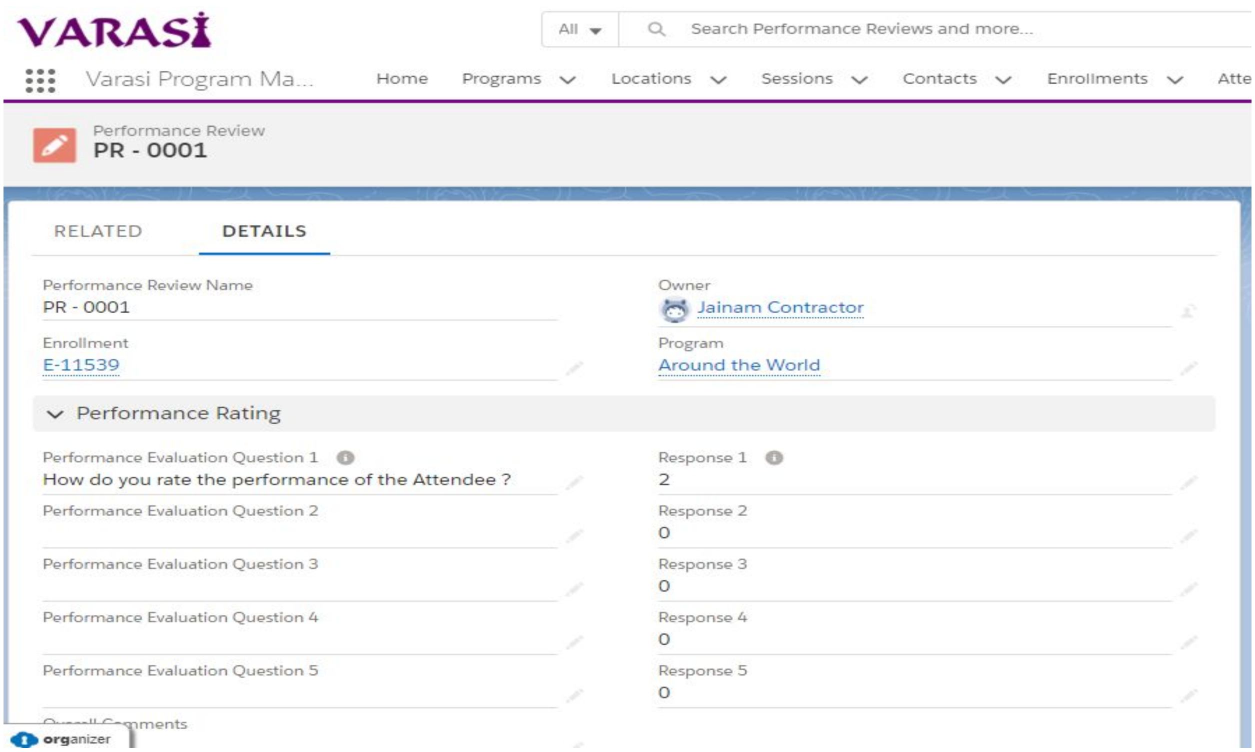

Fig 2.9.1: Performance Reviews Detail

3. Processes & Automation

3.1 Email Notification

Emails are the best way to communicate with the Contacts about the Programs Details, their respective role and send out Surveys at the end of the Program to get their valuable feedback.
There are also some pre-configured Email alerts and templates which would be sent out to the Contacts regarding their role and status on their successful enrollment.

List of Email Alerts:

- Enrollment Confirmed for Students/ Volunteers/ Instructor
- Enrollment in Waitlisted status for Students/ Volunteers/ Instructor
- Enrollment Cancellation alert (if enrollment cancelled due to any reason)

3.2 Confirmed Enrollment not greater than Capacity of the Program

Program you conduct may receive more responses than the capacity. In that case, **you don't want to go over the capacity of your program and also don't want to lose track of the interested audience.**

There are pre-configured few formula fields on the Program which will keep track of the Candidate registration and also check whether the response is more than the Capacity in the Program.

Custom Field Name	**Description**
# Of Total Enrollment	Count the total no of enrollment received for a Program
# Of Attendees Registered	Count total Confirmed enrollments for a Program. Always less than or equal to Program Capacity
# Of Waitlisted Enrollments	Count total enrollment which were waitlisted due to full Capacity

<u>3.3 Contact can't be enrolled into a Program with Multiple Role</u>

You might want your **Contact to have multiple roles** across different Program but want to **avoid him/her enrolling with different role on the same Program**.

For eg: You have a Contact named *Shannon Gabriel who wants to learn Salesforce* but can help you as a *Volunteer for Essay writing related Program*. So we have given a Privilege that a Contact can be enrolled with a different role in a different Program but not in the Same Program. In this scenario, *Shannon will act as a Student in Salesforce Training and he will be a Volunteer for Writing Skills Workshop.* ***Our system will not allow Shannon to enroll as a Student and Volunteer in the Salesforce Training***.

4. Analyze your Data with Reports & Dashboards

Varasi Program Management includes reports and dashboards that provide a ton of useful information about your program and related data i.e Sessions, Enrollment, Attendance, etc. You can use these reports and dashboards to analyze Program trends so that you can decide where to focus your efforts and budget.

4.1 Reports

Reports shows the Statistical view of the Data across your Salesforce Instance. Varasi Program Management contains 7 important reports. You can create some more based on your requirement.

