

Get and Connect Your Program Management Module Org

Step 1: Sign Up for a Developer Edition Org with PMM

1 Go to the PMM Developer Edition Sign-up Page

- Click this link: [PMM Developer Edition Sign-up](#)

2 Fill out the sign-up form:

- First Name: Enter your first name
- Last Name: Enter your last name
- Email: Enter an active email address (e.g., you@example.com)
- Role: Select your role (e.g., Admin, Developer, etc.)
- Company: Enter any name (e.g., Self-Employed)
- Country: Select your country
- Postal Code: Enter your postal/ZIP code
- Username: Enter a unique username formatted as an email (this does NOT need to be a real email)
 - Example: yourname+pmm240210@example.com
(Here, 240210 represents today's date YYMMDD)

3 Click Sign me up

A confirmation message appears, and an activation email will be sent to your inbox.

Step 2: Activate Your Developer Edition Account

- 1 Check your email inbox (It may take up to 10 minutes to receive the activation email.)
- 2 Open the email from Salesforce with the subject "Verify Your Account"
- 3 Click "Verify Account" in the email
- 4 A new page will open → Set Your Password
- 5 Choose a secure password and confirm it
- 6 Set a Security Question & Answer
- 7 Click Save

Your Developer Edition org is now activated, and you're logged in!

The screenshot shows a web browser displaying the Trailhead website at trailhead.salesforce.com/promo/orgs/program-management-module. The page has a pink header bar. Below it, the Trailhead navigation bar includes links for Products, Industries, Customers, Learning, Support, Company, and Salesforce+. A search bar and user profile icons are also present.

The main content area features a dark blue banner at the top with the text "Join us at TDX in San Francisco or on Salesforce+ on March 5-6 for the Developer Conference for the AI Agent Era. [Register now](#)".

Below the banner, there's a section titled "LEARN PROGRAM MANAGEMENT MODULE ON TRAILHEAD" with a cartoon character illustration of a person in a forest setting.

The right side of the page contains a form titled "Get hands-on experience with Program Management Module". It includes fields for First Name, Last Name, Email address, Role, Company, Country (set to United States), Postal Code, and Username. There's also a checkbox for accepting terms and conditions, a note about license expiration, and a link to the Privacy Statement.

Step 3: Connect Your Developer Edition Org to Trailhead

Now, let's connect the org to Trailhead so you can use it for challenges.

- 1 Go to [Trailhead](#) and log in
 - 2 Scroll down to the Challenge section at the bottom of the module page
 - 3 Click the Trailhead Playground Name
 - 4 Select "Connect Org"
 - 5 On the login screen, enter the username and password for the Developer Edition org you just created
 - (You may need to click "Log in with a Different Username")
 - 6 Click Log In
 - 7 On the "Allow Access?" screen, click Allow
 - 8 On the "Want to connect this org for hands-on challenges?" screen, click Yes! Save it
- Your Developer Edition org with PMM is now connected as a Trailhead Playground!

Final Summary

Step	Description
Step 1	Sign up for a Developer Edition Org with PMM
Step 2	Activate the org, verify email & set password
Step 3	Connect the Developer Edition org to Trailhead

Final Outcome

Now, you have successfully set up a Developer Edition Org with PMM and connected it to Trailhead!

You can now complete hands-on challenges and explore PMM features.

Configure Your PMM Playground in Salesforce

Step 1: Disable Active Processes in Process Builder

Your new Developer Edition org with PMM requires manual configuration for automatic record naming. We need to deactivate existing processes and clone new ones.

1.1 Open Process Builder

- 1 Log in to your Salesforce Developer Edition org with PMM.
 - 2 Click Setup () in the top-right corner.
 - 3 In the Quick Find Box, search for Process Builder.
 - 4 Click Process Builder from the results.
-

1.2 Deactivate the "Program Engagement Object" Process

- 1 On the My Processes screen, find Template: Program Engagement Object.
- 2 Click Show All Versions next to it.
- 3 Click Deactivate next to the active version.
- 4 Click Confirm.

Now, the "Program Engagement Object" process is deactivated.

1.3 Deactivate the "Service Delivery Object" Process

- 1 On the My Processes screen, find Template: Service Delivery Object.

Template: Program Engagement Object	Version 52: Template: Program Engagement Obj... This process builder process will set the Applied Date, ... Program Engagement	Record Change	2/21/2025	Inactive	Activate
Template : Service Delivery Object	Template that updates the service delivery name	Service Delivery	Record Change	2/21/2025	Inactive

- 2 Click Show All Versions next to it.

- 3 Click Deactivate next to the active version.

