Courses module

Courses Module Functionality

The **Courses Module** is useful in cases where it is necessary to manage Teachers, Documents, and Participants, inviting the latter to enroll in the course being published. The module sends an email to all Leads, Companies, and/or Contacts related to that specific course.

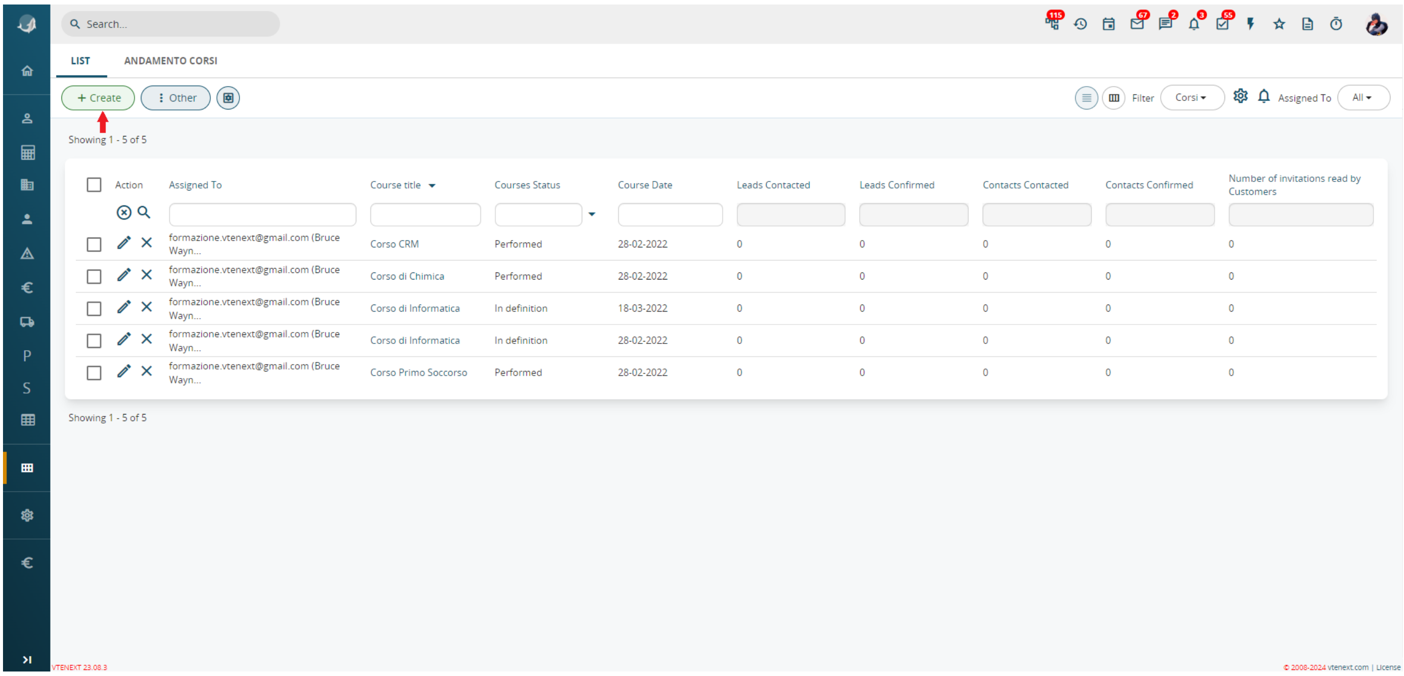
Within the email, a clickable link is provided that allows the recipient to confirm their attendance. This confirmation is then displayed in relation to that specific course, and for that same record, the following statuses can be viewed and/or modified:

- **Email Viewed** (automatically populated when the Lead, Company, and/or Contact opens the invitation email)
- **Registered** (automatically populated when the Lead, Company, and/or Contact clicks on the link in the invitation email)
- **Attended** (manually marked, used as a sort of "attendance roll call")
- **Paid** (manually marked by the person responsible, for example, for administration and payments)

