

# Courses module

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# 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.



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.



Search...

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Course Corso di Informatica

INFORMATIONS

PROCESS GRAPH

PROCESS HISTORY

HISTORY

Training Courses Management Data

Courses Status  
In definition  
Created Time  
01-03-2022 12:31:09  
Modified Time  
01-03-2022 12:31:09

Assigned To  
formazione.vtenext@gmail.com (Bruce Wayne)  
User creation  
formazione.vtenext@gmail.com (Bruce Wayne)  
Last modified user  
formazione.vtenext@gmail.com (Bruce Wayne)

Description Information

Description

Training Courses Information

Course title  
Corso di Informatica  
Course Date  
18-03-2022

Course Location  
Sala Riunioni 5, Palazzo Grigio, Via della Valle 5, Milano  
Course Duration (hours)  
8

Training Segmentation

Addressed to  
  
Course Types  
--Nobody--

Course topics  
  
Course Notes

Leads Statistics

Leads Contacted  
0  
Number of invitations read by Leads  
0

Leads Confirmed  
0  
Leads who attended the course  
0

Contacts Statistics

Contacts Contacted  
0  
Number of invitations read by contacts  
0

Contacts Confirmed  
0  
Contacts who attended the course  
0

Contacts Statistics

Contacts Contacted  
0  
Number of invitations read by contacts  
0

Contacts Confirmed  
0  
Contacts who attended the course  
0

Companies Statistics

Clients Contacted  
0

Number of invitations read by Customers  
0

General Statistics

Contacts  
0  
Participants 🕒  
0

Subscribed 🕒  
0  
Total invitations read  
0

Talks

Start a new talk

SHORTCUTS

Talks

Notes

RELATIONS

Teachers

Documents

Activities

Messages

Contacts

Leads

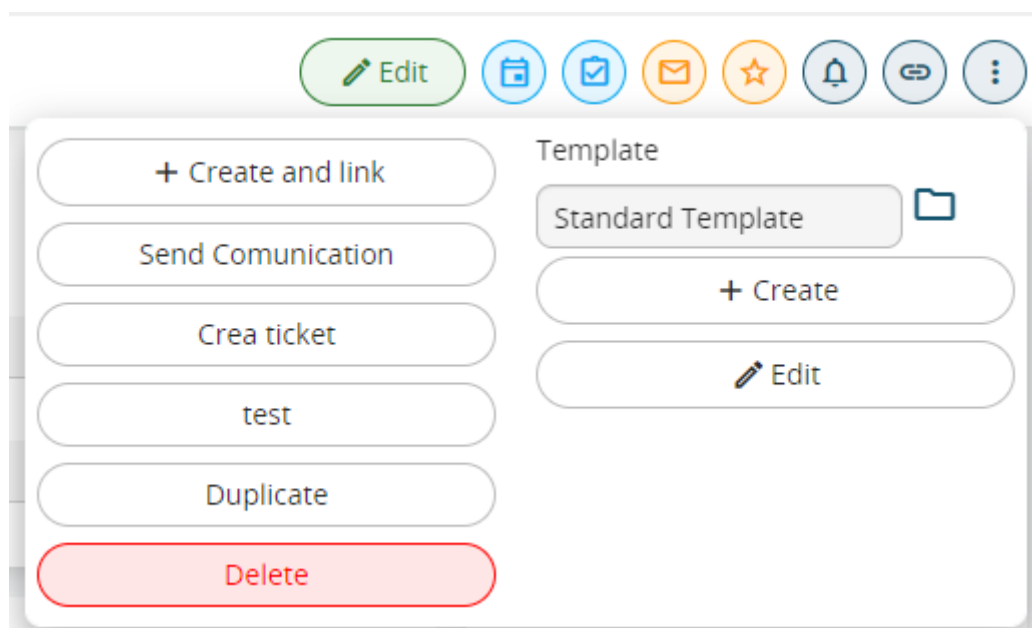
Accounts

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).