- 4 Click Confirm.

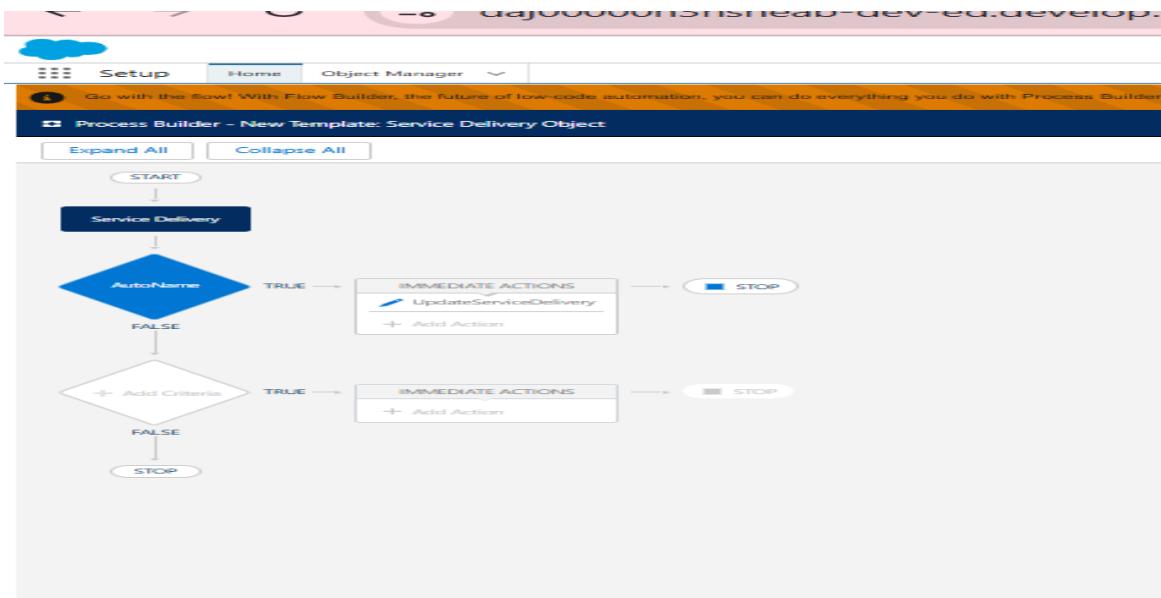
Now, the "Service Delivery Object" process is deactivated.

Step 2: Clone and Activate the Processes

Since we deactivated the processes, we now need to clone them and create new versions.

2.1 Clone "Program Engagement Object" Process

- 1 On the My Processes screen, find Template: Program Engagement Object.
- 2 Click Show All Versions.
- 3 Click the Process Name (not the version number).
- 4 In the Process Builder screen, click Clone.



5 In the "Clone this Process" screen, enter:

- Save Clone as...: A new process
- Process Name: New Template: Program Engagement Object
- API Name:
`New_Template_Program_Engagement_Object` (auto-fills)

6 Click Save.

7 click Activate, then Confirm.

Now, the new "Program Engagement Object" process is active.

2.2 Clone "Service Delivery Object" Process

- 1 On the My Processes screen, find Template: Service Delivery Object.
- 2 Click Show All Versions.
- 3 Click the Process Name (not the version number).

4 In the Process Builder screen, click Clone.

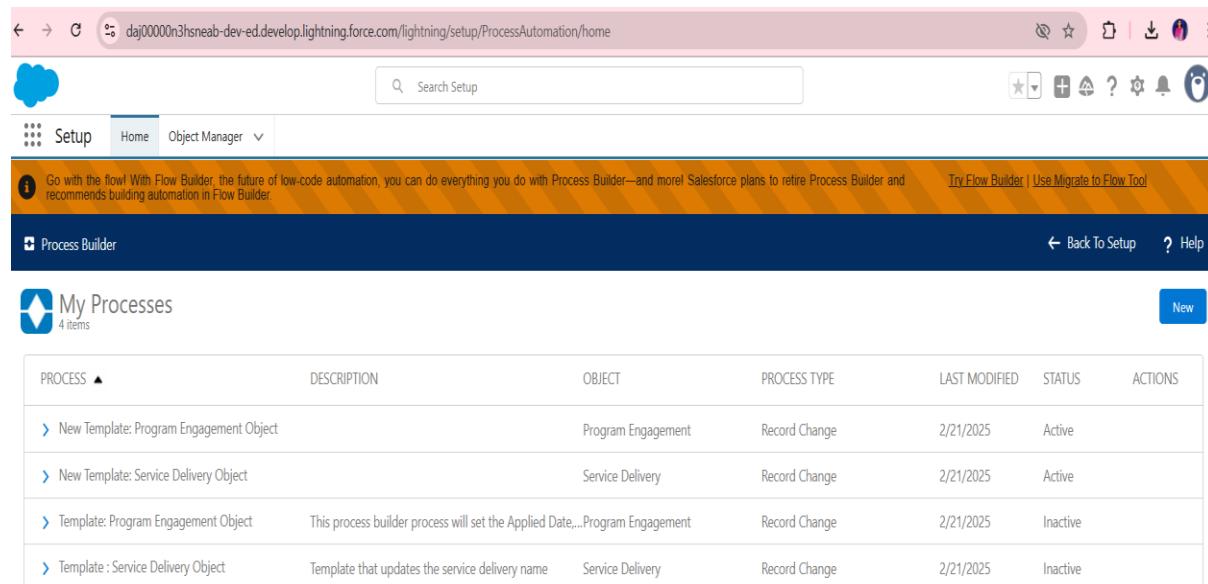
5 In the "Clone this Process" screen, enter:

- Save Clone as...: A new process
- Process Name: New Template: Service Delivery Object
- API Name: New_Template_Service_Delivery_Object (auto-fills)

6 Click Save.

7 Click Activate, then Confirm.

Now, the new "Service Delivery Object" process is active.



The screenshot shows the Salesforce Process Automation home page. At the top, there's a navigation bar with links for Setup, Home, and Object Manager. Below the navigation is a banner with a message about Flow Builder and a link to Try Flow Builder. The main area is titled "My Processes" and contains a table with four items. The table has columns for PROCESS, DESCRIPTION, OBJECT, PROCESS TYPE, LAST MODIFIED, STATUS, and ACTIONS. The processes listed are:

PROCESS	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS
New Template: Program Engagement Object		Program Engagement	Record Change	2/21/2025	Active	
New Template: Service Delivery Object		Service Delivery	Record Change	2/21/2025	Active	
Template: Program Engagement Object	This process builder process will set the Applied Date,...Program Engagement		Record Change	2/21/2025	Inactive	
Template : Service Delivery Object	Template that updates the service delivery name	Service Delivery	Record Change	2/21/2025	Inactive	

2.3 Verify Your Processes

1 Click View All Processes.

2 Ensure that New Template: Program Engagement Object and New Template: Service Delivery Object are Active.

3 Ensure that the old processes are Inactive.

Now, your processes are correctly configured!

Step 3: Test Your New Processes

Now that our automatic record naming is fixed, let's test it by creating a Program Engagement & Service Delivery.

3.1 Open "Program Management" App

- 1 Click on the App Launcher () in Salesforce.
 - 2 Search for "Program Management".
 - 3 Click "Program Management".
-

3.2 Create a Bulk Service Delivery

- 1 In the Navigation Bar, click Bulk Service Deliveries.
 - 2 Click Create by Individual.
-

3.3 Enter Client & Program Engagement Details

- 1 In the Client field, search for Ursula Maddox and select her name.
- 2 In the Program Engagement field, select "New Program Engagement".
- 3 In the New Program Engagement screen, enter:
 - Program: Housing Assistance Program
 - Stage: Active
 - Role: Client
- 4 Click Save.

Now, Ursula is enrolled in the Housing Assistance Program

3.4 Add a Service Delivery Record

- 1 In the Service field, select Monthly Rent Subsidy.
- 2 Leave the Delivery Date field as today (default).
- 3 In the Dollars field, enter 250.00.
- 4 Click Save.

Now, a service delivery record is created for Ursula!

Step 4: Verify Automatic Record Naming

- 1 Click on the Global Search Bar at the top of Salesforce.
 - 2 Search for "Ursula Maddox" and open her Contact Record.
 - 3 In the Related Lists section, check:
 - Program Engagements → The name should include Ursula's name + Today's Date + Program Name.
 - Service Deliveries → The name should include Ursula's name + Today's Date + Service Name.
 - If the records are named correctly, your automation is working perfectly!
-

Final Summary

Step	Description
Step 1	Deactivate existing Process Builder automations
Step 2	Clone & Activate new Process Builder versions
Step 3	Test by creating a Program Engagement & Service Delivery
Step 4	Verify automatic record naming is working correctly

Final Outcome

Now, your PMM Playground is fully configured, and automatic naming works correctly!

- Program Engagement & Service Delivery records are automatically named
- Bulk Service Delivery tool works smoothly
- Salesforce is ready for nonprofit program management