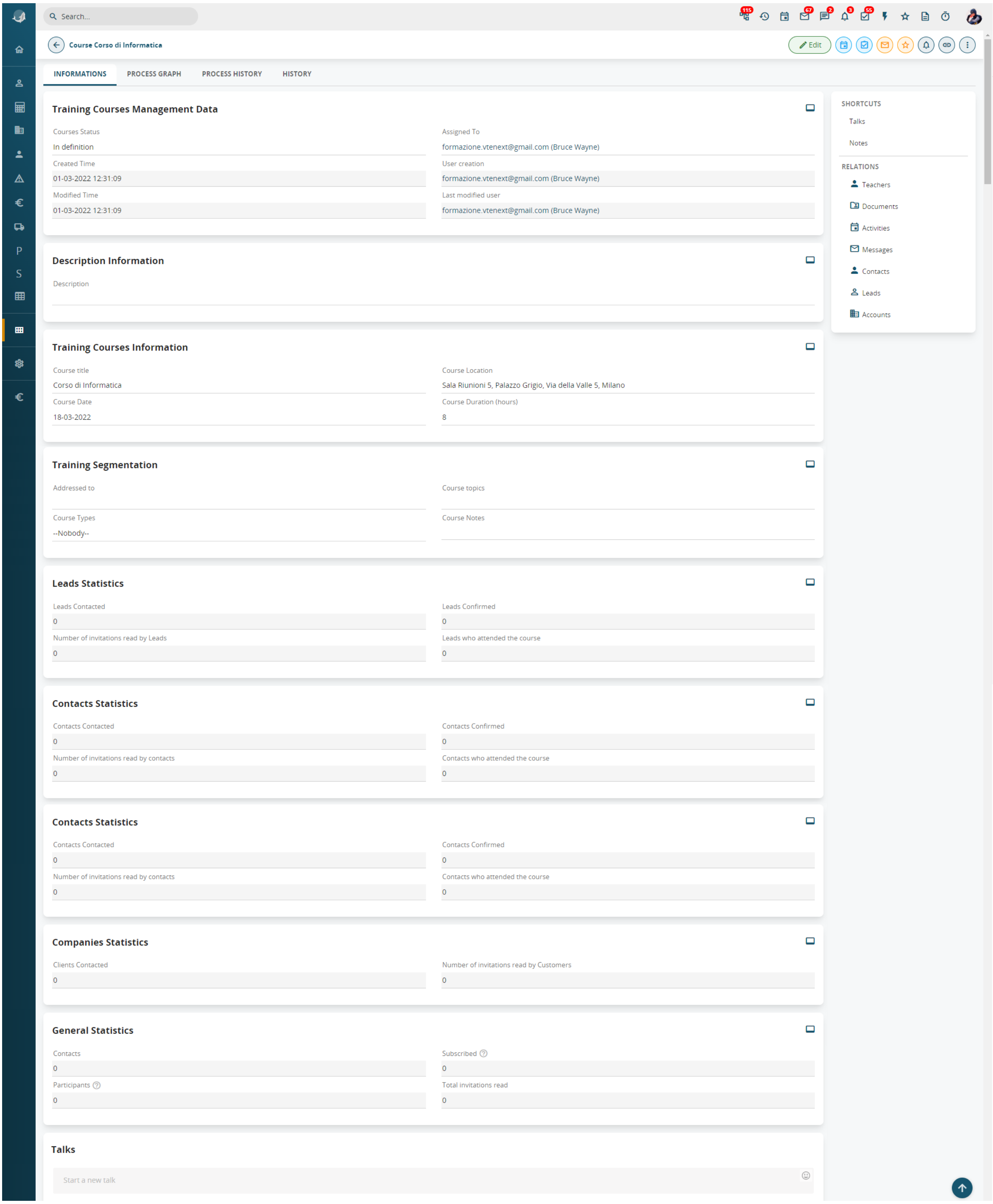
Finally, it is possible to create Reports to evaluate the progress of the courses, linked to the statistics already existing in the module itself, which will be discussed in the following chapters.

Creating a New Course

From the main screen of the Courses module, you can easily create a new course by simply clicking on the "CREATE" button located at the top left.