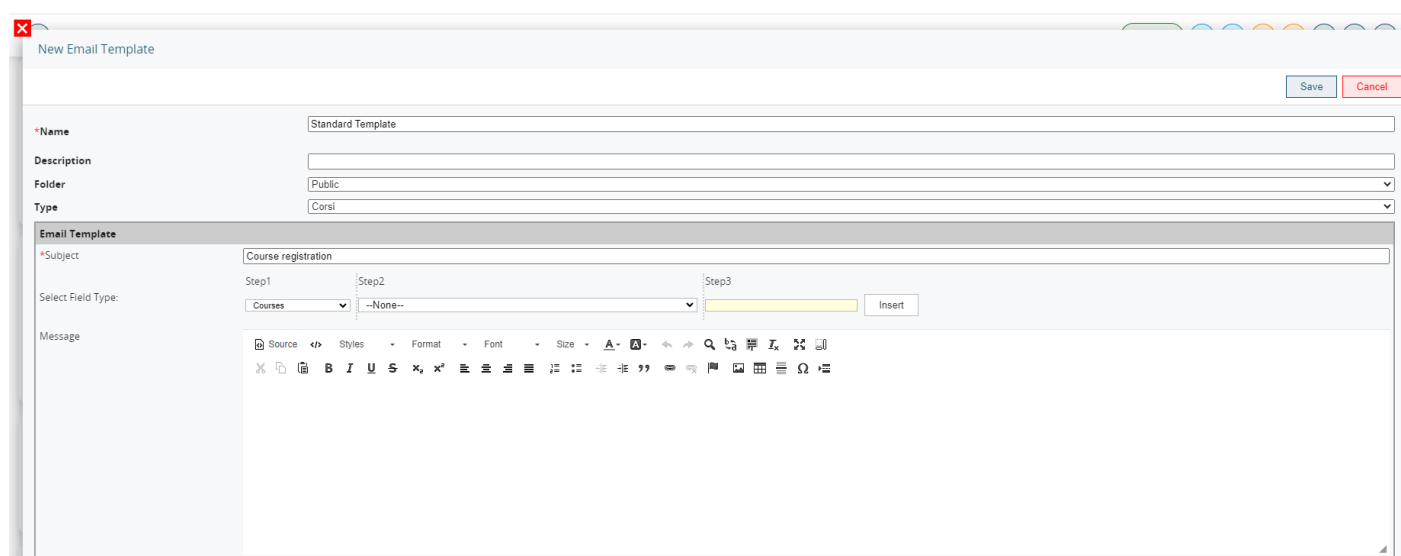
It is important to configure the dropdown menus mentioned earlier (such as Target Audience, Course Topics, Course Type) under SETTINGS > STANDARD PICKLIST EDITOR. This allows for maximum customization of the module based on specific needs. There is also the option to add additional fields as needed and 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.*

