



## Cobalt Classes

Classes for continuing education can be an important part of both membership and certification organizations. You can create class records to allow registration for classes hosted by your organization and/or preferred providers. Classes can also be linked to meetings if they are being offered as part of a conference. This course will take users through the steps for creating a class with different registration options and how to manage the class information on the back end.

**COURSE OBJECTIVE:** Create the system data to support class registration for a variety of different class delivery options.

### **LESSON 1: Class Entities**

Task 1: Identify class entities and where to find them

### **LESSON 2: Setting up a Course and Classes**

Task 1: Create a Course Record

Task 2: Create a Related Class Record with specific date/time

Task 3: Create a Registration Fee with begin and end dates

Task 4: Create a Registration Fee with a query

Task 5: Setup cancellation fees

### **LESSON 4: Create Related Records**

Task 1: Create an instructor record and link to the class

Task 2: Create a location record and link to the class

Task 3: Create a Preferred Provider record

### **LESSON 4: Register for a Class**

Task 1: Register for the class through the wizard

Task 2: Register for the class in the CRM wizard

Task 3: Manually create a Registration

Task 4: Cancel a registration on the portal

Task 5: Cancel a registration in CRM

### **LESSON 5: Manage a Class**

Task 1: Run Reports

Task 2: Continuing Education Records

### **LESSON 6: One Click Class Registration**

Task 1: Required settings for one-click class

Task 2: Register for a one-click class