Courses Module Home Page



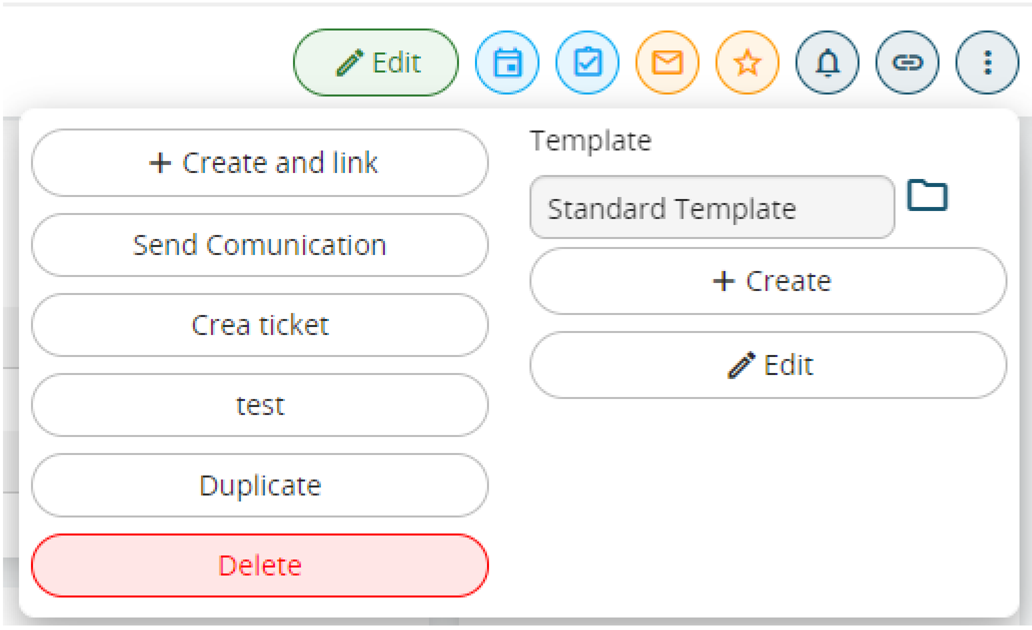
Course Details

First, you need to enter all the necessary information for setting up the Course, such as the Course Title, Location, Date, Duration, Topics to be covered, Course Type, Target Audience, etc. Note that there are some sections with fields that cannot be manually filled in, as they are controlled by the module's automation (we will go over these in detail later).

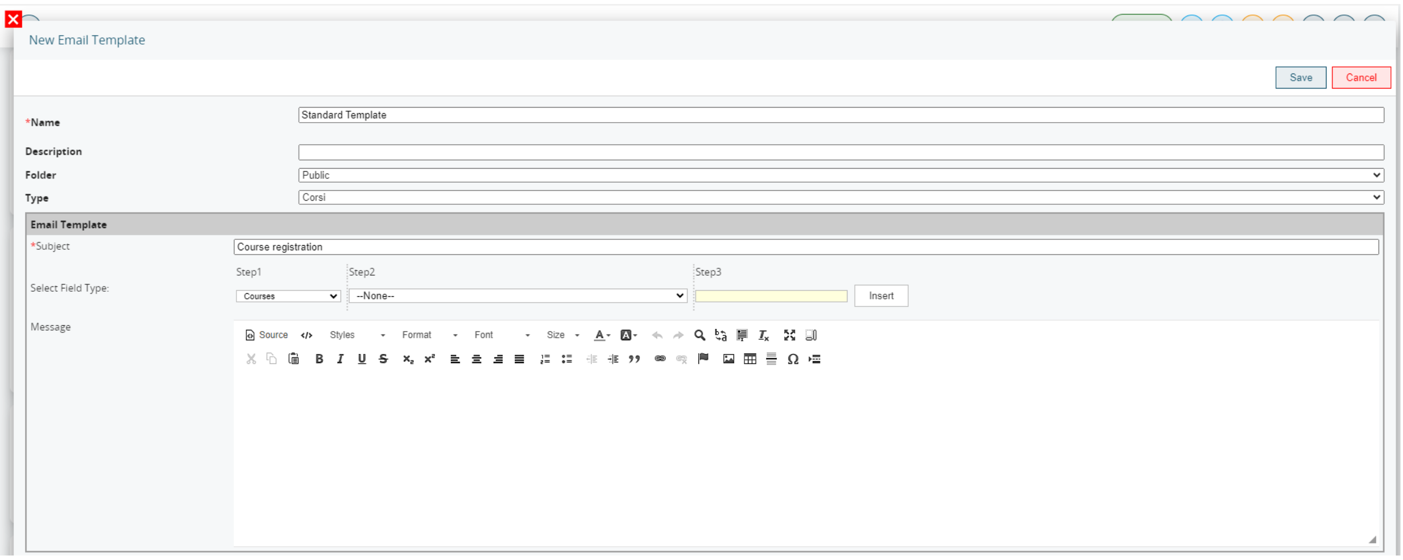
It is important to configure the dropdown menus mentioned earlier (such as Target Audience, Course Topics, Course Type) under SETTINGS > STANDARD PICKLIST EDITOR. This allows for maximum customization of the module based on specific needs. There is also the option to add additional fields as needed and create display rules using conditional fields, depending on the course type chosen (standard configuration in vtenext).