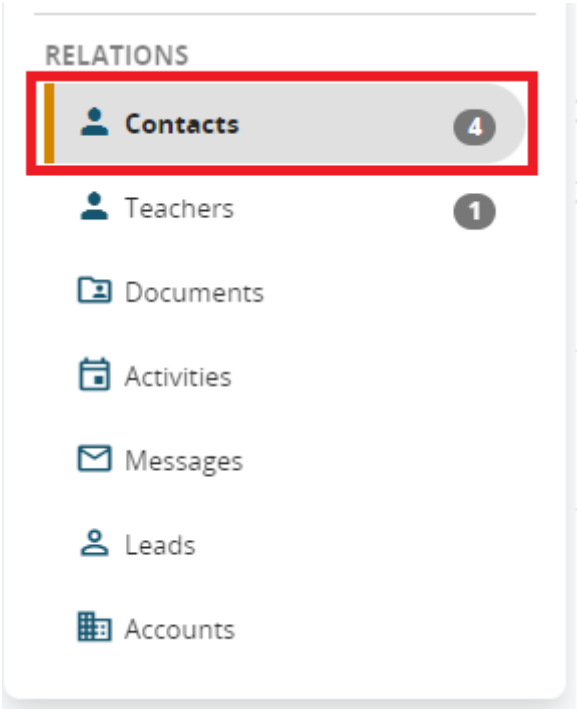


*Details of the Course Communication Template Creation Screen*

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

Contacts (4) · List

Showing 1 - 4 of 4

-- Select One --

Load List

Select Contacts

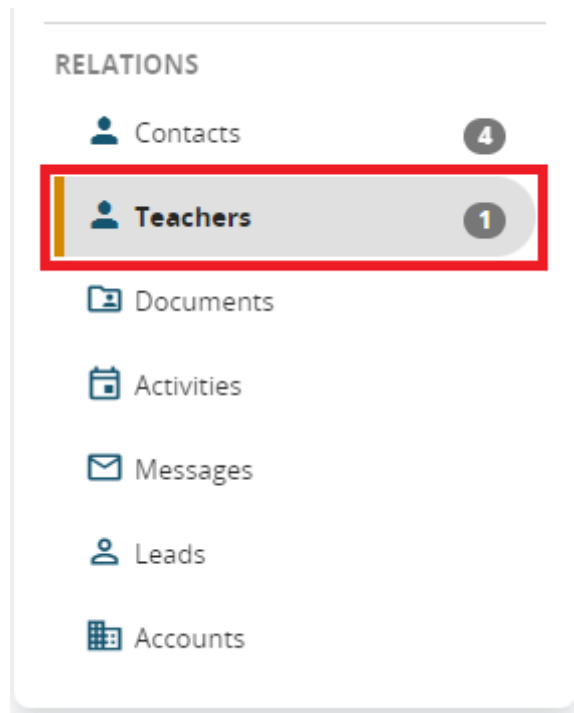
Add Contact

| Action                              | Last Name            | First Name           | Email                       | Mobile               | Account Name         | Confirmed            | Participated         | Paid                 | Mail Viewed          |
|-------------------------------------|----------------------|----------------------|-----------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <div><div>⊗</div><div>🔍</div></div> | <input type="text"/> | <input type="text"/> | <input type="text"/>        | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <div><div>✎</div><div>✕</div></div> | Alighieri            | Dante                | martina.salmeri@vtenext.com |                      | TEST MS              | no                   | no                   | no                   | no                   |

