



Cobalt Meetings

Meetings provide organizations with a vital tool for training, networking, and outreach. Cobalt events gives you the ability to create small single occurrence gatherings or large conferences with multiple sessions and activities. You can set multiple registration fees, registration restrictions, cancellation, and editing guidelines. If a meeting occurs regularly you can clone a previous version and make updates to save configuration time. This course will go through the steps to create a meeting and related records.

COURSE OBJECTIVE: Create the system data to support both a small meeting and a larger conference with related activities.

LESSON 1: Meeting and Event Entities

Task 1: Identify meeting entities and where to find them

LESSON 2: Meeting Set up for Online Registration

Task 1: Setting dates for the meeting and registration window

Task 2: Create a Registration Fee with begin and end dates

Task 3: Create a Registration Fee with a query

Task 4: Set up Group Registration and Waitlist

Task 5: Set edit registration dates and cancellation fees

LESSON 3: Create Meeting Activities

Task 1: Create a Session or Activity

Task 2: Create an Attendee and a Guest Registration Fee

Task 3: Select RSVP and automatic inclusion options

LESSON 4: Portal Registration Process

Task 1: Create registration for the meeting using the portal

Task 2: Edit a registration

Task 3: Cancel a Registration

LESSON 5: Manage a Meeting

Task 1: Manage the waitlist

Task 2: Run Reports

Task 3: Clone a Meeting