Creating the Communication Template for the Course

By clicking the MORE button in the top right, you can create or select a Template for the communication that will be sent to all course participants.



Details of the Popup for Choosing/Creating a Course Communication Template.

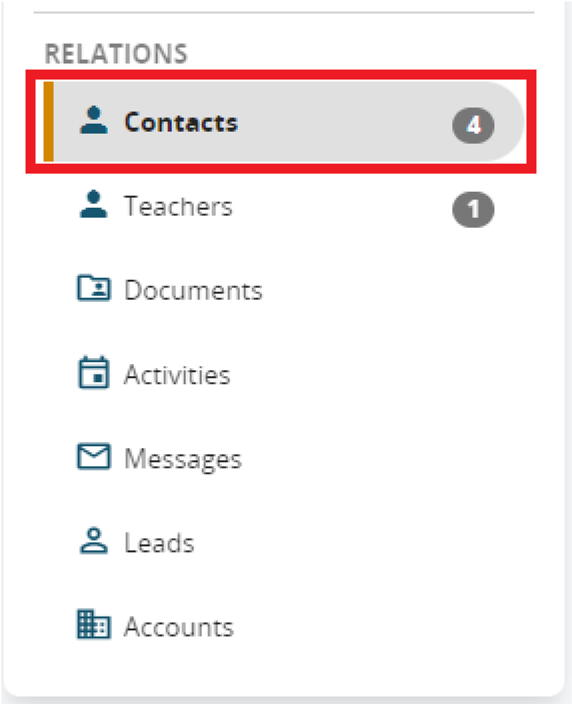


Details of the Course Communication Template Creation Screen

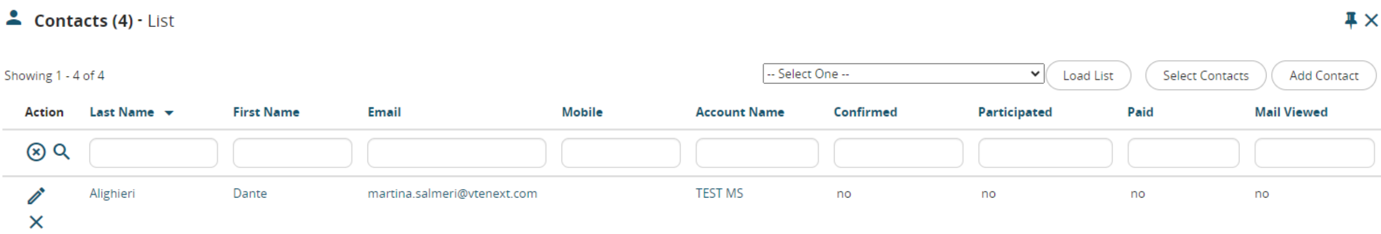
From this popup, you can create your own templates using the standard editor or by importing source code created on another external platform.

Selecting Participants and Sending Course Communication.

In the course details view, by clicking on the related records on the right side, such as Leads, Companies, and Contacts, you can choose a filter and import the records you want to contact.