Report Name	**Description**
Location wise Program	Report to get the List of Programs at a Particular location
Location wise Enrollments	Report to get the Enrollment vs Capacity % for all Program across different Location
Enrollments by Location	Report of total Enrollment count across all location
Program Attendance Report	Attendance % for an Attendee for all Sessions of a Program
Program with Enrollment Role	Differentiate all the Enrollments in a Program based on the Roles
Program with Enrollment Status	Check for the Enrollment status for all Enrolled Contacts in a Program
Session wise Attendance Report	Attendance % for all Attendees and No of Absentees for a Particular Program Session

Table 4.1.1: List of Reports

To view these reports,

- Click the Report tab on the App Navigation Bar. These reports resides in a folder named Program Management.
- Click on the folder and browse to any report you want.

4.2 Dashboards

Dashboards gives the pictorial view of the Statistical data which we captured using the Reports. Dashboards are very useful tool for the Management/ High Authority people to get the overview of the complete data across the Org in a Pictorial way and that too in one single screen. One dashboards can contain multiple reports in it.

Varasi Program Management also has one such very informative dashboard inbuilt for the Program Director/ Manager. You can create many more by applying your Salesforce Admin skills.

You can place the Dashboard on the Home Screen and also can personalize the Home screen for different users.

To view the List of Dashboards:

- Click the Dashboards tab. If you don't see this tab, click the App Launcher, expand All Items, then click Dashboards.
- In the left nav, click All Folders.
- Click the Program Management folder.
- Click Program Management Dashboard.
  The dashboard will appear as below:

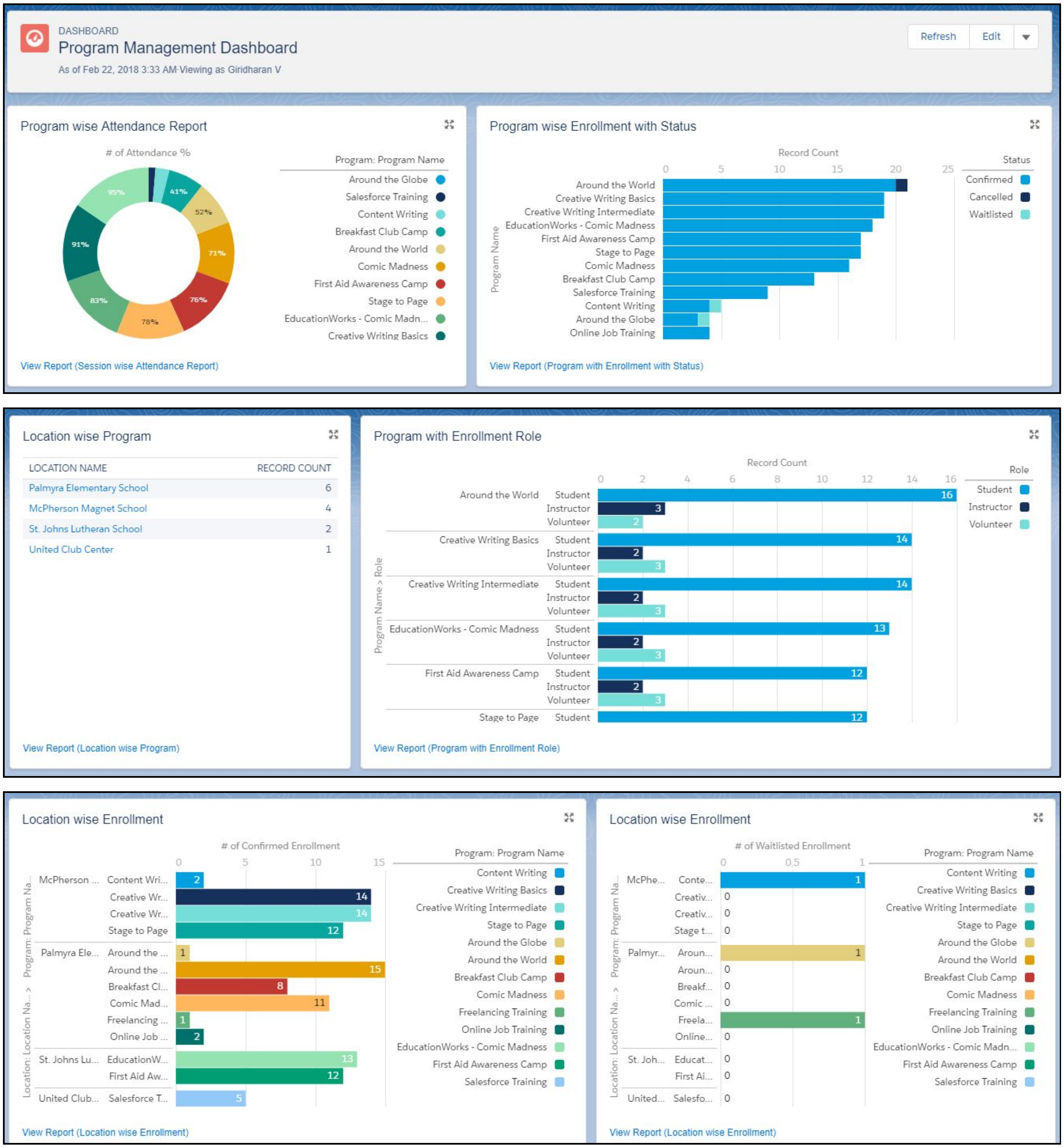

Fig 4.2.1: Program Management Dashboard

5. What Next

Your journey towards your Program Management doesn't end here. There's always something more and specific.

Watch out this space for any new Updates and Offering from Varasi Solutions for Varasi Program Management.

For any customization or Salesforce CRM related solutions, do reach out to us

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