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*

**T Teachers (1)** - List 📌 ✕

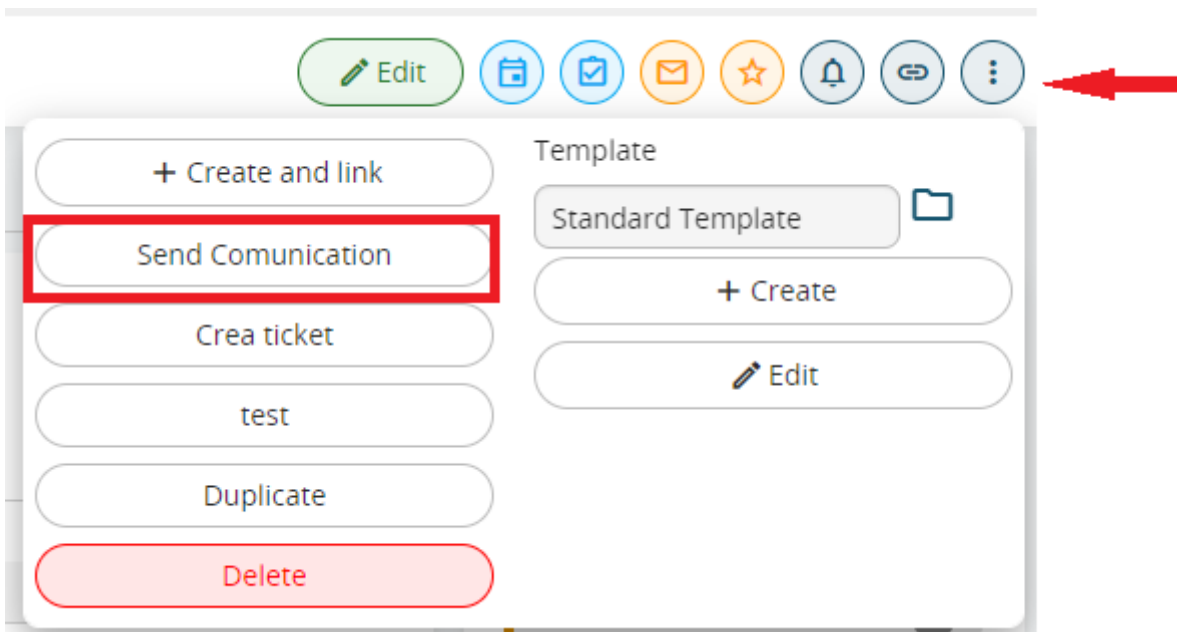
Showing 1 - 1 of 1 Select Teachers

| Action | Last Name ▾          | First Name           | Email                  | Mobile               | Ruolo                |
|--------|----------------------|----------------------|------------------------|----------------------|----------------------|
| ✕ 🔍    | <input type="text"/> | <input type="text"/> | <input type="text"/>   | <input type="text"/> | <input type="text"/> |
| ✎ ✕    | Amarone              | Guido                | amaroneguido@gmail.com | 32463841             |                      |

*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.

A screenshot of a 'Compose' email form. At the top left, there is a 'Close' button in a red pill shape. The title 'Compose' is centered at the top. Below the title, there is a 'Send Mode' section with two radio buttons: 'Single' (which is selected) and 'Multiple'. To the right of this is a 'Subject' input field. Below the 'Send Mode' section, there is a 'From' field with the value '"formazione.vtenext@gmail.com"<formazione.vtenext@gmail.com>'. Below the 'From' field, there is a 'To' field with three recipient names: 'Baroni Simone', 'Anselmo Simone', and 'Alighieri Dante', each with a blue 'X' icon to its right. To the right of the 'To' field is a blue circular icon with a white 'X'. Below the 'To' field is an empty input field. Below that is a 'Cc' field with an empty input field. To the right of the 'Cc' field is a blue circular icon with a white 'X'. At the bottom left, there is a link that says 'Add Bcc'. On the right side of the form, there are two dropdown menus: 'Font' and 'Size'.



## 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**

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

Contacts (4) - List











Showing 1 - 4 of 4

-- Select One --

Load List

Select Contacts

Add Contact

| Action  | Last Name            | First Name           | Email                        | Mobile               | Account Name         | Confirmed            | Participated         | Paid                 | Mail Viewed          |
|---|----------------------|----------------------|------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
|   | <input type="text"/> | <input type="text"/> | <input type="text"/>         | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|   | Alighieri            | Dante                | martina.salmeri@vtenext.com  |                      | TEST MS              | no                   | no                   | no                   | no                   |
|   | Anselmo              | Simone               | simone.anselmo@lanservice.it |                      |                      | no                   | no                   | no                   | no                   |
|   | Bacco                | Gino                 |                              |                      | Bacanai              | no                   | no                   | no                   | no                   |
|   | Baroni               | Simone               | simone.baroni83@gmail.com    |                      |                      | no                   | no                   | no                   | no                   |

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

| Confirmed   | Participated | Paid                                | Mail Viewed |
|-------------|--------------|-------------------------------------|-------------|
| <div></div> | <div></div>  | <div></div>                         | <div></div> |
| no          | no           | sì                                  | no          |
| no          | no           | <div><input type="checkbox"/></div> | no          |
|             |              | <div>Salva</div> o Annulla          |             |
| no          | no           | no                                  | no          |