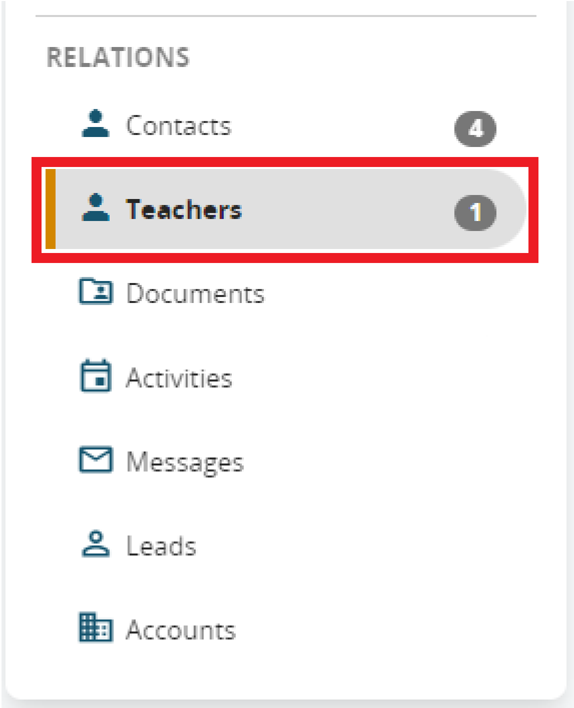
Details of Relationships with Contacts Selected for the Specific Course



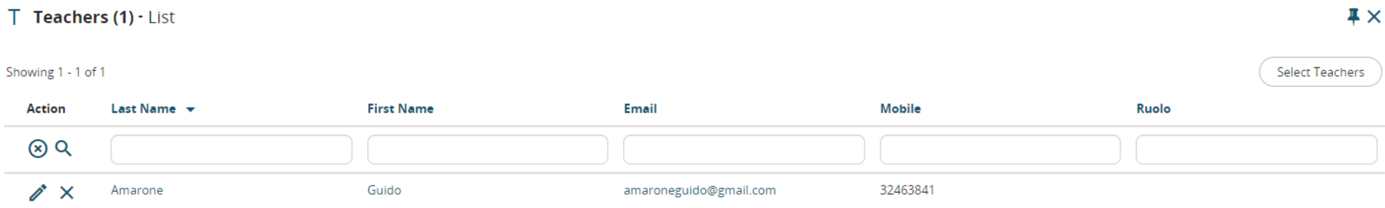
Details of the Related Section with Selected Records and Interaction Information

Selection of Instructors and Speakers

In the course details, by clicking on the relationships to the right concerning Instructors and Speakers, you can select from the contacts in vtenext who will be the individuals fulfilling those roles.



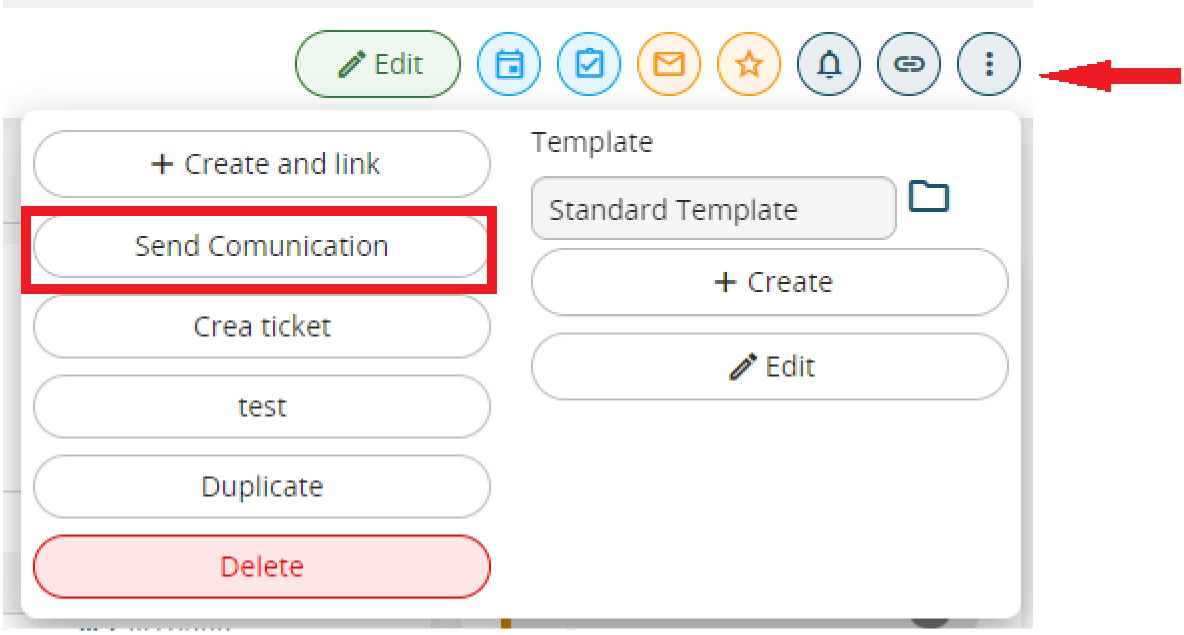
Detail of Relationships with Instructors and Speakers Selected for the Specific Course



Detail of the Related List of Selected Records for Instructors and Speakers

Sending Course Invitation Communication

Once the participants have been selected (similar to creating a manual target), it will be necessary to send the communication, which is the email containing the invitation that all recipients will need to click to accept.

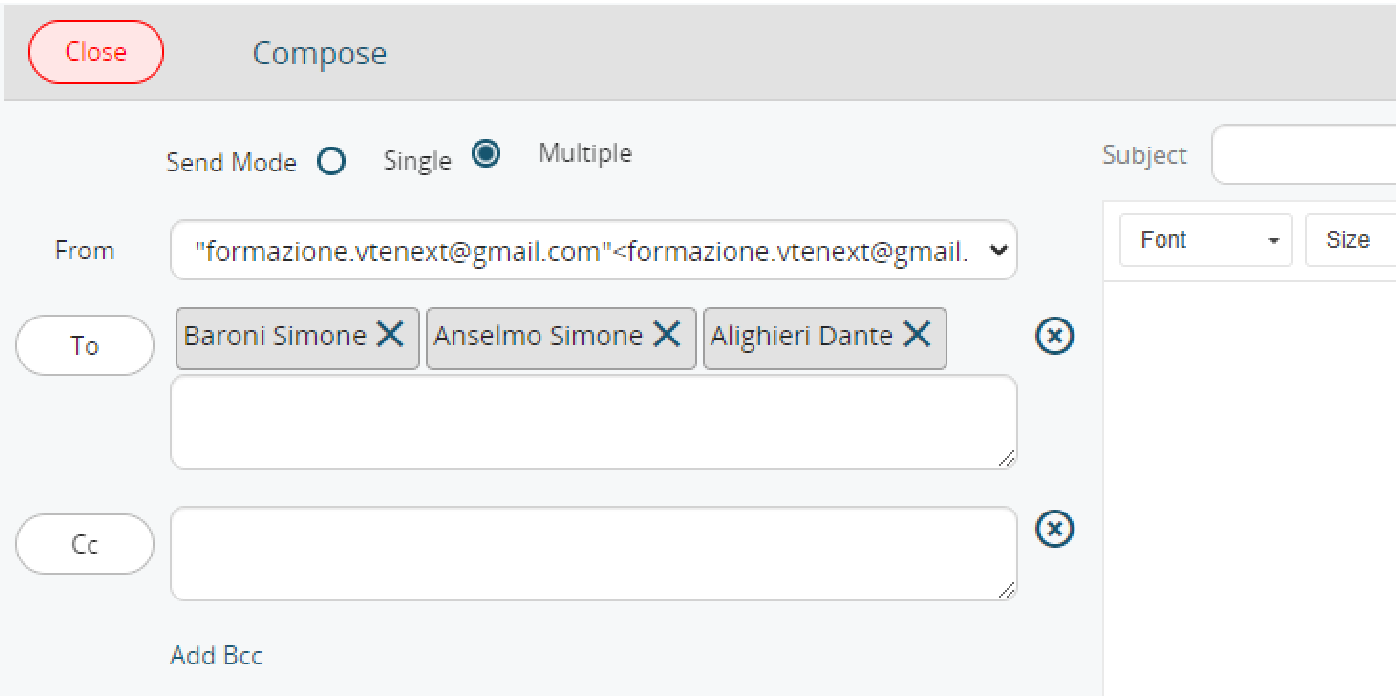


Details for Sending Communication to All Course Participants

By clicking the "OTHER" button in the top-right corner, you will be able to send the communication by first selecting the previously created template and then clicking the "SEND COMMUNICATION" button.

NOTE: To enable this sending, the CRM's SMTP server must be configured.

"**SEND COMMUNICATION**" opens a popup for sending multiple emails, where all the course participants' email addresses are included. Each participant will only see their own email address as the recipient and will not see the other email addresses to which the communication was sent.



How the Courses Module Works

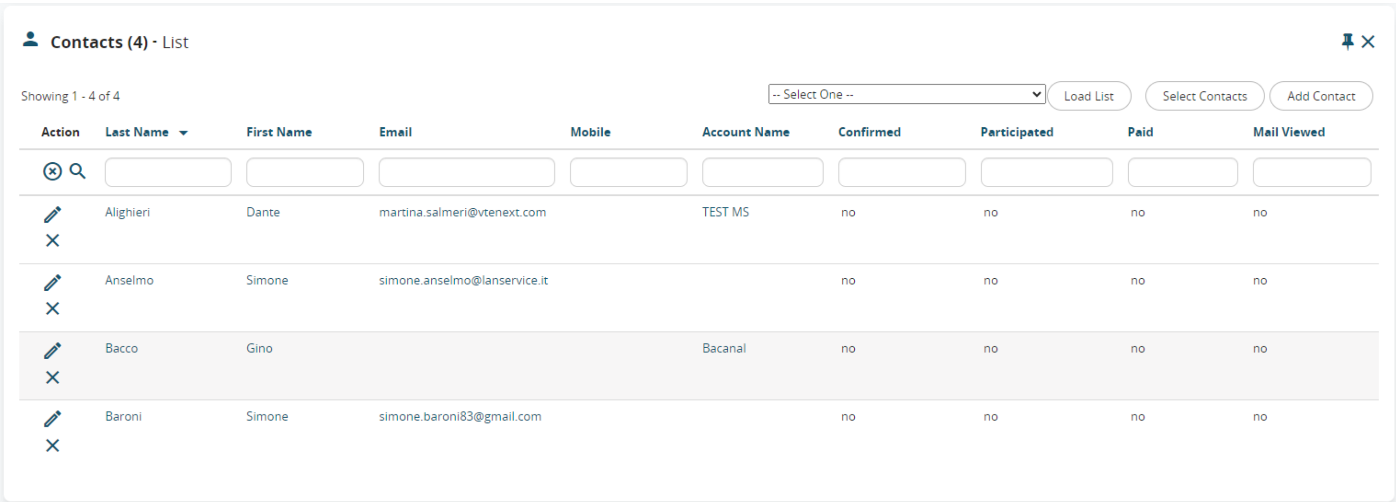
Once the communication is sent, the selected records will receive an email. When the email is opened, the value **MAIL VIEWED** will change from "no" to "yes." The email also contains a link that, when clicked, allows the CRM to record this data and change the value of the **REGISTERED** column from "no" to "yes."

The other two values, **PARTICIPATED** and **PAID**, need to be managed manually by flagging the appropriate fields to indicate the participant's attendance and payment status for the course.

Legend for Columns in Related **LEADS, COMPANIES, and CONTACTS**

Registered	when the recipient of the course communication email clicks on the link in that email, the value changes from NO to YES
Attendend	it is used for taking attendance; the instructor will be responsible for changing the value from NO to YES
Paid	when the administration reports that the course participant has made the payment for the registration, the value should be changed from NO to YES
Mail Viewed	when the recipient of the course communication email opens the received email, the value changes from NO to YES

To modify the flags, you need to click on the related list of Contacts / Leads / Companies. Once the list appears, double-click on the flag you want to modify:



You will be given the option to modify the value and then save the change:

Confirmed	Participated	Paid	Mail Viewed
no	no	sì	no
no	no	Salva o Annulla	no
no	no	no	no